

# Values and Heritage Conservation

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## Abstract

The notion of heritage and the practice of conservation have changed significantly since the 1964 Charter of Venice stipulated that the intent of conservation was “to safeguard...[monuments]... no less as works of art than as historical evidence” and that the aim of restoration was “to preserve and reveal the aesthetic and historic value of the monument ... based on respect for original material and authentic documents.” Since then the scope of heritage has expanded, both in terms of type and scale, and in relation to the time interval between creation and preservation. The characteristics and contexts of different types of heritage places have necessitated the revision of conservation principles and guidelines. Today conservation is understood to encompass any action designed to maintain the cultural significance of a heritage object or place, and is a process that starts at the moment a place is attributed cultural values and singled out for protection. In this complex environment, the protection of values and significance has been seen as a unifying principle of practice. These values are attributed, not intrinsic; mutable, not static; multiple and often incommensurable or in conflict – can challenge established conservation principles. The nature of cultural values has serious implications for the impact of conservation on the values of a place, the universality of conservation principles, and the protection of the heritage for future generations.

## Resumen

El concepto de patrimonio y la práctica de la conservación han cambiado de manera considerable desde que la Carta de Venecia estipuló en el año 1964 que la conservación “tiene como fin salvaguardar...[en los monumentos]... tanto la obra de arte como el testimonio histórico” y el objetivo de la restauración es “conservar y revelar los valores estéticos e históricos de un monumento [fundamentado] en el respeto hacia los elementos antiguos y las partes auténticas.” Desde entonces, el ámbito del patrimonio se ha expandido, tanto en términos de tipología y escala, como en relación al tiempo que transcurre entre la creación y la conservación. Las características y los contextos de los diferentes tipos de patrimonio han llevado a

una revisión de los principios y los parámetros de la conservación. Hoy día se entiende que la conservación abarca toda acción diseñada a mantener la importancia cultural de un lugar u objeto patrimonial y que es un proceso que comienza en el momento en que se atribuye un valor cultural a un lugar y se escoge para protegerlo. En este complejo ambiente, la protección de los valores y el significado ha sido adoptada como un principio práctico unificador. Sin embargo, los valores culturales que se aceptan hoy en día, en particular los valores sociales, han modificado la práctica de la conservación. Todos estos valores – que son atribuidos, no intrínsecos, mutables, no estáticos, múltiples y a menudo inconmensurables o en conflicto – pueden presentar desafíos a los principios de conservación ya establecidos. El carácter de los valores culturales tiene serias implicaciones en el impacto de la conservación en los valores de un lugar, la universalidad de los principios de conservación y la protección del patrimonio para generaciones futuras.

## Résumé

La notion de patrimoine et la pratique de sa préservation ont changé de manière significative depuis la émission de la Charte de Venise de 1964, indiquant que « conserver c'est protéger...[les monuments]...non seulement comme œuvres d'art mais aussi comme preuves historiques » et que l'objectif de la restauration est de « préserver et révéler la valeur esthétique et historique du monument...basée sur le respect des matériaux d'origine et des documents authentiques. » Depuis lors, la définition de patrimoine s'est élargie à la fois en terme de typologie et d'échelle, et en relation à l'intervalle de temps entre la création et la conservation d'un monument. Les caractéristiques et les contextes de différents types de patrimoine ont nécessité la révision des principes de conservation et de ses directives. Aujourd'hui, le domaine de la conservation du patrimoine comprend toute action destinée à maintenir l'importance culturelle d'un objet ou lieu de patrimoine, et ce à partir du moment où le dit objet ou lieu est attribué des valeurs culturelles et considéré comme digne de protection. Dans cet environnement culturel complexe, la protection des valeurs et de la importance culturelle est considérée comme un principe unificateur de mise en pratique. Ces valeurs sont attribuées, et non pas intrinsèques; changeantes et non pas statiques; multiples et souvent incommensurables ou en conflit. Elles mettent au défi les principes établis de préservation du patrimoine. Le caractère des « valeurs culturelles » a des implications sérieuses sur l'impact de la préservation sur les valeurs du lieu, l'universalité des principes de préservation, et la protection du patrimoine pour les générations futures.

**KEYWORDS:** cultural heritage, intangible heritage, heritage values, authenticity, cultural diversity, Nara Document, historic preservation, heritage management, world heritage

## Introduction

The expansion of the concept of cultural heritage<sup>1</sup> over the last quarter century has drastically changed our understanding of conservation. For a long time, “cultural heritage” referred to a narrow group of significant places remaining from the past recognized for their historic and aesthetic values. Their conservation consisted of attempts to prevent decay of the physical elements that were believed to embody these values.

Now “cultural heritage” encompasses architecture, both monumental and vernacular, gardens, industrial facilities, cities, and whole landscapes. Today conservation is understood to be a complex and on-going social process that includes the identification and valorization of heritage, and determines how it is used, cared for, interpreted, and by whom and for whom (Avrami, Mason, and de la Torre 2000: 7).

The expansion of the concept of heritage has been the direct result of the broadening of the values that are considered to have cultural significance, and these new values are now part of all decisions taken to protect and safeguard those special places. But as heritage values received more attention they came to be understood to have characteristics that often challenge established conservation principles and affect the way conservation is conceived.

This paper reviews the characteristics that have been highlighted in research and the literature in recent years. It considers how the expansion of accepted heritage values has changed the practice of conservation and some of the implications that the nature of cultural values have for certain conservation issues that are the focus of many debates.

## *Heritage*

Heritage and its preservation have become important fields of academic study and research, as well as a common topic in the popular media, yet there is no universally accepted definition of what constitutes “cultural heritage” (Harvey 2001).

The narrow view of heritage presented in 1964 in the Charter of Venice still reflected eighteenth- and nineteenth-century ideas developed in England and France. Traditionally conservation focused on the preservation of fabric and was equated with interventions and legal protection. The purpose of interventions was to reveal and preserve a place’s true nature—its authentic nature—believed to reside in its materials (Muñoz Viñas 2011: 90). Modern conservation started with a narrow set of values considered “intrinsic” and self-evident. The first values to be attributed to heritage places were historic and aesthetic (Hearn 1990; Ruskin 1961[1849]). For years, the heritage field was dominated by a selected group of individuals who shared a common perspective based on this common set of values.

The theory and professional practice of heritage conservation evolved quickly during the second half of the twentieth century, influenced by deep changes in society such as globalization, the rise of democracies, recognition of the rights of minority groups, the expansion of market economies, and mass tourism (Choay 2001; Glendinning 2003; Gillman 2010; Lowenthal 1996).

In the 1960s the scope of heritage continued to expand, both in terms of typology and scale, and in relation to the time interval between creation and preservation (Bentel 2004; Koolhaas 2004; Nora 1989). Many groups have fought for and won recognition and validation of their cultural values, and as a result, we now accept an expanded concept of heritage that encompasses places and objects that are significant in a variety of ways to different segments of society (Arizpe 2000). Heritage is no longer considered to be a static set of objects with fixed meaning, but a social process through which “any human artifact can be deliberately invested with memorial function” (Choay 2001: 12–13). Over time, it has come to be understood that the products of material culture have different meanings for different groups and communities, beyond historic and aesthetic, and that the particular significance of a heritage place is determined by the values that are attributed to it (Pearce 2000).

Today conservation is understood to encompass any action designed to maintain the significance of a heritage object or place, and is a process that starts at the moment a place is recognized as having cultural values and singled out for protection. In the past and the present, conservation is an attempt to control and direct change.

### *Heritage Values<sup>2</sup>*

Alois Riegl, in the early years of the twentieth century, was among the first to attempt to clarify and classify heritage values, and to distinguish between historical and contemporary values (Riegl 1996[1903]). Since then, practitioners have continued to reach out to different disciplines in their attempts to identify and classify the values that reflect the emotions, meanings, and functions attributed to that heritage (Johnston 1992; Walker 1998).

An important moment in the evolution of heritage came in 1979 when Australia ICOMOS issued the Burra Charter (Australia ICOMOS 1988), which recognized a new class of cultural values: social values. These values were defined as “the qualities for which a place has become a focus of spiritual, political, national or other cultural sentiment to a majority or minority group” (Australia ICOMOS Guidelines 1999).

Art History	ICOMOS Australia	Economics	English Heritage
Alois Reigl	Burra Charter	Bruno Frey	
1902	1998	1997	1999
Age	Aesthetic	Monetary	Cultural
Historical	Historic	Option	Educational & academic
Commemorative	Scientific	Existence	Economic
Use	Social	Bequest	Resource
Newness	Spiritual	Prestige	Recreational
	Political	Educational	Aesthetic
	National		
	Cultural		

Adapted from R. Mason (2002).

As heritage has come to encompass varied places, the protection of the significance of each new type of heritage presents its own conservation challenges. The numerous professional charters, recommendations, and declarations—from the 1981 Charter of Florence to the 2011 Declaration of Paris—provide evidence of the attempts of heritage professionals to adapt conservation principles to an expanding reality (ICOMOS Charters and Other Doctrinal Texts 2012; Araoz 2011). In this complex environment, the protection of values and significance has been seen as a unifying principle of practice.

The 1992 meetings in Nara, Japan,<sup>3</sup> started a re-examination of one the most basic tenets of conservation and ended with the acceptance of authenticity as a relative concept.<sup>4</sup> The resulting Nara Document is the acknowledgement that the narrow view of heritage and conservation presented in the 1964 Venice Charter are not applicable across diverse lands and cultures. Immediately after the Nara Conference, its organizers recognized that “Nara reflects the fact that international preservation doctrine has moved ... to a post-modern position characterized by recognition of cultural relativism” (Larsen 1995: xii).

Conservation has come to be seen as “a complex and continual process that involves determinations about what constitutes heritage, how it is used, cared for, interpreted, and so on, by whom and for whom. It has also become evident that decisions about what to conserve and how to conserve are largely defined by cultural contexts, societal trends, political and economic forces—which themselves continue to change” (Avrami, Mason, and de la Torre 2000: 7). Meanwhile, heritage professionals continue to attempt to accommodate a multiplicity of principles and approaches to the new conservation, without having to admit that “everything is possible” (Richmond and Bracker 2009).

While heritage values have become central to conservation, their nature and key to understanding this new perspective of conservation lies in the nature of heritage values: attributed, multiple, mutable, incommensurable, and in conflict.

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Characteristics of heritage values

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Always attributed.....	Never intrinsic
Always multiple.....	Never just one
Always mutable.....	Never static
Incommensurable.....	Not comparable
Often in conflict.....	Sometimes incompatible

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These characteristics of heritage values have important implications for the practice of conservation.

### Values are Attributed not Intrinsic

The most important characteristic of heritage values is that they are always attributed, never inherent. Places do have innate characteristics, such as material, size, color, or age, but these have no cultural significance. Although there are many

references to the “inherent value” of objects and places, in fact, heritage places are value neutral until they are attributed cultural value. At that point they cross into the category of heritage.

Cultural values are attributed by those who have an interest in a place. “Value is learned about or discovered in heritage by humans, and thus depends on the particular cultural, intellectual, historical, and psychological frames of reference held by the particular individuals or groups involved” (Lipe 1984: 2). “Individuals project value onto an object, place, or resource based on their own needs and desires, shaped by their current social, cultural, and economic circumstances (Spennemann 2006).

### **A Heritage Place has Multiple Values**

Stakeholders attribute different values to heritage places for different reasons, and most heritage places have multiple stakeholders. Thus, the significance of a place is never based on a single value, even for World Heritage Sites that are considered to have Outstanding Universal Value.

Generally, the values most readily recognized are those important to professionals concerned with the heritage: historical, aesthetic, and scientific. Social values are not easily elicited in assessments undertaken by professionals because they tend to be contemporary, locally held, and not always evident in the physical fabric (Johnston 1992; Walker 1998). Nevertheless, social values have become an important consideration in conservation as the expanded view of heritage encompasses cities, regions and landscapes, and preservation decisions have a stronger impact on the daily lives of larger numbers of people (MacFarquhar 2011).

### **Heritage Values are Mutable**

All values are expressions of emotions or beliefs (Zimmerman 2010), they are influenced by circumstance, and thus can evolve and change over time. The evolution of values can result from changes in society, such as those in the demographics of a place or in the function of a place. In many instances the factors that influence changes on the values of a place can be easily identified; other times, change results from more subtle factors and can only be detected over long periods of time.

Conservation is an engine of change. All the values of a place deserve to be protected and conserved. However, when establishing the significance of a place, stakeholders, and authorities must favor certain values over others. Those are then protected by designation and conservation, and de facto, officially promoted. They will be “valorized”<sup>5</sup> and their importance will increase, and those that were considered less important or ignored will remain in the background and can erode.

### **Cultural Values are Incommensurable**

The multiplicity of values attributed to any heritage place by its stakeholders requires that in establishing significance certain values be promoted over others. Ideally, the importance of certain values would be based on an objective comparison with the other values of a place. However, there is no common measure that can be applied to all values and thus, it is said that values are incommensurable and to a large extent, incomparable.

Economic value is one that presents particular challenges in heritage conservation. Economics is a discipline that has a toolbox of quantitative methods to measure "value." However, these methods are difficult or impossible to apply to other heritage values. In addition, there are other, more philosophical reasons why heritage professionals continue to have a troubled relationship with the economic value of heritage. It is seldom considered a true heritage value to be taken into consideration when establishing the significance of a place, and yet is often used as a justification for conservation. Without doubt, it is often the value best understood by political authorities. Economic value continues to be problematic: it cannot be ignored, and even when it is, it can trump all other value considerations.

### **The Values of a Place are Often in Conflict**

The incommensurability of values would not be important if it was possible to protect and preserve all the values of a place simultaneously. However, experience demonstrates that this is seldom possible. With the recognition of multiple values comes the acceptance that there are many instances when only some of them will be able to be fully conserved.

An early example of conflict and its implications for conservation is the priority assigned to two different values by the followers of Ruskin and Viollet-le-Duc. The latter considered aesthetic value to be paramount. To them, reconstruction was the correct approach to heritage since it restored the place to the physical image intended by its creators. The former, on the other hand, considered historic value to be supreme, and that every trace of what had come down bore witness to the past, and nothing was to be erased or altered. In these cases, the absolute primacy of one particular heritage value led to conservation philosophies that were completely incompatible.

Modern states have made great advances in the incorporation of indigenous and minority cultures with their own rich and valuable heritage. But conflict of values is inevitable and will come more frequently as new groups of stakeholders come to the table with their own values and challenge traditional conservation approaches.

### ***Implications***

The expansion of heritage, the multiplicity of values attributed to it, and the variety of actors involved in conservation decisions have resulted in a complexity that did not exist in the certainty of the aesthetic and historic significance of the Charter of Venice. The search for unifying elements in this confusing environment has propelled

values-based conservation approaches to the forefront. Basing conservation decisions on values has clarified some issues, but not all, and has raised new questions that need answers.

The characteristics of heritage values described above—that they are attributed, mutable, multiple, incommensurable, and often in conflict—lead to certain conclusions that have implications for the way conservation is conducted, how basic principles are understood, and for the sustainability of heritage and our responsibilities to future generations. Some of these are:

- Not everything with cultural significance should be conserved for future generations.
- Conservation does not perpetuate the status quo because all decisions affect values and significance. Conservation decisions are neither objective nor neutral.
- If each heritage place is unique, is it possible to have universal principles? Are we moving to “situational ethics” in conservation?

### **Intergenerational Equity**

The conservation of our heritage for future generations has been presented as a moral imperative, and great efforts are made to preserve everything that has cultural significance or could potentially have it in the future. This sense of obligation, together with the proliferation of heritage, has created a situation that will require increasing allocation of resources to preservation.<sup>6</sup> The desire to pass on to future generations a well-protected heritage is laudable, but should not be used as an excuse for attempting to conserve everything or avoiding choices (Lowenthal 1989).

Today’s heritage encompasses places identified by past generations as well as places that the present generation has deemed to be significant from the perspective of its own set of values. Having seen the nature of heritage values, it is understood that today’s choices are being made from our current cultural perspective. Future generations will have to find ways to make heritage conservation sustainable. In all certainty, using their own values and criteria, they will let go of some of the things that the present generation has tried so hard to preserve, and will identify others as their heritage.

The protection of the present significance of heritage, without impairing any other values that might be important for future generations when we do not know what values will be favored, is considered today one of the biggest conservation challenges (Lipe 1984: 2). Extending a thought of Mahatma Gandhi, if “a nation’s heritage resides in the hearts and the soul of its people,” then heritage will change as people’s values change, and change both in people and in heritage are inevitable. And the way heritage is conserved will have to change too.

### **Conservation Alters Values**

All conservation decisions (not only physical interventions) require prioritizing multiple values. These decisions are neither objective nor neutral. Those with power in

the process will have the final saying on which values will be favored and what version of the past will be preserve and passed on to the future.

Individuals in charge of protecting the sites have a strong influence on which values will be given priority. Heritage professionals can be open to the opinions of different stakeholders, but they are not neutral, and they favor particular values. In this environment, it has been recognized that:

“Conservation is not an impartial process of discerning some sort of intrinsic value. Rather, it is a creative process of valorizing a given resource or element within the built environment for the purpose of perpetuating a particular idea or narrative about a place or people. Decisions about how to conserve a resource are influenced by economic and political developments, and cultural beliefs, and thus reflect the very complex ways in which places are significant to different people at different times” (Avrami 2009: 180).

The statement that “conservation preserves significance” seems to imply that significance is static, and that conservation actions do not change the meaning of the place or any of its values. However, it is evident that in the conservation process values are always modified and interpreted, and in some cases, new values are created (Avrami, Mason, and de la Torre 2000: 9).

Inclusion on the World Heritage List without doubt valorizes a place. But in determining the required Outstanding Universal Value required for this, priority and protection are given to those values, which, in the eyes of the international community, are most significant (Intergovernmental Committee 2012). In many of these cases, as is also when designating “national heritage,” historic and aesthetic values are given preference, and local values—often social ones—suffer. This problem is becoming evident in some World Heritage Sites where local populations believe they are being denied their right to participate or make decisions affecting their living conditions and their heritage. “Until a fundamental conflict emerges between local and global perspectives, the world community is willing to enforce values that it views as superior to local practices. Despite the general moral anxiety of patronizing local sovereignty by global standards, the support of preservation as a global ideology remains stronger” (Barkan 2002: 27).

### **Universal Principles and Mutable Values?**

A question that has plagued heritage professionals for decades was articulated early on by Herb Stovel in the conclusion of the 1994 Nara Conference, when he asked if it is “possible to define universal principles which lie at the essence of our conservation endeavors, without trivializing the cultural expressions or denying the cultural values of non-central, non-conforming communities and groups?” (Stovel 1995:394).

As the scope of heritage expanded to cover monuments as well as cultural landscapes it became evident that the narrow principles offered by the Charter of Venice were not applicable to all types of heritage. Over time, professionals have

strived to maintain a certain rigor in the treatment of heritage by identifying common principles and approaches for the different types of heritage. This “evolution” of principles, in which each new set is layered upon earlier ones, has led to a long list of charters and recommendations (ICOMOS 2012). Inevitably, as these documents have proliferated, the principles proffered occasionally contradict each other and confound even the most basic tenets of conservation. It seems obvious by now that heritage conservation in the twenty-first century is a complicated matter and that it is difficult, if not impossible, to establish principles that can be universally applied. Nevertheless, as David Lowenthal (2008) has observed, professionals who are “now aware that there are no eternal truths keep asking for them all the same...the guidance they seek must be or seem specific—explicit and precise answers, if possible quantifiable.”

Furthermore, with the recognition of a multiplicity of values, it is unlikely that any two heritage places will have the exact same significance, and thus benefit from the same conservation approach. If the purpose of conservation is the protection of unique significance there must be flexibility to select approaches and actions that fit the singularities of each case.

On the other hand, conservation solutions that are tailored to specific situations and to resolve serious conflicts of values lead to a “situational ethics” approach to conservation decisions. This path was opened when the Nara Document recognized that the fundamental heritage tenet of authenticity is a flexible and relative concept: “It is thus not possible to base judgments of values and authenticity within fixed criteria. On the contrary, the respect due to all cultures requires that heritage properties must be considered and judged within the cultural contexts to which they belong” (Larsen 1995: xxiii).

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## Notes

- 1 Although “cultural heritage” covers a broad spectrum of tangible objects and places and intangible manifestations, “heritage” and “heritage places” in this paper refer only to places of cultural significance and their attributes unless otherwise specified.
- 2 “Value” is a word that has several meanings with subtle differences; in this paper, and in reference to heritage, it will be used to mean “the quality of a thing according to which it is thought of as being more or less desirable, useful, estimable, important, etc.” as defined by Webster Dictionary.
- 3 The Nara Conference on Authenticity in relation to the World Heritage Convention was held in Nara, Japan, 1–5 November, 1994.
- 4 This opinion expressed years earlier by M. Parent in 1976—UNESCO document 1979.
- 5 It is important to point out the difference between “valuing”—appreciating a certain value attributed to the heritage—and “valorizing”, which is creating or increasing value (Avrami, Mason, and de la Torre 2000).
- 6 Several authors have pointed out that the level of resources needed to conserve the heritage that has been identified is unsustainable for most societies (Benhamou 1996; Peacock and Rizzo 2008).