Deliverable D11

Summative report of Workshop II

Assessing, measuring and prioritizing heritage values

Prepared by the Norwegian Institute for Cultural Heritage Research

with financial support from Riksantikvaren, the State Directorate for Cultural Heritage

Contents

Background

The workshop was part of a series of events connected to the Heritage Values Network project (H@V project). The H@V project was designed to "instigate a European, transnational research network comprised of academics, practitioners and policy-makers around the theme of 'heritage values'" (application), responding to the JPI call to "build an effective collaborative network on a common transnational research topic in cultural heritage" (JPI-JPEH Cultural heritage).

The project itself examines the proposition that 'heritage values' are conceptualised and assessed differently by different disciplines and sectors. This results often in miscommunications and complexities

Three interactive, networking workshops will be held in, on the following themes:

- Eindhoven: Cross-sectorial, cross-disciplinary and cross-cultural conceptualization of heritage values (July 2014)
- Oslo: Methods of assessing, measuring and prioritising heritage values (Oct 2014)
- Barcelona: Public participation in value assessment (Feb 2015)

The Olso workshop built on some key questions to

- Can we find common ground in assessment?
- What are the common & different points?
- Do we need new tools and terms to conceive and measure values?

The workshop tackled a range of issues related to value assessment to build a discursive environment that could move beyond existing literature. Each session had several aims (Appendix 1), long- and short-term, to build towards the final conclusions. These are included in this workshop report and published n the project website.

The event was live-tweeted and recorded in a number of ways, all of which have contributed to this report.

Workshop Design

The topic of heritage values is both very specific in its scope, but also very varied in its application. By definition, the creation of a JPI network required the inclusion of different kinds of heritage, different roles within heritage and different countries. Furthermore, the different reasons for assessment can mean that ideas of how value can and should be measured and suitable approaches vary. There are many activities that are referred to as value assessment, but can relate to different ideas of value.

Looking at something so complex and varied in a short space of time required a mixed approach in order to both to elicit the experiences and perspectives and also have a coherent outlook at the conclusion of the workshop.

In order to create a simple framework that would allow these complexities and dynamics to be expressed, Harold Lasswell's (1936) classical definition of politics (who gets what, when and how) was used. This was chosen as something that was elegant and simple, that had recently been successfully connected to heritage (Taylor 2014), that acknowledged the political nature of heritage and value assessment, that could describe something as contested and complicated as politics, and that could also be related to heritage as a communicative practice, as Lasswell had applied this approach to communication science. The terms became the starting point for our broad themes: Why, Who, What, Where & When and How, as deeply interconnected themes that offer a range of issues to discuss. The aim was to be able to get some in-depth discussion that would be possible to connect later through structured overlap. The separation of the themes is artificial, as they inter-relate, but examining the dynamics of these relationships was an aim for the workshop. The intention was for balance and ultimately for the themes to merge by the end of the workshop. Furthermore, by mapping the issues from different angles, misrepresentation could be avoided by more than one group discussing a subject separately. The validity in any conclusions drawn is strengthened by either reinforcement or raising different perspectives.

Figure 1. Workshop themes communicated to participants

An equally important matter was for all of the activities to provide the opportunity to add momentum to the workshop or the project. Consequently, the aim and future benefit of each section was considered and stated to all (see Appendix 1).

Participants

25 delegates and 13 project partners from 15 European countries to discuss heritage values and their assessment. We had a diverse range of delegates, representing policy, practice and academia (fig 2). Although we could not draw any conclusions about preferences or activities based on discipline, European region or role within heritage, discussion was informed by a wide range of heritage professionals.

Unfortunate cancellations during the week of the workshop meant that Italy was not represented and Norway had more delegates than originally planned (but all with expertise in value assessment, which is not evenly distributed).

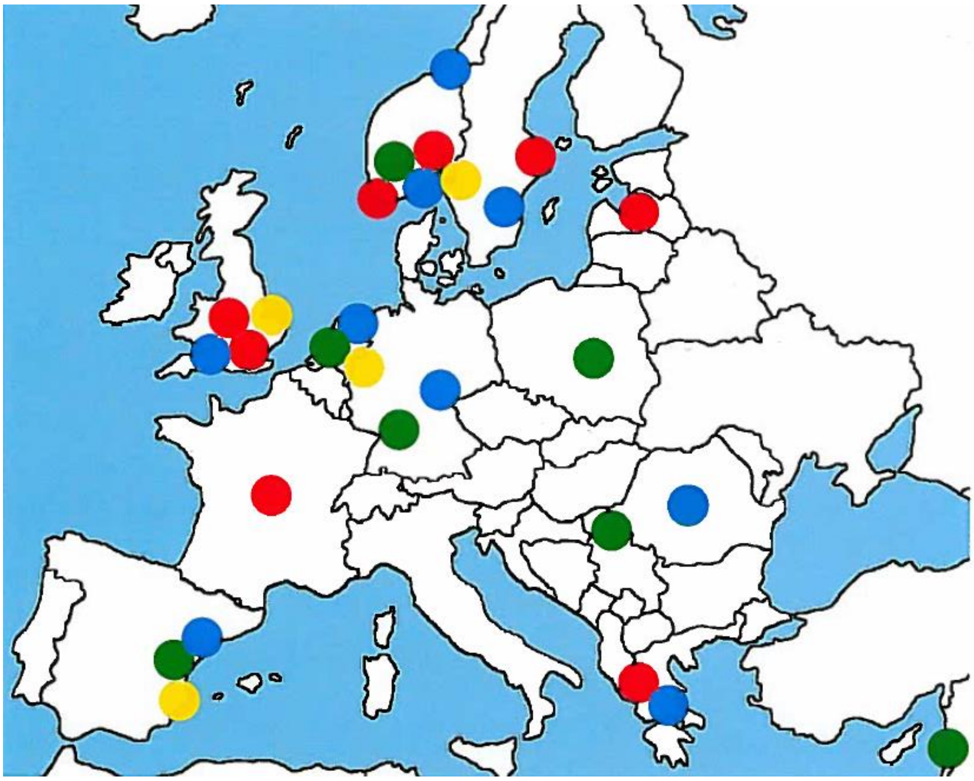


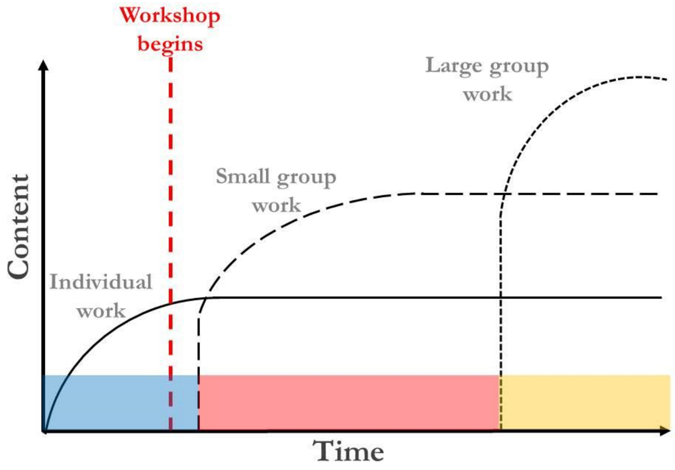
Figure 2. A map of delegates' locations with coding for their role within heritage.

Policy
Practice
Academia
Project Partner

Methodology

Preparation

The format included some introductory sessions and then informal activities and exercises to (including looking at a real site) before sitting down to discussion in groups. In order to consider the best ways to ensure meaningful interaction, a range of techniques were used. The structure of the workshop was derived from principles of case-based learning (fig 3), as this was a way to deal with group discussion of complex topics and information. This consisted of slowly building up interaction through three stages – individual preparation of delegates, small group discussion and finally gathering together to tie the threads of the separate conversations.



The workshop activities were developed with three connected stages of interaction that began before the workshop and reached its summit at the end.

Individual work: Critical thinking, your own experiences, ammunition

Small group work: Group thinking, negotiation, argumentation

Large group work: Negotiation, persuasion, master concept

Figure 3. Group work diagram based on Maufefette-Leenders, Erskine and Leenders (1999), and adapted to the aims of the workshop.

Much of the individual work was carried out prior to the workshop through the dissemination of discussion documents (Appendix 2) to be read prior to the workshop (blue section, with a longer lead-in time than represented). Individual work continued at the beginning of the workshop by partners giving presentations on their documents' topics.

The discussion documents were written by the project partners, relating to the broad workshop themes (fig 4). The documents were a selection of short, informal texts written by project partners to generate discussion and prepare delegates for the workshop. It was not intended that the papers were authoritative, nor provocative, but to level the discussion and provide common reference and engaging subjects for discussion. They were intended to be easy to read and help generate discussion. The intent was not to provide answers, but a platform for participants to share their approaches and experiences. They also included questions at the end to promote discussion at the workshop. This was sent out three weeks in advance to allow for busy schedules, and were briefly summarised at the beginning of the workshop. Project partners then facilitated the group discussion for the theme about which they wrote.

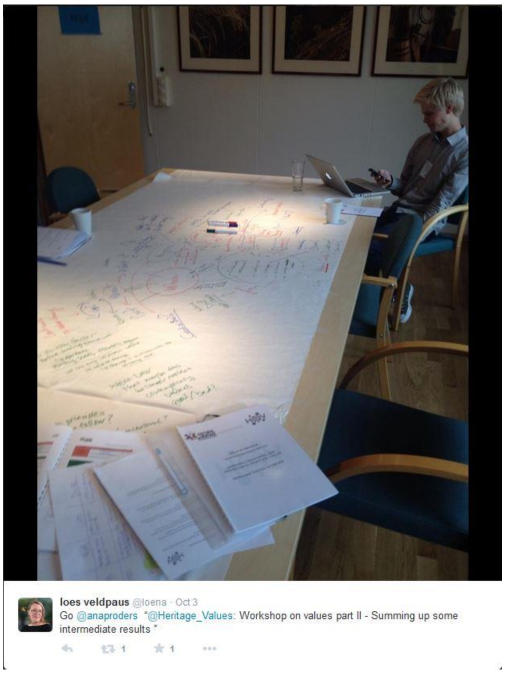
Discussion document	**Partner**
Why	Leiden University
Who	NIKU
What	University of Barcelona
When/Where	Technical University of Eindhoven
How	University College London

Figure 4. Table of themes and authoring institutions. Full document in Appendix 2.

Group work

The small group discussion (red section in fig 3) was considered in terms of the key questions, the best participants and the relationship to the overall structure and potential outcomes. In case study teaching, the small group discussions are often the same material, but an opportunity to gather ideas and views of experienced heritage professionals was considered very valuable. Consequently, the small groups would discuss the five interconnected themes. Prior to the workshop, each delegate received a Workshop Guide (Appendix 3). As well as logistical information, the Guide outlined the participants for each group and for each session, so delegates knew which discussion documents were most relevant to their participations.

Because delegates were talking about different topics, unlike the case study model, there was a need to connect discussions before bringing all the delegates together. As a result, there were two group discussions (valuing these as opportunities for in-depth talk) where delegates moved around. The first was specifically connected to the theme and the questions in the discussion document. The second was to look at how that theme related to the others, and identify knowledge gaps. This way, there would be the chance for cross-fertilisation before the group met as one.



Based on experiences at workshops in the past, and the desire to interweave the workshop themes, a 'World Café' approach was chosen. Discussion room tables were covered in a tablecloth, upon which delegates could draw to help explain their ideas (as they might in a restaurant or café). Then, when people moved groups there was a record of those ideas discussed in the previous session. Also, partners facilitating the discussion would report on the topics raised and points made at the end of the discussion periods.

These sessions were discretely recorded with mobile devices (fig 5), with notes of the discussion taken and photographs of the tablecloths.

Figure 5. A member of the workshop team taking notes and recoding on a mobile device.
Discussion documents and Workshop Guide in the foreground.

The final group discussion (yellow section in fig 3) was intended to be a summary of those earlier sessions, gathering shared ideas in order to consider the way forward as a collective. It was expected that activities on day 1 and discussion on day 2 should contribute to a sense of community. This session was intended to distil the previous discussion and bring diverse perspectives together (fig 6). The intended result was a short document that could serve as a summary of the discussions for future reference.
Video footage and flipchart notes were used to distribute a working document of the conclusions to participants, which forms part of this document (and is published on the project website).

Figure 6. NIKU facilitating group discussion

Results at the workshop

<u>Participants' value assessment methods</u>

Prior to the workshop, participants were asked to send the value assessment methods that they used. This was summarised by a member of the NIKU team. This session allowed the participants and partners to see the breadth of different methods and find the common points. It was also the opportunity to see methods that had developed in different disciplines brought together. Understanding the potential variation inn methods and perspectives was considered important for the ensuing discussions.

Figure 7. A selection of the assessments reviewed

In terms of their common ground, all the assessments were based on cultural history/ cultural historical significance as the focal point. Large degree of coinciding values that were used as categories, such as:

- Scientific/ knowledge value
- Social value
- Symbolic value
- Representativeness - uniqueness
- Architectural & artistic quality
- Authenticity
- Integrity

However, this didn't necessarily mean that emphases were the same. This was evident in the different use of matrixes to analyse those criteria.

There were many different kinds of heritage that were the subject of value assessments, such as World Heritage Sites, urban development, municipal planning, road planning, and museum collections. Perhaps as a consequences, different levels of user group involvement were evident as well as the amount of input in terms of time and resources. Consequently, there were talking points in terms of how assessment f\affected and were affected by the actors involved, the kinds of heritage and the conditions in which the assessments were carried out.

This work will continue with the creation of a bank of value assessment methods for the project and also a systematic analysis of different methods used.

The language of value

An issue identified during the early stages of workshop planning was the importance of language in value assessment. This was partly because there were many methods referred to as value assessments, which included methods for characterising different qualities (e.g. for management or conservation) and methods for evaluating the worth of a site in comparison to an external threshold or in comparison to other sites (e.g. designation of funding).

Figure 8. Tweet of the language session

This implies that there were not just different approaches to the same thing (such as qualitative and quantitative), but different kinds of value being assessed. However, all are called value assessments.

This is opposed to Mason's (2002) that qualitative and quantitative approaches were simply different perspectives. However, Mason outlined some of the problems associated with using 'value' in practice that one value dominates the assessment and other values are not considered, or when values are treated as a "black box with all aspects of heritage collapsed into the concept of significance" (Mason 2002, 8).

Reser and Bentrupperbäumer (2005) identified a split in ideas about heritage value between use as a noun and as a verb, a division that was embodied by the different perspectives of heritage managers (verb, physical site) and visitors (noun, experience).

- Value (plural noun): The things people believe are important – a descriptive category set of the basic ways a heritage site or object could be considered important.

- Value (verb): The extent to which something is considered important - a single scale that judges overall significance (usually economic, for comparison with other sites or phenomena).

In both cases, there is the possibility that people are measuring and assessing different things in the name of 'value'.

The session had four aims; for a diverse group to see how other people might be using 'value', to equip participants with more terms for 'value', to shed light on the professional problem of varied meanings, and to get feedback from participants on using these methods more systematically for further study. There were three sections.

1. Synonym replacement

Figure 9. Delegates carrying out the replacement exercise

Replacing the word 'value' with a synonym is a technique used in linguistics that can be enlightening on how meanings can be change with nuances and varied interpretation of a word. By switching the word, one can see the impact of meaning and context.

The participants were given seven sentences that have all been used to mean 'value' in heritage contexts and a list of words which had been used interchangeably with value in actual assessments (fig 9; Appendix 4 has the sentences and the suggested words). They were asked to state which word changed the meaning of the sentence most and which the least (and add other words if they wished).

Some interesting trends appeared, one of which was that of the seven options for replacing the word with the least change in meaning, at least six different words were used in all the sentences. For the word that changed the meaning the most, between three and six different words were used in all of the sentences. Although there was occasionally one word that was more commonly stated to change the meaning the least, there was never a clear case of a single word being the most likely to change the meaning of the sentence (with only one or two 'votes' separating several words. Also, all the sentences except one had at least one word that was considered to change the meaning the most and the least be different people.

An unexpected, informal find was that people from the same country had similar ideas about which words to use and discussion afterwards revealed similar responses from compatriots. The extent to which this is coincidence is not known, but creates further questions.

2. Semantic feature analysis

A second exercise was to look at the word value and synonyms in terms of the qualities that people thought they had. This was in order to determine the extent to which words could be separated, if and when alternative words could be used when discussing value and to examine the importance of context. The semantic analysis grid, commonly used in linguistics, allows one to look at how words can differ by selecting a range of qualities that could be associated with those words and deciding if they are present or not (fig 10). This is a simple Yes/No (or Both) question that builds up a picture from small nuances.

	FDR	JFK	Nixon	Reagan	Clinton
Democrat	+	+	-	-	+
War Time President	+	-	+	-	-
Congress of Same Party	-/+	+	-	-/+	-/+
Re-Elected	+	-	+	+	+
Served in Congress	-	+	+	-	-
Won Majority of Popular Vote	+	-	-/+	+	-

Figure 10. An example of the semantic feature analysis grid, using factual examples for clarity of explanation. Example from http://www.readingquest.org/strat/sfa.html

The list of words was the same as the first exercise, but with 'value', 'values' and 'to value' added to the group (fig 11). The features were all provided with opposites for clarity – Fluid (+)/ Static (-), Inherent (+)/ Ascribed (-).

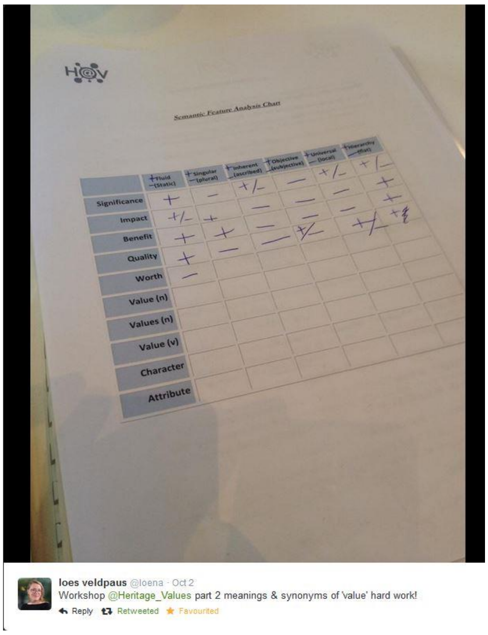


Figure 11. Tweet of participant filling out the grid

Emerging patterns from looking at the collected data together revealed some issues.

The analysis drew some data that supported fairly well-known conclusions, such as the most prominent features in value-related words being fluid and subjective (as opposed to static and objective). However, even in these features, some words did not fit the trend (generally, 'quality' was considered more objective than subjective).

The features that caused the most division were between singular & plural and inherent & ascribed. However, 'values (plural noun) was clearly plural (less prominent was singular noun 'value' as singular).

The most ambiguous words for the participants (those which created most disagreement amongst the group, rather than identified as ambiguous) were 'attribute' and 'character' (followed by 'impact', 'quality' and 'value' as a verb). However, there was not one feature of any word that did not include at least one vote for every possible response. Amongst the words that provided the clearest separation of features were 'value' (plural noun), 'significance' and 'worth', although 'worth was deemed the least objective term individually (interestingly, 'significance' and 'value' as plural and singular nouns were considered the most subjective).

3. Different languages

An aim of the project was to consider the impact of different languages, and the implications of one language dominating discourse. Consequently, participants were asked about their mother tongue (which included Chinese, Arabic and Turkmen as a well as a range of European languages).

Due to the same European root, there are some clear similarities. However, very few felt that there was no difference. Most translations were either variations of 'value'; 'valor' (Spain, Portugal, Italy), which was said to have economic overtones, 'valeur' (France), 'valoare' (Romania) 'vertiba' (Latvia), 'vrednost' (Croatia), 'verdi' (Norway). The Dutch word 'waarde', and the Swedish 'värde' were said to mean both value and worth, similar to the German 'Wert'.

Despite the stated similarities, there are subtle biases and connections that vary in each language. 'Valor' in Spain can also mean valour in English, and English has appropriated the French notion of 'valorisation'. Differences are more pronounced in another represented language, Turkmen, where 'Baha' is used and is similar to worth.

Many languages differentiated between price and significance, but some not (some Dutch and Chinese speakers felt that one word could be used for both. Arabic also makes a distinction ('Qimah' and 'Qiyan'). Some of these issues were considered a problem for the transfer of academic concepts.

Feelings about the extent of ambiguity varied from 'none' to 'a great deal', which requires further examination.

Although the exercise was intended to generate dialogue about language and terminology before the group discussion, there were some interesting findings. The topics are planned to be examined in more detail after refining the piloted methods.

Ekebergparken

The participants were introduced to the site of Ekeberg park, where the afternoon session took place.

Ekeberg park was chosen as a site that was topical, had a range of issues relevant to assessing values, provided a range of different kinds of heritage and viewpoints and was logistically feasible for the workshop to visit.

A presentation included a history of the way Ekeberg park has been managed and understood since its creation as a park (fig 12). This led directly to consideration of its values and how these could be measured before taking a tour of the park itself.

Figure 12. Presentation on Ekebergparken

Figure 13. The creation of a City Park. Archive image

This has included a range of different kinds of heritage, with varying degrees of visibility (for various reasons). This includes archaeological heritage as stone post holes and circles, as well as buried archaeology, its status as a public park (fig 13) and the landscape and view (and flora within), 'dark' heritage from periods that are painful to recall, such as the Nazi occupation (fig 14), architectural heritage including a museum in a vernacular building, as well as recent artistic trends through the recent creation of the sculpture park.

The different ways the park has been viewed over time, and the multiple interests were shown to illustrate the difficulties of assessing values.

This was able to provide some context to looking at a site that has facets that are simultaneously old and new, visible and hidden, celebrated and controversial

Figure 14. Image of Ekebergparken's 'dark' heritage

The different critiques of the sculpture park, and the public contestation, were identified and discussed in order to consider how these issues could be expressed and their values assessed and measured.

Figure 15. Protest voices at the park

Figure 16. Sculpture park owner, responding to the press

This provided a common reference point for participants to consider their own experiences, which was considered important for later given the general diversity.

The participants had time to look around the park for themselves and see the different kinds of heritage in context. At this stage, they were handed information about different value assessments in order to help them consider how these different kinds of heritage might be assessed and prioritised, with potentially differing results.

Figures 17 & 18. Participants walking through Ekebergparken at the end of Day 1.

Comparing methods of value assessment

Figure 19. A flipchart ready for responses

The park was also used as an opportunity to discuss the potential differences in perspective of different assessment methods and as a way to connect the preparation to discussion. The participants were presented with descriptions (for the uninitiated) of three different methods used for assessing heritage value that would be valid for the site: Contingent Valuation, Environmental Impact Assessment and DIVE (Appendix 5).

The following morning, participants had the opportunity to consider how the park might have been different if the values had been assessed in a different way (fig 19). This was carried out by way of considering the potential variation that could stem from the three valid methods for assessing value at the site.

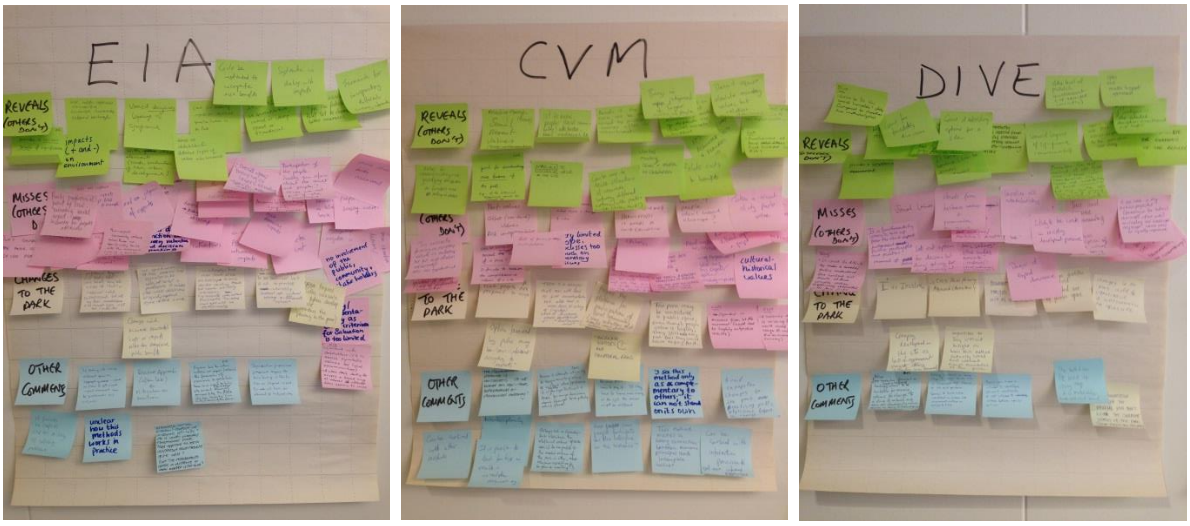
Participants were asked to comment on what the different method could reveal that the others did not, what they missed that the others did not, how the method might have changed the outcome of the park and other comments (fig 20).

The process was not intended to be a systematic evaluation, given the time available, but was hoped that the gathering of expertise within research policy and practice would provide insights that could not be gained separately.

The main aim was to get participants thinking about value assessment together prior to discussion, but the process produced some very interesting perspectives (figs 21-23; Appendix 6).

Figure 20. Participant adding to the evaluation exercise

The case study and perspectives will be used to help direct future investigations.



Figures 21-23. Post-it note responses for the three different value assessments analysed (see Appendix 6)

Group Discussion

For the groups' discussion, the participants were separated to talk about issues in-depth and allow each participant to contribute by creating smaller environments. The decisions of who took part in which session where made in advance of the workshop, based on backgrounds and publications of participants. This also informed the movement of participants for the second round.

The sessions were recorded, and these have been archived with the drawings and notes, but a short summary follows for each session. Session 1 was mostly connected to the workshop themes and initial questions, whilst session 2 was intended to connect them and find emergent themes and knowledge gaps.

Session 1 brief conclusions

Why?:

- Questioned the motivations for using assessment – to inform decisions, inscription
- The starting points for assessment were considered, such as reasons that drive assessments to be carried out (political aims) and the preconceptions that exist within current models..
- A further point of interest was personal influence in assessment, including the heritage professionals' vision of what they want to achieve. More reflective approaches that acknowledged political value were considered.
- Future directions were considered, such as the possibilities for adding value (future-oriented assessments), and whether current models for assessment allowed this or focussed too much on preservation.

Who?:

- The group identified the different experiences and conditions that lead to value assessment.
- The distinction between dissonant values –opposing ideas about a site in civil conditions where distinguished from conflict, which led to considering the underlying conditions required for assessment and the influence of politics on the methods chosen.
- Who assessments are for (as well as who carried them out) were considered, as well as new methods to engage people.
- Recognised gaps were the overview of assessments at national and European level, the consequences of using different methods and the ethics involved in such a political act.

What?:

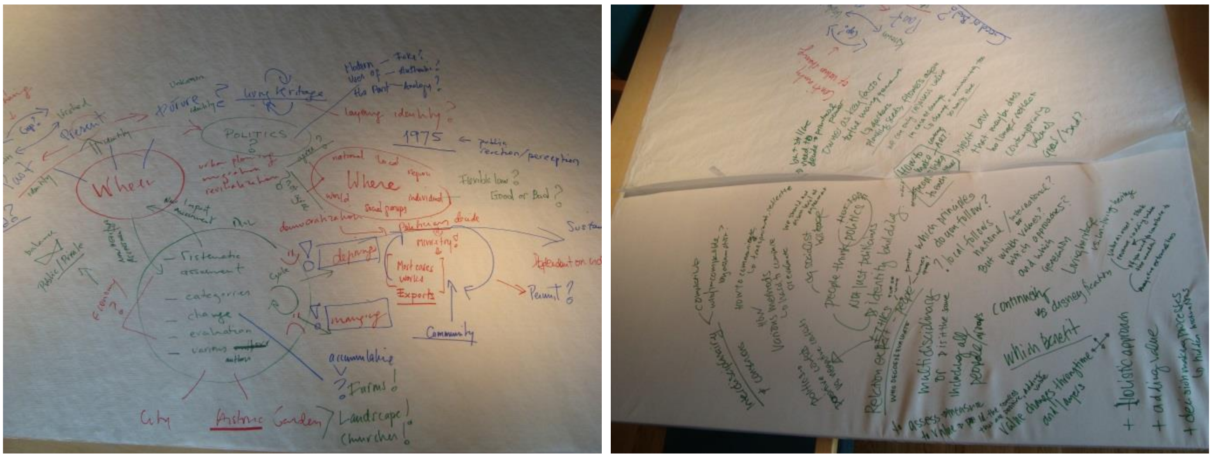
- Discussion noted that the same kinds of typologies were used in different contexts, and considered the issue of how social value was measured (and whether it actually existed).
- This led to discussion on the need for more debate within assessment procedures, and new skills to be connected to value assessment (and which heritage managers already work in this area)..
- Discussions concluded with the notion that cultural heritage is a form of power

When/where?:

- Discussion considered the geographical implications of policy and of prioritising differe3nt age groups.
- The group also examined the discrepancy between using present budgets and the needs of future generations: big ambitions, small resources.
- The issues of migration and moving heritage were also discussed and the fluidity of people brining their cultural heritage to new countries.
- The possibility that assessments in the present gave emphasis to 'living' heritage was also discussed.

How?:

- Discussion about whether we actually needed value assessments was discussed, as well as the need for value assessments being defined by politicians.
- Discussion focussed less on specific methods and more on core principles that are applied across the board.
- The principles of reflection: how and why they assessments are done was recommended as a means to increase transparency.
- It was felt that personalities were a bigger influence on value assessments than the discipline.
- The use of the word 'value' was considered a problem for value assessment
- The potential of turning the theme questions of the workshop into a value assessment was suggested as this provided open, reflective questions.



Figures 24 & 25. World Café tablecloths from the discussion sessions: 'When/Where' and 'How'

Session 2 brief conclusions

Why?:

- It was agreed that a value-based model needed to be more reflexive and transparent. Part of this was making issues more visible and making the 'why' question more explicit.
- Acknowledging the political values in assessments was important, including an explanation of why the assessment or report came to be.
- Skills in enthnology and/or sociology were considered important with the possibility of training discussed.
- Another issue that arose was the possibility of expiry dates for reports (acknowledging that they only serve the values of the present). Also, a boldness about not being dominated by stakeholder input – by openly explaining reasons.
- The importance of written reports was questioned, and thought that alternative means to capture the value assessment process should be explored.

Who?:

- Discussion considered the relationship between heritage managers and the public, both pressure groups dominating participation and apathy. The factors that mobilised interest were considered as well as new methods to elicit and mobilise values that represent the public as a whole (including the need for new skills).

- It was felt that new methods could consider the points at which different actors were involved or engaged, as well as pre-acknowledging where conflict may exist instead of reacting to it.
- An acknowledged problem was the opacity of current processes, in particular the top-down processes in terms of the internal language and the notion of Outstanding Universal Value affect the kind of communication that results. More openness was encouraged.
- The need to avoid considering 'the public' as a single entity was discussed and to acknowledge different groups and interests to achieve 'the art of compromise'. Developing new skills was a part of this.
- The possibility of examining past assessments and their success was considered in terms of retrospective analysis was considered a potential way to see what has worked and what can be carried into the future.

What?:

- Discussion considered the socio-economic factors that influence value assessments and the role of ideology in heritage. The influence of neoliberalism (and the lack of wider picture that stems from emphasising the free-market) was discussed as well as the underlying assumptions within heritage value assessment. This was connected to issues of political will.
- The relatively recent obsession with measurement was discussed and as a fact influencing the way in which values are assessed, which in turn, affects social values.
- A problem identified was the lack of long-term sustainability , as the wider connections are not visible.
- A further thread of discussion was what 'stakeholder' really meant, and the need to break down this term for a more meaningful assessment.

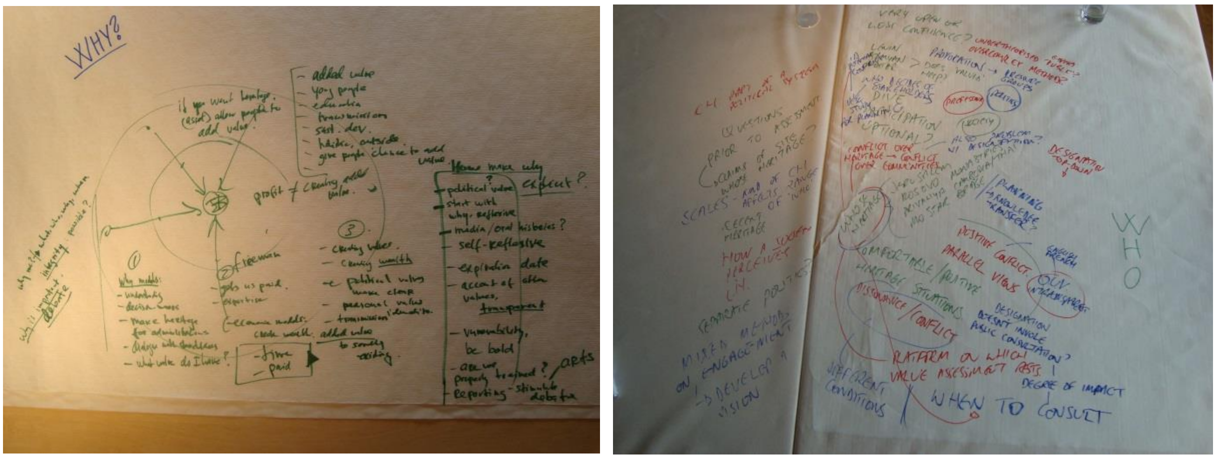
When/where?:

- The themes of transparency and reflection were discussed as well as the impact of hidden motivations when values are assessed (from all actors).
- The notion of value was considered alongside the notion of added value, in that space for future values must also be considered by regarding values through time and in time (intra-generational equity).
- It was noted that problems arise during periods of conflict, and the benefit of diffusing conflict was discussed (was it necessary?)
- Decision-making was discussed, and whether democracy was an aspiration or a fairy tale. Identifying means of communication and finding common ground was considered important, sometimes sharing 'what', sometimes sharing 'why'.

How?:

- The connection between theory and practice was discussed.
- He idea of a library of methods was supported, with an option to choose methods based on context.
- Transparency was considered a key issue in the real world, acknowledging the influence of time and money on methods as well as stakeholders and political factors.

- The need for a new language, unpacking the meaning of the word 'value' was considered important,, as was the need for inter-disciplinarity (and the skills to make that inter-discilplinarity work).



Figures 26 & 27. World Café tablecloths from the discussion sessions: 'Why' and 'Who'

Summary session

The final session was intended to gather together these threads as a large group and bring out these themes. To avoid simply repeating what had been summarized, the session was split in two. The first was a plenary discussion that allowed each person to contribute to the conclusions having been exposed to all the main points of each group discussion. The second was to consider ways forward in terms of research, building the network and considering how it can benefit heritage and the European citizen.

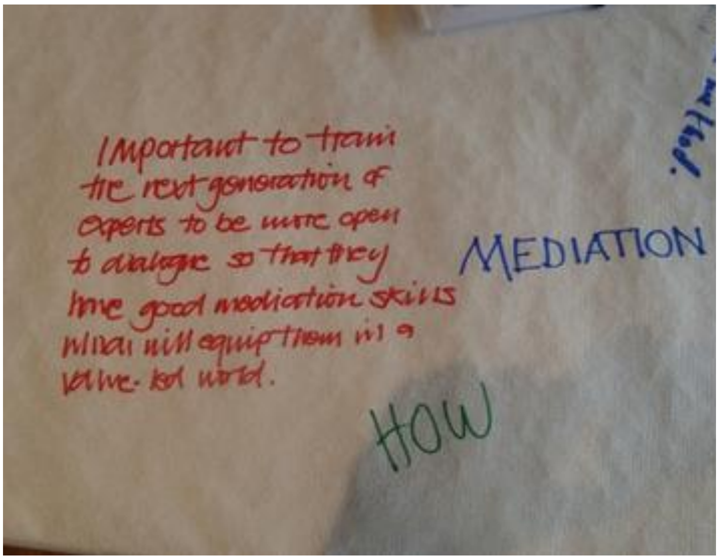


Figure 28. A key issue raised in plenary discussion

The following text was distributed to an agreed upon by the participants of the workshop, who suggested changes where appropriate. This is already available on the Heritage Values Network website http://heritagevalues.net/documents/?g=/Oslo%20Workshop .

Summary of the final session at the Value Assessment workshop

Knowledge gaps

An issue that arose in most of the group discussions was the need for new skills to enter the field. As heritage experts, understanding new skills and collaborating with those that have them was a need. An emphasis on developing new partnerships was noted.

A key skill, and a common strand of the group discussions, was communication. The ability to communicate, collaborate and be open-minded was considered important for all to acquire.
This communication was both amongst heritage professionals involved in assessment and with users of heritage ('the public').

Acknowledging that value assessment is not something that one person can do led to the conclusion that meaningful interaction (inter-disciplinary partnerships) between disciplines was vital.

The need to capture a range of views, not just the loudest voices or special interests, was also an issue. This was related to the kinds of participation and the forms of openness that heritage value assessments have. This was tempered with the feeling that value assessments should be inclusive, but decisions should be bold enough to differ from popular opinion (and be able to state why).

The need for greater transparency within value assessments was a noted matter. There was a call to show the reasons for the decisions, and have the opportunity to contest them sine people can respond to a transparent decision. This was coupled to accountability in the decision making process –who made the decision and why. A third theme that was connected to this discussion was integrity; that value assessments should be detached from political ideology and not be used for political ends. Transparency and accountability were felt to support this.

Future directions

Expertise in new media was considered a priority in terms of how to provide good communication that could reach all parties. This development in communication and new media was connected to a desire to increase the transparency and accountability in value assessments.

The possibility of different media being used at different points in the assessment process was discussed: dynamic resources that could engage widely would benefit consultation, and formats that could be handled by bureaucracy and leave a permanent record would benefit the final document.

The creation of a forum for practical problems that could integrate theory and practice through discussion of real situations and case studies. Connected to this was the opportunity to build a library of documents on value assessment. This could be used to understand differences, similarities between disciplines, kinds of heritage and European regions. It could also potentially be used to evaluate which processes are most effective. This continues the idea of sharing experiences and knowledge. This could be hosted on the H@V website and LinkedIn page if there was demand from practice.

This included critical analysis of existing methods through retrospective (longitudinal) studies of how well assessments had worked (or not). Existing work that had been done on following-up cases showed that half of the sites examined could not find their management plans. This was connected to the issue of values differing between designation and management, and changing over time. The possibility of value assessment being the start of a dynamic process that could be built on, rather than an end-point, was raised.

It was mentioned that the JPI Strategic Research Agenda noted a knowledge gap in terms of understanding the management and role of values in heritage.

It was noted that forums (such as IUCN) existed where feedback could be provided for practitioners and could be a benefit to heritage. Examining processes in other fields, such as landscape, was considered an area of interest, and learning from different fields and finding ways to sensitively apply to the heritage context.

Future directions for using new media included *how* to make effective channels or forums for communication and dynamic processes where people can respond to transparent decisions. In terms of developing this, it was thought that a diverse range of media (old and new) should be employed.

Existing network, such as ENCACT, were mentioned. Connecting to different networks was considered a more forward to engaging with and creating debate on heritage values.

As well as connecting theory and practice more thoroughly, a closer connection to policy should be an aim of the network.

Concluding remarks

The workshop received universally positive feedback and has generated contacts between project partners and participants, as well as amongst invited participants. Small collaborations have already taken place in terms of providing advice and feedback on works.

The workshop participants have already been active within the Heritage Values network, and presented work on assessment methods to contribute to the information bank.

Identifying gaps and key topics was intended to help project network activity into the future, including the third workshop in Barcelona on public engagement (which came out as a key theme), and also future opportunities to develop research projects. For this reason every activity at the workshop had short- and long-term aims, which will be built on during and after the project.

The workshop has stored copies of video footage of all the presentations and the final discussion. Furthermore, there are sound recordings of the presentations and all of the small group discussions. These are for archival purposes, and permissions from participants would be sought before further dissemination.

As well as this, the workshop produced a range of data that will be used to consider robust, systematic ways to study the topics such as language and differences in assessment in future projects.

Figure 29. A tweet from the final session at workshop

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Figure 30. A tweet from the networking lunch on Day 1.

Appendix 1

Workshop Programme

Heritage Values Network
Workshop II
2-3 October 2014

Workshop Aims

- *To generate insightful critique of how heritage values are measured and assessed by heritage professionals, agencies and practicing academics across Europe.*
  - *To characterize identified tensions in assessing heritage and to identify new issues and tensions.*
  - *To find common and divergent elements in the existing approaches to assessment and measurement of heritage values across different kinds of heritage in Europe.*
  - *Identify new knowledge gaps, and fill existing knowledge gaps where possible.*

Objectives to achieve the aim

Collection of existing approaches to measuring value to be analysed and categorized, to get a general overview prior to the workshop – to be presented at the beginning.

This will involve a mixture of facilitated discussion in groups, focusing on certain key issues related to heritage assessment, opened up to plenary discussion at the end. Plenary discussion will draw elements together.

Questions will revolve around 5 broad themes of Why (the aims of measurements and assessments), Who (whose values and methods are chosen, and by whom), What (different kinds of 'value', their meaning), When/Where (contextual factors) and How (methodological issues). Those below are just examples.

Each key issue will have a position paper – a short passage (1-2 pages) written by project partners to generate discussion and prepare delegates. It is not intended that the papers are provocative, but to level the discussion and provide common reference. Delegates will be sent the position paper(s) in advance in time to deal with clarification. It is thought possible that, with delegates' input, papers could be developed into publications.

The introduction of a case study will allow people to consider a common example, see issues out of abstraction and allow delegates to meet and mingle prior to discussion.

Delegates

Number: 20-25. Large enough to break into groups, small enough for discussion

Focus: A mix of academic and practitioner, ideally in the same person. Publications on assessments and personal networks have been targeted. Council of Europe (a feature of the application) has been dramatically reduced, and contacts generated have been extremely limited.

Prior to meeting (September)

Partners to write 5 position papers (~3 pages) outlining the broad issue to provide a common base to start discussion, raising knowledge gaps and broad issues.

Delegates asked to send the methods they use, or are used in their institution, to assess value - including economic impact, characterisation, methods used for resolving conflict and significance assessments. These will be reviewed by NIKU to discuss similarities differences – to be presented on day 1.

Delegates will be sent their position paper, and later a series of questions that they will be asked to discuss in their sessions. This is to prepare them for focussed discussion.

EVENING BEFORE
LOCATION: Thon hotel Oslo Panorama, Central Oslo (see maps, pp 10-11)

DAY 1: 2nd October 2014

MORNING
LOCATION: NIKU (maps, p 10 & 11)

9:30 Arrival – Registration and welcome to NIKU from Carsten Paludan-Müller (NIKU Director **9:50**).

10:00 Aims and logistics of the workshop.
Aims: *set out the workshop plan to establish a platform for discussion; to connect theoretical issues of workshop I to the discussion themes of workshop II.*

10:10 Overview of value assessment methods: differences & similarities, based on delegate experiences.
Aims*: to connect the workshop to delegates' own experiences; to identify common elements in methods; to provide opportunity for awareness of different approaches amongst a multi-disciplinary group.*

10:40 Presentations. Five discussion papers from the project partners, based on discussion documents.
Aims: *This will establish a platform from which delegate discussion can build, and provide a common point for discussion.*

11:30 Leave for Ekeberg.

AFTERNOON
LOCATION: Ekeberg, South East of Oslo (map, p 11)

12:00 Lunch, Ekeberg restaurant

14:00 Exercises on the language of 'value'.
Aims*: to allow delegates to see how others might use the term, to equip delegates with more other ways to express 'value', to examine how language has been used in heritage literature, and the potential impact on assessment, to consider future ways to study 'value'.*

15:00 Ekebergparken history, issues, and instructions for visit.
Aims*: to introduce a case with a range of kinds of heritage and stakeholder and complex challenges, to provide a topical case where values conflict; to consider how historical developments affect values and how value might be assessed differently in the same place at different times.*

15:30 Ekebergparken visit, South-East Oslo.
Aims*: An opportunity for delegates to mix before table discussion; to accommodate different thinking styles (not just didactic situations); for delegates to have time to digest information presented in a productive way.*
NOTE: This will be outdoors, so please consider your dress. The park has walkways, but also green spaces. http://www.yr.no/place/Norway/Oslo/Oslo/Oslo/

17:00 Leave for hotel from Ekeberg restaurant entrance.

EVENING
LOCATION: Elias mat og sånt, Central Oslo (map, p 11)

19:00 Dinner for delegates and project partners.

DAY 2: 3rd October 2014

MORNING
LOCATION: NIKU (maps, p 10 & 11)

09:00 Coffee and pastries together, examining assessment methods.
Aim: *critical appraisal of value assessment methods amongst delegates, based on Ekeberg park; to examine how the park might be viewed under different assessment methods; to discuss value assessments in context before splitting into separate themes; to connect Day 1 and Day 2.*

10:00 Discussion 1, small groups (see p 8). Consider selected questions connected to workshop themes.
Aim: *to consider some broad issues and key questions, and how they influence assessment (and other factors discussed). This builds on discussion documents presented on Day 1 (and distributed prior to workshop with key questions).*

11:15 Break

11:30 Report back discussions to all (facilitators). Key issues charted for each group.

11:50 Discussion 2. Building on previous discussion (see p 9), examining how the discussion themes are affected by other factors in heritage value assessments.
Aim: *to consider broader issues of assessing and measuring values, and consider how they are affected by the other issues discussed; each group will start to identify knowledge gaps that can contribute to the plenary session after lunch.*

13:00 Lunch at NIKU

14:00 Report back discussions to all (facilitators). Key issues charted for each group.

14:20 Plenary session. Expanding the discussion themes to consider opportunities and tensions.
Aim: *to bring together the separate discussion to tackle wide themes that look to the future; consider the development of the network; consider the emergent and strongest themes that come from the separate groups; develop possible avenues for further research.*

14:50 Break

15:00 Plenary session. Summing up and the way forward.
Aim: *to connect over-arching issues that have arisen, and identify knowledge gaps and future directions; relate to existing works like the JPI-JPEH Strategic Research Agenda.*

15:30 Finish.

Appendix 2

Discussion Documents

OSLO WORKSHOP

DISCUSSION DOCUMENTS

ASSESSING, MEASURING AND PRIORITIZING HERITAGE VALUES

HERITAGE VALUES NETWORK

Why Who What When Where How
Why Who What When Where How
Why Who What When Where How
Why Who What When Where How
Why Who What When Where How

To prepare for discussion, we have written five short pieces connected to assessing and measuring heritage value(s). The papers provide overviews to raise key issues, tensions and questions connected to value assessment in different disciplines and countries.

They are not intended to be comprehensive, but to provide some common ground to a diverse audience. If your experience is different, then we'd like to hear about that. This is just a platform for discussion, not an agenda.

As you know, the themes are deeply inter-related so there is overlap. As the discussion progresses, themes in different groups will mix. Seeing issues appear in different places is interesting for us, and also seeing different takes on related issues.

Each of you will be present for two of the five discussion groups. If you have limited time, it may be best to focus on those topic pieces. You will see which groups in the Workshop Guide. However, there will be opportunities to contribute to all themes later in the workshop.

The 'potential questions' are at the discretion of the chair, and will only be used to kick start discussions. We look forward to open dialogue where your contributions are at the core.

We hope you find the pieces interesting, and we look forward to hearing your contributions.

Why Who What When Where How

"Why bother?" A discussion on the aims, motivations and visions behind measuring, assessing and prioritizing values

Sjoerd van der Linde
Faculty of Archaeology, Leiden University

Introduction

Over the last few decades, the concept of 'value' has become a central conceptual tool by which we assess, manage and research cultural heritage. Most noticeably, the concept of value has become a fundamental concern in the practice and theory of heritage management in terms of assessing the 'significance' of cultural heritage resources, most notably in the USA, Australia and the European continent. Value-based significance assessments (such as propagated for instance by the Australian ICOMOS Burra Charter (1999) and adopted either explicitly or implicitly by e.g. ICOMOS, UNESCO and the European Council) in this sense often determine what should be investigated, excavated, developed, preserved, restored or presented. Indeed, it has been argued by some that values shape almost every decision in the heritage field;

*The assignment of value to material heritage is, in the end, seen at all stages of a project: value prefigures the kinds of research questions being asked, the choices made in what is conserved and what is destroyed (whether for development or research programmes), how we categorise the heritage, how we manage it and mitigate impacts, and whether the material is deemed heritage at all. However, while the assignment of significance is a singular step within the process of determining how to manage a specific material heritage, it nevertheless affects and dominates the whole process (*Lafrenz Samuels, 2008: *72-73).*

It is generally acknowledged that since its first real adoption, the meaning and use of 'value' in the heritage field has changed in broad terms from meaning 'uniqueness', through to considering the wider meaning and value of heritage in social contexts as being important to significance (see for example Darvill, 1994; Cleere, 1989). In addition, the epistemological understanding of the concept of value has changed, from an inherent characteristic of material heritage that could be objectively assessed, through to an understanding of values as being subjective, dynamic and related to the aims and goals of actors in the wider social context (Lafrenz Samuels, 2008: 74-75; Clark, 2005; van der Linde, 2012), such as in for instance the Australian ICOMOS 'Burra Charter' mentioned above and in the 'Faro' Convention on the Value of Cultural Heritage for Society, in Europe (Council of Europe, 2005).

But despite its wide use, implementation and critique, not enough attention has been given to the question of 'WHY' we assess values. This question is important for two main reasons. On the one hand, it is worth investigating what the aims and motivations are of assessing and measuring values, in the sense of questioning when exactly we adopt value-based assessments and for what reasons. Identifying why values are assessed in this sense helps pinpoint the motivations and preconceptions that affect assessment. As such, the 'why'-question also draws our attention to the deeper vision and raison d'etre behind heritage management – ultimately, what do we wish to accomplish with heritage management efforts? In this discussion paper, I wish to tease out some issues relating to the 'why'-question of value-assessment, hoping to stimulate debate and set some guidelines for discussions during the workshop in Oslo in October 2014.

What are the motivations for assessments of value?

One particular area in which value plays an important role is in the assessment of significance of cultural heritage, and in the subsequent categorisation and prioritisation of the worth of different heritage resources within the political and legal domains of society. But what exactly are our motivations for undertaking values assessments, and why do we put resources and efforts in value-based management at all?

To answer these questions, we first need to look at why and when we instigate value-based assessments, and in what context. Indeed, there are many opportunities to assess heritage value, but such efforts are always done on specific points in time,[1] and with specific motivations behind it. For example, if heritage resources such as artefacts, masterpieces, monuments or sites are under threat, then the value-assessment is mainly about whether that heritage should remain, and how much we should care about this heritage in relation to similar and other heritage resources. In such situations, heritage preservation and conservation for scientific, architectural and archaeological values is often an underlying factor. If heritage resources are to be accessioned into a museum, its educational, aesthetic and public value may be more of a factor, such as in its potential to inform and attract the general public. If we are dealing with an existing conservation area or scheduled archaeological site, then value assessments might be primarily done to inform its management, interpretation and stakeholder strategies. As such, understanding the moment when assessments are called for already helps us to understand something about the underlying motivations and the subsequent way in which the multitude of values and stakeholder involvement might be prioritized.

In this sense, it is worth debating whether heritage designation is a form of value assessment or a cause for value to be assessed? For example, even when designation or listing may not have had an accompanying structural or technical value assessment per se, it does identify value in order to avoid loss. Indeed, one might argue that it is the process of valuing, either implicitly or explicitly, that turns something into 'heritage' (van der Linde, 2012). Such a standpoint follows also from the constructivist notion that heritage only exists in discourse, and that it is the process of value attribution by stakeholders that leads to the labelling of for instance some buildings as heritage, and others as just plainly buildings. In this sense, we might need to seek the motivation behind linking value-assessments with scheduling and designation not only in turning things into heritage, but also when decisions need to be made in term of comparing heritage resources to one and other, for instance in the face of threat, limited resources and funding (such as is the case for instance with some archaeological policies in Europe). Another example might be seen in the value-assessments accompanying WHS designations. Here, it might not be unreasonable to assume that the site in question was already considered valuable (by national policy-makers, tourist boards and legislators for instance). A value assessment here is then to both determine its 'universal value' and to gain international recognition, as well as (in principle) to consider what is most important and break down the values further – in other words, value assessments here say something about the cultural significance of the site, about which and whose values to manage.

Such value-based management models (see e.g. Avrami, et al., 2000; Mason & Avrami, 2002), are presently seen as a standard in guiding decision-making in relation to archaeological and cultural heritage sites. According to these models, a heritage management model should approach a site as a conceptualisation of a network of actors (or stakeholders), that ascribe specific values to the heritage site – these can range from e.g. scientific values, cultural values, architectural values, religious values, economic values, educational values, and so on. According to this model, a heritage management approach should start to ascertain and identify these actors and their values in order to make sustainable and integrated decisions, and to make sure that certain values are not destroyed, simply because they were not recognised. A 'good' management decision in this sense does not try to necessarily manage the material fabric of a site, but rather the multitude of values ascribed to it (Mason & Avrami, 2002). In this sense, value-assessment are often applied with the motivation to come to a sustainable and holistic approach that

[1] The next few paragraphs are based upon pers. comm. Joel Taylor, September 2014.

manages the significance of a site, and to facilitate stakeholder involvement. As a final note in this regard, value-based assessments also function another role, and that is the worth its *process* brings to identifying stakeholders and sustainable management practices, despite the outcome of technical reports and management plans, as well as in providing us with an analytical framework for analyzing the social impact of our work (van der Linde, 2012).

What (ideological) assumptions are present in value assessments?

The 'why'-question within value assessments also allows us to look closer at our own role and responsibility within heritage management practices, and in particular at the motivations and preconceptions that we bring to the assessment and prioritization of values. If we would acknowledge that values are not always measurable in a technical and objective sense, we might perhaps best see value in the sense of those qualities that are ascribed by actors to archaeological materials and sites (cf Mason & Avrami, 2000: 15-16). Values in this perspective are therefore closely related to the *verb* value in the sense of valuing heritage projects, materials and sites, which in turn points to the subjective, conflictive, contextual and dynamic nature of values because they are inherently linked to the motivations, opinions and goals that actors bring to the archaeological process. In this respect, we might discuss whether values might have a means-to-an-end character in the sense that people put a value on something, because they 'desire' to do something with it (Darvill, 1994: 53) – or even, that people construct heritage by ascribing values to it. Such a construction of heritage is therefore also related to agendas and motivations of organisations, peoples and policies involved in such discursive assessments. In my opinion, such an idea fits well if one wishes to better understand the motivations behind value assessments and the 'why' of heritage practices.

Such conceptions bring to the foreground the idea that the 'assessor' of value is not free from value-judgments, and from his/her personal or organizational motivations. Advocating for example the archaeological and scientific value of a fragile and threatened site by defending it to its fullest in the face of overwhelming values of more powerful stakeholders in society, is fundamentally different from being given the authority to make decisions about archaeological sites in regions of the world where other values and stakeholders have not been given a voice – in the latter, one might consider if facilitating the recognition of other values and advocating for the right of e.g. minorities heritage value is not a more responsible role and responsibility to take on. The 'why' of value assessments is therefore highly dependent on the role we play in the power play of heritage, and on the context and countries in which we work.

In this sense, it is worth bringing our attention to the well-known idea that current heritage legislation and theory is still primarily dominated by western discourses that favor the role of the monumental, the material and the expert. Moreover, value-assessments undertaken in such legislative and academic contexts often favor, either consciously or not, the primacy of preservation of the resource. But this vision of preservation can be critiqued, in the sense that preserving material remains of the past as a scientific resource for a future generation is by no means a given (nor is, in fact, the materiality and authenticity of heritage). Nevertheless, it is a vision that often steers our decisions in current legislative contexts as to when we assess value, how we do it, who we involve, and how we prioritize actions and resources. But such a notion of preservation of values is ill suited to the reality that we, as heritage professional, often create values, identify opportunities, and develop significance – in the sense that we create and develop heritage sites by bringing for instance educational, tourism and scientific value where before these did not exist. This supposed dichotomy between preservation and creation is however not clearly highlighted and catered for in current value-based assessments, where we often pretend that value assessments are a technical matter.

Discussing vision

Thinking about the deeper vision behind value assessments is, in my opinion, worthwhile as it challenges us to question why we bother with heritage in the first place. For some, it might be preserving material remains of the past as a source of cultural identity, for others, it might be a scientific resource, an educational resource, a source of enjoyment, or even a source for intercultural dialogue and as a means to bring peace. In other words – even if we manage to preserve heritage resources, what do we gain exactly? Cultural capital? Economic gain? Educational worth? A sustainable living environment? Inspiration and respect?

This brings us, finally, to the question whether we actually need one shared vision behind value-assessments as a heritage discipline, or if we are content with a myriad of visions, motivations and goals, each deciding for her or himself what the vision and right applicability is. Personally, I would prefer the latter, not in the least because it brings a certain transparency and democracy to the heritage practice, but also because I feel it sits more comfortably with what happens in actual practice. The real question, in my opinion, is therefore if we need different value-based models and approaches for different visions, contexts and motivations – something that will turn out to be not only important to debate in our discussions, but also, I hope, will be good fun.

Potential questions to be raised in discussion sessions:

1. What are the reasons we assess and measure heritage value?
2. How can the assessment and measurement of heritage values inform decision-making and heritage policy?
3. Are the aims of value assessments different, or just the methods?
4. What is the vision behind value assessments – why bother?

Why **Who** What When Where How

Whose values and methods are chosen, and by whom?

Joel Taylor, Grete Swensen and Torgrim Guttormsen
Norwegian Institute for Cultural Heritage Research (NIKU)

"Heritage is a powerful source of meaning; those who can't see themselves reflected in the mirror are therefore excluded" Stuart Hall (2005: 24).

Introduction

Representing the ways in which heritage is valued, or could be valued, holds a number of challenges. As Coffee states, "many contemporary public museums, with missions and programs centered on mainstreaming the civic and educational values of the ruling strata, now sit within population centers in which many alternate socio-cultural affinities coexist and contend" (2008: 262). The form of that presentation returns to a common call – whose heritage? Recent calls for greater public participation in value assessment have recently been heard, such as the European Landscape and Faro Conventions (Council of Europe, 2000; 2005) and the UK's Farrell Review (Farrell Review Team, 2013), but the extent and juncture of participation, and the role of the expert, can vary a great deal.

The actors associated with different kinds of value assessment

The extent to which the ways heritage values are assessed and prioritised is affected by the actors involved in the process. The potential to influence, or be influenced by, the measurement or prioritisation of value can be highly significant. Defining how a heritage site or item's values are assessed goes a long way towards defining what that heritage is. This section will deal with who affects, and is affected by, assessment and measurement of heritage values.

In terms of value assessment, there are people or groups connected all along the process, from who decides that an assessment is needed, who selects the criteria through which 'value' is considered, who carries out the assessment or measurement, who is involved or consulted in the act of assessment, who interprets this information and uses it, to those who apply the information and those whose experiences are affected by such application. In many cases, some of these roles will be taken by the same person and some roles will be embodied by a community or communities. However, they can differ a great deal from situation to situation and also involve other actors (Erikstad, et al., 2006).

Perhaps the most profound of these influences is who selects the method of assessment of measurement. In some cases, this may be set, such as prioritisation with a museum collection where objects have been individually considered significant enough to become museum objects, but the choice of what gets assessed in the first place is a profound one that affects all others. Will the actors who are developing the value assessment tool, for instance the Road Administration versus the Cultural Heritage Management Administration, affect the principles behind value assessments as instrumental tool? The act of choosing to assess value may require an implicit idea of what is important to meet a set of aims – a value assessment of its own kind.

Who stands to gain from a value assessment, and what kind of assessment, can vary considerably. One perspective might be to consider who is best enabled to respond to the need to assess or prioritise values – in terms of carrying out the assessment and dealing with its consequences. The increased desire for value assessments noted in recent documents calls upon the heritage professional to play a key role, as well as communities to be accessible to engagement.

As well as any overt decisions on the processes and inclusivity, there are unintended consequences for the way in which values are measured and understood. Who gains influence in the process where value assessment tools are being used will depend on how those tools act as communicative actions between the actors involved. Do the actors speak the same "language"? Is the communication reaching consensus through dialogue rather than exercise of power? Who is gaining influence also depends on the relationship between policies at stake, for instance between local and national policies or how local participation is being implemented, which will vary temporally and geographically.

Whom are value assessments intended to represent?

There is also the receiving end of the assessment and measurement of value – for what or whom is the assessment? In many cases this may be to the decision-maker, and therefore influenced by the kind of decision to be made. Whether this is to choose between different heritage sites or objects, to consider how best to care for something or to determine if something is 'worthy' of preservation are all end results that affect actors. Who is affected by the decision, intentionally or unintentionally, may well have an influence on how values are assessed. Whether value can be expressed as a single metric like money, or a category set, will partly depend on how the result is expected to be used This will ultimately depend on its aim(s) and social context(s).

Different forms of participation

The requirement of participation can vary dramatically, and this also has consequences for the outcome of the assessment or process. This can vary from experts examining economic patterns of tourists to direct engagement with local communities, which can be broadly categorised as;

- Expert alone, looking at the site(s) or item(s), such as characterization (Mason, 2002); Expert assessment related to an existing category set, such as Conservation Principles (English Heritage, 2008); or an Expert looking at secondary data, such as spending through Economic Impact (Nypan, 2010; Greffe, 2011) or text through Discourse Analysis (Fairclough 1995), to determine the value(s).
- Expert consulting the public via on-site questionnaire, asking questions with pre-selected categories, such as Contingent Valuation and Hedonic Pricing Methods (Throsby, 2001; Navrud & Ready, 2002); Expert talking to a small sample of individuals in semi-structured value elicitation interview methods, such as Constructed Pathways (Satterfield, 2002)
- Users responding to a created forum or format (Mason & Bayvestock, 2009), such as a voting mechanism to generate public interaction, such as Singapore's electronic method of popular vote to create a national list of 'sacred' sites, with suggestions and 'other' category (Zaccheus, 2014).

The extent of involvement, and the point at which actors enter the process, and their ability to interact with it all vary. Examining spending data may mean that users are producing data prior to the involvement of a heritage professional, but are passive and unaware of the assessment process. Consultation may be engaging, but comes after the 'lens' of assessment has been focussed. Who chooses the purpose of the assessment is always a key influence.

However, in almost all cases an expert has chosen what should be assessed and the form of consultation. These are profound decisions that speak to the role of the 'expert' within heritage, whether this is as an agent that can solicit different viewpoints, the informed reviewer who can identify cultural significance beyond the immediate issues, or as the arbiter of divergent views.

This is not to suggest that the heritage professional has no place, and that public participation should over-rule any structural framework. Democratic approaches can also be problematic since public perception of heritage can change over time. For example, the Cincinnati Public Library (USA) moved locations in 1955, resulting in the demolition of the original building once labelled as the most magnificent library building in the country. The demolition was not met with any public protest. However, public protest did form part of an initiative to demolish the site of Bryggen in Norway to make way for residential buildings, opposed by a public Trust group (Holme, 2005). The area is now a World Heritage Site. In both cases, public opinion shifted considerably. Despite the benefits of inclusive engagement, there is no single actor or community that can provide an overview that will avoid regrettable loss or unnecessary precaution.

How likely is it that value assessments reinforce power structures rather than include public?

To approach this question, it is essential to ask what the context is, and who the various parties (or actors) that are carrying out or commissioning the value assessments are. The intended final results, the time frame and the economics of the projects all play a role, as well as the value assessment methods in use. The works carried out by various parties are based on different final aims. In these terms, it is important to recognise the range of value assessments and processes, such as determining some extent of value (valuation) for designation and determining the range of ascribed values assessment for management. Limiting the process can result in the exclusion of communities.

As a Norwegian example, three parties can be considered: The National Cultural Heritage Board need to do their listing through selection (including/excluding) – the State's road administration carries out its Environmental Impact Assessments to try to find a road line best suited to fulfil a serious of requirement (various environmental considerations, economy and technical solutions) – while a Non-Governmental heritage organisation can consider their main purpose to be a "watch dog" in the interests of cultural heritage conservation.

The extent the public is included as a party to be taken into consideration is of course coloured by the prime function these bodies fill. In a series of contemporary policy documents, public participation is stated as an aim, where public involvement is often mentioned as an overarching societal benefit. It is, however, important to remember that within a tight planning schedule public, involvement can be considered a rather time-consuming and delaying factor. Public involvement requires special methods and a well-defined framework, and the final results should include recommendations stated by the parties involved in the process. Too often local participation is reduced to a hearing after the planners have finished their work – a necessary final stage before implementation - and these sorts of procedure run the risk that 'public involvement' becomes an empty phrase.

Some arguments for and against public involvement:

- It can be in conflict with a result-oriented administration and/or parties with economic interests. It can also have to contend apathy in the general public.
- User participation can be based on the motivations of developing a shared ownership to plans and ensure better implementation of decisions.
- Done in the right way, it may also generate enthusiasm and build a shared responsibility for safeguarding local cultural heritage between the managers and local residents.

For different kinds of heritage, participation processes may have already occurred – an accessioned museum object, a listed building – that influence the form of assessment, and certain actors may be more or less influenced – farmers working adjacent to a heritage site. These actors and stages may be less visible or changeable, but are still part of a common process that is significantly affected by the people who are involved (and when and how they are involved).

Potential questions to be raised in discussion sessions

- Whose heritage values are being assessed? Who chooses the method?
- How can heritage values be negotiated and compromised if they are in conflict?
- What are representative forms of heritage assessment and appropriation?

Why Who **What** When Where How

What are heritage values?

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Introduction

Heritage values can be defined as a set of characteristics or qualities of tangible cultural objects and
sites, and intangible cultural practices perceived as positive by certain individuals or groups[2]. By its own definition it seems clear that whether certain elements are defined as positive or not depends to a great extent on these individuals or groups. It is because of the value placed on objects, monuments or customs that society considers them as heritage and decides to preserve them. Therefore, values are not fixed, but culturally created and historically specific. In this paper our aim is to underline which values are recognised as important today. We will do this by explaining when they were first identified as values and when society acknowledged them as such. Evidence of this acknowledgement will be shown by looking at the establishment of institutions and the passing of legislation that reveal such acceptance. However, as with most other ideas accepted by a collective, the final agreement on a particular value is preceded by what we could define as two prior stages: an initial phase in which a novel value is only upheld by one person or a small number of people, and a second in which the promotion of the proposed value goes through a series of discussions and negotiations that finally lead to their acceptance by society. In this paper we will distinguish between historical, aesthetic, natural, anthropological, symbolic, social and economic values?

Historical and aesthetic values

Of all the values to be discussed in this essay, historical and aesthetic values were the earliest to be appreciated. It is possible to go back to the late European medieval period, especially the Renaissance, to see how they led to the preservation of monuments and antiquities. It is even possible to seek out the earliest examples in many parts of the world, as was shown by Alain Schnapp (1996). In the European context, after some interest in the Middle Ages in the use of antiquity as a form of power representation, as exemplified by rulers such as Charlemagne, it was mainly in Rome from the fourteenth century that a regard for antiquity emerged. It then expanded to Italy and Europe and finally to the colonised world in the Early Modern era (Díaz-Andreu, 2007: Chapter 2). This earliest concern for antiquity was not linked to the use of the terms "heritage" or "value", which are much more recent and probably originated in the late nineteenth century.
Instead, other terms such as ruins and antiquities were used for "heritage" and interest and merit for "value". The preservation of monuments was mainly organised by the monarchy, aristocracy and the ruling classes, who provided funding for their conservation. There are a number of edicts from Italy in the seventeenth and eighteenth centuries that demonstrate this (Baldwin Brown, 2010 (1905): 130).

With the rise of the nation-state at the end of the eighteenth century many functions – including the preservation of antiquities – began to be considered as their duty. Thus, the nineteenth century saw

[2] Based on de la Torre (2002: 4), but modified to include intangible heritage.

the emergence of institutions and the passing of legislation that formed the basis of the modern nation-state. As far as values in the preservation of antiquities are concerned, the titles given to the first commissions to manage and protect monuments seem significant. In 1820 the ruler of Rome, Pope Pious VII, issued the Pacca edict, under which a Commission of Fine Arts was set up with responsibility for administering and inspecting ancient monuments (Baldwin Brown, 2010 (1905): 130). The stress on "aesthetics" of this first commission was replaced by an emphasis on "history" later in the century. Thus, after the neutral "Commission Royal des Monuments" (Belgium, 1835), there was a mixed "Central-Kommission zur Erforschung und Erhaltung der Kunst- und historischen Denkmale" in Austria (1850), which had been preceded by the French "Commission des monuments historiques" (1837).

An appreciation of the historical and aesthetic qualities of monuments was still a key factor in the early twentieth century, as we can see in Gerard Baldwin Brown's *The Care of Ancient Monuments* (Baldwin Brown, 2010 (1905)) and Aloïs Riegl's (1858-1905) *Der moderne Denkmalkultus* (Riegl, 1903). Both include the terms 'worth' and 'value' (or 'Wert', their German equivalent). The latter, a 65-page booklet, was written in the context of Riegl's experience as president of the Austrian Central Commission for Artistic and Historical Monuments (Zentralkommission für Kunst- und historischen Denkmale). In his book he mentioned two values for the unintentional monuments (i.e. ruins and objects newly defined as monuments): historical values (historischen Werte) and artistichistorical values (kunst-historischen Werte) and argued that our appreciation of them was very modern (Riegl, 1903: 6).

Of the two values, he prioritised the historical, as he contended that works of art had value because
they were historical (Riegl, 1903: 3). His way of using the term 'value' (Wert) did not imply an economic worth and this was revolutionary in itself, as it meant a departure from the semantic field most commonly used until then. In other countries, such as Spain, we can only see this new meaning of value embraced in 1926 in the Royal Decree for the Protection and Conservation of Artistic Wealth (Díaz-Andreu et al., 2014).

Historical values are still on the agenda. It could not be otherwise, as history is a key element in the
definition of heritage; there can be no heritage without history, no matter how recent that history is. Artistic value remains important, as was implied in the first years following the signing of the UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage in 1972. This was the reason monumental heritage was favoured and why the earliest inscriptions showed a clear bias towards monumentality and in particular towards grand, aesthetic sites in the Western World (Byrne, 1991; Cleere, 2001: 25-26; Smith & Akagawa, 2009: 1). This situation became a matter of debate and led to the correction of the legislation in some countries such as Australia, with its changes to the Burra Charter in 1999, and, internationally, to the 2003 World Convention for the Safeguarding of Intangible Cultural Heritage (Intangible Cultural Heritage Convention or ICHC) (Smith & Akagawa, 2009; Vecco, 2010).

Widening the typology of values: natural and anthropological heritage

Valuing of natural landscapes started later than that of history and aesthetics, although its roots go back to the nineteenth century, when Yosemite Valley was protected by the US in 1864. This set a precedent for the creation of national parks, the first being Yellowstone in 1872. The first site to be declared a national monument was Devils Tower in 1906, a geographical landmark located in Wyoming. At the same time interest arose in protecting sites once inhabited by American Indians and between 1906 and 1916 twenty national monuments of this kind were proclaimed. These newly promoted values of natural and historical landscapes – as well as of anthropological values – had an immediate economic impact, as a new tourist industry grew up around them. As Marguerite Shaffer has explained for the case of the US, national parks emerged as the nation's main tourist attractions and the state became involved in the promotion of national tourism (Shaffer, 2001: 157- 8). It was common to find in early twentieth-century legislation the term 'picturesque' ('pintoresco' in Spanish, 'pittoresque' in French) referring to natural landscapes that deserved heritage protection because of their beauty.

The US model was soon copied by other countries such as Canada (1885), Australia (1886), New Zealand (1894), South Africa (1898), Argentina (1901), Sweden (1909), Switzerland (1914) and Spain (1918). In Britain the National Trust, a charitable body aimed at the preservation of open spaces, was created in 1895, although in the 1930s it decided to widen its remit to include an emphasis on the conservation of buildings, especially country houses. This exemplified the blending of interests in landscape and monuments (Cannadine, 1995; Delafons, 2005). This blending of natural and cultural heritage became international in 1972 with the UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage (World Heritage Convention) (WHC) (http://whc.unesco.org/en/conventiontext/). This convention aimed to protect cultural and natural heritage of outstanding universal value that was so exceptional as to be of common importance for the present and future generations of all humanity (UNESCO, 1998).

Symbolic and social values - from intrinsic to extrinsic, from tangible to intangible

Cultural heritage was thought to have unchanging and universal intrinsic values. However, since the 1960s this belief has been increasingly undermined by what Honório Pereira identifies as the cultural turn of the 1960s and the communication turn of the 1980s. As a result, "the theoretical debate has been dislocated from the aesthetic-historic to the anthropological-cultural axis" (Pereira, 2007: 15). It is now argued that artefacts are more the medium through which culture is produced and reproduced than an embodiment of culture (Avrami & Mason, 2000: 6-7). The extrinsic values of heritage are the result of the interaction between the heritage itself and its social, economic and historical contexts (Mason, 2002: 19). This point of view recognises value formation factors outside the object itself and emphasises their important social processes (Mason, 2002: 8). The depreciation of intrinsic values has resulted in emphasis being placed on the immaterial aspects of heritage and on its meaning and significance. This has led the concepts of 'authenticity' and 'integrity' to lose ground, as became apparent in the 1994 Nara Document on Authenticity (Pereira, 2007). As the concept of 'authenticity' is now understood to be culturally specific, this means that what is considered as heritage depends very much on how the members of the community of interest perceive it and what values they agree on. This has had the effect of making it essential to gather the community's views, to take them into account and to balance them against expert opinion. However, the consideration of a community's views may be problematic, as may also be the definition of the community itself. There may be several communities with different views on the nature of the object or landscape that one or several of them deem as heritage. Or even if all agree on its significance, they may do so for different reasons (because they apply different values). This same reasoning regarding communities can also be applied to sectors within a particular community, as there are usually interest groups that may present alternative views. The cultural nature of heritage has also led to an acknowledgement that values may be extremely varied and that their nature is highly dynamic and changeable. This obviously makes it difficult to measure values objectively, as any attempt may be faced, as explained above, with alternative values proposed by particular sectors of the community. Expert opinion, once the only one that counted in such matters, is now challenged by those expressed by a community that in many cases is less than clearly defined.

Reaching agreement on a typology of heritage values has proved to be problematic. As the values ascribed to heritage have become more complex and dynamic, the category has expanded from the historic and artistic to include cultural, social, economic, spiritual, sentimental and symbolic aspects. The changes in and expansion of the type of values has followed the shift in focus from material to immaterial or intangible aspects of heritage (Pereira, 2007). One example of how the changes have led to new guidelines in the field of archaeology is that of the Heritage Council of New South Wales. In its document *Assessing Significance for Historical Archaeological Sites and 'Relics',* several criteria are given for assessing archaeological significance, mainly related to historic, artistic/technological, cultural, spiritual and natural values. These could be graded as exceptional, high, moderate, little and intrusive and either have a state or local significance. Archaeological significance could be defined by its research potential, intactness, and lifeways (the 'ability to demonstrate' a way of life, taste, function, custom or process of particular interest) (Lavelle, 2009). English Heritage also considers community value together with evidential, historical and aesthetic values (English Heritage, 2008).

Economic value

One of the most remarkable transformations in the values associated with heritage relates to economic values. The end of the Cold War in 1989 had the effect of loosening the restraints capitalism had placed on its economic ambitions. Until the 1990s, Cold War tensions were behind state funding for culture in the form of study grants, research funds, the sponsorship of conservation heritage projects and a wide range of other activities. There were already calls to rethink the economics of heritage, as can be seen from the creation of the *Journal of Cultural Economics* in 1977, but proponents were in the minority. Culture was considered to be part of the welfare state – culture made people feel happy with the political system they were living in (as opposed to living under a communist regime). However, the failure of the socialist/communist alternative in the late 1980s-early 1990s meant there was no longer any reason to maintain a generous welfare state. During the following two decades the economy expanded and spending was encouraged. Technological advances in the digital sphere (the generalisation of computer use, the development of the Internet and information technologies) reinforced the feeling that the Western capitalist model is a success. This model is based on the accumulation of capital in a competitive global market economy in which economic value and exchange are key elements. Global capitalism has affected the field of culture to a previously unknown extent.

In the last two decades we have witnessed increasingly limited state investment in the cultural field in the context of the imposition of global capitalism. As the Swiss professor of economics, Bruno Frey, argued in 1997:"The preservation of cultural heritage is costly and one has to decide if and which items of cultural heritage are worth preserving" (Frey, 1997: 231). However, he still considered a series of values of the type of heritage he was dealing with, artistic heritage, which were not reflected in the market: the benefits obtained by individuals, even if they were not using artistic heritage, the benefits of preserving a heritage monument versus the damage to current and future generations caused by its destruction, the symbolic benefits of culture in terms of identity creation and maintenance, and the educational value (Frey, 1997: 233).

The concept of cultural sustainability has increasingly gained ground in recent years, although it has its roots in the 1970s (see below).Sustainability does not include all the benefits mentioned by Frey above (see, for example, Tripp Umbach & NHAs, 2014). According to Honório Pereira:

> *Using the economic-ecologic metaphor, conservation objects are understood as finite resources to be wisely used, while (p)reserved for future appreciation, utilisation and modification. The criticised issue here is that the economic-driven approaches (…) can only guarantee success in the cases in which economic feedback or profit is guaranteed – thus privileging a priori the economic value of heritage (Pereira, 2007: 21).*

This trend can also be seen in the World Bank and a growing number of development agencies. As Michael Cernea, the American-Romanian sociologist, explained:

The patrimony [i.e., heritage] represents a vast collection of cultural assets, but these assets also have a huge economic value. Markets only imperfectly recognize this economic value because of insufficient information and inadequate pricing mechanisms. Historically, the economic value of the patrimony's endowments has been given much less attention than its cultural significance. Largely because of this limited recognition, policy makers and planners in developing countries have been little concerned, and little able, to activate and harvest the economic value of their country's patrimony. Bank policy has come to unambiguously recognize this economic value. It holds that the patrimony can become an auxiliary engine for generating economic growth and development (Cernea, 2001: 33 - in Silberman, 2012).

In the field of heritage values, this means that economics is increasingly taking precedence over any
of the other traditional values. In some cases this economisation of heritage may lead to its McDonaldization (cf. Ritzer & Ryan, 2002).Commodification – the process of transforming things into objects for sale – is encroaching on almost every aspect of life. French archaeologist Laurent Olivier has denounced this situation referring to archaeology in general and stating that:

> *The "commodification" of archaeology unties the political bond that linked the study and the preservation of the remains of the past [that]… the community of citizens [has]… received as an inheritance. The subordination to economic regulation produces a double exclusion: it excludes archaeologists from their own discipline and it excludes citizens from their own affairs, i.e. public affairs, the res publica (…) A new class of technocrats has taken over from researchers and creators and they are dismantling what they feel appropriate to transform into economic production, [even if it is] devoid of meaning (Olivier, 2013: 29).*

An area of cultural heritage in which sustainability has been particularly stressed is tourism (Mowforth & Munt, 2009). In 1993 Deirdre Evans-Pritchard commented that at the CANATUR (Costa Rican Chamber of Tourism) congress much use was made of the terminology of sustainable tourism (Evans-Pritchard, 1993: 779). We are told that the idea of sustainability emerged in the field of environmentalism and, particularly, in the book *Ecological Principles for Economic Development* (Dassman, Milton & Freeman, 1973) and was widely accepted in the 1980s. In the field of heritage, sustainability means that there should be a balance between economic growth and the exploitation of heritage resources.

The financial crisis that began in 2007 has forced global heritage institutions such as UNESCO to accept private sponsors. The commodification of cultural heritage has, therefore, reached the very core of one of the institutions that fought for universal heritage with the altruistic idea of saving it for the whole of humanity.

Questions to be raised in discussion sessions

- What kinds of values can be measured?
- Theory and practice. What are the tensions between sectoral needs and between disciplines?
- What are the opportunities we have to reduce confusion?

Why Who What **When Where** How

Time, place and heritage values

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Introduction

Change management is a great challenge for cultural heritage managers. To succeed they need to reconcile the interests of future generations in the retention of past values, with other values present generations might perceive as vital (Pereira Roders & Hudson, 2011). Heritage values concern past and present values of cultural heritage; they are the reason why society designates something as cultural heritage (Pereira Roders, 2007). Though, time is not the only challenge that needs to be reconciled in relation to cultural heritage. A cultural heritage property can convey endless layers and types of heritage values simultaneously, ranging from sub-national to supranational values.

One example is the historical centre of Amsterdam. The area was designated as a townscape in 1999 under the Dutch Monuments and Historic Buildings Act of 1988 (OCW, 1999). This area includes the Canal Ring Area designated as UNESCO World Heritage since 2010. On top of that, it also includes over 7000 individual buildings designated as national or municipal monument, with the oldest municipal protection efforts dating from the late nineteenth century (Potano, 1997). Since the beginning of this century, Amsterdam also makes “value maps” (waarderingskaarten) on which buildings with cultural-historical values, also non-listed, are being mapped and as such they are also subject to building aesthetics regulations (Amsterdam, 2013:24, 40-48). All those designations have some values in common, but also consider different values, depending on the time they were nominated, as well as their scale and the context they were nominated.

Which values prevail? What values influence(d) decision-making the most? How to balance past, present or future values? How can subnational, national, or supranational levels of scale co-exist? What is the influence of heritage values in conservation ethics? This paper aims to explore the role of the contextual factors time (when) and place (where) in assessing heritage values. It ends reflecting on the latest UNESCO Recommendation on the Historic Urban Landscape in its position concerning time and place.

Time

As hinted in the introduction, time (when) is a great challenge to heritage managers. These days, one cannot imagine a process of cultural heritage designation without public participation, even if only to inform the involved communities. Though, what about the past and future generations? Who defends them during the modern processes of decision-making? How are different interpretations, definitions and appreciations of heritage values part of the assessment process? How can heritage managers balance the real needs of the present generation, with the needs of imaginary past and future generations, who they will probably never meet?

There is a growing attention to the present uses and values of heritage (Smith, 2006; Veldpaus & Pereira Roders, 2014). Accordingly, there are no past or future values in heritage management, as one generation always regards what is to be valued and defines why. Further, past, present and future values are often assumed as incompatible. Yet, there is little effort being undertaken to actually compare them.

The assumed (in)compatibility of present values with past and future uses and values even seems to be one of the main drivers for change in heritage theory and management. Consequently, one finds numerous research studies arguing the (un)suitability of heritage designation, dismissing previous perspectives on heritage values. Those dismissals are often argued in direct relation to the (lack of) contribution of such perspectives to the three pillars of sustainable development: social, economic and environmental. The most commonly used definition of sustainability indeed only refers to present and future generations, taking past generations out of the equation.

But, what about time, tightened between those past and future generations? There are enough examples in the past, of European cities, where a lack of funding or a strong lobby of certain social groups blocked development plans from demolishing large urban areas, in order to make these cities 'more sustainable' for their present generation. In the name of health, energy, mobility, you name it. Instead, the same flagships have been guiding more recent acupunctural development, where these old neighborhoods are revitalized and rated as 'the places' to live. Often located at the heart of these cities, these urban areas used to contain primarily domestic architecture, meaning low density in built environment, but high density in urban traditions. Would there have been enough funding or less strong lobby and in the historic centre of Porto (Portugal) would no longer exist. Instead, today, it is designated as UNESCO World heritage.

How can heritage management learn from past experiences and take into account past generations, as well as present and future ones? How to move from reactive to proactive approaches? Cities can and should develop over time, though establishing limits of acceptable change, still seems 'not done'. Why is that? Why can society accept certain historic areas to be redeveloped, without questioning the value lost will be more than made up by the sustainability gained? Is that pure naivety or selfishness? Enough questions unanswered to feed discussion the role of time in heritage values.

Place

Let's now focus on the concept of place and the related challenge heritage managers need to reconcile in relation to cultural heritage. As introduced, depending on the asset, within the same time period one cultural heritage property can convey endless layers, types and scales of heritage values, as perceived by different groups of stakeholders. Thus, rather than the geophysical entity, a place becomes a complex network of attributes and values. Such places can partially match but also differ, per group of stakeholders. Such multi-layering raises several questions of ownership and identity in place-making. Because, even if theoretically possible, how can subnational, national, and supranational values co-exist? How do they really differ? Which heritage values have the final say in conservation ethics, concerning what should or not be done to cultural heritage?

Place plays indeed an important role in heritage values. The act of designating something as cultural heritage, entails a process of valorization and prioritizing. In specific, heritage designations go hand in hand with the process of deciding where to invest (public) funds. If funds are public, the public should surely have a say in how the funds are used. Though, in a democratic world, governments have been elected to represent their communities. So, if they decide to protect a particular category of cultural heritage e.g. industrial or monumental, while demolishing everything else, can we really blame only them for doing so?

There seems to be a romantic belief bottom-up approaches, and a preference for sub-national values, will solve all challenges top-down approaches, prevailing national and supranational values, fail to address. Though, we inquire if the matter in question is rather the co-operation in decision-making, than to determine who is initiating the process. Moreover, who should have the final say on where to invest heritage funds and how to conserve them? Should supranational governments decide where subnational communities invest their funds? Why then should subnational communities decide where supranational governments invest their funds? A paradox still to be solved, potentially grounds on a lack of communication between the different groups of stakeholders and their perspectives in place-making.

There is a great intolerance for heritage values designated in supranational settings as UNESCO World Heritage List or the European Heritage Label. Though, why should the notion that different people from different cultures, can agree to conserve what they designate as cultural heritage and are willing to share their resources to achieve it, even when conveying different heritage values, be so puzzling? Why do we feel some heritage values are being neglected? Does it make sense at all, especially in a democratic context? Is not an exclusive focus on subnational values as those conveyed by local communities as partial as one on supranational values?

When studying heritage values with detail, one can notice that there is a difference between *what* cultural heritage is, named as attributes, and *why* it is designated, named as heritage values. These last seem to vary more than the first among the different groups of stakeholders. So, even though the place is the same, the values change per group of stakeholders. Values also seem more influenced by contextual factors, as e.g. war, tourism, natural disasters. Instead, attributes are far more consensual and often cross the different layers of heritage values. Should that be a problem? Is that not exactly what makes us a community, the sharing of values?

Rather than thinking one layer –most often 'our' layer, our current perception– of heritage values is overruling the others, one could try understanding why is that happening by comparing their own to other values. How else can differences in processes and enrolment of groups of stakeholders along place and time be considered? Why do supranational values need to be discussed with subnational communities, or vice versa? Should that happen? When should that happen? Do my neighbors have the responsibility to maintain my garden? No. Why should that differ in a heritage management setting? Instead, my neighbor and I could agree to share resources and help each other maintain our gardens, as the whole street comes out better when they, and we, respect each other. Do we need to value each other's gardens equally for that? No. Long live democracy and freedom of values.

Recommendations of the historic urban landscape (HUL)

This recommendation (UNESCO, 2011) defines the historic urban landscape in terms of time "*the result of a historic layering of cultural and natural values and attributes*" and place, it "*includes the broader urban context and its geographical setting*". The HUL approach is meant to be holistic, with development and change as basic principle instead of a reactive and protective approach. It argues that decisions related to how much things we value can be changed, should be based on consensus of the values actually ascribed to them by the various stakeholder groups. In addition, expected vulnerabilities should be mapped, to understand the most urgent contextual and global social and environmental factors of impact. When an urban development strategy includes both, heritage can be used as a driver to build sustainable and resilient cities (Landorf, 2009; Van Oers, 2013; Guzman, et al., 2014). As such, the approach is taking in account all consideration mentioned above, though it remains theoretical. Embedding across-temporal and multi-layered approach in heritage management based on internationally developed concepts as well as their constant evolution into the daily practice of sub-national policy is a challenge. Cities engaging with the HUL recommendation are therefore encouraged to share the outcomes of implementing such approach.

Discussion

There is much discussion in papers as these, about the role of time and place in heritage values. Depending on the point view one wants to make, there are endless references one just needs Google to find. Though, not all do search or even find them. There is a great lack in comparing what is being said and why. So, only a smaller group actually notices this inconsistency, both in heritage studies and heritage management. There is still a strong rely in our peers, so if they say UNESCO is wrong and local communities are right, we should all believe that is the case, without questioning why! Really? Instead, we claim that each group of stakeholders can take decisions that influence the conservation of cultural heritage in a negative way, even when well-intended. Subnational, national and supranational. Even you and me. That is life. But that is also how we learn and move forward. Thus, rather than being critical about one or other approach, we plea for a greater understanding to the diversity of approaches through time and place. A stronger investment in the systematic analysis, based on reliable data and varied sources, to replace eminent anecdotal information (Coalter, 2001; Reeves, 2002) that feeds no other than conflict. We plea for an open and assertive discussion on what and how to conserve cultural heritage. Hopefully together, while respecting each other's garden!

Potential questions to be raised in discussion sessions

- What is the influence of context (place, time) on value assessment?
- Can contextual assessments be compared (surrounding sites)?
- How can measurements usefully reflect changing values this?

Why Who What When Where **How**

Mapping values: Some methodological issues

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Introduction

Capturing, mapping and assessing 'heritage values' is a complex but essential process for establishing the significance of heritage and for informing heritage management and heritage conservation. It is a complex process because 'values' are not only diverse but also changeable and often in conflict with each other. Indeed, existing typologies of values reveal the diverse range of values and interests represented by the involved stakeholders as well as the difficulty in selecting the best methods and tools for understanding and assessing those values.

So, one of the first questions to ask is: how do we assess heritage values? Do we first start with an existing typology as a starting point which we then elaborate further or do we attempt to identify in partnership with the involved stakeholders the various values ascribed to heritage? More importantly, once all values are mapped and assessed, how do we make priorities and decisions that represent stakeholders' voices?

Before presenting briefly some of the methods and tools that could be used for capturing heritage values, it is vital to note that each method and tool has limitations, advantages and disadvantages. It is because of this that, ideally, a combination of more than one method is often recommended for assessing values although this may not always be feasible due to the limited available resources. The resources issue imposes an additional, critical question: how do we select the most suitable method and tool and what are the implications of such a choice on heritage conservation?

Broadly speaking, the potential methods for assessing heritage values could be classified into three main categories including **a)** qualitative methods **b)** quantitative methods and **c)** mixed methods. Qualitative methods (such as interviews, participant or unobtrusive observation, in-depth discussions, narratives, participatory action research) are used to understand how and why different stakeholders value a particular heritage place. The emerging data are rich but often difficult to analyse as well as their interpretation is open to subjectivity. Such methods allow all stakeholders to express their voices, opinions, beliefs, ideas and – ultimately – values. The challenge though is to use the data for informing prioritization of values if such prioritization is needed. Quantitative methods, on the other hand, such as surveys comprised of attitudinal questionnaires or methods used by economists are suitable for measuring and quantifying values and thus providing a basis for prioritization and decision-making in heritage conservation. However – although it may be easier to measure economic values through quantitative methods – there are risks and difficulties in quantifying other types of values such as social, cultural, community value etc. Table 1 provides a summary of each method, its advantages and disadvantages.

Table 1. **Methods and Tools for Assessing Heritage Values: Advantages and Disadvantages**

Qualitative	**Method (s)**	**Description**	**Advantages**	**Disadvantages**
	Visual(Photo elicitation or production)	Photos are used or produced by participants as a means to instigate in-depth discussions	Rich data; participatory method	Subjective and difficult to analyse or inform priorities
	Unstructured, semi-structured or structured interviews	Interviews are based on a set of questions which can be elaborated with additional (prompt) questions	Rich data; 'easier' to design	Difficult to analyse and inform decisions/priorities
	Focus groups	Group of stakeholders are gathered and express their opinions	Rich data	Difficult to analyse and inform decisions/priorities
	Experimental workshops	Hypothetical scenarios are designed and testing behaviours and attitudes	Rich data and engaging	Difficult to design and analyse
	Participatory/action research	Questions are generated from grassroots	Rich data; participatory	Difficult and time consuming
Quantitative	Attitudinal surveys	A series of closed statements are provided to respondents	Easy to analyse and quantify values (more accurate if the statements emerge as a result of qualitative interviews or focus groups)	Difficult to design and risk of oversimplification or exclusion of some values
	Decision to Pathways	A sequence of questions leads respondents to determine the response to each question.	Possibility to quantify values	There is a risk of oversimplification; difficult to design
	Social Return on Investment	Measures and quantifies the economic, social and environmental impact of a heritage project or heritage activity	Measures and quantifies economic value – useful for generating data for policy makers; combines qualitative and quantitative methods	There is a risk of oversimplification

	Hedonic Pricing	Measures the economic value of a property that lies in the proximity of a heritage asset	Measures and quantifies economic value – useful for generating data for policy makers	Too limited/ restrictive. Cannot capture full range of values
	Contingent valuation	This method also known as 'willingness to pay' captures the total economic value assigned to heritage by an individual by asking how much he/she would be willing to pay	Measures and quantifies economic value – useful for generating data for policy makers	Highly relying on hypothetical scenarios- high degree of inaccuracy
	Choice modelling	It measures what drives one's individual's choices over particular types of values (especially economic)	Measures and quantifies economic value – useful for generating data for policy makers	It presupposes very well informed participants and fails to capture non-monetary values (e.g. spiritual values)
	Subjective well-being	It is used to estimate the economic value of non-market goods by calculating how a good or service affects individuals' sense of wellbeing and computing its impact's monetary equivalent.	Measures and quantifies economic value – useful for generating data for policy makers	Still unexplored and possibly tricky to quantify non-quantifiable values

As can be observed from the table, each method has advantages and disadvantages. In addition, some methods are by nature more suitable to assess particular 'values' than others. Methods, for instance, employed by economists are more suitable to capture the financial value of heritage while qualitative methods are appropriate for understanding social, cultural and other values. Because of the limitations of each method, a mixed methodological approach that combines qualitative and quantitative methods is often the best way forward (if resources are available). For instance, in a recent research project entitled 'Collections Demography' (funded by the Arts and Humanities Research Council in the UK) that aimed to develop a collections management model for archival collections, three different methods were used for assessing values of experts and non-experts using national archival collections. The methods included in-depth interviews that informed the development of attitudinal questionnaires which were then followed by experimental workshops. This approach – although time consuming – provided a holistic way for capturing values across a wide range of stakeholders more accurately as well as assisted collections managers to make informed decisions about the management of the collection.

It should be noted here that some methods of assessment are better suited to different aims. For instance, a scale questionnaire can determine the extent to which something is valued in comparison with other things. This method can be proved useful for designation purposes, but not for management. On the other hand, eliciting values through qualitative methods, complex value systems and how they interrelate to stakeholders can be particularly useful for management. In addition, if the purpose is to demonstrate public benefit and impact then different methods (drawn mainly from cultural economics) can also be used.

Another critical question related to the diverse range of methods is whether qualitative and quantitative approaches simply constitute different ways of assessing the same thing, or whether they ultimately assessing different things (and thus should be used in combination). Indeed, each method could assess different things at different stages of the process and thus a combination of methods is desirable. It has become clear already that methods used by economists are used exclusively for the monetary value of heritage while qualitative methods can capture a wider range of values. However, in most cases (at least with the case of qualitative methods) it is not possibly so much a question of whether different qualitative methods assess different things but a question of whether value is understood in different ways by different professionals and groups.

Another ‘easy’ method is to use an existing value typology and apply this in the assessment of any heritage site. The risk here is that values (and groups of individuals who assign those values) are not captured with potential conflicts in the future which can affect the heritage conservation and the management of the site. Moreover, each typology is not inseparable from the disciplinary boundaries of those who developed it or the ideology of the institution where the individuals are based and thus it is heavily context-laden and potentially limited in terms of its general applicability.

In most existing typologies, ‘economic’, ‘aesthetic’ and ‘symbolic’ values prevail. The Burra Charter typology, for instance, introduced for the first time ‘social value’ encompassing spiritual, political, national and cultural values. The social context within which the Burra Charter was formulated (growing emphasis on involvement of Aboriginal communities) can explain the focus on social value. Fielden and Jokilehto (1993) on the other hand have placed greater emphasis on rarity and artistic value, a reflection of the priorities assigned by architectural conservators. Darvill’s (1995) typology is influenced by economic value classifications and distinguishes values into use, option and existence value – useful for heritage management practice. Overall, an expansion of the range of values appears to have occurred over time, with many values that may be considered intangible (e.g. spiritual, symbolic, associational) becoming more prominent in later typologies. Socio-cultural and economic values are both recognised by Mason (2002) who attempts to provide a holistic approach to value assessment. It becomes thus apparent that each typology reflects different professional or disciplinary backgrounds; different professional ethos; and different socio-cultural or institutional contexts. In view of this, value typologies are heavily context-laden and thus it might be safer if a typology was developed for each site separately.

Potential questions to be raised in discussion sessions

- What are the implications of different approaches to measuring and assessing value?
- Do different disciplines affect the way values are measured? How?
- Can the positive qualities of different methods be connected?

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Appendix 3

Workshop Guide

Heritage Values Network
Workshop II
2-3 October 2014

Assessing, measuring and prioritizing heritage values

Table of contents

Introduction

This document is to help you navigate and prepare for the Oslo workshop.

In addition to the programme you already received, we include a list of participants, some information on the discussion groups that connects with the documents you received, some maps and background information on the project team.

The first day is largely plenary, as we gather a wide range of professionals from different disciplines, and a little about each other's' approaches to value assessment. The second day, once you're more familiar with one another, is more focused on discussion. Each of you will be most closely connected to two of these themes for discussion, but as the workshop continues these connected themes will merge. From there we will join together again to consider actions for the future.

There are many issues to consider, and we hope to cover a lot of ground. However, we hope there will be time to make connections. This workshop is part of a networking project and the benefit of sharing ideas and experiences is to promote understanding and cooperation in the future.

We look forward to further connections in Oslo!

The NIKU team

Programme

EVENING BEFORE

LOCATION: Thon hotel Oslo Panorama, Central Oslo (see maps, pp 10-11)

DAY 1: 2nd October 2014

MORNING
LOCATION: NIKU (maps, p 10 & 11)
Aim: *This will set out the workshop plan to establish a platform for discussion.*

9:30 Arrival – Registration.

9:50 Welcome to NIKU from Carsten Paludan-Müller (NIKU Director).

10:00 Aims and logistics of the workshop.

10:10 Presentation. Overview of value assessment methods –differences & similarities, based on delegate experiences.

10:40 Presentations. Five discussion papers from the project partners.

11:30 Leave for Ekeberg.

AFTERNOON
LOCATION: Ekeberg, South East of Oslo (map, p 11)

12:00 Lunch, Ekeberg restaurant

14:00 Exercises on the language of value.
Aim*: to examine how language has been used in heritage literature, and the potential impact on assessment*

15:00 Ekebergparken history, issues, and instructions for visit.
Aim*: to introduce a case with a range of kinds of heritage and stakeholder and complex challenges.*

15:30 Ekebergparken visit, South-East Oslo.
Aim*: to examine how the park might be viewed under different assessment methods. An opportunity for delegates to mix before table discussion.*

NOTE: This will be outdoors, so please consider your dress. The park has walkways, but also green spaces. http://www.yr.no/place/Norway/Oslo/Oslo/Oslo/

17:00 Leave for hotel from Ekeberg restaurant entrance.

EVENING
LOCATION: Elias mat og sånt, Central Oslo (map, p 11)

19:00 Dinner for delegates and project partners.

DAY 2: 3rd October 2014

MORNING
LOCATION: NIKU (maps, p 10 & 11)

09:00 Coffee and pastries together.
***Aim**: critical appraisal of value assessment methods amongst delegates, based on Ekeberg park.*

10:00 Discussion 1, small groups (see p 8). Consider selected questions connected to workshop themes.
***Aim:** to consider some broad issues, and how they influence assessment (and other factors discussed). This builds on discussion documents presented on Day 1 (and distributed prior to workshop).*

11:15 Break

11:30 Report back discussions to all. Key issues charted for each group.

11:50 Discussion 2. Building on previous discussion (see p 9), examining how the discussion themes are affected by other factors in heritage value assessments.
***Aim**: to consider broader issues of assessing and measuring values, and consider how they are affected by the other issues discussed.*

13:00 Lunch at NIKU

14:00 Report back discussions to all. Key issues charted for each group.

14:20 Plenary session. Expanding the discussion themes to consider opportunities and tensions.
***Aim:** to bring together the separate discussion to tackle wide themes that look to the future.*

14:50 Break

15:00 Plenary session. Summing up and the way forward.
***Aim**: to connect over-arching issues that have arisen, and identify knowledge gaps and future directions.*

15:30 Finish.

List of participants

Invited delegates			
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Discussion Session 1

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	Sjoerd van der Linde	Stene Berg
Leiden University	Eirin Breie	Claire Giraud-Labalte
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	Helene Skoglund-Johnsen	Walid Salem
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WHAT	Facilitators	Delegates
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	Ana Pastor	Susanne Hauer
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	Emma Johansen	Begoña Soler Mayor

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		Hélène Svahn Garreau
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	Adrian Olivier	Tessa Luger
	Kristin Rattke	Vasiliki Manousiadou
		Bogusław Szmygin

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WHY	Facilitators	Delegates
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	Joel Taylor	Hélène Svahn Garreau
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WHAT	Facilitators	Delegates
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		Walid Salem
		Jean-Dominique Seroen

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	Adrian Olivier	Katrina Kukaine
	Kristin Rattke	Gareth Maeer
		Nikki Sakka

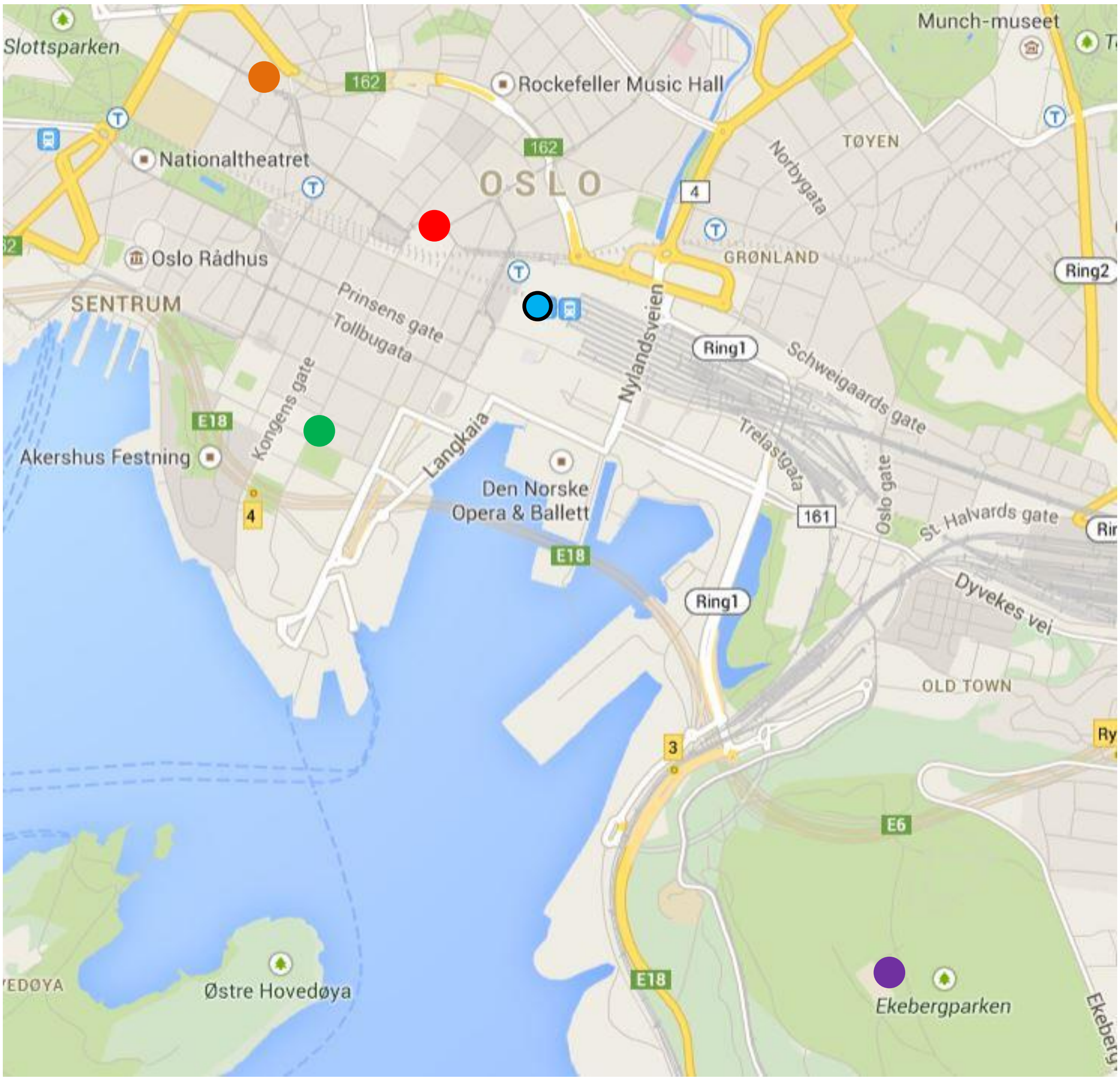
Maps

Central

- Oslo Central train station (Oslo S), with trains to airport
- Thon hotel Oslo Panorama, Rådhusgaten 7b
- NIKU, Storgata 2

Maps

Overview



- Oslo Central train station (Oslo S), with trains to and from airport
- Thon hotel Oslo Panorama, Rådhusgaten 7b
- NIKU, Storgata 2
- Ekeberg restaurant, Kongsveien 15, & Ekeberg park
- Elias Mat og Sånt, Kristian Augusts Gate 14

The project team

UCL Centre for Applied Archaeology (coordinator)

The Centre for Applied Archaeology (CAA), incorporating Archaeology South East (ASE) is part of University College London's (UCL) Institute of Archaeology. CAA's team of 13 provides support for academic staff at the Institute and commercial staff in our contracts division (ASE), a further 80 archaeologists who collectively are involved in heritage work in over 87 countries with over 100 members of academic and support staff. We build links between commercial practice, academic research and local communities. The Institute of Archaeology is the largest and one of the most highly regarded centres for archaeology, cultural heritage and museum studies in Britain with 5 major heritage MA programmes taught by 15 core academic staff. As the CAA is a commercial enterprise within an academic department, it has many links to the heritage sector within the university, which is currently preparing an interdisciplinary research strategy on CulturalHeritage@UCL.

UCL Centre for Sustainable Heritage

The Centre for Sustainable Heritage was established in 2001 by UCL through the collaboration of three UCL departments; The Bartlett Faculty of the Built Environment, The Institute of Archaeology, and the School of Library, Archive and Information Studies. CSH aims to fill the gap between disciplines responsible for the physical protection of the moveable and immovable heritage. Its contribution to a sustainable future for the heritage is through participation in collaborative environmental, scientific and technological research, innovative teaching, advice and consultancy. The Centre engages in evidence-based research on heritage protection, and through its teaching activities challenges the traditional divide between preservation and use. The 'environment' area of Bartlett research is one of the largest and most mature within the Bartlett and has expanded significantly over the last five years. CSH is currently coordinating the CULTURALHERITAGE@UCL initiative, an emerging cross-disciplinary research network at UCL.

Norwegian Institute for Cultural Heritage Research

NIKU is an independent non-profit institution dedicated to preservation and sustainable management of cultural heritage. NIKU conducts research and provides professional services for cultural heritage authorities, public administration agencies, churches, museums, property developers, owners of art and historic buildings, and international clients. The institute's main areas of expertise are conservation of art and buildings, archaeology, cultural heritage in the High North, and spatial planning for embracing cultural heritage in public and commercial development. NIKU's professional staff (more than 70 people) consists of conservators, archaeologists, architects, engineers, geographers, ethnologists, social scientists, art historians, researchers and advisors with special competencies in cultural heritage management and preservation. NIKU is based in Oslo and have regional offices over Norway.

Technical University of Eindhoven

The Department of the Built Environment at Eindhoven University of Technology (TU/e) contributes via its education and research to improving the built environment. It does this at various levels, such as cities, buildings and building components, as well as in the field of building materials. The department offers one undergraduate programme, two graduate and two designer's programs. Research in the department revolves around Building, Physics and Services, Design and Decision Support, Innovation in Building Technology, Public Health Engineering for the Built Environments, Structural Design Urbanisms. It has over 1000 students and over 124 permanent staff members.

Leiden University, Common Sites

Leiden University is the first university in the Netherlands founded in 1575. It has 46 bachelor's programmes and 70 master's programmes with 20,712 students and 4,018 staff. The Faculty of Archaeology of Leiden University is the only archaeology faculty in the Netherlands. This independence makes it possible to pursue an efficient and stimulating policy in the fields of education and research, and to take advantage of new developments. In European terms, the faculty is an averagely-sized institute, with a wide range of specializations and several specialist (laboratory) facilities. One of the main research strands of the faculty is international heritage management. There is a series of undergoing research projects on heritage management including the Archaeology in Contemporary Europe and Quality management in Archaeology.

University of Barcelona

Founded in 1450, The University of Barcelona is ranked within the top highest public Universities in Spain, in terms of both the quality of the teaching it offers and the productivity and quality of the research carried out by its members. It is the only Spanish university to appear on the list of the world's 200 best universities published by the specialist British newspaper, The Times Higher Education Supplement.

The workshop was delivered with kind support from Riksantikvaren, the State Directorate for Cultural Heritage

Appendix 4

Language Session Hand-out

Synonym replacement exercise

Replacing the word 'value' with a synonym can be enlightening on how meanings can be change with nuances and varied interpretation of the word value. By switching the word, one can see the extent to which there is dissonance in its usage.

From the list of synonyms on the next page, decide which one you think changes the meaning of the sentence most, and which the least and write them below. Add other words if you like.

It's not a test or a controlled experiment, so discuss the impact of changing the word with colleagues.

1. "the ultimate aim of conservation is not to preserve material for its own sake, but rather to maintain (and shape) the **values** embodied by the heritage" (Avrami *et al.* 2000, 7).

2. "The Ise shrine is not a tangible cultural property but a unique example of a living tradition of a building whose **value** is not defined by the criteria of the material" (Tokoro 2001, 22).

3. "heritage becomes… the **values** and meanings that are constructed at and around [the object or place] – heritage is what is done and not what is conserved, preserved or managed" (Smith & Waterton 2009, 15-16).

4. "We **value** our heritage most when it seems at risk; threats of loss spur owners to stewardship" (Lowenthal 1996, 24).

5. "**Value** judgments in cultural heritage are never straightforward due to the mutability of heritage **values** over time and a multitude of stakeholders who can have diametrically opposed opinions as to what is **valuable**..." (Holtorf, C. 2014 [online], 9).

6. "collections management and conservation professionals appear to be capable of providing repeatable estimates of **value** lost when presented with pictures of objects with and without damage" (Waller 2003, 60).

7. The World Heritage Committee encourages the States Parties to enact necessary policies to ensure that the Outstanding Universal **Value** of the property is not degraded due to insufficient water resources (UNESCO 2009, 59).

Some definitions

Significance: the quality of being important : the quality of having notable worth or influence

Impact: to have a strong effect on (something or someone)

Benefit: a good or helpful result or effect

Quality: a characteristic or feature that someone or something has : something that can be noticed as a part of a person or thing

Worth: the value of something measured by its qualities or by the esteem in which it is held

Character: a set of qualities that make a place or thing different from other places or things

Attribute: an object closely associated with or belonging to a specific person, thing, or office *especially* such an object used for identification in painting or sculpture

Merriam Webster dictionary

Semantic Feature Analysis Chart

	Fluid (Static)	Singular (plural)	Inherent (ascribed)	Objective (subjective)	Universal (local)	Hierarchy (flat)
Significance						
Impact						
Benefit						
Quality						
Worth						
Value (n)						
Values (n)						
Value (v)						
Character						
Attribute						

‘Value’ in your language

What language do you use other than English?

What is the term you use most for value in your language?

How does it differ from the English term?

Are there any ambiguities in the terms you use for ‘value’ in other languages?

I AM….

(please circle) Policy Practice Academia

Country of residence:

Discipline (archaeology, conservation, landscape):

Gender: Male Female

Age: 25-35 35-45 45-55 55-65 65-75

Role: Project Partner Invited guest

Appendix 5

Assessment Methods Hand-out

CONSEQUENCES OF DIFFERENT VALUE ASSESSMENTS - HANDOUT

After having heard about the different value connected to Ekebergparken, and having looked around, we will have a look at some different value assessment methods.

By considering three different, valid approaches to assessing the park, there is a chance to see how differently the park might have been. They are all methods that could have been applied.

In considering the differences, it is useful to think about the strengths and weaknesses of the different approaches. However, some differences may simply be alternative perspectives. The aim isn't to decide on the 'best one', but an examination of how they differ.

These aren't controlled conditions, and the park is not supposed to be representative of all heritage sites. However, it is an opportunity to see the site through different lenses and consider how assessing the values differently might have resulted in a different park.

It is also worth considering how sensitive the methods are – i.e. what changes might affect the assessment most. An increase in tourists? Economic shifts? Demographic changes? Damage to the park?

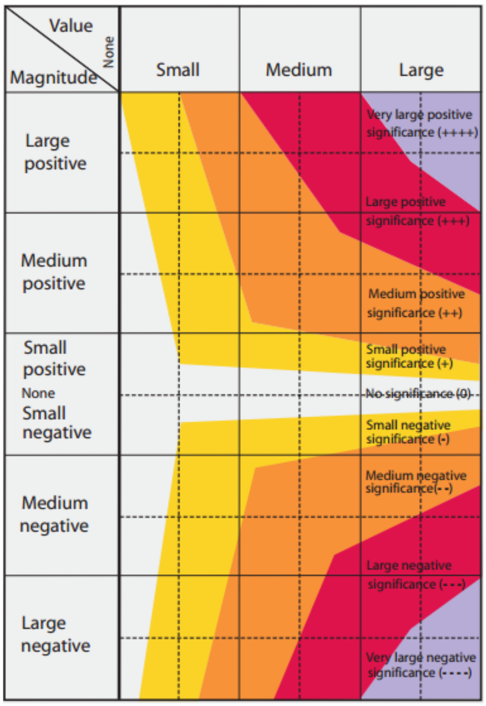
After a long day of presentations, we will not ask too much of you.

Tomorrow, we will informally reflect upon how the different methods might have influenced the park. The will be a chance early on to comment on each method – how it might differ from the others, what the implications might have been for the park.

The three methods (described later) are;

- Environmental Impact Assessment (EIA)
- Contingent valuation methods (CVM)
- DIVE - Urban Heritage Analysis

Environmental Impact Assessment (EIA)



The EIA method called "Handbook 140" is developed by the Norwegian Road Administration. The method is used for recommend one or a few alternatives. Alternative 0 is present condition without any intervention. Alternative 1, 2 etc are defining various alternative uses of the area that affects the environment, also called non-monetised impacts. Non-monetised impacts are *Landscape, cityscape*; *Community life and outdoor recreation*; *Natural environment*; *Cultural heritage*; and *Natural resources*. Ideally, there should be no overlap between the themes so as to prevent double counting. The significance of the various impacts is to be assessed by combining the value and the magnitude of impact (see matrix).

Impact assessment is an attempt to assess all impacts, whether negative or positive and whether measurable in monetary terms or not, that are predicted to occur if a project is implemented. The aim of the impact assessment is to contribute to well-informed decision making.

http://www.vegvesen.no/_attachment/61439

The summary is a qualitative evaluation and is based on professional judgement and therefore will not yield precise answers. The comparison summary is divided into two steps:

Table 2: Collocation of non-monetised themes

Theme	Alt. 0	Alt. A	Alt. B
Landscape/ cityscape		– –	– –
Community life and outdoor recreation		0	+ +
Natural environment		–	–
Cultural heritage		– –	– –
Natural resources		0	–
Total evaluation		Negative	Negative
Ranking	1	3	2

Table 3: Ranking

Impact / Alternative	Alt. 0	Alt. A	Alt. B
Monetised: Net present value	0	90	-100
Non-monetised: Comparison summary and ranking	None 1	Negative 3	Negative 2
Socioeconomic evaluation	0	Uncertain ⇒ Positive	Negative
Ranking	2	1	3

- first, the monetised and non-monetised impacts are evaluated together for each alternative
- then, the alternatives are ranked.

Example of value criteria: Low value - heritage environment (a farm, industrial site, urban quarter etc.) which is common and where the original relationship between heritage monuments is disrupted; medium value – representative for the epoch / period and pertain in a context or an environment with some time depth. Also places known for tradition /belief. High value – rare / excellent example of the epoch / period and pertains to a very important context or an environment with high time depth. Also special important places known for tradition /belief.

The method is logically very stringent and it is usable in most kind of projects, not only for assessing "road spaghettis". The method has however received criticism for among other things being too rigid. Furthermore, in reality, impacts overlap between the themes so it would be impossible to prevent double counting of values.

Contingent valuation methods (CVM)

Contingent valuation methods (CVM) are part of a wider group of methods that determine peoples' willingness to accept or pay for a particular situation, often a change.

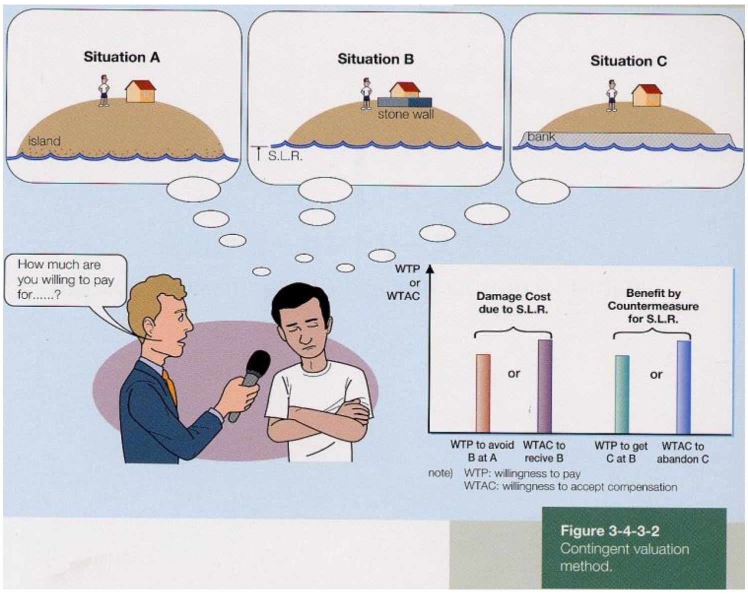
Asking people to state their preferences when considering issues beyond entrance fee helps understand its wider role in society. The benefits of keeping a library or historic site can be determined when the number of users or visitors may not tell the whole story. It is inclusive in that the stated preference may be for a number of reasons.

The method allows assessors to standardize and quantify peoples' attitudes instead of learning that they simply 'care about' a site. This offers possibilities for comparison between options or with other sites, and also to identify the perceived benefit of an action. How much visitors are willing to pay to enter a museum or site indicates its perceived value, but may underestimate something shared by many over time.

Asking a random selection of people (both visitors and not) about how much they might be willing to pay to see a site improved or kept involves creating a hypothetical situation to which people respond. A simplified example: "The government can no longer afford to maintain this park. Would you pay an extra €5 to keep this site as it is, or allow it to deteriorate?" The amount can change to examine a range of thresholds for acceptance.

It involves;

- Developing a scenario that relates to the site and issue of interest
- Developing a format to draw out those value preferences.
- Considering questions that would help elaborate on preferences
- After developing test protocols, asking members of the public.



http://www.env-econ.net/2006/10/theyre_still_ou.html

CVM has received criticism for not including 'non-use' values, and for being very theoretical (or hypothetical), and also because people may answer what they think they should rather than what they really think. Also noted are 'framing' effects (ways in which the issue is conceptualised for the public), including that value is considered as a single entity. There are also problems, such as the endowment effect, where people have preferences for what they have through a preference to keep the status quo rather than valuing the site in question. However, it has been used in a number of situations to move beyond simple ideas of cost and revenue to connect cultural heritage to a broader context.

DIVE - Urban Heritage Analysis

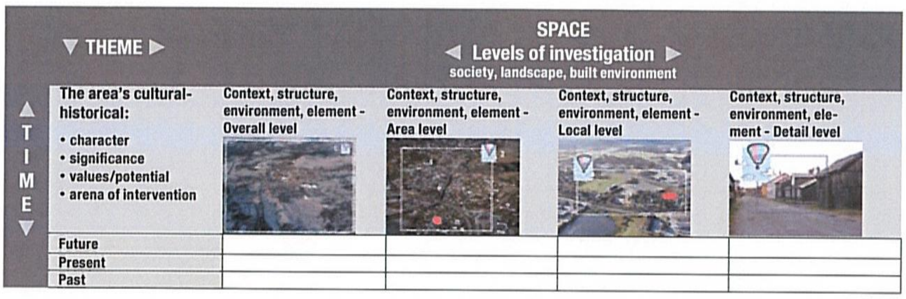
The DIVE-analysis addresses some of the challenges which are encountered when viewing historic and cultural environments as both qualitative and functional resources. The approach encourages cross-disciplinary and cross-sector cooperation, and emphasizes the importance of public participation, communication and dissemination of results.

The four main steps of the DIVE analysis (Describe, Interpret, Valuate and Enable) are compatible with a number of methods and approached found in other areas and professions, e.g. archaeology, landscape planning and urban design.

Stages (work phases)	Summary of the DIVE analysis
Prepare	the preparations, program and process including plan for participation
S1 Describe	the historical character of the area, especially its particular evolution and characteristics
S2 Interpret	the historical meaning of the area and elements of particular significance and communicative value
S3 Valuate	the area's cultural historical value, development potential, sensitivity and capacity for change.
S4 Enable	the potential arena of intervention in the area, with alternatives and concrete ideas for the preservation and development of prioritised historical qualities and resources.
Summarise	the most important points and issues that need to be integrated into ensuing planning and other processes.

http://www.riksantikvaren.no/en/Topics/Settlement-planning/Cultural-Heritage-Analysis-DIVE

Some of the central terms and techniques of the DIVE analyses are e.g. ***time/space matrix, historic legibility, integrity, capacity for change etc.*** The method has stressed the importance of involving user participation in several of the work phases.



The space-time matrix can be used throughout the analytical process, as a knowledge-base and basis for discussing the area's character, significance, values/opportunities and arenas for action. The vertical tima axis represents the area's development, both chronologically and topically. The horisontal axis shows the development's physical manifestations - at a number of chosen geographical scales.

http://www.riksantikvaren.no/en/Topics/Settlement-planning/Cultural-Heritage-Analysis-DIVE

Other terms of importance are historical significance – historic readability - authenticity and integrity - vulnerability and tolerance.

DIVE analyses may be integrated into urban planning procedures, or used as independent knowledge-building tools. Target groups include stakeholders, planners, cultural heritage professionals and decision-makers involved in urban conservation projects and planning, both in the public and private sector.

The DIVE design can be regarded as a rather comprehensive method involving time- and resource consuming processes. On the other hand it is built over a flexible matrix (see the time/space figure above) which can be adjusted according to the available resources.

Appendix 6

List of Post-it note Comments

Environmental Impact Assessment

REVEALS (that others might not)
Identified the relationship between heritage and other elements (roads, construction of train, urban developments) Good for assessing impacts on identifiable qualities/ values in the park Gives scenarios for the future that let one choose better measures It, in the end, is quantitative, which is very good – practical Takes stakeholders and different layers of value information into account Provides various levels of significance More holistic approach, encompassing landscape, community, cultural heritage Reveals impacts (positive and negative) on environment Varied, disciplinary layering of significance Could be extended to incorporate positive benefits Systematic in dealing with impacts Framework for incorporating different survey information
MISSES (what others might not)
Misses the public opinion- what are the needs of the local community and its expectations from the project Lacks the point of viewof the local communities It doesn't consider the future users of the park Rarity/ representativity as only criterion for valuation is too limited Misses contact with local stakeholders (e.g. to assess symbolic values for local communities) Seems to missea clear desktop study to assess a broad range of values of affected sites Bias towards mitigating negative impacts Doesn't relate to cost. Does not help make creative decisions/ solutions No involvement of the public, community, stakeholders Doesn't prioritise between impacts. Doesn't pick up interactions. Most financial aspects. About choices and alternatives – misses mediation and compromise Method seems to make no clear distinction between valuation and decision-making. Based on judgment of experts. Does not capture change, capacity for change like DIVE. Risk of 'hidden' and simple arguments. Misses non-expert values unless they are specifically built into the assessment (which is possible, but usually resisted by "experts"). Purely professional point of view, missing social aspect – inquiries on people's attitudes Public opinions missing – ranked by professionals Not good for assessing public attitudes Scoring 'high – low' values remains a black box Missing correlation between layers – accumulative (secondary) impacts (non-project) Missing participation of people – usually you inform about the result and people's voices are not part of the assessment What about the qualitative aspects? How to measure them? Missing an overall view – merging of layers of value Missing specific impacts Missing secondary impacts

Missing social impacts Relies on preparatory survey work Little stakeholder involvement
How the park might be different
Changes that minimise environmental 'costs' or impact rather than maximise public benfits Prepare a better scenario for future development (introduce the funding(?) in the park Out of five themes, three are related to landscape. Isn't it a risk to prioritise inevitably natural over cultural heritage or over community values? Since it is based on professional judgment, it is likely that some themes may be viewed of 'low' or 'medium' value by professionals, but not by other stakeholders and therefore will be conflicts The identification of low medium and high value on the basis of 'rarity' is problematic. It excludes other values which may be equally important. Again, conflict is a risk.
Other comments
The philosophy is that there should not be an overlap to avoid double counting. However, the themes are closely overlapping, e.g. landscape with natural environment. This means that there will be double counting. Ultimately, did the conflict/problem just dissipate with time? It's a multi-purpose/functional park that appears to serve different constituencies quite well? Did the assessments make a difference or even matter in the end? Dependent of professional judgment beyond the basic level of 'is then/ is then not physical impact' , so will have an element of subjectivity Rigorous but value criteria are expert/national – the framework of assessment is good but there is a need to take into account the values of the landscape as perceived by the people who have 'ownership' (in a cultural sense) of the place. Reactive approach (often late) – mitigation as solution If dealing with many different qualities, aggregating impacts on them to get overall impact assessment can be problematic and subjective It focuses on conflicts and has no way of solving problems Unclear how this method works in practice

Contingent Valuation Method

REVEALS (that others might not)
Relates costs to benefits Useful for communicating and justifying decisions to funders and policy makers Good for valuating one feature of the park, e.g. if the historical restaurant should be replaced by something else Approach to economic value of the site Can be used to decide allocation of resources between different options all with positive benefits (if they exist). Clarifies monetary issues in relation to stakeholders Proactive planning (future) Social present values Let to know peoples' (local community) attitudes, their readiness to engage in the preservation Reveals if the park can be maintained by private sources after its enhancement Involvement of local stakeholders (not included in Environmental Impact Assessment) Different points of view on the park/ on the users' conflict/ wishes Brings in judgment of a larger number of people than focus groups Doesn't require absolute monetary value but relative differences It is realistic in the sense that survival of heritage depends on (future) societal support
MISSES (what others might not)
Dependent on answers given 'at the moment', which could lead to highly subjective results A rational desk study is missing (which could reveal a wider range of values besides the answers of the survey) Missing real impact/ technical impact Missing coming together of various opinions (experts/ public). Misses secondary impacts Misses cultural historical values Questions are defined by experts A random selection of people is not useful The method does not include the public, it just 'uses' them Can it correctly reveal multiple values of a place? Difficult to measure the comprehensive values of a site Some of the values could be missed, and neglect taking into account subjective opinions of society. Lack of professional knowledge Misses soft and attributes No help in thinking or creating plans and solutions, just testing Doeesn't facilitate discussion about different impacts of a project It needs good, informed participants It requires respondents with good education Not good at assessing actual impacts and changes of value Takes no account of why people value What if people don't want change? Very limited scope Focuses too much on monetary issues Misses past values Misses non-social values It risks unrepresentativeness

Too narrowly focusing on monetary values, so excluding the full range of values of heritage Too hypothetical Risk of participators' manipulation This method makes a wrong connection between economic principles and intangible values Very hypothetical because people do not have to pay for it. If they had to hand over money on the spot, the answer might be different. Because it artificially attempts to assign monetary values to cultural values/preferences, it is usually too hypothetical a basis for major decisions about change to a publicly valued place The fundamental premise is unrealistic – it's not based on real-time intellectual or financial currency
How the park might be different
Since the park affects the quality of life of the local community in multiple ways, priority should not be placed on its maintenance by private sources but on the ways it will respond to the needs and expectations of the people. The park may be considered a public space; even though people value it highly, they still may not feel they would have to pay for it. Prepare the platform for participation of local communities (some activities that would come from bottom-up) Increase visitors Increase collateral risks Can actually promote a change that people are prepared to accept There is a danger that this will lead to some commodification, but also that it may lead to voting (and inaction) What if people attribute 'low' economic value Option favoured by the public may be misinformed according to 'experts'
Other comments
It is necessary to associate it with a democratic society Can be combined with information provision to get more informed responses How can people participate in the design of the scenario? Perhaps not in Norway – but elsewhere- the 'artificial value' of CVM would be compared to the market value of the park in other, more intensive uses (and be found wanting?) Can be combined with other methods Interdisciplinarity It is possible to test for bias in results – unrealistic answers, for example Avoid unpopular changes to the park, realising the public objections before the change. I see this method only as complementary to others – it cannot stand on its own

DIVE

REVEALS (that others might not)
The most 'complete' of the three methods Good for facilitating discussions Analytical A comprehensive measurement Good for establishing options Possibility to involve all levels (from professional to community) Time/ space matrix helps follow changes in part and identify 'stable' values It helps when heritage can be made functional The inherently flexible matrix and approach provides a relatively sound basis for informing choices The level of public involvement (if executed correctly) Open and multi-layered approach Different levels of analysis – the detailed description and contextual and layer Varied layers of significance (environmental) There is some flexibility with DIVE which allows adaptability to the particular case study How to evaluate the awareness of the results? Probably the best method of all three since it takes into consideration the needs and expectations of local communities and this is the only way for such a project to succeed. If the local community embrace the park, it will find ways to conserve it.
MISSES (what others might not)
Missing the capacity for changes Where are the people preferences and sustainability? Danger of expert dominance Social values It is fundamentally wrong to mix up from the start expert judgement, public participation and politics! Research does not equal policy What about ecological economic values? How do the scales communicate? Specific impacts? What about future value or mitigation of impacts? Sets out options for decisions, but doesn't get very far in arriving at a final decision. To take in account the audience/ population's perception A clear description of what values are being taken into account Natural heritage values? Characteristics of spaces that people value like 'tranquility'? Difficult to define but easily lost Likely to be weak in resisting development pressure Time and resource consuming Involve all stakeholders It does take a very narrow perspective (focussing on the historical character of the park) excluding the landscape cityscape, which may be equally important Starts from historical values and preservation too much It could be difficult to make a broader public understand the content and results of these complex studies (especially stakeholders with few links to the cultural-historical)
How the park might be different
A cross disciplinary approach described Dissonant heritage analysed (dialogue with all stakeholders) Landscape qualities preserved Integrated use of public space

Changes to the park could be significant if interpretations are excessive Creeping development on site as lack of agreement prevents strong alternatives coming forward Impossible to say without insight into the method and more information o the park
Other comments
Strong similarities in early stage to James Semple Kerr on Conservation Management Plans to UK HLF guidance. Seems to build value identification process into assessment method as opposed to EIA. Seems open-ended to identifying options and constraints and not intended to choose between specific options The method can be used in many ways – it is malleable (both good and bad) Perhaps too narrowly focussed on (expert defined) heritage value to be suitable for assessing options for change to a place of natural and, above all, community value as well as being an archaeological cultural landscape