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From architectural conservation, renewal and rehabilitation to integral heritage protection (theoretical and conceptual starting points)

1. Introduction

Where to search for the basic theory and ideas to understand the values of heritage and related architectural and urban design conservation, renewal, rehabilitation and integral protection? What is the decisive element worth attending to? Which »fostering« disciplines are involved? To what extent are theoretical and methodological starting points limited by nation, authorship or otherwise?

We can raise many similar questions when we try to clarify the terminology and professional foundations of the mentioned fields; all of them often referred to in day-to-day practice.

The presented method of researching the theoretical foundations, analysing the definitions and their understanding, of course isn't the only acceptable or possible method. It does however try to become a discourse, meaning that it is simultaneously theoretically convincing and logically conceptualised and above all, that it can be empirically checked. The latter a necessary precondition for any scientific and research work.

The theoretical rationale of the research evolves from so called meta-analytical debates of particular selected leading authors and international documents, dealing with the specific issues and field. Certain domestic interpretations were also used, which have had definite influence on the definitions of ideas in Slovenia.

2. Typical historical concepts on heritage

From the history of protection and the development of heritage conservation several principles or »theoretical frameworks« can be discerned (comp. Jokilehto 1988: 83–93). However distinction between precisely defined periods is almost impossible, in view of the fact, that general principles of conservation were often mutually contradictory, established gradually and over an extended time period, but nevertheless becoming clear and profiled. Under no circumstances were they a miracle appearing »over night«. Even the statements and recommendations written in international conventions and documents have their origin in distant history. Therefore the brief introductory review of three historical types of comprehensive relations to heritage and conservation are more than appropriate.

First, the traditional approach dealing with »historical monuments and art« from the past can be compared directly to the existence of human society. Historical structures (»buildings«, objects, …) were preserved as long as they were being used and until reasons emerged for their destruction (an exception is planned destruction – plundering, for example changing the Coliseum in Rome into a »quarry«). Changes and additions to numerous »buildings« were slow and took generations to accomplish. From the contemporary perspective they can be described as achievements or development done in a harmonious way with comprehensive preservation of continuity. This attitude can be ascertained throughout civilisation, up to the period of medieval cathedrals. Already in distant history certain »historical« buildings gained a special place with their »memorial value«, for example in ancient Greece (a concept much later introduced and explained by Alois Riegl). Even the Egyptian pyramids gained their »symbolic« and »universal memorial« value very early and were maintained as »wonders« right up to the present times.

The second approach to historical objects can be defined as the »**romantic restoration**« period, appearing in Italy during the renaissance. We can establish that the first reaction of the renaissance was the rejection of medieval building and artistic achievements, which were contradictory to the principles of new artistic viewpoints. Exceptions were certain parallel views, respecting achievements of the distant past. This principle is reflected for example by Leon Battista Alberti (with his »stuck-on« renaissance façade on the church S. Maria Novella in Rome – 1450), intentionally refraining from the destruction of medieval structures. Similar relationships to those developed in Italy can be seen even in England (Stonehenge) or in Scandinavia (the rune stones – alphabets). Further development of more mature consciousness of history and its remains can be seen in other parts of England, the Germanic world and French regions until the revolutionary era. With the evolution of nationalism and romanticism in European countries, the desire to protect and renew national monuments, the proof of a nation's history, changed preservation into a widespread movement. The new relationship was most vividly seen on medieval buildings, restored to be further developed and thus »recreated« into comprehensive architectural statements about their apparent original image or most important development phase in history. Here we can notice the first use of applied historical research and the use of analogy as a method for comparing similar intent and design on buildings. Probably the most typical representatives of this movement in the history of conservation were **George Gilbert Scott** (1811–1878) in England (for example the actions and proposed additions to the cathedral in Durham) and **Eugčne Emmanuel Viollet-le-Duc** (1814–1879) in France (the actions on the medieval walled city of Carcassone and the Notre-Dame cathedral). At the time the historical meaning of these buildings and places wasn't understood only as a result of continuity or »layering«, the effect of time on a particular object, but more as an intentional act to preserve them as »frozen images« from a particular time in the nations history.

The third approach to historical objects evolved parallel to the second one. The second approach gave priority to aesthetical values, while repeated evaluation of the authenticity of the object, originality of materials, protection of its historical strata and prevention of falsifying typified the third. Although the second and third approach partially coincide, after all both are oriented towards the protection of historical buildings and »objects of art«, their methods and goals are often contradictory, gradually evolving into massive discre-

pancies. Examples of the approach can be easily recognised already in the renaissance in Rome; Pope Leon X commissioned and directed the work of the »comissario delle antichita di Roma«, i.e. the work of the person in charge of »artistic heritage« in the city, carried out by **Raffaello Santi** (1483–1520). The new tasks enforced by Raffaelo Santi, were supposed to diminish and prevent further destruction of antique monuments in Rome. Principles of such approach can be best seen from the attitudes to the ruins of Diocletian's baths (terme) in Rome, carried out by Michelangelo **Buonarroti** (1475–1564). In the mid sixteenth century he built a new church there, according to the principle of »minimal intervention«, as would be the contemporary conservation term. The exterior with the remains of the terme was preserved untouched.

From the three differing concepts of approaching valuable remains from the past, many other »author interpretations« of conservation principles were formed. Besides the mentioned individuals, many other known personalities involved with conservation »theory« added leading principles and ideas, affecting contemporary concepts. All of them gave priority to various particularities or specifics.[1]

The selection of leading ideas and principles from the world of conservation and protection of cultural heritage is shown very briefly and in a synthesised form. It stops at the point, represented by the gradual enforcement of international treaties and documents dealing with the field of protection of cultural monuments, art and other heritage. In fact, until the 20th century there were no international agreements about their protection in times of peace [2] (comp. Petrič, 2000: 8).

3. Common ground – (cultural) heritage

The central common basis of discussion is undoubtedly the term heritage. Almost every publication or more elaborate article, written by an expert, dealing with (cultural) heritage or the relation of society and the profession to heritage, tries to define and limit the topic. The same applies to various international documents dealing with heritage. In most of them, the terms are defined because of the inherent clarity of definition, needed to deal with the subject itself, whereby the distinction between cultural good, cultural monument and cultural heritage is drawn. With a large share of sympathy and neglect for particularities, we can accept the conclusion, that definitions of the term (cultural) heritage are mostly related and similar. However not entirely; important conceptual differences can be discerned in the scope and extent of the term.

In earlier documents cultural goods understood as cultural monuments, recognised as such and suitably protected and preserved, were mentioned. At present the term (cultural) heritage is more often used.

The dilemma between the terms »heritage« and »cultural heritage« is often redundant. In the context of recognising heritage, the adjective »cultural« is often completely useless. It is however necessary when we wish to discern man-made heritage from natural heritage, i.e. created by nature itself, without the assistance of humans. Otherwise the term »heritage« would suffice. The term »cultural« is correct if we wish, for example, to use the term as a norm and enforce it by law.

Several decades ago the term »heritage« was most often used in conjunction with inheritance, whatever an individual was granted after a deceased ancestor. Such use of the term wasn't a Slovenian speciality, it was used worldwide (comp: Graham, Ashworth, Tunbridge 2000, Nara 1998). Today the used term has much more meanings, we can in fact establish that it can mean any kind of inter-generation exchange or relationship, good or bad, in the scale of the whole society or of the individual.

Important second thoughts spring to mind. First of all, the existence of an object from the past in the form of an »object of objective reality« – i.e. in material form, is by no means a criterion for heritage! Achievements of various cultures are not always expressed in physical – material form. A large part of heritage is »invisible« and »intangible« and exists only in the mind. They are the heritage of ideas and the heritage of scientific discoveries that have left nothing material in the original – primeval form. Second, everything that we create becomes the heritage of the future! We therefore do create heritage on a day-to-day basis.

If we focus on the physical form of heritage, we can conclude that its definition has recently spread into, at least, three directions. The present times and its products have become a part of heritage, but also objects from daily life from the past. Definitions of heritage have spread to non-artistic and non-historical (natural) heritage, the heritage of science and technology and the heritage of lore and folklore. »From heritage that has been simply inherited, we have arrived at symbolic heritage, connected to the term of originality, from heritage controlled by the state, we have social, ethnic and community heritage. If we borrow from the language of the relativity theory, we can say that we have travelled from the »particular« system of heritage to the »general« system. In other words, from the times when heritage was history, we have come to a time when heritage is memory.« (Nara 1998: 14–16).

Contemporary concepts relating to architectural (building) heritage apply to the whole built environment and to all cultural goods within. They have to be understood in the global ecological context! Contemporary relations to architectural heritage mainly define the relationship of modern society to development, the evaluation of heritage in the framework of development and the established needs and demands, evolving in society.

Not long ago survival of mankind and society was more directly dependent on nature than today. Today the dependency of mankind is not felt so directly, another of the numerous effects of the globalisation processes. However the stated doesn't change facts about the irreversibility of certain global resources (e.g. oil, minerals...) or that certain other resources are hard or almost impossible to recycle (e.g. drinking water, air, rain forests ...). Because of these reasons management of such resources is gaining in international character and becoming a part of global management. Even cultural heritage surely fits into global irreversible resources and goods as a heritage resource. Today cultural heritage mostly isn't defined as a first class cultural monument, historical area or garden of historical importance, but as environment created by man in its entirety. Thus, cultural heritage can be connected to different values (compare with Feilden, Jokilehto 1993: 11–21).

4. Evaluation of heritage

Evaluation is definitely the most important part of the topic. Usually it is the basis for all relationships that a particular society, nation or culture develops towards heritage. The systematic of expert evaluation was the topic tackled in the past by numerous multitudes of foreign and domestic authors. Because of this, the most adequate theoretical source is probably the evaluation system developed within the framework of ICCROM and ICOM by Bernard M. Feilden and Jukka Jokilehto (1993) for the purpose of managing world cultural heritage. The concept of the system is universal and one can conclude that in the modern world, through the UNESCO organisation, it also has worldwide support!

»Guidelines for management« were published in 1993 following the guidelines from the expert meeting of ICCROM and ICOM. The meeting was organised in Rome, April 1983, by the UNESCO department of cultural heritage. The authors analysed and argued for values, that can be attributed to the most valuable cultural heritage and how the same values have a retroactive affect on their treatment. The presented universal evaluation system, elaborated by the authors in detail, can be applied to the evaluation of all types of heritage. It can also serve as the background for devising more detailed and adapted methods of evaluation of specific heritage.

Two groups and categories of values describe cultural heritage:
– cultural values
– contemporary social and economic values.

4.1 Cultural values

We tie them to heritage in relation to the present time and they are always subjective (depending on interpretation that is necessarily a reflection of society and the time). Such understanding in return, reflects the level of general interest in heritage and the pertaining space, interprets its essential cultural characteristics and consequentially even the strategy of treating heritage. The recognised general meaning or value of heritage or the outstanding universal value of heritage affect in return our treatment of heritage and the general relationship of the public towards heritage.

Furthermore, cultural values can be grouped into the following categories:
- **Identity values** (based on recognition and include the following characteristics and meanings: age, tradition, continuity, memory, legend, miracle, sentiment, spirit, religion, symbol, politics, patriotism and nationality);
- **Relative artistic and technical values** (based on research);
- **Values of rarity** (argued by statistics; based on comparison with other similar units of the same type, or style, or builder, or era, or area or any other combination between the mentioned criteria for comparison).

4.2 Contemporary social and economic values

Used values of heritage always apply to the modern society and its social and economic internal organisation. The following modern social and economic values can be identified:
- **Economic values** (their sources are: marketing, tourism, income from use and income from the status of heritage itself);

- **Functional values** (stemming from possibilities of use);
- **Educational values** (descriptions of the meaning of heritage and connected history);
- **Social values** (applying to various traditional and modern activities tied to heritage);
- **Political values** (applying to connections between heritage and special events in the history of the place, country or society).

5. World cultural heritage

Only after the establishment of the United Nations Organisation and the UNESCO organisation was it possible to define the term »world cultural heritage«. It is a term expressing equal respect by all cultures and acceptance of the notion, that preservation of heritage is a task of the entire global community. To understand the term cultural heritage the definition from the international contract – The Convention on the protection of World and natural heritage, is most useful (and professionally legitimate), even for further application, because of its wide support [3].

In the Convention, cultural heritages are:
- **monuments:** works of architecture, monumental sculptures or paintings, elements or structures of archaelogical nature, signs, dwelling pits and groups of elements that have from the historical, artistic or scientific aspect, exceptional value;
- **groups of buildings:** groups of independent or connected buildings, whose architecture, unity or harmony with their setting have from the historical, artistic or scientific aspects exceptional general value;
- **renown places:** the work of man or combined work of man and nature, as well as whole areas together with archaelogical finds, that have from the historical, aesthetic, ethnological or anthropological aspect exceptional general value.

For the simple recognition of cultural heritage two more conditions are extremely important: the established **exceptional general significance** and that heritage can withstand the trial of **authenticity**. In professional terminology this implies the level of žoriginality1, žauthenticity', žreality' and/or žlegitimacy' of a given object or product. Usually authenticity is attributed to heritage that has in the period of ageing and changes maintained the originality of materials (own substance) and own genuineness (from the time of its creation). It is an important aspect of assessing heritage and simultaneously the basic criterion for determining its value. Putting it more simply: the more its authenticity is damaged or infringed upon, the lesser is its value. Often in conjunction with heritage various shares or aspects of authenticity are determined, such as authenticity of design, materials, assembly, and placement. The guidelines for implementing the Convention contain criteria for establishing exceptional general significance of any unit of cultural heritage (comp. Operational guidelines for the implementation of the world heritage convention, 1994; Petrič, 2000: 18, 55;).

5.1 International documents on cultural heritage

The first international document formalising relationships to cultural (and above all architectural) heritage was the »Charter of Athens«[4]. Following a previous meeting in Rome (October 1930), 120 representatives from 23 coun-

tries, mostly from Europe, met between October 21–30, 1931 in Athens. The result of the conference was a charter, drawn out as some kind of a recommended mode of conduct when dealing with heritage (more on the Charter: Fister 1979: 49–50; Marasovič 1983: 113–115; Jokilehto 1999: 284–285). The Charter offered to nations as the rationale and starting point for devising national strategies and legislature had noted effect and response. The formalised Charter however didn't mean, that the influence of leading personalities in particular countries was in any way later diminished.[5]

Destruction caused by WWII showed that the need to set up a more efficient, international organisation for education, science and culture. The fact stands that with the establishment of the UNESCO and later the ICOM (1946) and ICCROM (1956) fundamentally changed the methods for exchange of experience, knowledge and methods between experts. Internationally verified documents became the rationale and basis for international communication between experts (conventions, declarations, covenants, recommendations etc.).

One of the first amongst these documents in the field of conservation was surely the »**Charter of Venice**«. Preparatory phases began in 1957 when the UNESCO, together with the French government, managed to organise a working meeting with architects and technical experts, responsible for historical monuments. Representatives attended the meeting from 25 countries. The initiative was continued eight years later; between May 25–30, 1964, architects, conservationists and technical experts met again, this time in Venice. There were more than 600 participants from 61 countries and representatives of international organisations UNESCO, ICCROM, ICOM and the European Council.

The Charter of Venice revised and corrected the Charter of Venice. The older document was based on norms, put forward by Gustavo Giovannoni, while the new one clearly reflected the conservation theory of Cesare Brandi, published a year ago (1963) in his famous book »Teoria del restauro«. An important new finding in the charter was that after WWII, too much emphasis was still given to so called »reconstruction in style« of monuments – adding to architecture »in style«, which was always a result of fantasy. Mérimée and Viollet-le-Duc introduced the principle into conservation acts long ago in differing ways. The congress for the first time stressed the term »(architectural) integrity« in conservation and argued about the meaning of historical authenticity of monuments. Even the understanding of monuments was widened to comprehensive urban, as well as rural places.

The Charter of Venice was translated (or at least in its abridged version) into numerous languages of the World and generated a profusion of other documents (guidelines, recommendations) dealing with the protection of cultural heritage from different angles. It is still often used in professional circles even nowadays, as a reference and basic primary document. It was adopted as the main doctrinaire document by the ICOM and ICCROM and later even by the ICOMOS, established in Warsaw in 1965 (also: Jokilehto, 1999: 288–290; Feilden, Jokilehto, 1993: 12, 111–114; Fister, 1979: 51–52).

An important hindrance for success recognised as early as the mid-20th century by international organisations concerned with conservation, is education. Both in the sense of training all kinds of experts dealing with conservation in their day-to-day work and in informing and educating the public in the widest sense. This is why since 1962 the ICCROM has been organising training of experts all around the World and disseminating principles of contemporary conservation.

With the growing problem of globalisation views on heritage have also been changing. Breakthrough ideas are included in the »Convention on the protection of World cultural and natural heritage« adopted at the UNESCO meeting in 1972 in Paris. Maybe the most propulsive new idea and covenant is the one written in the preamble of the convention, that World cultural heritage belongs to all humanity![6]

Transition to the age of »information management« and increasing role of heritage owners in its management necessitates more international co-operation. A part of these needs and consciousness reflects in emerging international documents that are becoming the basis for any actions by individuals or societies on World resources. Heritage, even in its widest sense, is undoubtedly a resource. The role of promoters of change, related to World resources and cultural heritage and development in general, has since the mid-twentieth century, besides the already mentioned parties, been taken by numerous government and non-government organisations.

One of the non-government organisations that had a significant indirect influence in the early seventies was the »Roman club«. It was established in 1968 in Rome and joined numerous scientists and economists from more than 40 countries. They were among the first global organisations that wanted to cajole the political decision-makers to become conscious of the global issues of humanity, even in relation to world resources and cultural heritage.

Under the auspices of the European Council following arduous preparation and several introductory documents, in 1975 the »**Amsterdam declaration**« was created. The declaration is important because it enforces the doctrine of integral – comprehensive protection of cultural heritage. The intention is absolutely clear; preservation of cultural heritage values is possible only within the framework of development. The finding should be applied not only to the most valuable monuments, but also to the lesser ones, together with the environment where they stand.

Some of the primary international documents were followed by many more in the last decades. Besides the documents adopted by the European Council and now even European Union [7] one of the comparable documents is the fairly new »**Charter of Cracow**«. It was passed in 2000 after three years of preliminary meetings, by more than 300 participants at a conference, together with representatives of ICOMOS, ICCROM and UNESCO. The charter summarises numerous positive experiences in architectural conservation, previously partially dealt with in other international documents. The plenary meeting was held under a meaningful motto »Cultural heritage as the basis for the development of civilisation«. Amongst other, the document emphasises management of cultural heritage, that has to be ensured by suitable legislature, possibilities of controlling changes, if we want to integrate heritage into dynamic changes, transformation and development. Conservation of cultural heritage has to become an integral part of planning, as well as government processes in society, so that it can fulfil its role

in sustainable, high quality, economic and social development (The charter of Kraków 2000, 2000).

Some of the international documents are the backbone; others bring amendments, further definitions or clarifications. Since conservation is an extremely diverse and expansive activity, the volume of adopted documents that should be reviewed is almost unsurveyable. Here one has to be aware of the various obligatory levels of particular documents. Some have the status of international contracts (ratified by Parliament), meaning that in Slovenia – according to the Constitution – they are applied directly, i.e. all the other laws and regulations are subordinate to it. Many of the other international documents have the status of »recommendations« and it is up to the country, organisation or individual to decide, whether and how to interpret or use them [8] (detailed account of legal aspects in Petrič, 2000).

International contracts and other documents of international character (that can be termed by different names: declarations, conventions, acts, ordinances, protocol«s, agreements, recommendations, guidelines …) cannot be pushed aside. Various »recommendations« are intended to be used by experts as guidelines for their practical work, which in all cases needs implementation, application and superstructure, all of which are surely part of professional creativity. International contracts signed on the national level or other ratified international documents (e.g. the UNESCO conventions) above all imply compulsory methods of conduct. Certain parties do nevertheless try to confuse the legal relations to international documents or simply leave them unanswered. Here one can also establish, that the subjects of international law are not only countries, but also international organisations (more: Petrič, 2000).

5.2 Cultural heritage in Slovenia

Despite all the stated and the fact, that international documents speak about cultural heritage of all people, all humanity and about common World cultural heritage, formal definitions and the scope of listed cultural heritage is always dependant on the laws of particular countries. Each country alone defines the scope of cultural heritage on its own territory and the level of its protection. Thus definitions of cultural heritage vary extensively between particular countries. Even from the legal aspect one has to point out that the term heritage itself is not an international one, but one belonging to the internal legal system of each particular country (also: Petrič, 2000: 6 – 15).

According to the present law on the protection of cultural heritage in Slovenia (Official bulletin No. 7/99), cultural heritage is defined in the following manner (article 2):

- »Cultural heritage (in continuation: heritage) are areas and complexes, built and otherwise designed buildings, objects or groups of objects and preserved material achievements, the results of human creativity and various other activities, social development and events, typical for particular ages in Slovenia and elsewhere, whose protection is, because of their significance for culture and civilisation, in the public interest.
- Heritage are mainly archaeological sites and objects, settlement areas, especially old urban and rural cores, designed nature and cultural landscape, buildings, their parts or groups of buildings with artistic historical or technical testimony; buildings and other objects that are tied

to important personalities and events from our political, economic and cultural history; archive material; bibliographic material; objects or groups of objects with historical, art-historical, artistic, archaeological, sociological, anthropological, ethnological or natural scientific importance, testimony of historical events in Slovenia.
- According to this law, heritage are properties or their particular parts, groups of properties or areas (in continuation: immovable heritage) and mobile objects and their collections (in continuation: mobile heritage).«

Protection of cultural heritage, ranging from legal and expert protection (theory and practice) to public funding, is in Slovenia proscribed by this law. The law consequentially affects the definition of public interest concerning heritage and the limits to heritage under special protection. The legal status of heritage, also proscribed by law (listing in the register of heritage and proclamation act) is causing in Slovenia an exaggerated differentiation effect between heritage that has been granted the status and heritage that hasn't (as yet). It is a state definitely contrary to the spirit of numerous international documents and recommendations. Heritage that is listed in the register i.e. has been granted the status of monument, is protected by law, we can also state, that the status of all other heritage is not proscribed by law and is completely vague.

6. Architectural conservation – renewal – rehabilitation

Maybe this is the reason, why the idea and activity of architectural conservation in Slovenia is marginalised and constantly pushed towards the limited quantity of listed heritage. The principles and methods of architectural conservation, as an important part of professional protection of cultural heritage, should be given due respect, wherever heritage is as such recognised. In contemporary times, the term conservation can include all kinds of activities and endeavours, whose main goal is to gain knowledge and understanding about heritage and its values. Heritage (natural or cultural) is in many cases understood very broadly as property or a resource, whose value we were capable of recognising, but also as value that has so far not been recognised. This means that heritage can be recognised »again«, also meaning that its scope can vary. Besides knowledge about the history and significance of heritage the main intents and goals of conservation are to ensure or increase its material protection or its renewal.

The term conservation can include very different measures, acts, activities etc. from the field of heritage preservation or protection. The basic intent of endeavours is to prevent the destruction of cultural or natural heritage. From the absolute point of view this means, that we can in fact slow down the forces of destruction. Conservation therefore includes all activities that perpetuate the existence of heritage.

In Slovenia, but also in other places worldwide, the term has been used even in its narrow sense. In these cases the term is usually used as a simile for the first three types of conservation measures, as shown in the continuation. These measures are: prevention of further dilapidation or deterioration, preventive protection acts (protection of the existing state) and conservation consolidation acts. Such use of the term is widespread (and correct) in the field of mu-

seal conservation. Narrowing the term to architectural conservation however doesn't have correct professional foundations in international documents and of course, doesn't benefit terminological clarification either.

According to Fielden and Jokilehto (1993) we can define seven basic types of conservation acts, so called interventions, that differ according to content or character and can be used in practice in different scale or mutual relationships.

The underlying principle of using conservation measures is to use that type of intervention (method, technique, and measure) that is most efficient with minimal activity. Here one must also pay respect to the principle of reversibility, id technically possible and the principle of preserving authenticity of heritage and/or the monument.

To properly understand the particular terms from the palette of possible conservation measures it is also necessary to understand the level of use (context) and scale (architectural, urbanistic, landscape), that defines the content of each particular term and provides its relativity (also: Fister, 1979: 13–20). Examples of several types of measures are shown, pertaining to architectural conservation:

1. **Prevention of deterioration** / indirect conservation, implies regular assessment and control of cultural heritage properties, thus basically preventing deterioration; regular maintenance, cleaning and other care, together with suitable management are most beneficial in preventing deterioration of heritage property.
2. **Preservation of the existing state**, implies maintaining the extant state, also meaning special protection and even (smaller) repairs or substitutions to prevent further damage or destruction.
3. **Consolidation of the fabric**, implies physical acts on the building with addition or use of adhesive and/or strengthening modes on the materials / structures or building construction, to further the life span and integrity of the structure. Consolidation acts are used when ordinary maintenance or preventive measures cannot provide desired results.
4. **Restoration** are acts with the intention of recreating the original concept of building legibility or architectural composition /architectural image. Restoration is always based on so called scientific certainty (respect for original materials, archaeological testimony, original design, authentic documents) and never on supposition. Substituted missing or destroyed parts have to be harmonised with the whole, but also in a manner that on careful observation enables their distinction from the original. Restoration by the so called method of anastylosis, the placement of original remaining fragments into their original position, has as its goal, to improve the spatial impression of the demolished structures and increase their testimonial integrity. This type of restoration is legitimate only if it is based on firm archaeological testimony and when it is possible to present the remains in a more understandable manner. The new parts functioning as supporting structures have to be distinctly different from the originals. The method is often used and legitimate for restoring buildings destroyed in earthquakes from structures whose materials can be clearly identified, such as stone, wooden roofing etc.
5. **Rehabilitation** are acts, that imply the renewed enabling of a building for use. It can be achieved with more

or less varied modernisation acts including adaptations, changes etc. of varying extent.
6. **Replication** (restoration) means creating a copy based on the existing original. Replicating is often used, when we know exactly, what the original is like and is used to substitute missing or destroyed parts of the original with replicated elements, thus recreating its aesthetic harmony, as well as possibly preventing destruction of the original. Replication is usually used for particular objects/art pieces and less often for assembled complexes or objects and buildings.
7. **Reconstruction** is a conservation act, whereby we establish, rebuild or otherwise renew destroyed or damaged parts of a building by using old or new materials or their combination. Similarly to replication, reconstruction has to be based on data from documents, testimonies or other proof and never on (unjustifiable) supposition. During the planning of a reconstruction act, we have to stop at the point when suppositions and guesswork about the former state set in. In reconstruction usually the idea is to establish one of the development phases of the building.[9]

For future use it be beneficial if we succeeded in avoiding terminological confusion and simultaneously tried to logically join the presented international system of terminology in architectural conservation. We must also pay adequate respect to the established »parallel« terminology often used in Slovenia.

Thus the term **renewal** in the field of architectural conservation should mean the use of various types of (conservation) acts (treatments / measures / interventions) on architectural / built heritage. They can in real circumstances be used in invariably different ratios. Usually these are reconstruction, restoration, consolidation, and repair, substitution and other acts from the field of architectural conservation.

It would be sensible to simultaneously use the term **rehabilitation** in a wider sense than renewal, corresponding to its present use. Rehabilitation should always imply a more complex set of acts (intervention / measure / activity), whereby the technical and spatial – design properties of an object (complex / settlement / quarter / area) are improved, but also the residential, social, cultural and ecological conditions. Rehabilitation cannot be only a sum of different technical conservation acts, nor a sum of design creations (artistic / author) or achievements. Its contents carry widely conceptualised endeavours. The working methods of rehabilitation stem from the principles of protection and preserving cultural heritage, principles of rational use of materials, space, time and energy and the principles of sustainable development.

The term can be useful in conjunction with renewal of units with varying size: building complexes, villages, towns and larger areas.

Of course there are many more terms and further definitions tied to renewal and architectural conservation, all of which demand further negotiation and harmonisation about use in professional terminology. Professional agreements and terminological clarity have to be brought to a level where dialogues on conservation on heritage and »new development« on heritage, most often the modus of its survival, are simple and understandable.

7. The field of architectural conservation

The field of architectural and other conservation disciplines, as was established earlier, is an extremely wide field of activity. James Strike (1994) states, that it can be roughly divided into two aspects, »technical« and »philosophical«. The first aspect tries to search for answers to technical issues, such as adequate methods for ridding of moisture in construction and materials, preparing right mixtures of mortar or static strengthening of weight bearing structures. The other seeks above all for answers to principles and strategies – »philosophical« questions of conservation. For example, questions about the significance and value of heritage, questions about the importance of events from the past, tied to material heritage, questions about the basic purpose and goals of conservation etc.

Within the framework of the education programme, the ICOMOS organisation has issued the following guidelines tied to conservation acts [10]:
»Conservation activities can be entrusted to persons that are competent (in charge and trained) to execute the listed activities. Education and training for conservation creates from various experts of different disciplines conservators, trained for:
a. analysis and documentation of monuments, complexes or settlements and the establishment of their emotional (identity), cultural and functional values;
b. understanding the history and technology of monuments, complexes or settlements to establish their identity, plan their conservation and present the research results;
c. understanding the role of monuments, complexes or settlements, their content and surroundings in relation to other buildings, parks or cultural landscape;
d. research and respect for all available sources of information, important for the monument, complex or settlement;
e. understanding and analysis of social behaviour and social relationships to the monument, complex or settlement as a complex system;
f. diagnosis of external and internal causes of dilapidation as the basis for adequate response;
g. research and preparation of a report about the monument, complex or settlement, that can also be understood by non-experts and containing graphic supplements, such as illustrations, sketches or photographs;
h. knowledge, understanding and use of UNESCO conventions and recommendations, as well as other known ICOMOS documents, norms and guidelines;
i. production of a balanced evaluation based on consensus of ethical principles and accepting responsibility for long-term protection of cultural heritage;
j. recognising the need for additional specialist research, for example: frescos, sculptures and objects of artistic and historical value and/or research of materials and systems;
k. issuing expert proposals about the strategy of maintenance, management policy and policy guidelines for environmental protection and preservation of monuments, their contents and environments;
l. documenting the executed work and enabling access to it;
m. working in multi-disciplinary teams by using harmonised methods;
n. working with the inhabitants, government and planning bodies to resolve conflicts during the development of the conservation strategy adapted to local circumstances, capabilities and resources.«

Definitely an exceptional range of knowledge, expected from a trained conservator!

Undoubtedly conservation is a multidisciplinary task, where usually many disciplines contribute to the solution (Feilden, 1994). Therefore in the field of conservation one cannot expect comprehensive results, that would be an authors project of a single expert – whatever his/her discipline. Even architects are no exception! The only possible exception is that the demands concerning expected knowledge, qualifying the particular profile of expert for conservation, are widest for architects. The guidelines from the ICOMOS matrix on »integral conservation« also dictate such terms.[11]

The discipline of architectural conservation, or in the wider sense architectural rehabilitation, is extremely complex and is constantly developing its own working methods. Recognition of the fact that architecture doesn't participate only in the creation of »new«, but also in defining the »extant« has gradually reached maturity. The more profound and argued is the recognised value and complexity of the »extant« in architectural heritage, the more included can architecture following compromises be, with its co-ordinating and connecting role in the inter-disciplinary field. The **architect – conservator** typically assumes the role of generalist in the process of conservation activities.

He should have knowledge about history and the development of architecture, to be used creatively in combination with modern demands on the architectural practice. This means the conditioned capability of critical assessment of aesthetic, historical, technical, functional and other values of architectural heritage in relation to contemporary needs and simultaneously recognised values of heritage. This also demands the inclusion of corresponding practices and norms from the building laws and the denial of all common acts that can be harmful, unnecessary or inadequate. The architect – conservator has to be qualified even in the field of research of architectural heritage, analysis and documentation, as well as control over implementation. Additional expectations concerning training involve knowledge about representation techniques for presenting heritage and efficient search for modern functions and contents suited for the heritage. The characteristics of architecture, as a discipline that can be applied in different fields with different orientation, make it almost universal. It is usually employed in functions with a connecting nature, reaching from specialities on one side to generalisation on the other. The method of functioning constantly shifts between **science**, always demanding the possibility for empirical checking, the **profession**, representing day-to-day use of knowledge in practice and art, distinct component of activity based on creativity.

We can conclude, that architectural conservation and architectural renewal, not only have a common subject of interest (heritage) and common evaluation system, but also common components in their methodologies. In contemporary professional endeavours, the most distinctive characteristics are:
– aiming at scientific action, whereby empirically assessable knowledge is organised, either into new theories, new methodologies or with the intent of achieving new practical applicability;
– aiming at connecting disciplines operating in various fields in such a way, that none of the fields is structured introversive, but open to learning processes;

– aiming at protection and »interpretation« of (cultural and natural) heritage, that is with the presented universal system of evaluation always oriented towards general development goals.

In these times of globalisation it is easy to discern many parallel movements concerned with the preservation of nature, the human environment and heritage in it. The necessity of modern societies is to develop concepts that will not be applied only to listed heritage. Concepts have to be universal, connected into different forms and social structures, albeit in the promotion of the principles of »new museology«, »modern conservation«, any »new architecture« or other modern interpretation of desires that understand heritage as an existential problem of humanity.

The type of heritage protection that apparently satisfies most contemporary approaches is constantly approved, enforced and developed, is the doctrine of **integral protection**. This basic goal and intent of heritage protection can be described as a connecting doctrine (i.e. a system of theory, viewpoints, principles, methods …) between different fields, involved with heritage. The goal of heritage protection within the framework of the mentioned ždoctrine' are protection and preservation of recognisable values, preservation of the highest possible level of its authenticity, the basic condition for the existence of heritage and its suitable contemporary žuse'.

The foundations of modern doctrines can be found already in the »Charter of Venice«. The fifth article clearly states the desire that »conserved monuments always have to serve socially useful uses«. It is stressed that such use is desired, but not at the cost of the monument. Further steps in the development of the idea about integral protection were taken in the seventies. In 1975, the year of European architectural heritage, first the »European Charter of the Architectural Heritage« was adopted by the Council of ministers of the EC and a month later the »Amsterdam Declaration«. The declaration was adopted by the congress after several years of preparatory work.[12] Both the documents confirmed the principles of integral protection, later amended and elaborated further. Such a document is for example »Resolution No. 28«, by the Council of ministers of the EC, speaking about adaptations to laws and other regulation to demands of integral protection of cultural heritage (Compendium of basic texts of the Council of Europe... 1998: 153–159).

Even the Convention for the protection of the Architectural Heritage of Europe, the so called **»Granada Convention«**, in article 10 defines integral (comprehensive) protection as compulsory policy in the protection of cultural heritage for all contract signatories.[13]

Similarly new documents and other material produced by the European Union [14] maintain the doctrine of integral protection and heavily rely on the development of the foundation reached with the Granada Convention. There are also an increasing number of individual interpretations by various authors, trying to additionally develop other guidelines and principles concerning orientations and method, already defined in international documents.[15]

Integral protection is therefore a kind of protection that is actually built on completely different foundations: **protection of heritage makes sense only because of develop-**ment and in the context of recognised modern societal needs. Contemporary understanding of heritage doesn't limit itself to »cultural and historical monuments« and »artistic achievements«. Heritage is dispersed and simultaneously woven into urban and rural environments. It demands to be dealt with as an important component of and planning or designing on the local and national level. Therefore it has to be granted equal value and legitimacy when negotiating either programmes or construction in the »natural« or »built« environment. Changes in understanding progress in the development of modern societies demands from owners and managers of heritage to refresh their knowledge and capabilities, mainly when dealing with the mentioned categories of values of heritage, versus the categories of modern societal and economic values. These processes of change are far from simple or easily attainable. Proof is recent experiences, not only in Slovenia, but everywhere in the World!

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Notes

1 Probably the most in-depth and elaborate work dealing with the history of architectural conservation (History of Architectural Conservation) was recently published by the expert of the ICROM centre in Rome Jukka Jokilehto (1999; as a shorter article already in 1988). He presented widely argued descriptions of all the important breakthroughs in history affecting the development of architectural conservation. Important starting points for assessing architectural conservation, presented in a less articulate fashion, can also be found in other work. Such authors are Feilden 1994; 1981; Ceschi 1970; Brandi 1963, Strike 1994 etc. Even certain Slovenian authors added valuable discussions dealing with the mentioned issues that simultaneously deal with the responsiveness and specifics of architectural conservation in Slovenia (compare with: Fister 1979; Pirkovič 1993; Mikl Curk 1992–93, etc.).

2 The first attempt at codification of rules intended to protect cultural goods occurred during the American civil war in the 19th century. The Supreme command of the Union army in 1863 issued a set of rules (guidelines), known as the »Liber Code«. These rules determined that cultural goods had to be dealt with as private property, thus it couldn't be confiscated or expropriated and had to be protected from damage. In Europe the Hague convention on rules of warfare on the ground (II) from 1899 contains articles about the marking and protection of buildings used for cultural, scientific or religious purposes (Prim. Petrič 2000: 8)

3 By October 2nd 2000, The Convention on the protection of World and natural heritage was signed by 161 member states. The number 17 marks the Convention: It was adopted on the 17th session of the UNESCO General conference on the November 17th 1972 and became legally valid when it was ratified by the first 20 states. This happened on December 17th, 1975. The Convention on protection of built heritage in Europe is very similar and with the same rationale; it was signed by all the member states of the European Council, including Slovenia.

4 It shouldn't be mistaken with another document (»La lettre d'Ath~nes«), that came into being at the CIAM congress (Congrčs internationaux d' Architecture moderne) in 1933, also organised in Athens.

5 The conference in Athens was for example attended by (1873–1947), amongst other an active participant in the

creation of the document of Italian norms – »Carta by Giovannoni« (also: Jokilehto 1999: 284, 288)

6   The Convention was valid when signed by 20 states – members of the United Nations Organisation. This happened in 1975. The Convention is legally binding also for Slovenia, when the so called »Act of notification of inheritance« was signed (More about the details of the Convention and other internationally binding contracts for Slovenia can be found in Petrič, 2000).

7   For example documents of the European conference of ministers in charge of regional development (CEMAT), European Spatial Development Perspective (ESDP), Guiding principles for Sustainable Spatial Development in Greater Europe.

8   The list of published international documents, dealing with conservation could be excessively long (even if we disregard the documents available on the worldwide web). In the continuation only publications accessible in Slovenia are listed, which besides containing the basic documents, also contain comments: Petrič, 2000; Marasoviš, 1983; Fister, 1979; Feilden, 1994; Feilden, Jokilehto, 1993: 111–116; Brguljan, 1985; Kolarič, 1975: 313–323; Deu, 1997: 39–42; Agenda Habitat, 1997; Compendium of basic texts of the Council of Europe in the field of cultural heritage, 1998; Operational Guidelines for the Implementation of the World Heritage Convention, 1994, etc.).

9   The substitution of the architectural conservation term reconstruction with the same term used for engineering and construction and so stipulated in the building law, is completely wrong. In the latter case reconstruction means the execution of acts by which the construction elements (of a building) are changed and the execution of those technical acts that affect (improve) the static safety of the building.

10 Guidelines from the meeting in Colombo, 1993. In: Seminar of the European Council on integral protection of cultural heritage, Ljubljana, 9. – 11. 2. 1994 (papers).

11 Guidelines from the meeting in Colombo, 1993. In: Seminar of the European Council on integral protection of cultural heritage, Ljubljana, 9. – 11. 2. 1994 (papers).

12 More on the Amsterdam documents, their content and meaning, can be found in: Kolarič, 1975: 313–323; Fister, 1979: 53–58; Marasoviš, 1983: 145–150; Compendium of basic texts of the Council of Europe... 1998: 147–151; 261–270; the texts are published untranslated.

13 The Convention is undoubtedly binding for Slovenia, after all obligations from international contracts and the Convention is a contract, reach with their validity above national laws (compare to: Petrič, 2000: 6).

14 For example the material: »European conference of ministers in charge of regional development (CEMAT) / European Spatial Development Perspective (ESDP) – first official draft.

15 One of these more contemporary endeavours is the book by author Nahoum Cohen »Urban Conservation« (1999). In the introduction he states that »urban planning and conservation are not in contradiction, but are complementary ideas. Urban planning that doesn't pay adequate respect to conservation, is incomplete.«

Pictures:

Scheme: The extent and subdivision of the term »heritage«
Picture 1: The level of common knowledge about activities between different experts in the process of integral conservation
Picture 2: List of professions, participating at various extent, in the management of cultural heritage (source: Feilden, B. M., Jokilehto, J., 1993:48)

Maruška ŠUBIC KOVAČ

Goals and instruments of land policy and the growth and development of cities

1. Introduction

Instruments of land policy in particular countries are directly tied to the relationship between the role of private property and the use of authoritative measures to achieve specific goals. Possibilities for executing land policies and their success are not connected as much to the quantity of devised instruments, as they are to their suitability for achievement.

Valid instruments of land policies show, that even in this field, Slovenia is in a state of transition (Law on building land, Official bulletin, No. 44/1997). The legislature is adapting to constitutional provisions on private property. To achieve the set goals of land policies, also conditioned by the equality of private and public property, instruments of land policies have to change. Before new laws are passed in Slovenia, adequate respect has to be given to past experiences and the present circumstances while in the definition of the instruments themselves; the same has to be given to basic principles, from which procedures for implementing particular instruments evolve. Only in this way can the legally determined instruments of land policy become operational in practice and influence the development and growth of cities.

Urban development is tied to the reconstruction of cities. Reconstruction of cities implies active renewal, connected to the removal of dilapidated buildings and preparation of building land for construction and construction itself. Thus use changes while demand for new land increases. Thus development of cities affects their growth and reconstruction has to be dealt with in a complex manner. Even when building on vacant building land.

Urban reconstruction has to be assessed also from the economic aspect, because of the various costs involved. Exceptions apply to artistic, cultural and historical and similar buildings. An entrepreneur, whose desire is to maximise profit from his property, constantly compares the present yield with the yield one would achieve with changed land use. One decides for reconstruction only if the market value of the reconstructed property will be higher than the previous value, and the difference in value at least equal to the costs of reconstruction (Barlow, 1986). In national economic assessment of reconstruction, besides the increase of individual particular product, increase in foreign particular product, direct change in property and direct change in consumption have to be given due attention (Bajt, 1967). The logic of »cost-benefit« analyses can be applied.

When deciding »for« or »against« reconstruction it is necessary to pay adequate respect to the whole set of valid instruments of land policies.

2. Goals of land policies

Goals of land policies can be general or specific. While space and the time, in which they occur, condition specific goals are by general goals are long-term and not tied to na-