URBAN AND REGIONAL PLANNING REQUIREMENTS FOR A CULTURAL HERITAGE CONSERVATION POLICY

THE BRITISH SCENE

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CONTENTS

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ABSTRACT
A/1208

In accordance with the Symposium's objective, the emphasis is on the contribution of urban and regional planning to conservation of the urban and rural cultural heritage. This is here tacked in five parts. Sections 1-2: The Nature of the Cultural Heritage; Sections 3-4: The Process of Heritage Planning within Urban and Regional Planning; Sections 5-6: Conservation in Economic Life; Section 7: Evaluation of Conservation Proposals; Section 8: Philosophy of Conservation in Planning.

First comes a clarification of what is meant by the cultural heritage (1) and then the logic behind its conservation (2). Then we introduce a manner of devising a strategy for "integrated conservation", this being the advancement of conservation in association with urban and regional planning (3). For this purpose the urban and regional planning process should cover the four elements of: Plan making; plan implementation; post completion management; and monitoring, ex post evaluation and review. We then introduce the comparable elements in British planning, to show how well it lends itself to the theme of the paper (4).

We then enter a particular aspect of conservation, its role in economic life (5). The point is made that cultural activities are but one aspect of human lives alongside many others, and that like these others they have an unavoidable economic dimension. This is explored. As is all economic life, the application is helped if the

element under consideration can be valued in money terms. This is difficult since the cultural attribute of the heritage is not an isolated good which can be bought and sold, and so has no exchange value. On the contrary, it is inseparably embodied in Nature or in the cultural built heritage, and thus has no independent existence. But attempts can be made to measure the cultural quality as it exists, and then use that as the basis for measuring potential quality in order to evaluate whether proposals will enhance or undermine that cultural quality (6). That evaluation must be supplemented for decision taking on conservation projects by evaluation of the project itself. This requires evaluation by use of the cost benefit family of methods, of which community impact analysis and evaluation is one (7).

In the above many controversial issues arise in the subject matter of the paper. These need to be clarified in order to advance cultural conservation. This requires a decided philosophy in the topic, on which the paper ends with a list of relevant questions (8).

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1. FOCUS[1]

1.1 Man's General Heritage

At any moment in time, any society is using its *general heritage* from the past, namely all that it inherits from its forebears. This is very varied in character. It can be categorised as follows:

Physical stock

(a) natural resources: land, with its minerals, agricultural and timber products, animal and bird life; the water, with its fish and plantlife; the environment in sun, air, rain, climate;

(b) man-made: works and buildings which are attached to the land (immobile);

(c) man-made: works which are not attached to walls and buildings (mobile).

Activities

(a) consumption: quantity and kind of goods and services available to people for their standard and quality of life;

(b) production: way in which society has learned to provide the goods and services forconsumption;

(c) religion: relation with the God(s) of the country and the institutions which serve that relation;

(d) arts: graphic, music, dance, literature, film, plays;

(e) knowledge: accumulated and transmissible through education and training of all kinds;

(f) folklore: collective memory of past generations, absorbed through the family, teachers, etc.;

(g) tradition: carrying out activities in a manner reminiscent of previous generations.

By definition, this heritage is continually growing, both with the rise in numbers of population who are able to transmit to the future, and the increasing amount of heritage goods and services in the above categories which are left behind. But the rate of growth is not uniform in all categories. In the natural heritage there is indeed a diminution, as certain irreplaceable resources of the planet become consumed. Certain kinds of inheritance are diminishing, for example particular crafts and skills,particular forms of education, such as the classics, and particular traditions, when discarded by the young. Others have newly appeared, the home computers. Thus there are variations in stock in particular categories and sub-categories.

Associated with these variations in growth in categories are variations in the future life that can be expected of them. In the built heritage, the passage of years must erode the structure. Its maintenance will also be undermined unless measures are taken to preserve and continue the knowledge, number and skills of master craftsmen; to emphasise the point in Japan and Morocco these are classified as “living cultural heritage”. In the transmission of certain

languages or dialects only a short life can be visualised if there is lack of use, unless efforts are made at continuation under adverse circumstances (Catalan in Franco Spain) and revival (as with Gaelic or Hebrew). Folklore, music and dancing are particularly exposed to disappearance without efforts to record and revive.

1.2 Categorisation of the Urban Heritage

The preceding shows that the urban resource available to people has three components: natural, man-made and human.

Natural

These are derived from nature or, as many believe, from God, although man has often adapted them by "improvement", in drainage, etc.

Depending on the objective, natural resources can be categorised in a number of ways. Since we are primarily concerned with conservation, our categorisation relates to renewability of stock rather than other attributes:

(a) exhaustible and non-rewable (irreplaceable): land as space, topography, landscape, minerals;

(b) exhaustible but renwable: vegetation, wild life animals, water in place, soils;

(c) non-exhaustible but pollutable, when they are "renewable" by removing the pollutants: sun, air, rain, climate.

The levels of exhaustion, renewal and pollution is affected by the *management* of the stock in terms of its flow.

Human

There is little need here to dwell on the human resource except to note the obvious. As a human animal, man is comparable to natural resources which are "exhaustible but renewable". As with other animals, the exhaustibility comes for individuals from incapacity or death but the species is renewable through birth of others.

People as a resource have great variety in their characteristics, derived from the interaction of nature (innate) and nurture (acquired). From the former might come qualities of character, personality, intelligence, etc. But in contrast to other animals, the human has a long learning curve; he acquires much more from nurture, for example as a growing child from the accumulated reservoir of knowledge, technology, ethics, etc. of human society.

Man-made

In the urban area this comprises what is called the *built environment* made up of the built fabric which is attached to the land (including space around which is used with the fabric, the roads, utility services, etc.) and the moveables which are not (motor cars, clothes, furniture, etc.), being made in particular localities and transported to their place of use/consumption. The terra firm apart, these resources clearly come under the category of exhaustible but renewable.

1.3 The General and the Cultural Heritage

By definition, natural resources (1.2) are not part of man's cultural heritage. But within the *man-made general heritage* can be detected part which is termed *cultural*: viz: that which expresses some indefinable but recognisable element which the current society values especially and which it wishes to pass on to posterity. It is this part which is popularly called *the heritage,* which is thought to be the

hallmark of the “civilisation” of the people who created it, so enabling civilisation to advance... by extending the number of important operations which we can perform without thinking about them. It is the “sum of human endeavour” and “includes styles, institutions, activities and memories and values”.

The division between what is to be passed on or not is obvious in certain instances (traditional cooking versus harmful drugs) but not in others (classical versus jazz music). In these instances the distinction is seemingly subtle and arbitrary. It is made by successive generations (in some kind of consensus or elite choice) as the following examples show. Man-made moveables to be preserved find their way to private or public museums and art galleries; religion is perpetuated through its institutions; the arts which survive will depend upon taste as the years go on; all knowledge is stored (books, TV, film, etc.) with later generations selecting what they find of value (sometimes to become “classics”); traditions are a matter for individuals or institutions.

The choice cannot be made once for all but is reviewed by successive generations. The Victorians disdained Georgian architecture, as the Edwardians disdained the Victorian. While popular music was originally disdained by the classical performer it now has a classical era of its own, in jazz and the blues. Classical Latin and Greek, initially the hallmark of education, have become dispensable and not mandatory; folklore and folklife have been pushed aside with “growth and development” and tourism is now being treasured; traditional technology is now being restored under the slogan “small is beautiful”; obsolete buildings of the nineteenth century are now revered as industrial archaeology.

These examples relate to both activities and buildings. But they are not necessarily found together. The cultural built heritage can house mundane activities such as warehousing or manufacturing. And traditional pursuits are carried out in contemporary schools and community centres. And it is not even apparent that the matching of the two would assist in conservation generally. Generally speaking, the historic buildings need high value uses, not necessarily cultural, to

maintain them; and the cultural activities need low rented accommodation, not necessarily the cultural, to sustain them.

1.4 Proprietary Rights in the Heritage

The heritage can also be property and commodity. But there is variation in the kind of proprietary rights in the different categories of heritage. While natural resources have been given to men by God or Nature, they have become appropriated in most societies: in the state (nationalisation or public ownership of land), in private ownership (large landowners or peasants), or in the tribe. The same can be said of the built heritage which becomes attached to land in various forms of ownership; personal property can be owned by government, companies, individuals, etc.,; and cultural arts are owned by any person who can use the painting, music, dance, language, etc., of preceding generations, although the content of the performance could be owned by others under copyright.

But whatever the nature of the "appropriation" there is in respect of certain parts of the heritage, a form of ownership which transcends that of the proprietor protected in law. This arises where the society in question, through its government, attaches sufficient value to any element in the heritage to lead it to exercise some influence or control in its protection, nurture and survival. Examples are the wish of a government to ensure the continuation of certain arts (e.g. folk dancing or language) or, of greater concern to us here, of buildings of historical or architectural significance. When this governmental concern is sufficient to justify its taking such a stand it can be said to create in the heritage a "heritage tenure", that is rights without necessarily assuming ownership, of the kind which are taken by central and local government when adopting laws in urban and regional planning. But it could also go with ownership, as in museums which set out to record, store, exhibit and make available to the public collections of the past, covering any of the elements of the heritage described above. The principle has a particularly poignant

expression in respect of mobile elements of the cultural heritage of a country which have been taken abroad, whether as booty from conquest or exercise of other kinds of power. The heritage tenure is here taken to justify restitution to the original country. The debate continues while an international code is being built up.

2. THE LOGIC OF CONSERVATION[2]

2.1 Why Develop or Conserve Urban and Rural Resources

Within the life cycle of resources just described we can see the place of both "development" and "conservation".

As to the former, speaking generally, development of resources stems from their fundamental characteristic: potential to give rise to an activity which can satisfy human needs, wants ordesires, be they material or non-material. The application of the *development* process to the resources will generate the *growth* in goods and services (material and non-material) which will be the basis for the *growth* in activities.

Since these appear to be limitless (the motor-car, homeand holiday, soon give rise to the desire for more) the stimulus for developmentalso seems limitless. But such development, in utilising resources, tends by definition towards their exhaustion (in natural or human resources) or obsolescence (in the man-made). Such growth in itself is beneficial if it has no adverse impacts when satisfying human needs, wants and desires. But the adverse impacts are only too familiar in the contemporary world: in exhausting non-renewable or renewable resources; polluting the air or rain; or blighting, eroding or wasting human life. Yet their occurrence is concealed in the manner in which the indicators of growth are shown in national economic accounts, which relate to direct production and consumption but not the indirect. Then the harm becomes palpable, giving rise to the pressures for conservation, whose aim in essence is to check the rate of change (e.g. in progress of exhaustion in natural or human

resources, and in obsolescence in the man-made resource), in order to enable resources to offer greater capacity over their life cycles or use and enjoyment by people. This is “sustainable development”, “....that meets the needs of the present without compromising the ability of future generations to meet their own needs” leading to the suggestion that “....the goals of economic and social development must be defined in terms of sustainability in all countries”'. However aims for such sustainability produce the reaction; since growth is needed to equalise between income groups in any society, and between the First and Third Worlds over the globe, conservation can be socially unjust.

These considerations apart, on the second question, why conserve, there is a commonsense answer. The potential benefits from our urban resources are inherited without specific payment, although there is implied acceptance of the on-going liability of funding past debts for the heritage and of operating costs, both direct and indirect. Accordingly, there is every temptation to continue to use the established resources since the alternative, of replacing entirely with new, would be out of the question for any particular generation: there would be inadequate real economic resources yet responsibility for the accumulated debt.

But there could also be commonsense reasons for not accepting the gift on these terms. The operating costs could be too high, as in an outmoded hospital, no value is seen in the benefits to be derived, as in a vandalised housing estate; a political revolution could demand a break with the past and thereby the abandonment of assets associated with the former ruling class.

These commonsense answers will be varied according to the nature of the resource in question, as will now be described.

2.2 Logic of Conservation in the Various Categories of Urban Resources

Natural

The reasons for conservation have been most clearly seen in relation to natural resources. Since they are not man-made, they are not so obviously reproduceable and renewable, although they are substitutable to a large degree by other minerals, given adequate energy. And where exploitation has been profligate, e.g. in forests or farming, the evidence is only too painfully apparent.

But failure to pursue conservation policy has rung alarm bells only in comparatively recent times. The pressure on the resources has grown remorselessly with the explosion in world population; the rising standards of living and expectations of Third World counties; the advances in technology which can be used for capturing resources to satisfy demands; the rise of the capitalist profit-seeing ethic which drives forward the exploitation without regard to social costs; the pollution of the non-exhaustible resources so that environmental conditions are degraded.

Whilst factors such as these triggered off the conservation movement, this of itself has been stimulated during this century by the factors such as the Green political parties, pressure for the zero population growth society, etc. The alarms have been rung by those who predict disaster through resource depletion and equally strongly resisted by others. Whether or not the arguments against approaching doom be accepted there is general recognition that they cannot be ignored, and that conservation must be an important strand in our management and planning ethos. There must be protection of the stock of non-renewable resources; and environmental control over pollution. The concern is encapsulated in the statement that, “We have not inherited the earth from our fathers, but we are borrowing it from our children.”

Human

The reasons for the conservation of the human resource, people, would hardly appear to need spelling out. While not all, even all Catholics, would go along with the view of the Vatican, that human life is sacred from conception, and that contraception is sin, there is the general presumption in the values of Judeo-Christian religions that each life is sacred and should be capable of self-fulfilment.

These values are not however completely accepted in non-Judeo-Christian cultures. In Japan and Africa the lives of the elderly are terminated when they can no longer function; in India in some castes wives were encouraged to join the husband's burial pyre; and in China population control through one child per family has led to the killing off of female children.

Where the individual life is considered sacrosanct, the general efforts of medicine under the Hippocatic Oath are to extend its span, through eliminating mortality, and enriching its enjoyment through decreasing morbidity. So far the progress of medicine has not advanced life expectancy at birth but is certainly advancing that for the elderly approaching their three score years and ten. It is this very progress which has sharpened the question of human values in relation to life prolongation the polemic continues. The tendency has been to cease discussing life expectancy just in terms of years but to qualify these years as with or without capacity to function in a reasonable manner. If this condition no longer obtains, should the doctors prolong life? Should the individual concerned be able to request, when suffering from an incurable disease, the privilege of “dying with dignity”? When prolongation requires heavy investment (e.g. dialysis machines) of which there are insufficient to go round, who is to be allowed to live or die? In all these questions: should the decision to terminate be taken by the doctor, lay administrators, the parents, the children, husband or wife?

Whereas the preceding relates to the individual, the implied attitude of society is however a disdain of human life, in appearing to

tolerate so much slaughter on the roads, terrorism, repressive regimes, torture and war itself.

Another such contradiction arises in respect of "quality of life". Whereas the "self-fulfilment of the individual" would be thought to be the value accepted by society, it is flouted daily in the intolerable conditions around the world in the degradation of rural poverty, slums, shanty towns and urban squalor.

But even where the physical conditions are acceptable, the seemingly remorseless pressures for change threaten the ways of life and values which are traditional and which people cling to in order to provide stability in a changing world. They are assisted if a balance can be kept between the new and the old; they are enriched if the past culture which is valued can be transmitted.

Thus there are clearly no universally accepted values in relation to human resources. But most would accept nonetheless that the prolongation and improvement of quality of human life, its conservation, is an aim to be pursued.

Man-made

We expand here the distinction made above between moveables and immoveables.

Moveables

The reason for conservation here relates to the commonsense view: given ownership and possession why spend new resources on replacement while the goods have potential for satisfaction? But there is the deeper reason: the wish to have a visual reminder of the past, for the purpose of education, culture, history, etc., which is catered for individually or in museums.

However, while consumers would take the commonsense view, producers do not always do so. In part, production for indefinite life could so increase production costs as to make new goods unsaleable.

But in part, there is built in obsolescence in order to stimulate greater sales than would otherwise occur.

Immoveables

By definition this stock (unlike the moveables) is of necessity attached to terra firma and is, through people's locational requirements, of necessity distributed in settlements throughout the country, from the metropolis to the village or hamlet.

In societies in which there is change there is continuing pressure on the man-made environment. Population growth generating new families gives rise to the need and demand for new homes; growth in income gives rise to the need and demand for new homes; growth in income gives rise to the demand for more space, and more modern space, growth in leisure time gives rise to the need and demand for more buildings and places devoted to mass recreation and/or cultural pursuits. And even if there is little growth similar pressure can arise from migration of people and activity to new locations.

Alongside this pressure there is inevitably, because of competing pressures, a limitation in the amount of investment resources, both real and financial, which are available for the creation of the man-made environment.

Accordingly, there is an overriding pressure for society to use its stock of man-made environment as opposed to discarding it and providing new. The possibilities of such use are greatest in immoveable compared with moveable capital goods (motor cars, clothes, etc) simply because of the relatively longer life of the built environment. And this tendency is reinforced by the uneven distribution of income within society, for whereas those with higher incomes can afford the “conspicuous consumption” of buying or building new instead of using the old, those with lesser incomes do not have the luxury of this choice. For them, and they are the larger in numbers, the use of the established resource whose continued use enables investment resources, otherwise required to replace it, to be used for other purposes.

To this economic reason must be added another, of a social kind. People will express a demand for the new stock (growth in population, income, taste, etc.) but concurrently would have an attachment to the past through nostalgia, familiar way of life, etc. They would accordingly like to have both. In this people are not homogeneous and enter into all sorts of compromises. Some will prefer to live in older property but enjoy modern facilities in schools, work places etc. Some would prefer to have also new homes as long as others live in the older areas, which they can occasionally visit. Some would be attached to the old completely in order to avoid disruption of homes, families, neighbourhood relations, etc.

Overall

Thus there can be no consensus on the logic for conservation, as between the different kinds of urban resources or within any particular kind. But there would be general agreement that some mix is essential and desirable at the appropriate balance. Where such mix emerges from the market process (supply and demand for both old and new in one market) the results are likely to be patchy since the decisions will relate to individual ownerships and there will be externalities. Some improvement on this is a central feature of management and planning for conservation, to which we now turn.

3. DEVISING A STRATEGY FOR INTEGRATED CONSERVATION[3]

3.1 Sustainable Conservation[4]

Conservation of the heritage is a clear example of what is today termed “sustainable development” in relation to non-renewable resources that is.

"*Development that meets the needs of the present without compromises the ability of future generations to meet their own needs.*"

While coined so recently in relation to the resources available to the contemporary generation, the principle is well established in economic theory and practice. There the value of any built asset is increased over its life if it be conserved, in the sense of prolonging its ability to earn an income from its use. But there is a contrast in treatment through demolition and redevelopment from the viewpoint of the owner of the asset and that of society, which gives rise to different considerations and time horizons. As an example, the individual owner will terminate the physical life of the asset when it reaches the end of its "economic life", in financial terms, i.e. when the liquidation of the value of the current asset can be justified by the financial returns from the new one. That is not the social viewpoint, since the destruction of the asset is a loss to the economy as a whole, and the financial returns foregone through not scrapping the asset could possibly be compensated by financial gains to others. That is a stand implicit in the contemporary view of "sustainable development".

Indeed, once the cultural built heritage had been identified, the aim is to ensure that its economic life is continued into the indefinite future, in order that the cultural asset, fused with the bricks and mortar, is also available in the future. One approach for so doing is pursued via borrowing from nature conservation: the concept of an *environmental capacity framework.* In essence this places an upper limit on urban growth and development of the town in question beyond which pressure for the erosion of the environment is likely to set in. Starting with the identification of features of the historic centre that are critical in forming its overall character and quality, the capacity framework is identified as a basis for producing guidelines for containing growth and development within the capacity itself, and so limiting the pressure for erosion of the cultural quality.

In this application one warning from economics needs to be presented. While it might be accepted in the conservation of the cultural built heritage (CBH) that certain *outstanding monuments* must be protected from erosion at "any price", it is also generally accepted that for the generality of the CBH the cultural quality should not *of itself* necessarily impose a barrier on urban growth and development. Where the pressures for growth and development are high, so threatening the conservation objective, there should be a weighing up of the costs and benefits of the options in order to establish the net costs to society of the conservation (the opportunity costs) as a basis for the judgement as to whether the CBH in this particular instance should be conserved. Otherwise there is the implication that the CBH asset has a cultural value to society which is limitless. That is an example of the *best being the enemy of the good*, for it implies that there are limitless economic resources for the protection of the cultural built heritage as a whole, and fails to recognise that with necessarily limited resources the protection of one element of the CBH must mean sacrifice of another. By contrast the aim should be to prioritise in terms of cultural value and so maximise social value for money over the cultural heritage as a whole.

3.2 Integrated Conservation

It is possible for a strategy for the conservation of the heritage to be pursued independently of the town and country planning objectives of the country concerned by "conservation planning", sometimes called "heritage planning", with conservation as a "single issue". But this reduces the possibilities of the strategy being successful. To increase these possibilities conservation should be planned within the urban and regional planning process. This is called "integrated conservation", i.e. the advancement of conservation via the urban and regional planning process. To achieve it:

- The conservation strategy should be integrated with the town and country planning strategy for the heritage (buildings, areas, historic centres landscape, countryside) in order to avoid conflict between the two, which could undermine each other. Examples are overpowering commercial buildings which damage an historic city centre; or historic buildings allowing to inhibit commercial or transportation improvements aimed to bring benefits to the community; or urban growth which prejudice open country space, woodlands or green belts.

- Town and country planning proposals should be devised to strengthen the heritage. Examples in urban areas are enhancing the setting of the CBH or improved access to it, or by providing screened coach parking for the visitors; and in the rural areas by disguising for protection national park areas of outstanding natural beauty, nature reserves, woodlands and forests.

- Where there is such conflict there needs to be reconciliation between the planning and conservation objectives. Where the planning objective is to prevail, the conservation objective should not lead to the abortive expenditure of time and energy aimed at the conservation of these buildings. Where the conservation objective is to be sustained, the planning objectives need adjustment. The criteria for choice between the two is the weighing up of the options in terms of costs and benefits to the relevant community.

3.3 The Integrated Conservation Planning Process

Overview

The town planning process differs between countries, according to their individual planning systems, that is the law which enables government led planning to take place; the administration and institutions available for the prupose; the education and training of the relevant professional manpower in adequate quantities; the manner in which the various actors, stakeholders and public are able to make their contribution to the process. From this it follows that the "integrated conservation planning process" must also reflect the planning background of each country.

But some generalisation can be made as regards the successful economic revitalisation of the cultural heritage:

- While "conservation" might be visualised at the opposite end of the spectrum from "regeneration" of areas, these are nonetheless different sides of the same coin. Conservation without regeneration implies that the process of revival of the CBH does not make its contribution to the socio-economic regeneration of the heritage itself, and accordingly of the remainder of the urban and rural fabric with which it is associated. That would clearly undermine the very possibility of a "successful strategy" for the revitalisation.

- Historically speaking, planning systems have evolved over Europe from the starting point of architecture applied at the larger scale. This has been a strength and weakness: a strength in the founding of the planning process on the imaginative contributions of architecture to the future; a weakness in that architecture and planning are not synonymous, so that the planning process and system must be informed and strengthened by many other participating skills (for example,

engineering, economics, sociology, law, landscape, environment, natural resources). In the context of this paper, one particular skill is picked out for emphasis, namely that of economics, including its sub-divisions of urban and regional, land, natural resource and environmental economics. These skills obviously have a critical part to play in any project or study which includes the economic dimensions.

- The planning process itself needs to be pursued on the systemic lines which have come to be associated with what is called the "rational process in planning". This does not mean that it must of necessity be carried out in a standard systematic way. It must be individualised according to circumstances in which the process is carried out. But it does mean that, whatever the actual process adopted, certain recognisable elements must be found. These are:

  - plan making
  - plan implementation
  - post-completion management
  - monitoring, ex-post evaluation and review

We must now consider each in turn in relation to the integrated conservation planning process.

Plan Making

The plan making process and strategy for the successful revitalisation would be integrated with the general plan making process for the town in question, so that benefits to conservation of the integration can be achieved. In essence, heritage revitalisation would become one of the critical streams in the plan making, alongside other such as housing, transportation, environment and so on. That stream could be devised as follows:

(a) Prepare an inventory of the urban and rural heritage of the area in question, via the standard preservation/conservation analysis, including the cultural quality of the different elements of the heritage, as a whole and in its parts.

(b) From this stocktaking of the heritage consider the strategic issues for example, how much of this stock could be conserved without underminign a town's socio-economic viability in competition with other towns, and are the resources available for the conservation inventory.

(c) From the inventory, and subject to the constraint just mentioned, prepare a list of the areas and buildings which are proposed to be subject to legal measures for protection.

(d) Study the problems facing the cultural heritage. the constraints on the solution of those problems, and the opportunities revealed for revitalising the heritage as an integral element in the urban area.

(e) Identify any framework for the environmental capacity of the inventory.

(f) Devise options for the preservation/conservation of the inventory of the heritage within the capacity framework.

(g) Consider the options so generated against the non-conservation policies of the urban plan.

(h) Integrate the conservation with the other streams in tems of the evolving plan and its options (housing, transportation etc).

(i) Test the integrated conservation options in t;erms of financial and economic feasibility, public acceptability, and so on.

(j) Evaluate the options as a basis for choice by the authorities.

(k) Prepare for the chosen option a programme of projects aimed towards the achievement of the economic revitalisation of the cultural built heritage. For each project should be considered its means of implementation (e.g. the implementing agencies, the need or otherwise for subsidy, the source of funding). For the programme as a whole should be considered the priorities of the projects and their funding.

(l) Evaluate the programme in terms o its socio-economic costs and benefits to the community involved, national , regional and local.

(m) From the latter, identify priorities within the programme, with a time scale, on stated criteria. These for example could be by the net overall benefits to the community, or the maximum equity in distribution of benefits to the community, or the maximum equity in distribution of benefit and costs, or a combination of the two.

Implementation of the Programme

The implementation of the programme could be directed either towards the physical fabric or to the activities within that fabric. Within this it would comprise measures ranging from the indirect (such as general influence over developers and operators, organisation and co-ordination, innovative tax relief and incentives) to direct (regulatory powers under Planning and other Acts or direct positive action taken by the authority as in the purchase of the fabric to carry out the rehabilitation). This diversity of necessity will call for integration and co-ordination.

Of importance also in the implementation of the projects would be the need to change the traditional balance of responsibilities for conservation between public and private sectors, with less reliance on

the former and more on the latter. This change would be in line, and could therefore take advantage of, the general movement in Western Europe in the direction of the private sector, and the new shift towards it in Eastern Europe.

Management Post-completion

The implementation of the programme just described will result in a series of diverse projects being carried out concurrently by diverse agencies, to provide incremental steps towards revitalisation of the heritage as a whole. For this programme there will need to be an overall management strategy. This will involve different tactics for the different kind of projects. An example will illustrate, of direct investment by a private or public agency, perhaps in partnership.

The project is completed when, following the works of revitalisation, the property i disposed of to its new occupier for use. Following that begins the manaement, including maintenance and repair of the fabric, ovet the period until obsolescence and non-viability recur, leading to the need for further works of revialisatin.

The disposal just indicated could be of many forms. If the “estate” were in the one ownership, it could be disposed of on a leasehold basis to the occupiers, so enabling the ground landlord to introduce “estate management” policies on a comprehensive scale. Amongst other things, this would enable the ground landlords to exercise estate management policies with the aim of keeping a flourishing level of occupation which could, through its own financial viability, continue to maintain the property and its heritage into the future. Examples of successful management on these lines abound with the development in the 18th Century in Britain of comprehensive urban development by the private sector on large landed estates which have been then kept in the same ownership or family, and of unsuccessful management where the piecemeal disposal of the freehold did not enable these advantageous features to be retained.

The opportunities for such leasehold development and management in residential buildings have weakened in Britain of

recent years through the introduction of possibilities for purchase by the lessees of the freehold from the ground landlord, thus eroding the possibilities of comprehensive estate management on the lines described. But in this situation there are still possibilities for retaining some overall control, even though the estate be pepper-potted with freehold ownerships. This takes the form of appropriate “schemes of estate management” which allows landlords, or tenants' associations, to maintain positive convenants in the long term interest of all owners and tenants.

But in general, heritage revitalisation does not relate to properties in one large ownership, which thereby offers no opportunities for leasehold or freehold estate management on a comprehensive scale. By contrast the heritage area could be in individual ownerships. This adds not only to the complexities of achieving the successful revitalisation but also to difficulties in the after-management.

But since such after-management is a crucial element in the implementation o the revitalisation, some surrogate for comprehensive ownership must be sought. The only real possibility in practice is the power vested in the central and local planning authorities for control over the use and activity in the disposed properties, and the provision of fiscal penalties and incentives through taxes, grants, loans etc. One the former, they can typically control “change of use” between certain categories; and typically control changes in the external appearance of the buildings, and perhaps the internal, which will undermine the heritage character. On the latter, they can become financial partners in implementation of projects. This again gives an example of the value of “integrated conservation”, wherein the planning authority introduce “management policies” aimed at achieving successful revitalisation. These can be supplemented by ad hoc bodies which have been set up on “town centre management” and “tourist management”.

Monitoring, ex-post evaluation and review

In the planning process, it is accepted that during and following the implementation of the plan there should be monitoring of events of two kinds: those comprising the content of the original plan and programme itself; and those external forces over which the planning authorities have no direct control (for example in population growth, disposable wealth, income, spending patterns). In this way it is recognised that the conditions which form the basis for the predictions and assumptions in preparing the plan will not necessarily be borne out by future events, and indeed will often be falsified.

The purpose of such monitoring is to facilitate an evaluation of the nature of the changes which are identified, and to consider whether or not the initial plan and programme which are being implemented need to be reviewed in terms of form and content. The process takes the form of what, in contrast to ex ante evaluation or appraisal is generally called "ex-post evaluation" or "programme review".

4. INTEGRATED CONSERVATION IN BRITISH PLANNING SYSTEM[5]

4.1 Cultural Heritage Planning

Conservation of the inheritance itself can be sub-divided into the urban and rural, of which has had separate origins. In urban areas, starting with the movement for the Protection of Ancient Buildings in the 19th Century, the rings have spread to embrace ancient monuments in general, archaeology, buildings of special architectural or historic interest, conservation areas being "of special architectural or historic interest, the character of which it is desirable to preserve or enhance", churches, trees and woodlands. In the rural areas the protection and conservation, again under quite different origins and programmes, has extended to national parks, access to the countryside, areas of outstanding natural beauty, the coastline, public rights of way, metropolitan regional and country parks, waterways, wildlife sanctuaries or nature reserves, sites of special scientific interest,

forestry and landscape. While of varying origins, each with its own ad hoc sectoral legislation, the objectives and practices of cultural heritage planning have been largely absorbed with the mainstream town and country planning legislation and practice. The planning authority plans for the cultural heritage.

In addition to the individual programmes being subsumed into the policies and practices of urban and regional planning, each also has its sectoral agency working alongside the planning system. For example, the cultural built heritage is the concern of English Heritage, working alongside the Department of the Environment and Transport and Regions and the Department of Sport, Leisure and Culture. In the countryside there are various bodies working in parallel, such as the National Parks Commission, Nature Conservency, Forestry Commission, Countryside Commission.

In brief, heritage planning is near comprehensive in both the urban and rural scenes, is backed up by a large number of independent agencies and is fully integrated into the urban and regional planning system. This is, of course, not to say that there are no administrative, policy, political and other "glitches".

4.2 Planning for Conservation

Given the huge array of topics included in the label of the *cultural heritage*, it follows that there must be very many ways of handling these topics in policy principle and practice. For example, Listed Buildings and Conservation Areas have a literature of their own as do the National Parks. Entry into all these is clearly beyond the scope of this paper. But some generalisation on principles can be offered based upon one element in the heritage scene, namely the Urban.

The starting point is the recognition that the urban system as a whole can be regarded as a resources "...in that it potentially provides the means to produce goods and services for consumption which can favourably satisfy human needs, wants or desires. More precisely the resource has *characteristics* or *attributes*, i.e. properties which are

relevant to consumer choice, which provides consumers with the means of reaching these objectives.

As with any resource, there is a continuing scope for management over the life of that resource. In essence the object of the conservation is to ensure that the contribution that it can make to the consumer will be maximised, within the economic constraints o the costs of the conservation against its benefits, with the equation being considered not simply for the contemporary generation who make the conservation decisions, but also for succeeding generations within the concept of sustainability. This management process as others, requires planning, both at the strategic and local levels.

As indicated above, such planning is subsumed into urban and regional planning. The starting point here is the sectoral planning for the particular category of heritage, which presents itself as a "stream" within the overall urban and regional planning process, as does also, for example, the transportation, housing, urban renewal and environmental protection. But it cannot be expected that any sectoral plan can be merely accepted and slotted into the urban regional planning process. This has by definition the need for balancing the various streams against each other, both to ensure that the best use is made of the scarce resource in the area being planned, the land and also that the various urban and regional systems are compatible (e.g. location of a out-of-town retail centre where it an be served by both private and public transportation). An example more pertinent to the theme of this paper is the local area of planning in the immediate environment of conservation areas, to ensure that there is no compatibility with the requirements or conservation.

4.3 Implementation of Conservation: A Review of Possible Measures[6]

As in all urban regional planning, it is the implementation which is critically important. Otherwise the planning is an exercise only on paper, and in education. Here we enumerate possible implementation measures which are available for use, and how they can be employed to carry out the conservation programmes and also the implementation of conservation projects.

General Influence

An attempt to influence the practice of owners and occupiers of the heritage, in the direction of adopting a "conservation ethic" which reflects conservation objectives. The attempt would cover a variety of measures such as persuasion through publicity and social pressures; information about the cultural value and importance of the buildings, etc., concerned. In all this there would be liaison with and involvement of conservation pressure groups, and development agencies interested in carrying out conservation.

Public Support

The general influence just described would be directed at those primarily concerned with management decisions for the heritage. In addition, conservation needs the widest public support in the community from those who can influence such management decisions. This would require education on the importance of the cultural heritage, directed to the schools, universities, adult education, media, etc. The support would be all the more active if it were channelled into groups and organisations concerned with heritage, such as civic societies, trusts, etc.

Urban and Regional Planning Policies

In urban plans there could be policies which are either helpful to conservation objectives, or undermine them, or are neutral. A review of these policies should be made with an eye to the effect on the achievement of the conservation objectives. For example: given that there are buildings within the brief heritage which are suitable for residential, shopping, offices, etc., purposes, a policy which is helpul to conservation would limit the amount of new building that could be devoted to these purposes and so help to channel latent demand to them; or, policies which affect a local environment (e.g. transportation) could be so devised to avoid damage to the environment of the buildings, and increase their accessibility, and so increase the demand for them relative to other places.

Direct Planning Control

Under the British planning system the direct control over changes to the urban or rural heritage is possible by powers known as *development control*. This is particularly powerful in Britain because of the particular nature of the ownership of development rights in property. These were nationalised for the country as a whole under the Town and Country Planning Act 1947, and never privatised since.

The development rights are available only by specific planning permit. Accordingly any refusal of permission to exercise the development rights which the market bestows upon the property, or to subject the permission to onerous conditions, can be made without compensation. Thus they cannot be taken as read from the statutory plan for each case is considered on its merits.

According to the precise powers which are available any applications for permission to alter, extend, demolish, etc., heritage buildings would be judged from the conservation viewpoint. Any attempts to carry out such work without permit would be subject to penalty. Neglect of the buildings, which advances obsolescence to the

point of making demolition inevitable, would be delayed through enforcement of compulsory repairs at the owners expense.

Where changes of use which, if not in a heritage building, would not be granted (in being out of accord with the plan) a relaxed attitude on planning control would be considered, and also on building regulations, where these would be costly to meet in an old building.

But even so there could be diminution in the value of the property affected to the point of non-viability if the conservation objective is sustained. The authorities could offer compensation to the owner, there would need to be provision for payment, in money or kind, to ensure that the conservation objective can be implemented.

Financial Intervention in the Market

Where owners and occupiers of the cultural find it financially non-viable to carry out conservation objectives, then their paths in that direction can be made easier through the offer of financial carrots. This could take various forms:

(a) grants to owners, developers or occupiers

(b) loans to the owners or developers at favourable rates;

(c) tax rebates on expenditures for conservation by developers

Environmental Improvement

Where environmental obsolescence is contributing to the difficulty of conservation the authority could intervene by itself carrying out improvements to the local physical environment, e.g. closing traffic from certain streets and diverting to new, demolition of poor structures to provide open space, modification of water supply, drainage and other utilities.

Voluntary Societies Concerned with Conservation

Whereas the main thrust in the implementation of conservation tends to come from Government, there is a significant role for voluntary societies and associations who would like to move from just support to action in carrying out conservation. For this purpose they would need an appropriate organisation and structure, and be in a position to employ or have voluntary contributions from the professions and to be organised as charitable trusts in order to be able to receive financial contributions.

Business, Industry, Financial Institutions

The actions here in conservation are also voluntary, in the sense that they are not an essential part of the everyday business. But with a growing "conservation ethic" and trends towards "ethical investment" there is scope for business firms to participate in conservation on a basis which would be motivated partly by financial and partly by non-financial considerations. They would regard their actions as both socially conscious and also as being a contribution to improvements in their locality.

Direct Action by Local and Central Government

Where conservation is needed but is unlikely to be found financially profitable by the landowners and conventional development and financing agencies, there is scope for government (central, local or ad hoc arms) to enter the process with the help of public money as necessary. The intervention can take many forms according to the type of buildings and conditions found: for example, the purchase of properties with a view to their rehabilitation; or the purchase of areas with a view to clearance and reconstruction which would be sympathetic to the conservation objectives and plans.

Government Occupation

Very often a key to the inability of owners to carry out conservation objectives is the difficulty in finding occupiers who would be prepared to pay the kind of rent which would offer the appropriate return for the use of the propert, or to finance the appropriate conservation works in the face of obsolescence. In such an instance it would be possible for local or central government, instead of offering financial subsidy, to take on the occupation direct (for one or other of their functions) and to pay the appropriate rent. If this were higher than the market would justify, they would thereby be making a diret financial subsidy to conservation; they would be substituting rental payment to an owner outside the CBH to one who is within.

Government Ownership

If the above measures fail to produce results, then the government could buy the building, by agreement or compulsorily, and then manage it for the achievement of conservation objectives even though financially they would lose money. They could, for example, channel the building to a use for which they would otherwise be responsible, such as a museum.

Public-private Partnership

Where government assumes ownership but has no prospective use in mind for its own occupation it could sell on, by definition at a loss, to a body which would agree to conserve; or it could enter into partnership with a developer for joint conservation work and marketing of the property.

Co-ordination

To pursue the appropriate instruments from within this range requires a careful consideration of the alternatives and the possibilities. And the possibilities are strengthened if there be some means of co-ordinating the views of the various public and non-governmental bodies who might be interested in ownership or occupation, who would be amenable to purchase.

Register of CBH Available Property

It would be an aid on the supply side if there were made public a full list of CBH property which is available for occupation, in particular noting those which are subject to risk.

4.4 The Conservation Programme

The plan making process will result in a programme for implementation which would be a basis for action. The programme would reflect the nature of the "plan" itself, ranging from policies and strategies through to a development plan.

Should the "plan" be of a general kind, then the programme will relate to conservation policies or strategy, which will be the guidelines for decisions on particular cases. If it be a development plan it will comprise a programme for action in conservation projects. For the conservation programme to be meaningful for implementation it would be helpful for each of the projects to be specified in greater detail as regards, for example, the agency or agencies which will be involved; a description of the works to be carried out; statement of the order of magnitude of the resources required; an indication of the sources of support from government or other institutions, etc. For this purpose there may be need to call on a conservation team: the town planner, urban designer, landscape architects, conservation architect,

engineers, economists, cost consultants, property managers, environmentalists, transport.

For such programme to be a viable basis for action it clearly will need to be prepared with some regard to its feasibility. This could be carried out in two steps. First, there would be the general screen for feasibility or implementability in the macro planning of the area, in which proposals need to be tested before inclusion in the plan, having regard to their prospects for implementation in the circumstances available in the locality. Second, there will be the more detailed viability studies in which varying options for projects will have been designed and then analysed in terms of cost and benefit, the latter including the degree of heritage value which an be "bought" under each project. The options will reflect the varying degrees of intervention which are available.

Implementation of Projects

The conservation programme just described is intended to be a summary of the action to be taken in conservation implementation over the foreseeable future, perhaps 5 to 15 years. In practice it will comprise projects ranging from those already in an advanced stage (or preparation or implementation), to others which are yet to be launched. In the former there will typically have been consultation between the plan makers and those responsible for the project implementation. In the latter there will in the plan making process need to be some machinery whereby the implementing authorities are in consultation and discussion with the potential implementation agencies, and those providing for governmental financial support, with a view to initiation of potential projects.

For each particular project the implementation agency could be one of many kind: a private owner/developer/financier/occupier who finds it worthwhile to carry out conservation of a particular building or group of buildings; a local authority which intends to initiate the conservation on its own, and for its own occupation; a non-profit making body set up for the purpose of conserving particular elements

of the heritage with public financial help; or there could be a formal partnership between any of these parties, in which each has specific functions contributing to the totality; such as ownership of the property; development and managerial know-how; private finance; public finance in terms of subsidy, loans, contribution to repairs, etc.

Whatever the basis for the partnership, there must be some agreement or bargain preliminary to the initiation of the works. This can be simply implied, as where the owner of the property and his developer/financier collaborators proceed with the benefit of a planning and building permit, in negotiations for which each side has expressed its views and intentions on the project to be launched. Or it can be formal, as where the authority as owners of the property in question are seeking the collaboration of the private sector with its funds and entrepreneurial skills, spelling out its conservation requirements in a planning or development brief. This must satisfy the private sector having regard to any incentives which it will be obtaining for the conservation action, this being the price of ensuring conservation quality in the completed project.

4.5 Financing and Conservation[7]

The provision of finance for implementing conservation was included amongst the measures outlined above. But it does have a particular importance amongst such measure, and thereby justifies particular mention.

In the conventional renewal of a city, it is recognised that the market itself will not carry out renewal where the after-use values are insufficient compared with the value of the property at the commencement of the operations. This is even more so when such renewal needs to cope with conservation constraints.

For that reason financing for conservation becomes of particular importance, leading to a wide array of schemes for supplementing the market.

5. CONSERVATION IN ECONOMIC LIFE[8]

5.1 Value for Money in Conservation[9]

The Context

In his everyday activities, as an individual or in a family or wider group, man leads many different lives: spiritual, cultural, social and psychological as well as economic. The lives are concurrent and interdependent. Cultural activities need a social life to support them; religious activities need financial resources for maintaining places of worship.

Within this array, economic life has one special characteristic: to implement a decision to act in any of our lives typically implies the use of economic resources, for without them the decision will not result in action. Daily meditation or jogging absorbs time which could be put to competing purposes, and thus the time is an economic resource.

And so it is with conservation of the cultural built heritage. For it to come about needs decisions leading to action, as in the following familiar examples:

(a) to avert a threat to undermine the heritage, as where the building or object is at high risk through decay and could thereby get to the point of requiring demolition.

(b) to regulate a proposal to alter the building and so erode the heritage;

(c) to resist a proposal to destroy the building for redevelopment and so remove the heritage;

(d) to carry out a positive programme for conservation, whether or not the buildings themselves be under immediate threat.

In any of these actions there will be an input of resources (costs) and an output of values (benefits). Of particular relevance here on the output side is the alteration (diminution of enhancement) in the quality of the cultural built heritage.

In conservation, controversy arises in the relationship of these costs and benefits. Should conservation be based upon the axiom that, since it is aimed at a cultural not commercial value which is to be passed on to future generations, it should be carried out regardless of cost to the current generation? Or is conservation, like all other things in life, subject to the necessity, on the following propositions, of achieving "value for money". If costs are ignored, and the decision based simply on the cultural values, it could follow that a significant share of total available resources would be needed for a comparatively insignificant enhancement in total cultural value. If on the other hand only minimal costs are employed it could be that there would be unacceptable erosion of cultural quality, and the resources so used would be wasted in terms of their contribution elsewhere to conservation. Since the resources available for conservation are invariably limited (in the sense that they cannot match up to all the requirements) we need to be sure that they are used with discrimination in the conservation objectives. Any particular budget should be spent to achieve the maximum possible value in heritage quality.

That we <u>should</u> aim at value for money is certainly the standpoint here. But the application is more complex than in everyday affairs, where value, cost and their relationship can be put in money terms to one individual or enterprise.

Achieving Value for Money

The Approach

We can now return to the question posed at the beginning: how do we aim at achieving value for money in the kind of decision needed?

The value side of the equation is indicated by the difference in the cultural quality under the options. The depth to which the valuation is made will depend upon the circumstances (data available, time and resources for the study). At the simplest it will be the judgement of an individual expert, which can be taken further by more systematic valuation on a points scale.

The cost side is, as always, simpler. Here we have the direct costs to the development industry, which in turn are valued at the market price for commanding the resources.

Value for money then amounts to a comparison of the options in these terms as demonstrated in Diagrams 1and 2. It shows the changes in cultural value (in points) for the changes in cost in three typical situations in a conservation project: Do minimum, rehabilitation or restoration. The choice would be that option which gives the best ratio of value to cost. More precisely: would the extra cultural quality of rehabilitation or restoration over Do Minimum be worth the extra cost?

This kind of analysis over the range of possible conservation projects also enables the classic question to be answered: given a limited budget which should be the priority projects in conservation? Diagram 3 presents the approach to the answer. Within the limited budget it is important that each project will be taken in the priority that achieves the maximum cultural quality and output compared with resource inputs. By applying priorities in this way it follows that the maximum cultural quality for the given budget is achieved.

5.2 Asset or Liability

Why an Asset?

The heritage is an asset in any society, since is a resource which can be used for the satisfaction of a society's wants, needs and desires, without the need to inject new capital resources in its provision. But the asset could be positive or negative in money value. An example of the former is the good standard housing or commercial area, with owners/occupiers who can afford to pay the on-going operating expenses, including upkeep. An example of the latter is the defunct power station which has no future use, and will require heavy expenditure to de-commission. Such financial valuation will be a main determinant to the assets future use in the development process.

The CBH similarly has a positive or negative financial value. On the positive side it has features which are distinct from the general built heritage, for example in providing a cultural memory of the past by continuing its existence into the future; and by providing a welcome contrast to the image of contemporary environment. But it could be negative, as for example where a ruined castle is incapable of beneficial use, and involves expenditure which the market will not provide.

It is these qualities of the CBH as an asset, which can make a distinctive contribution to socio-economic welfare from urban development, which is the special theme of this Report. The CBH need not be a limitation but be an ally of socio-economic welfare.

5.3 Conservation as a Socio-Economic Process[10]

In economic life, revitalisation of the GBH or CBH consists of the injection of economic resources into the built heritage in order to transform that heritage into an asset more suitable to contemporary needs. The initial injection can be categorised as "upstream" of the transformation. This has consequential effects which are

“downstream”. These can be of varied kinds: such as physical, economic, social, environmental and cultural.

Upstream are the development industry resources which are initially injected for revitalisation of the heritage, as a result of the developer/promotor commanding and co-ordinating the factors of production (land/property, construction industry, finance) for the purpose of consumption (the utilisation of the finished space with its associated activities). Some socio-economic effects here are the relatively short term creation of employment in the development and construction industry professions and building workforce, and production of materials, so creating income with its multiplier effect on the local economy, and reduction of welfare payments for any former unemployed.

The socio-economic effects downstream are both more enduring and also more widespread than those upstream. Examples are:

- employment and income in the revitalised fabric with multiplier effect
- increased tax income from the generation of employment and spending
- reduction of welfare payment for the former unemployed
- tourism with its many side effects, both beneficial and not
- stimulus to development and regional development
- social housing subsidy from the more profitable development
- sustainable development that will lengthen the life of the asset

While such effects are to be found in any revitalisation of the urban fabric there are additional effects in the revitalisation of the CBH. Some are:

- upstream: unemployment for those in the building industry skilled in the CBH, such as conservation architects, building craftsmen, producers of traditional materials for matching those in the older buildings, leading to:

: more jobs than for revitalisation in the GBH, because of greater labour intensity
: retention of labour skills which would otherwise be lost

- downstream: cultural tourism to supplement other kinds

: improved living and working conditions within the CBH which is revitalised

: lengthening the expected life of the CBH, adding to urban sustainability

: intensive employment for skilled craft labour in maintenance

The Costs and Benefits of Revitalisation

The *effects* just described will bring changes in the way of life of the people affected; for example in higher standard of living for the additional people employed; and the addition of cultural elements to tourist activity. These we call *impacts.* As such they will bring both costs and benefits to the people impacted. But the impacts will not be uniform in all community sectors. From this it follows that some sectors of the community will gain and some lose.

One downstream benefit stems from the explosion of international tourism from its position prior to air travel. Within this there has also been an explosion in cultural tourism around the cultural built heritage and also more recently around what has been terms the “heritage industry”.

This downstream impact is certainly not distributed evenly between different countries nor between localities within countries, the distribution being a function of the historical incidence of cultural heritage which is available in the various countries. It has been suggested that Italy for example contains over 60% of the cultural artefacts available in Western Europe, which is localised in particular communities, in for example the “art cities”.

But alongside the downstream benefits of tourism, there is a growing awareness of the downstream disbenefits. Well known phenomena are the "crowding out" of the traditional functions of the cities; contribution to traffic congestion and pollution; increase in crime rates, burdens on the local municipality in providing for the wear and tear caused not only to the cultural heritage itself but also to the public facilities, such as access, car parks, public places. An indication of this local over-burden is seen in two indices collected for art cities, namely of visits (ratio of visitors/residents) and tourists (hotel beds per inhabitant of the City). For example, in the historic centre of Venice the respective indexes are 89.4 and 15.0, compared with 8.0 and 7.0 for Aix en Provence.

Associated with this is an inherent problem stemming from the historically accidental distribution of the heritage throughout a country. As shown notionally in Diagram 4 the benefits would seem to be largely directed to the national economy (foreign earnings and tax income), the regional economy (employment) and to those catering locally for tourist accommodation and expenditures (hotels, restaurants, shops etc). The costs fall largely on the public authority charged with responsibility for the heritage programme, and the residents who live nearby. So critical is the growing awareness of the burdens that some authorities are making tourist strategies with an eye to capacity constraints, aimed at limitation of the disbenefits through management of the concentration of the tourist impact Accordingly, in the terms of socio-economic evaluation, there arises the need to explore (as in all ventures) where lies the incidence of the socio-economic benefits and also costs; and who pays and who gains in financial terms.

The general picture which emerges is that the financial costs of devising and administering the conservation programme falls on local and central government. But the locality in which history has created the heritage finds few opportunities for recoupment from the revitalisation benefits, which largely accrue to the business interest (shops, hotels, etc). Thus some way of recycling the costs and benefits is called for. This recycling can be supported by a profile of

who would benefit and who would lose from a conservation programme.

6. ASSESSING THE CULTURAL QUALITY IN THE CULTURAL HERITAGE[11]

6.1 Diversity in Cultural Quality

In all manifestations of the heritage, the cultural quality is necessarily identified with the nature of the cultural stock or flow. Without their being some inherent quality there is little logic in the contemporary generation wishing to conserve for the future.

But the nature of the quality is not uniformily attached to the various elements in the cultural heritage. For example, in religion there is the enduring quality of the relation with God, whereas in the arts there is the embodiment in the actual performance itself, which will not necessarily be consistent over time. In this sense the quality in the heritage with which we are concerned in urban regional planning is very distinct. In the natural resources it is bound up with the qualities with which we have been endowed by God or Nature. In the man-made works and buildings they are .an inherent part of the real estate which has been produced. In the mobile man-made works they are inherent in the quality of the production. This link clearly affects any endeavour to assist a cultural quality of any of the heritage elements. For example, in the endowments of God or Nature, we must start with whatever it is we have been endowed with from that direction: beautiful or unattractive scenery; land at differing altitudes some being ameniable to human existence and some not. In the man-made immoveable element, the cultural quality is intimately bound up with the structure itself. The Georgian architecture, admired for its architectural quality, cannot be disassociated from the structure, and the inevitability of obsolescence of that structure as the years go by.

It is this quality, embodied in the bricks and mortar or in the landscape, which is the challenge in assessment.

6.2 Measurement of the Quality of the Urban or Rural Cultural Heritage

That some measurement of quality in the cultural heritage can be achieved is seen from everyday practice in the preparation of inventories of the cultural built heritage. In these, some monuments, buildings, objects, groups of buildings, etc., are selected as worthy to be included in the inventory and some are not; and in the former there is often attempted grading or rating into a category of quality. If this be so, then the same mode of measurement can be applied to assessing the improvements in quality that will come from the interventions which are proposed. Given the degrees of quality that exist then some interventions will:

- destroy the quality which exists
- maintain the present qualities against deterioration
- enhance the qualities through skillful restoration

Thus the approach is to:

(a) establish the current quality in cultural terms;

(b) consider what would occur without any conservation intervention;

(c) predict the quality in the cultural terms of (a) following the different levels of intervention. In this the difference can arise from either or both of intervention on the buildings themselves or in the environment/setting/ambience of the building (e.g. through pedestrianisation of streets, etc).

(d) measure the improvement in the cultural heritage which would arise through the intervention (i.e. (c) minus (a)).

Methods of Measurement of Current Cultural Value

In illustration is presented one such method which has been well articulated in Canada for valuation of the current cultural built heritage[12]. Diagram 5 illustrates.

On the left are shown five basic criteria (A-E), each with sub-criteria, which have four sub-divisions. There are thus 80 items requiring assessment for any particular building or group. Each attracts its own score in points, allocated within a predetermined maximum, as follows:

The five basic criteria are allocated a maximum of 100, the allocation reflecting the purpose of the evaluation. This is illustrated in the following Table which shows how the respective weights can differ, for example between the commemoration of history or protection for the future.

	Maximum Points in Score	
	Historical	Future
A Architecture	40	35
B History	45	25
C Environment	5	10
D Useability	0	15
E Integrity	10	15
	100	100

Each of the sub-criteria is then graded by points which are allocated to the following verbal description, the points distribution reflecting a geometric rather than arithmetic progression in order to distinguish more sharply between the different qualitites:

E Excellent
VG Very Good
G Good
F/P Fair or Poor

The final step is the evaluation of the meanings of the scores. In this regard is had to the purpose of the evaluation; the weightings

between criteria and sub-criteria which have been built it; and the significance of the conclusion for the conservation policy and plan itself.

It should be noted that the Kalman approach (of using a number of varying criteria to which ratings are given) can be described by the contemporary term "multi-criteria evaluation". Under this name Nijkamp has introduced a similar approach, but with a different method of aggregating the results[13]. The essential difference is in the criteria which have been chosen for the purpose.

(a) Socio-economic/functional-urban value (user value).

1. Tourism (domestic and foreign)
2. Religion (actual use for worship, marriage, baptism, etc).
3. Location (that is geographic accessibility, for example distance from city centre)
4. Degree of uniqueness (monovalence).

(b) Historic or cultural value (option value)

5. Artistic value (beauty of icons, mosaics, frescos, e.g.)
6. Symbolical value (historical memory, e.g.).
7. Representativeness for a given style period.
8. Integration of different style periods (internal complex value).
9. Integration with external environment (external complex value).
10. Visual beauty of exterior of monument.
11. Age (period of first construction).

6.3 Measuring the Prospective Cultural Quality

In the Kalman and Nijkamp studies, the criteria have been used for assessing current value, as a base line for predicting the outcome of conservation intervention (that is only (a) in the approach outlined above). In order to assess the change in the cultural quality that will result from the conservation intervention it is clearly necessary to proceed to steps (b), (c) and (d). In this there must clearly be consistency between the assessment of the current situation and the predictions of what might happen in the future, as the basis for the assessment of the cost of the conservation intervention. The approach is through the economic concept of opportunity costs, as now described.

The Concept

Both Kalman and Nijkamp attempt to establish the value, measured by points, of the cultural element of the built heritage. But given that their approach provides reasonable values, how is this to be used in economic assessment where both cost and value must be considered together? It is here that the concept of opportunity cost is relevant. In essence this starts from the statement that there is no objective way of measuring the *value* of a good or service to the consumer. An illustration can be given for so tangible a commodity as a motor-car. Clearly it would not be offered by the manufacturers unless the price to be paid (the value) exceeded the cost of production, appropriately defined. Given this, the price is dictated through the competitive interaction of supply and demand. An individual faced with the possibility of purchase will buy if the value to him of the use of the motor (travel, prestige, etc.), judged subjectively, is at least greater than the cost in money terms. But as regards this cost he will consider not simply the dollars and cents but what those dollars and cents would buy as an alternative to expenditure on the motor-car, namely their opportunity cost, i.e. their worth to him of the goods and services in the best (to him) alternative use. Indeed, having regard to

this, it could be that he would pay more than the market price if he had to. The excess in price would be the measure of his *consumer surplus* in respect of the car.

Thus the purchaser's opportunity cost of the motor-car is not the money price but rather what that money could buy for him in goods and services. He is judging the satisfaction from the motor-car itself only by comparison with the satisfaction from other commodities which he could pursue with the given money price. These satisfactions are entirely subjective to him. Thus he has no way of establishing the value of the motor-car. What he can say is whether or not he would be prepared to pay the money price in terms of opportunities which would be foregone. And if this reasoning applies to a motor-car it will so much more apply to an incommensurable, like buying a seat for the opera or the enjoyment of a meal in a restaurant.

We now apply this concept to the valuation of the cultural built heritage.

Private

In illustration we use four options for the renewal of a listed obsolete residential building in the town centre. For these we add the following information on the heritage quality of the building (HV) under the four options. Using the Kalman method the cultural element in the building in its current condition scores forty-eight points. Using the same method to predict potential heritage quality following the works in each of the schemes, we reach the following ranking (with 1 as best).

		Score	Ranking in HV
(a)	Do minimum	48	3
(b)	Rehabilitation	65	2
(c)	Restoration	82	1
(d)	Redevelopment	0	4

From this ranking the question arises: if heritage value is to be conserved at eah of these levels, what would need to be given up in money value by the proprietor through not exercising the best commercial option (on his own or in association with a developer)? In this instance, the best commercial option is redevelopment, which would result in the maximum surplus to the land. This is the opportunity cost of any of the options. It is accordingly the common datum in the following comparison:

(a) *Do minimum*: the property would continue in its present condition so that no net additional cost would be required except the essentials to keep out the weather and maintain functioning. The opportunity cost is therefore a/lv from the redevelopment plus these essential costs.

(b) *Rehabilitation:* here is it assumed that the extra value from reconditioning of the property would be offset by the extra cost of works (including developers profit) so that the net cost of the rehabilitation would be zero. The opportunity cost is therefore s/lv from the redevelopment.

(c) *Restoration*: The cost of works will be greater than in rehabilitation and the potential after use value likely to be less. Accordingly the net added value of restoration would be minus, so that the opportunity cost would be this net loss added to s/lv from foregoing redevelopment.

This opportunity cost ranking an now be compared with the heritage value ranking, as follows (with 1 as best):

Heritage Value Ranking	Opportunity Cost Ranking

(a)	Do minimum	3	3
(b)	Rehabilitation	2	2
(c)	Restoration	1	4
(d)	Redevelopment	4	1

From this it is seen, as might be expected, that the ranking for heritage value and opportunity cost are not symmetrical. The best commercial option (i.e. least opportunity cost) results in the lowest ranking of heritage value; and the highest opportunity cost (restoration) has the highest ranking in historic value. Thus the proprietor concerned with heritage value would need to trade off the marginal difference in heritage value and opportunity cost between the options. For this purpose he would wish to quantify the difference in opportunity cost. The method of so doing, using our present example, is presented below in respect of certain options. Adopting illustrative we have:

		Heritage Points	Value in £m	Private Opportunity Cost in £m
(a)	Do minimum	48	-0.1	2.6
(b)	Rehabilitation	65	+1.2	1.3
(c)	Restoration	82	-1.0	3.5
(d)	Redevelopment	0	+2.5	0

The findings are illustrated in Diagram 1. The horizontal axis shows heritage value in points and the vertical the private opportunity cost in £ millions (that is to the proprietor). From the plotting of each of the four options it is seen that redevelopment has zero opportunity costs with zero heritage value, whereas restoration has opportunity costs of £3.5 million and maximum conservation quality. The other two options are between.

Faced with this display what decisions would the proprietor take? If following only commercial objective he would clearly opt for

redevelopment, giving him the maximum surplus of land value. But if his management objectives tempered commercial gain with the wish to maintain heritage quality, he would consider the marginal financial losses of pursuing the other options against the marginal gain in conservation quality. Of these it is likely that he would come down in favour of rehabilitation, where for a relative loss of 1.3 million he would achieve high conservation quality.

But whether or not the proprietor includes conservation objectives, the conservation (planning) authority will. In this it will have regard to many considerations of which one could be the amount of loss which its conservation j decision would impose upon the proprietor. In this regard it would look at Diagram from the other end of the telescope than the proprietor. It would wish to avoid the Do Minimum situation and encourage conservation works, and so be strengthened in the knowledge that the Do Minimum option would give the proprietor high opportunity costs. But if it wished to pursue the purest restoration line, it would reflect that this option would cause even higher opportunity costs (i.e. loss of potential development value) to the proprietor. Thus it would be reasonable to settle for rehabilitation in the knowledge that this would achieve high conservation quality with not unreasonable opportunity cost. Provided this option would be financially viable to the proprietor this option could well be the basis for the bargain to be struck by proprietor and authority in pursuing their individual objectives.

Social

In the bargain just described the proprietor is concerned with a private good (his property) and the authority with a public good, even though impure (heritage quality attached to the property). In this situation, if the authority were concerned only with conservation it might enter the bargaining process as just described. But where it is also the planning authority (practising integrated conservation) it would be pursuing planning as well as conservation objectives. While

these are somewhat diffuse they can be acceptably described as having reard to the *public interest* in the evolution of our towns and regions.

The criteria for achieving such public interest are notoriously difficult to both define and follow. One such criterion which is central to our focus has been introduced: just as the proprietor is concerned with his opportunity costs in the conservation objective so should be the community. Thus the planning authority is concerned to identify the opportunity costs to its community (the public) of alternative courses of action , in this case of the conservation options. In this analysis itis necessary to have regard to <u>total</u> costs and benefits to the proprietor, the conservation authority and also all other externalities stakeholders. This we call the *social* opportunity cost.

In essence the analysis needs to predict the value as far as possible of the costs and benefits falling not only on the proprietor but also on the remainder of the community. A method of so doing is Community Impact Evaluation. For our immediate purpose we assume that it has been so applied to our options. But since so many of the costs and benefits are unpriced and non-measureable we cannot show the opportunity cost in money terms but only by some points system. This is presented for illustration in Diagram 2 with the ranking (1 is best) brought out in the following table:

		Heritage Value Points	Social Opportunity Cost in Ranking
(a)	Do minimum	48	3
(b)	Rehabilitation	65	1
(c)	Restoration	82	2
(d)	Redevelopment	0	4

This ranking it will be seen is different from that derived in terms of private opportunity cost. This demonstrates what is apparent: that the opportunity costs of conservation of the heritage will differ according to the parties whose costs and benefits are considered, and so would vary between them. This can be of practical significance in

conservation issues. A common example arises where the benefits to be derived from conservation fall upon the visitors and tourists but the costs on the local community and taxpayer. The opportunity cost to the later is therefore very much larger than to the former. Thus a similar analysis of any or all of the sectors which are impacted would enable the distribution of costs and benefits throughout the sectors to be seen, so that a judgement can be formed in terms of the equity of theconsequences of the conservation decision.

In conclusion we return to the discussion above on the measure of value of conservation to society. We see that it is not the economic value in itself which is critical but the opportunity cost. We accordingly can conclude with Fusco Girard: in order to measure differences in value to society of the cultural heritage, that would come from optional conservation decisions, we need to assess the social cost of the achievement of the differences.

7. EVALUATION OF CONSERVATION PROPOSALS[14]

7.1 The Concept

In the preceeding section we introduce the investment of the heritage quality of the conservation proposals, with indication how its value could be measured in either private or social opportunity cost terms. We now turn to the evaluation of conservation proposals themselves. In this we need to take account of the totality of the costs and of the benefits which will be derived, i.e. social value for money.

7.2 The Stake Holders in Conservation

Integrated conservation is a plan-led activity to introduce conservation within an urban and regional planning framework for particular objects or areas to be conserved. But the planning authority is only one actor in the process (Diagram 6). There are several

stakeholders, by which is meant an agency, in addition to the local planning authority, who have the capacity to advance, influence or hold up the conservation programme itself. An illustration in relation to conservation is presented in the attached Diagram 7 where nine such stakeholders are indicated.

In their participation in the conservation, each of the actors will consider to himself the costs (disadvantages) and the benefits (advantages) which will accrue to his interest. To assess this he will use one or other of the members of the cost benefit family of methods, a family which is united in making assessments having regard to the relationship of benefits and costs for the project in hand. In this respect for any project the stakeholders each may have different objectives. These vary with the criteria for choice that are set, implicitly or explicitly, by the decision taken or analyst in question, in relation to, for example.

(a) *Whose costs and benefits are to be taken into account?* The individual purchaser would think of his financial costs and benefits, or those of his family, and not others, unless he were altruistic. A private company would also think of financial costs that the company had to meet and benefits for which they could charge, so excluding the others, the "externalities". Such a company might be involved in "ethical investment", which brings in ethical constraints against certain choices, for example in industries involving drugs, armaments or terrorism. A local authority might be concerned only with the cost of all its corporate services and the benefits to the residents they serve.

(b) *Which costs and benefits in geographical terms?* The private individual or company would tend to think of the costs and benefits accruing to the household or project with which they are immediately concerned, and not those falling elsewhere. But a local authority, faced with the need to provide for the offsite impacts of a development project (traffic, water, sewerage, etc.) would also consider these cost implications.

(c) *Should the decision relate simply to efficiency or also equity and social justice or political sensitivity?* Comparison of the direct benefits or costs is a measure of *efficiency* in terms of value for money, be these the costs and benefits to be experienced by the decision-taker (the individual or family) or the wider community (municipal services). However, the individual or company might not be concerned with the distributive consequences of the purchase or investment (unless they take an ethical stand) and would therefore not concurrently take into account criteria of *equity and* social justice, as between those to whom the product of the purchase or investment is distributed. By contrast, a municipality that represents its electorate and is also concerned with prospects for return at the next election, would take account of distribution, in prospective votes. A planning authority, choosing between optional plans for a community, would also take account of distribution, if only because of the pressures by the public that forces them to do so. Even if they do not wish to consider social justice/equity (on the proposition that only the creation of wealth makes possible its distribution), they would certainly be sensitive to the distributive aspects if only, if equity and social justice are ignored, to be warned of the opposition they are likely to encounter.

This review of varying criteria adopted by decision-takers, in answer to the three questions, present further instances of cost-benefit analysis aimed at multiple objectives, which we termed above “truly social cost-benefit analysis”. which is community impact analysis.

Specialisation in the Different Methods

From these examples it can be seen that there is potential for considerable diversity in the criteria adopted for choice by decision-takers. For this reason, the members of the cost-benefit family have specialised, either expressly or implicitly.

To some extent this specialisation has already been brought out in the differentiation above between the members of the family in terms of their characteristics. Here we proceed to differentiate further in terms of the method of project appraisal within the cost-benefit family that would be used by different types of decision-takers.

Diagram 8 gives a general impression of the differentiation. It shows in the rows the kinds of costs and benefits/disbenefits that an arise in relation to a particular project, and in the columns which of these a particular kind of decision-taker or his analyst would call upon in pursuing the choice in that particular instance. At the foot is shown the member of the cost-benefit family that could typically be used to make the analysis.

The Table gives a *general* impression, only because the precise methods are not standardised and particular studies call for a combination of aspects, without change in nomenclature. For example Schofield subdivides cost-benefit analysis into economic, relating to efficiency, and social, relating to distribution[15]. In our approach the economic *can* include distribution whereas the socio-economic *always* does, and it also embraces outputs that are *social*, in that they include aspects outside the conventional boundaries of *economic life*. Bearing this in min, we now amplify in respect of each kind of decision taker.

The developer/entrepreneur/financier, be s/he private or public, would be concerned with the financial costs s/he has to bear and the financial benefits for which s/he can charge, and so ask for a financial analysis (FA). Were s/he also interested in the repercussions on others directly involved in the project, for example consumers on site, s/he might ask also for a social financial analysis (SFA), as would developers/entrepreneurs (who have to assess what the market would bear, or have yet to raise finance) or a financier considering whether to lend money.

Where the decision-taker is in business or industry, s/he would typically be concerned only with the financial outcome to her/himself, and thereby use financial appraisal (F). But in addition s/he might need to consider the impact of her/his activities on those outside the project (e.g. on the natural environment or traffic flows), applications

for planning permission, or finding measures of amelioration to meet the requirements of environmental protection. S/he would accordingly wish to use impact assessment (IA).

Municipal or central governments are clearly faced with decisions on a variety of issues and will therefore need to have a wider array of choice criteria leading to different methods. These could include the methods already discussed (FA, SFA, IA). But in addition they might need to employ cost-revenue analysis (CRA), in order to assess the tax burden implications of municipal or governmental projects; planning, programming, budgeting (PPB) for their municipal services; cost-benefit analysis (CBA) in assessing non-market projects (such as transportation): social cost-benefit analysis (SCBA), as where assessing non-market projects that have repercussion on other governmental activities (such as the closing of a hospital in terms of implications for patient welfare).

Where a planning authority needs to take into account the total array of costs and benefits that might arise in a community, it could use community impact analysis.(CIA). Since this has the widest treatment (in embracing off site impacts and all relevant costs/benefits), it can be set up in such a way to embrace all the other analyses; these, as it were, can *nest* within the CIA. Then, conclusions can be drawn from the CIA relating to the decision-takers and stakeholders, consistently with the overall analysis.

Because the different decision-takers/stakeholders just noted will, as clients, employ different kinds of professional advisers, it is inevitable (academic and professional divisions being what they are) that the different skills would have devised methods of their own in isolation from others. A clear example here is the use by accountants, surveyors and engineers of financial costs and returns in making financial analyses; and the use by economists of economic as opposed to financial measures in cost-benefit analysis.

For all members of the cost-benefit family the measurements need to be reconcilable, even if the differences between them are necessary for the particular analysis. For this to occur, on any particular project, the different skills need to adopt terminology, definitions, rules of

measurement, use of criteria and so on, that have greater similarity than they traditionally do. The different questions, which are justifiably asked by the array of decision-makers/stakeholders, can then be reconciled in the sense that differences and similarities in the answers can be better understood. This is particularly important in recognising the distinction between decision-takers and stakeholders; unless those involved in particular aspects of the project can see clearly how their cost-benefit calculations agree with or differ from those of the others, there is room, without good reason, for confusion, heated debate and delay.

7.3 The Role of Community Impact Evaluation

From the preceding it is seen that community impact analysis and evaluation is a particular member of the cost-benefit family. It is also seen that its distinction from the others that it takes into account a comprehensive enumeration of the relevant costs and (financial, economic, social, etc.) and also thereby can reflect the widest concept for the public interest in the process. But the making of the community impact evaluation does not of itself disregard the important evaluations made by each of the stake-holders, in pursuance of their objectives. Thus it recognises the need for a multi-array of evaluations for each of the relevant sectors. It has potential for doing so because of its comprehensiveness in the array of costs and benefits that it can handle, so that the other members of the cost-benefit family can be said to be nesting within its overall embrace. Accordingly the CIE will offer not simply an indication based upon the totality of the cost and benefits of concern to the community but also that of the individual stake-holders that may be concerned.

Diagram 9 illustrates the principle.

7.4 CIE and Integrated Conservation

As brought out above (3.3) successful strategies for the economic revitalisation of the cultural built heritage require that they be carried out as part of an integrated conservation planning process. Within this it was illustrated (3..2.2) how in plan making proposals can be tested for its outcome in terms of maximising the net benefits to the relevant community. It is within this process that the Community Impact Evaluation has its natural part to play, for it was specifically devised as an adaptation of Cost Benefit Analysis in order to advance welfare from the exercise of town planning.

In addition, CIE can be used in the ensuing stages in the planning process. The implementation of the programme of revitalisation will be via a series of projects. These will be worked up in greater detail than in the overall plan itself. As such, each of the projects an then be tested by CIE in terms of its contribution to welfare. When the project is completed the revitalisation process enters into the management phase. Here the aim will be to ensure that the prediction of costs and benefits associated with each project will be minimised in costs and maximised in benefits.

As in all planning processes, it is then necessary in the light of experience following implementation to review the plan and strategy underlying the revitalisation. In this phase the monitoring process will test whether or not the predicted costs and benefits to the community have emerged as predicted, with an indication of the reasons. The revitalisation proposals can then be evaluated in the light of that experience. An indication can then be given of the *success* of the particular strategy for the economic revitalisation of the built heritage, based on the degree to which the asset of the cultural built heritage has been used to maximise the total net benefits to the community in question. In addition, if the evaluation method ex post corresponds to that of the ex ante evaluation, a pointer can be given to the manner of improving the method of ex ante evaluation for the next round of projects.

In this and other ways CIE can make its contribution towards successful strategies for the economic revitalisation of the CBH. In doing so it offers the possibility of filling the gap highlighted in the Council of Europe Report of 1985[19].

> *"if , until recently, it was necessary to produce evidence of the usefulness of introducing economic analysis in the heritage field, it subsequently became necessary to show proof of the capacity of economic analysis to evaluate the dimension of the heritage.*
>
> *The difficulty arose both from the absence of appropriate methodology and from that of adequate, comparable information. Finding an appropriate economic analysis method embracing all the "cost-profit" aspects of the existence of the heritage and action to protect it, could make a big contribution to the development of economic, social and cultural policy. It would greatly facilitate the action of public authorities in the protection field by enabling them to appraise more realistically the true costs and economic and social spin-offs of the proposals put forward".*

8. NEED FOR A PHILOSOPHY OF CONSERVATION AND PLANNING

In this section we make an overview of the above paper, with a view to an attempted clarification of the underlying issues. The issues relate to the first four parts of the paper:

Sections 1-2: The Nature of the Cultural Heritage
Sections 3-4: The Process of Heritage Planning with Urban and Regional Planning
Sections 5-6: Conservation in Economic Life
Section 7: Evaluation of Conservation Proposals

While the last two sections have many uncertainties of their own, this paper is not the occasion for an attempted clarification, for this is the subject matter of many volumes and much history on the topic. But this paper is certainly the occasion for an attempted clarification of the nature of the heritage, for it is on an understanding of that element in our society on which we are to concentrate the planning exercise. The reason for so doing is that the topic has uncertainties; and if the uncertainties are not clarified then conservation activity can be hampered. And this could be very costly in making and pursuing incorrect decisions which would have heavy costs in money, time and economic resources which could lead to the liability to society rather than an asset. In brief we need some kind of accepted "philosophy of conservation" which hopefully can be discussed as the basis for some agreement on principle and practice. We do this here by raising pertinent questions for discussion.

1. What is a working definition of the nature of our heritage?
2. What part of that heritage can be described as "cultural"?
3. How do we identify those parts of the heritage which a contemporary society would wish to conserve.
4. How we decide which part of the cultural heritage to select for conservation through institutional means?
5. Having decided the list for potential conservation, what is the logic behind the aim in particular cases?
6. In this logic distinguish between cultural values at an international level, a national, regional and local levels.
7. At each level consider the values to be conserved and the resource costs of so doing for progress.
8. How does the process link with the generally accepted aim ofsustainability?
9. Find a means of assessing the questions of who gains and who loses and the process, and thereby of adjust in equity in the impact.

10. Since the dedication to conservation of a particular generation is but the handing over of the baton, on some presumptions of valuations by the succeeding generation, formulate a process for keeping these, possibly changing values under review.

These questions, and no doubt others relating to the remaining sections of the paper, should find their way onto the Agenda of the International meeting to be held in 1999.

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