

MONITORING WORLD HERITAGE

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It is accepted worldwide that monitoring is the most neglected activity in planning and management. Furthermore, the monitoring of historic urban centers is largely inadequate or totally lacking. Very recently, according to Nicholas Stanley-Price, Director General of ICCROM, as conservation professionals have begun to direct more attention towards strengthening arguments for heritage retention, monitoring techniques and approaches have acquired an adequate level of respectability.

To mark the 30th anniversary of the Convention Concerning the Protection of the World Cultural and Natural Heritage in 2002, UNESCO with the support of the Italian Government organized an International Congress to reflect on some of the main issues, achievements and challenges of the World Heritage mission. Immediately prior to the Congress, over 400 experts gathered in nine different Italian cities to consider the major themes under discussion. In Vicenza, twenty-three participants, from eleven countries, debated the specific issue of Monitoring World Heritage, resulting in a set of extremely significant reflections and guidelines, which were consequently published in 2004 by ICCROM and UNESCO World Heritage Center.

The publication, entitled *Monitoring World Heritage* puts forward the views of experts from both cultural and natural backgrounds. Drawing on experiences from all over the world, the authors discuss a wide range of questions related to the monitoring process, such as: What is the relevance of monitoring to management effectiveness? What should monitoring efforts measure? What are the necessary conditions for effective monitoring? What are the differences between systematic and reactive monitoring? What tools, mechanisms and methods are most effective for monitoring? To what extent can experiences from monitoring natural heritage be used in monitoring cultural heritage? A set of reflections about such issues follows.

According to the final discussion of the Vicenza Monitoring Workshop, monitoring is critical to management effectiveness since it provides the necessary information at site level, to enable the responsible authorities and other stakeholders to evaluate the effectiveness of efforts in achieving their objectives, and to prompt, modify or adapt management processes and actions.

This leads to the issue of *what should monitoring efforts measure?* Hermann van Hooff raises the initial question related to the need of linking management and monitoring to the World Heritage value. He argues that the essential missing link in the World

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Heritage process is the clear definition of the World Heritage value of a site, its explicit recognition in management and its incorporation in, or translation into, management objectives, programs and actions. Therefore, a coherent World Heritage framework must: identify the Outstanding Universal Value of a site at the time of its inscription in the World Heritage List; create legal, institutional and managerial arrangements that ensure long-term preservation of the OUV; and introduce mechanisms to assess whether this value is being maintained over time. Within these assessment mechanisms, monitoring the status of this value is essential.

Along similar lines, Bénédicte Selfslagh concludes that monitoring should be focused on the key indicators for conservation, over time, of the Outstanding Universal Value: authenticity and/or integrity of World Heritage. Therefore, it should cover the condition of the properties and its OUV-AI, the threats and impacts of corrective measures, when appropriate. Herb Stovel also argues that the central question in any monitoring effort must be the impact of time and circumstance on the heritage values defined during the inscription process.

Planning monitoring at the nomination stage ensures that reference data will be available for measuring the evolution of the property and its OUV-AI throughout time. One potential problem with monitoring is that the baselines against which changes of conditions are measured may not represent the original or desirable conditions of the resources. The final conclusions of the Workshop also present the possibility of this problem being compounded if monitoring programs are regularly changed and new baselines established, reflecting a slow shifting and generally deteriorating baseline.

As a result, an important condition for effective monitoring is that nominations include an outline for focused monitoring, including the identification of key indicators related to the two physical attributes linked to the Outstanding Universal Value. The organization of reliable base-line data, including data relevant to day-to-day management is fundamental.

Since 1998, State Parties have been invited to include “Statements of Significance” within their nomination documents. To strengthen effectiveness of monitoring activities, these statements need to include all elements necessary for their efficient use as a monitoring reference, i.e. data regarding the condition of the property, the state of the social, physical, and economic environment surrounding the heritage element or property, and in the effectiveness of actions or strategies adopted to improve their condition.

One further aspect discussed by the experts is that *monitoring is different from reporting*. Stovel argues that it is relevant to distinguish between long-term, on-going efforts to monitor effectiveness of site management and the need, at intervals, to report to the World Heritage Committee and others about the conservation of a property. Giovanni Boccardi adds that the first process is carried out by local staff on a continuous basis, while the monitoring as part of the Periodic Reports focuses every six years, on the implementation of the Convention. Bruce Mapstone further argues that monitoring to assess management effectiveness and monitoring to assess the status of World Heritage Area values are not synonymous, and at times not even mutually informative.

There also exists a difference between systematic monitoring, a continuous part of the management cycle of a property, and “ad hoc” monitoring, which is reactive, a

“snapshot” taken at a moment in time in the life of a property, aimed at solving particular problems of particular sites. In sum, it is proposed that monitoring should be seen as the essential underpinning of effective Periodic Reporting at site level.

In addressing the issue of indicators, a fundamental *tool for monitoring*, Stovel suggests that their effectiveness in measuring the quality of change on sites depends on the care taken in defining the desirable objectives for that site, and the subject areas for which indicators need to be established. Furthermore, monitoring systems should respond in an integrated manner to agree on “Outstanding Universal Value”, as well as local perceptions of heritage value.

Bruce Mapstone stresses that it is also fundamental to clarify the relative importance of different values in a property, allowing for the development of clear objective hierarchies, including specific, quantifiable objectives for the guidance of monitoring. Mark Hockings outlines a very useful framework for assessing the management effectiveness of protected areas, and has been developed by IUCN. This framework has been developed as a flexible design tool for preparing evaluation systems which are responsive to the needs, capacities and circumstances that apply to protected areas. Consequently, it would be widely applicable around the world.

Addressing the *adequacy and effectiveness of monitoring systems*, Giovanni Boccardi, based on the Arabic and African experience, comments on the risk of promoting monitoring standards which are impossible to implement in most countries that ratified the World Heritage Convention. Caution is necessary in introducing too much GIS mapping, satellite imaging, laser scanning, etc. into the monitoring process in developing countries. Monitoring should be conceived and planned taking local conditions into consideration, and limited to the essential observations for determining if heritage values are affected by changes occurring at a site.

Sueli Schiffer emphasizes the importance of a participatory monitoring process for the conservation of cultural and natural heritage in order to achieve better returns from project investments. She argues that a greater commitment by the local population to a monitoring system leads to greater social cohesion, improving the sustainability of the cultural heritage. A monitoring process where stakeholders play an active role helps to prevent the future deterioration of cultural heritage and promotes long-term conservation at a lower cost. It also helps to address changes brought about over time, adapting the cultural heritage to new demands while preserving its heritage values.

Applying experience in natural World Heritage sites to cultural or historical sites seems to be a controversial issue. Based on the Enhancing our Heritage Project, which aims to develop a framework for assessing the management effectiveness of Natural World Heritage sites in pilot sites across three continents, Sue Stolton and Nigel Dudley conclude that the EoH project framework could, in theory, be used in cultural sites, particularly in those nominated for both natural and cultural values, or sites managed as a single entity. In such cases, the methodology could be adapted, although different indicators and other tools should be used. Matters would be more complex in the case of city centers or larger areas of land with multiple management authorities. Questions of what to assess in cultural sites are inevitably more complicated.

Bringing together lessons learned from cultural and natural heritage monitoring systems is a worthwhile objective. However, Stovel argues that building one broad

World Heritage monitoring framework will be difficult to fully achieve, and is not really desirable. There are differences in the understanding of cultural and natural heritages within the respective fields. Natural heritage is closer to the sciences in the evaluation process, while cultural heritage is closer to humanities, accepting that the perception of values will shift over time and vary within communities. In sum, there are limits to the integration of approaches from the two fields, which should be defined and acknowledged. The Workshop concluded that it is relevant to examine and reinforce commonalities, and resolve differences within and between monitoring approaches and evaluation frameworks developed for cultural and natural heritages. Discussions should be conducted in this direction.

Finally, it is important to stress the relevance of the discussed publication, in that it provides an excellent state-of-the-art overview of monitoring for the benefit of cultural and natural heritage. It brings together experiences from all three World Heritage Committee Advisory Bodies and should be most useful to professionals and researchers involved in conservation activities for improving monitoring efforts and management effectiveness.