

# Cultural Value

## Valuing the Historic Environment

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Arts & Humanities  
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# **Valuing the Historic Environment: a critical review of existing approaches to social value**

**Siân Jones & Steven Leech**

## **Executive Summary**

This project seeks to advance understanding about how experience of the historic environment creates forms of social value. Value is central to how aspects of the historic environment are designated, managed and conserved as heritage. For much of the twentieth century this was primarily linked to what have been seen as intrinsic historic, aesthetic and scientific values. More recently there has been increasing emphasis on the social values derived from active use of the historic environment. There are considerable difficulties surrounding how these different kinds of value should be weighed up against one another. This is exacerbated by a lack of understanding about social value, which falls largely outside of the kinds of expert knowledge traditionally associated with the heritage sector. Furthermore, social value is not readily captured by quantitative methods or easily subjected to instrumental forms of cost-benefit analysis.

Through a critical review of existing research, this report examines current knowledge and understanding of social value. Encompassing the significance of the historic environment to contemporary communities, social value relates to people's sense of identity, distinctiveness, belonging, and place, as well as forms of memory and spiritual association. Particular attention is focused on the modes of experience, engagement and practice that inform people's relationships with the historic environment. The report also considers how to deal with the dynamic, iterative, and embodied nature of these relationships. The range of methodologies used in existing research and surveys is critically discussed, along with their application in the spheres of heritage conservation and public policy. Finally, the appropriateness of conceptual frameworks that quantify and fix values is examined. The possibilities for capturing more fluid processes of valuing the historic environment are considered, along with the implications for other spheres of arts and culture.

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## 1. Introduction

- 1.1 The need to identify, narrate and measure value is a complex and difficult issue within the heritage sector. The assumption of intrinsic worth, linked to historic and aesthetic values, was central to the foundation of the modern conservation movement, and continues to underpin the moral duty of care promoted by conservation charters. These international instruments play an influential role in national policies regarding the historic environment, in the UK and elsewhere, and consequently impact on the kind of built heritage we preserve. Yet in recent decades, forms of social value associated with the historic environment have received increasing attention in both international and national contexts. These are fluid, culturally specific forms of value produced through experience and practice, and whilst some align with official, state-sponsored ways of valuing the historic environment, others are created through unofficial and informal modes of engagement. This development may seem fortuitous in terms of demonstrating the instrumental value of heritage to society (often conceived in terms of 'benefits'). However, forms of social value are not readily captured by quantitative methods or easily subjected to cost-benefit analysis. Indeed, the heritage sector now encompasses a complex landscape of different, potentially incommensurate forms of value associated with different modes of evaluation (Gibson and Pendlebury 2009).
- 1.2 This project is specifically concerned with the place of social value within this complex landscape. It builds on an unpublished discussion paper prepared by the current authors for the *Historic Environment Policy Review*, which was led by Historic Scotland in 2013. In the heritage sector, 'social value' is one of a number of categories of value that make up 'cultural significance', along with 'historic', 'aesthetic', and 'scientific' values. It is defined in various ways, but it alludes to the relationship between the historic environment and people's sense of identity, distinctiveness, belonging, and wellbeing, as well as forms of memory, spiritual association and cultural practice. The proposed project asks:
- How is social value defined and approached in the heritage sector and what kinds of contexts and agendas is it associated with?
  - To what extent has social value been treated as a superficial or instrumental value, and how has it been weighed up in relation to forms of historic, aesthetic and scientific value, which are still, despite critiques, often considered to be more intrinsic?
  - What kinds of methodologies have been applied to assessing and measuring social value? Is there a place for quantitative methodologies? Or are qualitative methodologies that facilitate robust narrative accounts more effective?
  - Can a rigorous synthesis of the social value of heritage be produced from existing research, or do we need to develop new frameworks involving definitions and methodologies suited to specific contexts and questions?
  - Finally, is an emphasis on the identification of values conceptually problematic in regard to these fluid contemporary forms of engagement? Would a focus on processes of *valuing* the historic environment associated with modes of embodied experience and practice be more appropriate?
- 1.3 This report provides a basis for further discussion concerning the social value of the historic environment. It focuses on the implications of existing research, and considers a range of possible mechanisms that might be employed to realise the social value of the historic environment in a more systematic and thoroughgoing manner. The literature reviewed encompasses: (i) studies that were specifically

designed to measure the social value of heritage; (ii) research commissioned to investigate social value with a view to informing policy and practice; and (iii) wider academic research that sheds light on the forms of engagement, experience and practice that surround the historic environment. Competing theoretical positions relating to value are explored and problems associated with identifying and measuring dynamic and emergent social values are discussed. The range of methodologies used in existing research, including qualitative and participatory techniques, are critically discussed, along with their application in routine heritage management and conservation. Current best practice is identified and new directions for methodological development are proposed.

- 1.4 Whilst the main methodology is a critical review of existing research, partnerships with public and third sector heritage organisations are an important component. The project has 4 partners: The Council for British Archaeology (CBA), English Heritage (EH), Historic Scotland (HS), and the Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS). These are national organisations, which play key roles ranging from the creation and maintenance of records relating to the historic environment, statutory protection, conservation of historic buildings and monuments, advocacy, and research. They all have an active concern with creating, recording and understanding value and bring a range of professional expertise and experience to bear on these processes. Through an initial series of meetings between the Principal Investigator and representatives of project partners, issues surrounding social value within the UK heritage sector were identified. A workshop involving representatives from partner organisations midway through the project provided the opportunity to discuss conceptual and theoretical issues, gaps in current knowledge and understanding, and the suitability of current methodologies for routine practice. An account of the workshop discussion is provided in Appendix 1.
- 1.5 Some clarification of terminology is required. Social value is a complex concept (Pearson & Sullivan 1995: 155), which has been variously used to refer to some or all of the following: community identity; attachment to place; symbolic value; spiritual associations; social capital; recreation; and education. The terminology varies considerably across heritage instruments, policy documents and research reports. In addition to 'social value' (e.g. ICOMOS Australia 1999 [1979], Article 1.2; Johnston 1994), overlapping concepts include, 'social asset' (HS 2011) 'communal value' (English Heritage 2008), 'community value' (Pearson & Sullivan 1995), 'heritage community value' (Council of Europe 2005 & 2009), and 'social significance' (Bryne *et al.* 2003). All are used to invoke aspects of what is described here as social value.
- 1.6 For the purposes of this report, social value is defined as a collective attachment to place that embodies meanings and values that are important to a community or communities (Johnston 1994: 10). The concept is used here to encompass the ways in which the historic environment provides a basis for identity, distinctiveness, belonging, and social interaction. It also accommodates forms of memory, oral history, symbolism, spiritual association and cultural practice associated with the historic environment. It is recognised that social value often intersects with significance of the historic environment with respect to the regeneration, sustainability, leisure and tourism. However, these dimensions of heritage, which are more readily subjected to measurement and quantification, are beyond the scope of this report. Instead, it deals with the qualitative relationships between people and their pasts and the value that accrues through these relationships.

## 2. Background: the treatment of social value in heritage charters and policies

- 2.1. A concern with the values that underpin cultural significance is fundamental to heritage conservation today (Avrami *et al.* 2000; Bell 1997: 6; de la Torre & Mason 2002: 3). However, whilst aspects of what we now call social value were alluded to in nineteenth-century conservation debates, it is only in the second half of the twentieth century that it emerged as an explicit component of conservation policy and practice. This section briefly charts the place of social value in the international heritage conservation instruments (charters, conventions and recommendations) produced by organisations like ICOMOS, UNESCO, and the Council of Europe. It then examines how social value features in current policies and practices in the UK, specifically those of national heritage bodies.
- 2.2. The modern conservation movement is usually traced back to nineteenth-century debates about restoration (Bell 1997: 7; Wells 2007). John Ruskin's ideas resulted in an appreciation of the historic and aesthetic value of historic buildings and monuments, particularly those of the Gothic style. Whilst opposing the extensive restoration fashionable at the time, Ruskin highlighted the importance of material fabric and the patina of age. At the same time he emphasised the intangible living spirit of historic buildings and monuments, as well as the sense of historical witness or "voicefulness" felt in the presence of "walls that have long been washed with the passing waves of humanity" (1849: 233-4).
- 2.3. Ruskin's arguments in favour of conservative preservation of the original fabric based on its historic and aesthetic value proved incredibly influential. They were consolidated by his friend and collaborator William Morris in the *Manifesto* of the Society for the Protection of Ancient Buildings (SPAB) (1877) and have been perpetuated in subsequent conservation instruments through the principles of preservation as found, minimal intervention, reversibility and readability (see Bell 1997). Morris and SPAB also saw conservation as a means to keep traditional craftsmanship alive and provide access to the benefits of modern design in an industrial age. During the early twentieth century such social dimensions remained important; for example, in the *Recommendations of the Madrid Conference* there was a concern with "living monuments" that had a continued purpose in society (Locke 1904: 343-346). However, the social, spiritual, and other ephemeral values expressed by notions such as "voicefulness" were soon to take a back seat.
- 2.4. The Athens Charter (*Athens Charter for the Restoration of Ancient Monuments*, 1931) placed particular emphasis upon the preservation of historical and aesthetic qualities deemed to be inherent in the physical fabric of structures. Considerable emphasis was placed on the use of scientific analysis and solutions to ensure preservation of original, 'genuine' fabric for future generations (Bell 1997: 8). As Byrne *et al.* (2003: 74) point out, the Athens Charter attributes an important role to the public in conservation, but largely as a source of support for the a professional conservation ethic, rather than as a source of values which themselves might be worth taking into account.
- 2.5. The canonical *Venice Charter* (1964) further reinforced a concern with the historical and aesthetic value of original fabric, stating that the purpose of conserving monuments was to "safeguard them no less as works of art than as historical evidence" (article 3). All courses of practical action were methodically and rigorously laid out in relation to these values with further weight given to scientific methods. Despite a growing post-War awareness of the benefits of the historic environment to society, Bell (1997: 9) notes that there is little evidence of this

awareness in the document. The social value of the historic environment is implied in the overall aim of safeguarding historic monuments for future generations, but it plays little role in the specific criteria and technical processes outlined in the Charter. This marginalisation of the intangible and social dimensions of cultural heritage became part of an international consensus, as the *Venice Charter* provided a foundational reference point for subsequent charters and was given concrete form in national documents guiding heritage conservation (Jokilehto 1998: 239).

- 2.6. The concern with the conservation of original fabric at the heart of this international consensus was further reinforced in UNESCO's *Convention Concerning the Protection of the World Cultural and Natural Heritage* (1972). In Article 1 "outstanding universal value" is defined in terms of history, art and science. Nomination for World Heritage status required a scrupulous test for authenticity, which was deemed to be located in material fabric rather than intangible social and cultural associations and practices. Furthermore, the Convention values the integrity and rarity of material and architectural forms above all else and through its emphasis on the "Outstanding Universal Value", it asserts a form of universalism that has been subsequently challenged (Byrne 1991; Choay 2001; Smith 2006).
- 2.7. From the mid-1970s onwards, the emotional and social value of the historic environment started to re-emerge. The *Amsterdam Charter* (Council of Europe 1975: *preamble*) emphasised the relevance of the past to contemporary life (Article 1), and stated that "architectural heritage is a capital of irreplaceable spiritual, cultural, social and economic value" (see Article 3). It was also framed by a language and passion reminiscent of Ruskin and Morris (Bell 1997: 9) referring to the importance of "atmosphere" (Article 1) and "instinctive feeling" (see Article 2). There is also evidence of a more instrumental concern with social value in Article 4, which states, "the structure of historic centres and sites is conducive to a harmonious social balance". Educational value is also stressed (Article 5) and urban architectural heritage is presented as an economic asset that can save resources (Article 3).
- 2.8. ICOMOS specialist charters and declarations also started to give greater weight to social, economic and educational values. The *Declaration of Dresden on the Reconstruction of Monuments Destroyed by War* (ICOMOS 1982a) introduces "spiritual" (Articles 1 & 9) and "symbolic" values (Articles 7). The *Tlaxcala Declaration on the Revitalization of Small Settlements* (1982b) emphasises collective memory and community wellbeing, asserting that historic small settlements "personify the community relations which give inhabitants an identity" (Article 1). However, as many commentators have observed, whilst social, economic and educational values appeared as part of the rationale for conservation they had little impact on the practice of conservation, which remained tied to the foundational principles of the Athens and Venice Charters (see Smith 2006). It was a charter developed and adapted by a national ICOMOS committee that was to prove internationally influential in terms of bringing social value to the fore, namely the Australian *Burra Charter*.
- 2.9. The *Charter for the Conservation of Places of Cultural Significance* was first adopted by the Australia ICOMOS Committee in 1979 and was subsequently revised in 1981, 1988, and 1999. The *Burra Charter*, as it is widely known, placed the assessment of cultural significance at the heart of the conservation process on the basis that: "places of cultural significance enrich people's lives, often providing a deep and inspirational sense of connection to community and landscape and to lived experiences" (ICOMOS Australia 1999 [1979]: 1). Cultural significance is defined as the sum of a set of interlocking values including aesthetic, historic,

scientific, social or spiritual value for past, present or future generations (Article 1.2). Social value, defined in the Charter's *Guidelines* as "the qualities for which a place has become a focus of spiritual, political, national or other cultural sentiment", is thus placed on an equal footing, in theory at least, with historic, aesthetic and scientific value (*ibid.*: 12).

- 2.10. Some have argued that the *Burra Charter* continues to be strongly influenced by the *Venice Charter* in certain crucial respects. For instance, it takes a "cautious" approach to physical intervention in existing fabric, which looks to change "as much as necessary but as little as possible" (Article 3.1). There is also debate about the extent to which the *Burra Charter* really challenges the traditional emphasis on material fabric in its recognition of social and spiritual dimensions. Article 1.2 states that cultural significance is embodied in the place itself, "in its fabric", but also in its "setting, use, associations, meanings, records, related places and related objects" (Article 1.2). However, Waterton *et al.* (2006: 348) argue that the concept of fabric used in the *Charter* still "assumes cultural significance is inherently fixed within, thus becoming physically manifested and subject to conservation, management and other technical practices". Notwithstanding the persistence of a traditional emphasis on fabric, the *Burra Charter*, in its revised 1999 form in particular, marks a point of departure in its recognition of social and spiritual values as distinct value categories. The reference to meanings, taken to "denote what a place signifies, indicates, evokes or expresses" (Article 1.16), is also an important *recognition* of the more intangible aspects of significance. Likewise the revised Charter introduced a new emphasis on the participation of people for whom a place has special associations and meanings, or communities who have social and spiritual responsibilities (Article 12).
- 2.11. As a product of the Australian national ICOMOS Committee, the *Burra Charter* is intended to set standards of practice for those involved in conserving places of cultural significance in Australia. It has been strongly influenced, especially in its later revisions, by indigenous heritage issues, and the ways in which Australian Aboriginal places of significance challenge long-standing European conservation principles and their emphasis on tangible historic structures. However, the *Charter* has proved extremely influential in shaping international conservation policy even if its impact on practice is less far-reaching. Its influence has been greatest in terms of significance assessment and conservation planning, often referred to as the '*Burra Charter process*'. Article 6 of the *Charter* states that, "The aim of conservation is to retain the cultural significance of a place". Understanding cultural significance is therefore an essential first step in managing and conserving a place (Article 26.2 and chart on p.10). Only after gathering and recording information relating to cultural significance, assessing it and preparing a statement on it, can a conservation policy (or plan) be developed and the place conserved and managed.
- 2.12. This principle is now widely accepted and central to a number of charters and conventions. Of particular relevance to the UK is the *European Landscape Convention* (Florence Convention) (Council of Europe 2000), which promotes the protection, management and planning of European landscapes and organises European co-operation on landscape issues. The Convention stresses contemporary *perceptions* through its very definition of landscape as "an area, as perceived by people, whose character is the result of the action and interaction of natural and/or human factors". It also emphasises *value* (including social and economic aspects) in terms of the need "to assess the landscapes thus identified, taking into account the particular values assigned to them by the interested parties and the population concerned" (Article C(b)).

- 2.13. A recent European Convention places the concept of value even more squarely at the heart of heritage policy: *The Council of Europe Framework Convention on the Value of Cultural Heritage for Society* (Faro Convention) (2005). Whilst the Faro Convention has yet to be ratified by the UK, it has nevertheless had some influence on professional debates and heritage initiatives (e.g. English Heritage's Constructive Conservation and Power of Place programmes). Of particular relevance to this Report is the emphasis on the "commonplace heritage of all people" and the focus on "ascribed values rather than on the material or immaterial elements which combine to constitute heritages" (*Faro Convention Explanatory Report*, <http://conventions.coe.int/Treaty/EN/Reports/Html/199.htm>). Furthermore, ascribed values are seen as the product of (self-defined) "heritage communities" extending beyond communities of heritage specialists (*ibid.*).
- 2.14. The centrality of significance or value has also been reinforced by the influential Getty Conservation Institute project, *Research on the Values of Heritage* (1998–2005). As its project leader, Randall Mason (2002: 5), stressed: "Conservation decisions – whether they are concerned with giving a building 'heritage' status, deciding which building to invest in, planning for the future of a historic site, or applying a treatment to a monument—use an articulation of heritage values (often called 'cultural significance') as a reference point". Many national heritage policy frameworks around the world thus place significance at the heart of conservation and UK heritage bodies are no exception, although there is significant variation in how specific values are defined and measured in different arenas.
- 2.15. As noted in English Heritage's *Conservation Principles* (2008), the practice of designating and conserving particular aspects of the historic environment in the UK has developed along parallel paths, trodden by different professional disciplines, often resulting in a lack of common terminology. Furthermore, in recent years both the relevant legislation (in the case of Listed Buildings) and the guidelines associated with that legislation (in the case of Scheduled Monuments) have diverged somewhat in England, Scotland, and other parts of the UK. Here, the main focus will be on the place of significance and value in designation and conservation management, with particular attention to Scotland and England (as a source of comparison).
- 2.16. The assessment of value has arguably been an integral part of the designation process since legislation for this purpose was first introduced to protect ancient monuments in 1882. However, it is only in recent decades that guidelines accompanying the statutory instruments have explicitly elaborated on different kinds of value, and there remains a strong emphasis on the historic value of tangible remains. Under the provisions of the current Ancient Monuments and Archaeological Areas Act 1979, the sole criterion for inclusion in the schedule is national importance: "it is the intrinsic value of the monument to the nation's heritage that is the primary consideration in deciding whether or not a site shall be scheduled and in determining applications for scheduled monument consent" (Historic Scotland 2011: 22; see also Department for Culture, Media and Sport 2013: 4). Importance is established in terms of the inherent capability of the physical remains to contribute to our understanding of the past, based on an assessment of survival, rarity, and contribution to a wider class ('group value'). The quality and extent of surviving documentation, and the monument's potential to connect past and present in the national consciousness, are also factors (see Historic Scotland 2011:73 and Department for Culture, Media and Sport 2013: 10–11 for variations).
- 2.17. In both England and Scotland it is recognised that the evaluation of 'importance' requires an assessment of significance. In the Scottish Guidance on Scheduling the

characteristics relating to ‘Cultural Significance’ are defined in some depth (Historic Scotland 2011: 71-73). The influence of the *Burra Charter* is evident in the priority given to “associative characteristics”, which encompass “more subjective assessments of the associations of the monument, including with current or past aesthetic preferences” (*ibid.*: 72). However, associative characteristics are still closely tied to the fabric and form of a monument. Furthermore, designation as a Scheduled Monument is still dependent on intrinsic historic/evidential value. “Associative” aspects, such as significance in terms of national consciousness, are presented as secondary factors that may be considered “in support of” other factors (*ibid.*: 73).

- 2.18. English Heritage takes a rather different approach to guidance on Scheduling, providing separate guidance documents for different classes of site/monument, each of which builds on a set of common core criteria (Department for Culture, Media and Sport 2013). In keeping with the primary focus on tangible evidence, these guides focus largely on the physical characteristics of the class of monument concerned and the specific ways in which they can contribute to an understanding of the past. Significance is not a prevalent concept in these guides, in contrast to documents like *Conservation Principles* (English Heritage 2008) where a broader approach to significance assessment is developed (see below).
- 2.19. The process of designating historic buildings is entirely separate to scheduling and comes under the Planning (listed Buildings and Conservation Areas) (Scotland) Act 1997 (or the 1990 equivalent for England). The statutory criteria emphasise special architectural or historic interest. The principles for selection also include age and rarity, and close historical association (Historic Scotland 2011: 74-76; Department for Culture, Media and Sport 2010: 4-5). “Setting” is considered to be particularly important in terms of its impact on the character of a building and its architectural or historic interest. Authenticity of fabric and form are also important in evaluating the “special interest” of a building in respect to Listing.
- 2.20. Whilst significance is mentioned, designation as a Listed Building is primarily a test for ‘importance’ and specific heritage values are acknowledged where they are deemed to meet a threshold of importance. As with Scheduling, the range of values recognised is constrained by the legislation with primary focus on fabric and intrinsic historic and architectural value. Close association with nationally important people or events is the only area that allows for more recent socially significant subjective associations, but these must still be of a well-documented historic nature. Moreover, the physical fabric of the building must also be of “some quality and interest” in and of itself (Historic Scotland 2011: 75).
- 2.21. To summarise, whilst designation in the form of both scheduling and listing takes account of significance, the range of values acknowledged are defined by the statutory criteria and directly tied to surviving historic fabric. As noted above, ‘associative’ factors have received increasing attention and are evident in the wider guidelines, but these are still expected to be linked to fabric, often excluding more intangible meanings and values. However, it is widely recognised that once a place has been designated “decisions about its day-to-day management should take account of *all* the values that contribute to its significance” (English Heritage 2008: 27). Moreover, “the significance of a place should influence decisions about its future, whether or not it is has statutory designation.” (*ibid.* 27 and 39).
- 2.22. The ongoing conservation and management of the historic environment (both designated and undesignated) therefore involves a much broader assessment of significance, at least in principle. With this in mind, English Heritage’s *Conservation Principles* (2009), closely mirrored by Cadw’s (2011) version, provides an

integrated framework intended to inform the management of the historic environment in the broadest possible sense. It adopts 'place' as its primary concept to avoid the specialised terminology associated with designations such as 'listed building' and 'scheduled monument', and extend the remit of the document to aspects of the historic environment that do not meet the statutory basis of designation (*ibid.*: 13-14). Whilst the *Scottish Historic Environment Policy* (SHEP) (2011) is arguably more tightly focused on designated sites, it too is intended to set out principles relating to the historic environment in a broad sense. In all these high-level policy documents, the influence of international heritage conservation instruments is palpable.

- 2.23. According to *Conservation Principles* "sustainable management of a place begins with understanding and defining how, why, and to what extent it has cultural and natural heritage values: in sum, its significance" (English Heritage 2008: 14). In essence, once the significance of a heritage place has been appraised it is possible to judge how heritage values are vulnerable to change, to take actions to sustain those values, and to differentiate between conservation options (*ibid.*: 22). As in the case of the *Burra Charter*, significance is understood to be composed of a range of values. In the case of *Conservation Principles*, they are encompassed by the following categories (*ibid.*: 7):
- Evidential value: the potential of a place to yield evidence about past human activity.
  - Historical value: the ways in which past people, events and aspects of life can be connected through a place to the present – historic value tends to be illustrative or associative.
  - Aesthetic value: the ways in which people draw sensory and intellectual stimulation from a place.
  - Communal value: the meanings of a place for the people who relate to it, or for whom it figures in their collective experience or memory.
- 2.24. 'Communal value' is the main category relevant to this report. It encompasses commemorative and symbolic values reflecting the meaning of a place for those who relate to it (war memorials and buildings of symbolic significance are cited as examples) (English Heritage 2008: 31). Spiritual value is also placed within the communal value category, referring to the value emanating from places associated with organised religion, as well as a broader 'spirit of place' (*ibid.*: 32). The third sub-category is social value defined in terms of identity, distinctiveness, social interaction and coherence. Although they may be linked to historical values, places of social value have often acquired significance over time through the resonance of past events in the present, and through communal activities. Furthermore, *Conservation Principles* stresses that in some instances social value may have little connection to historic and aesthetic values, or indeed the physical fabric associated with these latter values (*ibid.*).
- 2.25. The current Scottish Historic Environment Policy also places cultural significance at the heart of heritage conservation: "conservation of any part of Scotland's historic environment should ... be founded on full awareness and consideration of its cultural significance and all phases of its development" (Historic Scotland 2011: 8). The need to understand and assess cultural significance in advance of both designation and conservation management is stressed. Scottish Ministers are expected to ensure that an assessment of significance is provided for all properties in state care, and that all conservation decisions are based on an evaluation of significance (*ibid.*: 51). Since 2000 interim statements of cultural significance have been prepared for Historic Scotland Properties in Care. *Guidance Notes for preparing Statements of Significance for Historic Scotland Properties in Care*

reinforce the principle that "in common with national and international good practice, Historic Scotland uses a broadly based assessment of the heritage values of the sites in its care as a guide to conservation and management activity" (Historic Scotland n.d.; 1).

- 2.26. The *Guidance Notes for preparing Statements of Significance* encompass a wide range of values making up cultural significance, extending well beyond those that conform to designation criteria. Six categories are identified: evidential; historical; architectural and artistic; landscape and aesthetic; natural heritage value; and finally contemporary/use values. This report relates specifically to the latter values, which correlate with social and spiritual significance in the *Burra Charter*, and communal values in *Conservation Principles*. In Historic Scotland's scheme use value and corporate value are also accommodated within this category, but it is social value that is primarily relevant here. As in other national and international documents these are linked to communal and national identities. Religious use and commemorative practices are also associated with this category, along with spirit of place in a wider sense.
- 2.27. Any accommodation of social and communal values also has implications for policies relating to fabric and authenticity. As highlighted in *Conservation Principles*, social values "may relate to an activity that is associated with a place, rather than with its physical fabric. The social value of a place may indeed have no direct relationship to any formal historical or aesthetic values that may be ascribed to it" (English Heritage 2008: 32). Furthermore, "compared with other values, social values tend to be less dependent on the survival of historic fabric" and "may survive replacement of original fabric" (*ibid.*). This is because many aspects of social value, such as memory, symbolism, identity and spirit of place, are ultimately intangible, even though they may in many instances be integrally entwined with the tangible aspects of the historic environment.
- 2.28. There are of course a number of recent international instruments that promote new or modified understandings of authenticity and intangible heritage. The *Declaration of Dresden on the Reconstruction of Monuments Destroyed by War* (ICOMOS 1982a) promotes the reconstruction of monuments destroyed by war based on "spiritual" (Article 1) and "symbolic" values (Article 7) that are deemed to survive the destruction of historic fabric. The *Nara Document on Authenticity* (ICOMOS 1994) also marked a significant shift acknowledging the importance of spiritual associations, feeling and cultural tradition in determining authenticity (Byrne *et al.* 2003; Larsen 1995b: xiii). Importantly, Article 11 emphasises that judgments of value and authenticity cannot be based on fixed criteria and must take the relevant cultural contexts into account. The *Declaration of San Antonio* (ICOMOS 1996) and the *Riga Charter on Authenticity and Historical Reconstruction* (ICCROM-UNESCO 2000), also address authenticity in relation to intangible values. For instance, the *Declaration of San Antonio* states that "intangibles" – such as spiritual meaning, ancestral memory, customs and traditions, religious beliefs – are an "inherent part of the cultural heritage" and that their relationship to "tangible elements...must be carefully identified, evaluated, protected and interpreted".
- 2.29. Whilst the aforementioned instruments attempt to address intangible aspects of heritage in relation to tangible elements, UNESCO has taken a rather different approach with the *Convention for the Safeguarding of Intangible Cultural Heritage* (2003). Under this convention, intangible heritage becomes a focus of conservation in and of itself. It is broadly defined as: "the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognise as part of their cultural heritage" (Article 2).

Furthermore, in contrast to most instruments and policies relating to tangible heritage, the text of the *Convention* and its accompanying guidelines suggest a shift in emphasis from the historical to the present. For instance, it is stressed that "intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups" (Article 2), and that it is "traditional, contemporary and living at the same time" (<http://www.unesco.org/culture/ich/>). Moreover, there is a strong emphasis on contemporary community perceptions of value: "intangible cultural heritage can only be heritage when it is recognised as such by the communities, groups or individuals that create, maintain and transmit it – without their recognition, nobody else can decide for them that a given expression or practice is their heritage" (*ibid.*).

- 2.30. Despite these developments, the relationship between tangible and intangible aspects of heritage remains a source of tension. The link between authenticity and fabric remains strong in many documents that attempt to accommodate intangible aspects (e.g. the *Riga Charter* remains pre-occupied with falsification of historical evidence located in fabric, and the *Nara Document* maintains a strong emphasis on design, materials and substance). Furthermore, despite emphasizing the "the deep-seated interdependence between the intangible cultural heritage and the tangible cultural and natural heritage", the creation of a separate UNESCO Charter for intangible heritage inevitably creates a dichotomy between the tangible and intangible (Munjeri 2004; Smith 2006; Smith and Akagawa 2009). In particular, the intangible aspects of tangible heritage remain peripheral to the *Convention Concerning the Protection of the World Cultural and Natural Heritage* (1972), even though objects, artefacts and cultural spaces associated with intangible heritage are accommodated within the *Convention for the Safeguarding of Intangible Cultural Heritage* (2003). In general, tensions also persist "between the idea of heritage as 'fixed', immutable and focused on 'the past', with that of a mutable heritage centred very much on the present" (Smith and Akagawa 2009).
- 2.31. The Council of Europe's *Faro Convention* (2005) is arguably the most far-reaching attempt to get beyond such a dichotomy in the realm of international instruments. As noted above, the *Convention* promotes a shift in focus away from the elements that constitute heritage to the values that are ascribed to it (*Faro Convention Explanatory Report*, <http://conventions.coe.int/Treaty/EN/Reports/Html/199.htm>). It can be characterised as a 'functional' or 'instrumental' framework in that it advocates measuring the value of cultural heritage by the effectiveness of its contribution to everyday life, as much as its more intrinsic historical and scientific value. Yet in taking this approach the *Convention* pays particular attention to the interactive nature of both tangible and intangible cultural heritage, "recognising that it is defined and redefined by human actions and that it must not be perceived as either static or immutable" (*ibid.*).
- 2.32. The ICOMOS *Quebec Declaration on the Preservation of the Spirit of Place* (2008) is an even more radical document, although lacking the power of a Convention where the latter's signatories are concerned. Produced by the 16<sup>th</sup> ICOMOS General Assembly it is based on the principle that the tangible and intangible aspects of heritage are fundamentally inter-related and mutually constitute one another. Furthermore:

the spirit of place is constructed by various social actors, its architects and managers as well as its users, who all contribute actively and concurrently to giving it meaning. Considered as a relational concept, spirit of place takes on a plural and dynamic character, capable of possessing multiple meanings and

singularities, of changing through time, and of belonging to different groups. (ICOMOS 2008, Preamble)

- 2.33. Whilst such international instruments have had limited impact on heritage legislation, or even broader conservation principles, in the UK, they have stimulated debate and circumscribed initiatives. For instance, through its Scotland Committee, the UK National Commission for UNESCO (UKNC) has set up an initiative to document Scotland's intangible heritage through a Wiki inventory ([http://www.unesco.org.uk/documenting\\_intangible\\_cultural\\_heritage\\_%28ich%29\\_in\\_scotland](http://www.unesco.org.uk/documenting_intangible_cultural_heritage_%28ich%29_in_scotland)); an initiative directly influenced by the UNESCO *Convention for the Safeguarding of Intangible Cultural Heritage*. In another example, the *Quebec Declaration* was the catalyst for the *Norwich Accord*, produced by the ICOMOS UK Tourism Committee. Focusing on 3 English medieval cathedral cities it involved an exploration of the "links between the tangible and intangible heritage in terms of the association of people to the spaces and places they experience as visitors". In the resulting *Accord* conservation is conceived as a dynamic process involving an on-going interaction between the tangible and intangible heritage (para 1). Significance is also seen as a subjective quality fundamentally embedded in the relationship between people and places (para 2).
- 2.34. To conclude this section, the centrality of cultural significance assessment in heritage management marks an important shift in international heritage instruments, which is also evident in national policies/guidelines. In particular, it has been accompanied by a new emphasis on the value of heritage places for contemporary communities in terms of identity, memory, sense of place, and sensory and spiritual experience. Yet a continuing emphasis on tangible heritage and historic value constrains where and how such values are addressed.
- 2.35. The legislation underpinning designation in the UK places considerable emphasis on authenticity of historic fabric, alongside historic and architectural value. Thus while social value is receiving increasing weight in relation to broad principles of heritage management, it necessarily has a secondary place in the designation of monuments and buildings (and in approaches to scheduled monument and listed building consent). There are ongoing debates about how aspects of the historic environment that do not meet the requirements for national designation, but which nevertheless have considerable social value, might be recognised and/or protected. However, whilst regional and local planning mechanisms, such as Local Listing, offer possible avenues, they are currently implemented in an uneven fashion and often poorly resourced in a harsh public funding climate.
- 2.36. Perhaps more importantly, there is very little guidance or consensus in UK national heritage bodies about how to ascertain social value (i.e. communal value or contemporary/use value). Recent documents are unequivocal about the need to understand cultural significance prior to designation and/or conservation. The relevant heritage values must be considered to provide a firm basis for management. Major gaps and limitations must be identified and research initiated where necessary. Only then can heritage values be related to the fabric of place and its associated context, collections, and so forth, such that balanced and proportionate decisions can be taken about how to manage and conserve a place. The problem is that identifying who values a place and why they do so is not straightforward (English Heritage 2008: 36).
- 2.37. Certainly the expectations regarding public participation in identifying and assessing landscape significance outlined in the 2008 *Guidelines for the Implementation of the European Landscape Convention* seem a far cry from the current situation in the UK. This assessment process is understood as a complex

"dialectical comparison between analyses by experts and the values attached by the population to landscape" (Council of Europe 2008: II.2.3.A). It is worth quoting at length the thinking behind this statement, many aspects of which will be at the heart of the ensuing discussion in this report:

[D]ifferent systems of "values" and "non-values" exist that may be well-entrenched or still in the process of definition; these value systems (universal, specific to national cultures, to local cultures, to each individual's culture) belong to both scholarly culture and to popular culture: they are qualitative and not quantifiable and some of them are sometimes mutually opposed. The concept of participation involves taking into account the social perception of landscape and popular aspirations in choices regarding landscape protection, management and planning. In this sense, the concept of landscape proposed by the convention implies an exercise in democracy whereby differences are accepted, common characteristics found and operational compromises eventually reached; these represent an alternative to the drawing up by experts of hierarchical classifications of landscape qualities (*ibid.*).

### 3. Social value and the historic environment: research review

- 3.1 There has been a wide range of research that highlights the social meanings and values produced through the historic environment. It encompasses different disciplines – sociology, anthropology, archaeology and heritage studies – and different geographic and cultural contexts. Some studies focus on comparative analysis and synthesis, whilst other research offers detailed case studies of specific communities or aspects of the historic environment. Finally, some research represents purely academic concerns, whereas other work directly addresses issues relating to heritage management and conservation, including research that has been grant-aided or commissioned by heritage organisations.
- 3.2 In the interests of identifying the key findings, the following synthesis will cross-cut this wide-ranging literature and will not differentiate between different kinds of research. Studies commissioned and grant-aided by heritage organisations will be integrated with other research, although it should be noted that this research will come to the fore in section 4 which focuses on the implications for the conservation and management of the historic environment. There is an additional body of recent literature that focuses on the identification and critique of what has been called the “authorised heritage discourse” (Smith 2006). This discourse has been shown to frame professional policy and practice relating to the historic environment (Byrne 2009; Pendlebury 2009; Smith 2006; Waterton & Smith 2009). In what follows, this literature will not be a focus in and of itself, but again will be integrated into the discussion where relevant to social value.
- 3.3 As will be discussed below, contemporary social values and meanings are often intangible, or indirectly related to the physical fabric of historic places. Moreover, qualities such as a sense of place, identity and memory, are actively produced and negotiated within the historic environment through a range of social and cultural practices. Consequently, these aspects cannot simply be identified or measured by traditional means, which have tended to concentrate on the intrinsic qualities and integrity of historic objects and structures. A growing number of scholars have therefore adopted qualitative and participatory research methods, derived from sociology and anthropology, to investigate social value. These methods involve the use of participant observation and qualitative interviews in conjunction with other forms of evidence, such as oral history and archival documents, in order to reveal the deep meanings and attachments that underpin aspects of social value.
- 3.4 The use of qualitative research methods to assess social value is most prevalent in non-Western heritage contexts. Primarily, studies have focused on the unequal power relations that underpin the interpretation and management of heritage and tourism within postcolonial contexts (e.g. Andrews 2012; Meskell 2012; Winter 2007). Particular social and political contexts have informed these research agendas; for instance, in Australia and New Zealand active indigenous minorities have shaped research on cultural heritage management by voicing conflicting beliefs about the cultural significance of particular heritage places (e.g. Baird 2013; Byrne *et al.* 2003; Harrison 2004; Harrison & Williamson 2004). Non-Western ethnographic examples have also been drawn upon as counterpoints to Western models of heritage management and practice. For instance, detailed ethnographic studies of Buddhist monuments have stressed the importance of dismantling and renovating ritual monuments and have been invoked as counterpoints to Western models that have traditionally focused upon the maintenance and preservation of tangible materials (e.g. Byrne 1995; Karlström 2005, 2009). Nevertheless, as will be discussed below, ethnographic and sociological research in European contexts has also highlighted the significance of the historic environment in terms of communal

identities, sense of place, spiritual attachments, social capital and well-being (e.g. Bender 1998; Dicks 2000; Herzfeld 1991; Jones 2004; Macdonald 1997a; McClanahan 2004, 2006; Smith 2006; Yalouri 2001).

- 3.5 There has been a considerable body of research investigating the meanings produced and negotiated in relation to the historic environment. This demonstrates that contemporary meanings are by no means restricted to the official histories surrounding monuments. The ways in which communities come to understand historic places may be rooted in oral narratives, folktales, spiritual associations, and everyday practices, which often sit outside official narratives and at times can even be incommensurate with them (Bender 1998; Loh 2011; Macdonald 1997a; Riley *et al.* 2005; Robertson 2009). For instance, Orange's (2011) recent ethnography at Cornish Mining World Heritage Sites, examined local residents' attachments to the landscape and their "sense of place" in relation to the historic environment. Rather than place weight on authorised histories, some residents expressed a sense of belonging "in terms of the everyday aspects of life in the place", for example, through regular encounters with neighbours (*ibid.*: 108-9). Furthermore, others, particularly those born in Cornwall, emphasised the importance of connections between their own personal biographies and the land, as well as additional associations to Cornish ethnic and national identities (*ibid.*: 109). Barbara Bender's (1998) study of Stonehenge provides insight into a rather different community relationship, revealing how contemporary pagan meanings attached to the monument are produced through a range of oral histories, site-based practices and alternative textual narratives (see also Blain & Wallis 2012). Historic monuments and places can also provide a locus for powerful symbolic and metaphorical meanings that inform people's experience of the world, particularly relationships to place and forms of displacement and disenfranchisement (Jones 2004: 27). Recent research demonstrates that such forms of contemporary meaning emerge in specific cultural contexts, and are embedded in social relationships, providing a basis for the negotiation of identities and power relations. As such they are fluid and dynamic aspects of the fabric of social life (see below).
- 3.6 It is widely acknowledged that the historic environment plays an important role in relation to community and national identities, but less attention is devoted in heritage policy to the complexities and nuances of these relationships. Communal identities are predicated upon categories of sameness and difference that create group boundaries (Cohen 1985), and research has shown that the historic environment plays an important role, informing perceptions of belonging and difference. This is evident in relation to broader collective identities such as nationality, ethnicity and class, as well as local community identities (see Dicks 2000; Peralta & Anico 2009; Smith 2006; Watson 2011). The historic environment is often used to differentiate, producing a 'distinctive' sense of identity and attachment to place that can be elevated above that of others (see Jones 2004; Loulanski & Loulanski 2011). In order to establish and negotiate these identities, communities participate in a range of social performances and practices at heritage sites (Byrne *et al.* 2003: 67; Smith & Waterton 2009). For example, community identities and histories can be established and reaffirmed through the construction, designation and maintenance of memorial sites (MacLean & Myers 2003; Stephens 2013). However, as with meaning, the relationships between identities and the historic environment are complex and fluid, rendering the identification of stakeholder groups or community relationships difficult from the outside (Brint 2001; Jones 2004; McClanahan 2007; Simpson 2008; Waterton & Smith 2010).
- 3.7 The attachment of meaning and identity to a specific locality is integral to the production of a 'sense of place' (Johnston 1994: 10). There is a large body of research exploring the notion of a sense of place, including a number of

commissioned studies by heritage organisations (English Heritage 2000; Gathorne-Hardy 2004; Graham *et al.* 2009). However, in relation to the social value of the historic environment, sense of place has predominantly been approached in an experiential manner (see Graham *et al.* 2009 for an overview; Schofield & Szymanski 2011). This involves an attempt to acknowledge and characterise the qualities and “spirit”, which places hold for individuals and communities (Casey 1996; ICOMOS 2008). For example, in Waterton’s (2005) study of the Northumberland National Park, locally determined values amounting to a particular sense of place were often fore-grounded by the community, over and above nationally recognised heritage values. Multiple notions of place can be produced in relation to any particular aspect of the historic environment and this means that relationships to place can be the focus of multiple claims making them a potential source of tension and conflict (Opp 2011; Waterton 2005: 317; and see below).

- 3.8 Performance and practice play an important role in the establishment of social value at heritage sites (e.g. Bagnall 2003; DeSilvey 2010; Smith & Waterton 2009). These may include: community festivals; ritual and ceremonial activities; everyday practices; recreation and leisure; memorial events; and “mark-making” (Frederick 2009: 210) performances such as graffiti, which inscribe a sense of place. Moreover, these practices and performances are often mediated through various forms of embodied and sensory experience. Recent scholarly work has highlighted the extent to which visual modes of perception are privileged in the management, representation and experience of heritage sites (Karlsson & Gustafsson 2006: 140; Watson & Waterton 2010). Nevertheless, other sensory modes such as sound (O’Connor 2011), smell (Boswell 2008) and touch (Pye 2008) are also important aspects of the historic environment. In particular, touch offers a potent means of establishing real and imagined connections to people and places in the past and in the present (Chatterjee 2008; Jones 2010a: 199). This is evident in Emma Waterton’s (2011) study of working class heritage in the Potteries in Staffordshire, England. Through a range of participant observations and visitor interviews at Gladstone Pottery Museum, Waterton (*ibid.*: 360) identifies a “sensually-charged” heritage, in which emotional responses and a sense of place are produced through embodied experiences, such as touch. For example, the handling of particular objects associated with the region, and its historic production of ceramics, facilitated feelings of belonging and identity (*ibid.*: 352-3). Waterton (2011: 354) argues that this amounts to an embodied form of thinking, which is particularly appropriate for an understanding of industrial heritage, where the toils of the labouring body often take centre stage. In contrast, O’Connor (2011) highlights the importance of the acoustic dimensions of culturally significant heritage places in Australia, and suggests that these should be foregrounded in heritage assessment practices.
- 3.9 Religious structures and architecture have long been the focus of conservation movements. Controversies surrounding the treatment of medieval churches and cathedrals were at the heart of 19<sup>th</sup> century debates surrounding the restoration and preservation of the historic environment (Pendlebury 2009; Wells 2007). However, more recently, there has been moves to capture the “spirit” of historic places and community attachments to them, which is supported by a range of international heritage instruments such, as the *Nara Document* (ICOMOS 1994) and *Quebec Declaration* (ICOMOS 2008). Spiritual attachments may be cultivated through encounters with designated places of worship and the ritual practices that surround them (Stovel *et al.* 2005). However, they have also been documented in relation to ritual or religious sites that may lack obvious spiritual value. For example, “sacred trees” and stone circles central to indigenous practices and traditions, as well as vernacular and unorthodox religious sites such as “holy wells” and “mass rocks” (Jonuks 2012; Karlström 2009: 126; O’Brien 2008; Pearson &

Sullivan 1995: 30). Within an Irish context, for example, O'Brien (2008) has shown that historic holy wells are the focus of ongoing spiritual attachment through which complex and heterogeneous identities are integrated and reconciled. Seemingly secular sites can also be the focus of a general and ineffable "spirit of place" that can emerge through an encounter with both tangible and intangible aspects of the historic environment (Jones 2005b; Opp 2011; Turgeon 2009).

- 3.10 Social memory plays an important role in framing contemporary understandings of the past. It can be understood as the "mediated action of remembering [and forgetting], which itself is a process engaged with the working out and creation of meaning" (Smith 2006: 59). Such "memory practices" are a form of heritage work, but they rarely conform to linear chronologies and historical frameworks in a straightforward fashion. Instead, social memory usually consists of a dynamic collection of fragmented stories that revolve around family histories, events, myths, and community places (Jones 2010b: 119-120; Smith 2006). These stories are continually reworked in everyday contexts where they are passed within and between generations.
- 3.11 Such memory practices can be illustrated by UK-based studies, which demonstrate the role of generational continuity in the establishment of layers of social memory that in turn, generate deep community attachments to places (e.g. Jones 2010b; Waterton 2005). For instance, in a Scottish Gaelic-speaking context, Robertson (2009: 159) highlights the intangible qualities of the concept *àite dachaidh* ('place of my home' or habitat). It refers to fluid oral narratives – such as litanies of names, places and the *loci* of particular events – that wend their way through community life in the production of Gaelic identities and a sense of place within the Outer Hebrides (see also Macdonald 1997a; Robertson 2009: 158-159). Other research has focused on the highly contested forms of social memory surrounding the Highland Clearances (c.1780-1850). A range of texts (Basu 1997; Macdonald 1997a), oral histories (Richards 2000), stories (Basu 1997, 2012), and objects (Gouriévidis 2010), mediate difficult community narratives surrounding the Clearances. Historical sites, such as the ruins of abandoned settlements, can also act as "memory-props" in the negotiation of these histories, producing a sense of loss and displacement amongst local and diasporic communities (Basu 2007, 2012; Jones 2010b; Robertson 2009; Withers 1996, 2005). Furthermore, as Jones (2010b) demonstrates, social memory relating to the Clearances can also be used to establish connections between Clearance memorials and seemingly unrelated historical objects, as is the case in the metaphorical relationships drawn between the Duke of Sutherland memorial (1837) and the Hilton of Cadboll cross-slab (c. ninth century AD).
- 3.12 Relationships between the historic environment and the construction of contemporary meaning, identity, place and memory contribute to various forms of attachment and belonging that are often conflated with concepts of ownership. However, for contemporary communities, a sense of ownership often takes a subtly different form than the nineteenth-century conceptions of cultural/national property that heritage conservation and management are rooted in (Carman 2005; Jones 2005a). In many cases, the privileged relationships that communities claim over particular historic objects and places are based upon perceived notions of genealogy or cultural continuity (Bender 1998; Poullos 2011; Waterton 2005). These give rise to feelings of inalienable belonging that are often rooted in a sense of connection with past communities and the materiality of place (Macdonald 1997a; Dicks 2000; Jones 2005b). A sense of belonging emerges through practices and encounters, which situate people and objects in relation to particular places. Furthermore, where communities have experienced a sense of dislocation or

relocation through migration, a sense of belonging and ownership is often intensified (Bender 2001; Bender & Winer 2001; Jones 2005a, 2005b).

- 3.13 Studies have shown that historic monuments, buildings and places are often subject to multiple claims by various stakeholders and community groups resulting in sites of conflict (e.g. Bruce & Creighton 2006; Herzfeld 1991; Yalouri 2001). In part, this may be due to the diverse range of social values that communities invest in places, as well as the nature of identity construction, which involves forms of differentiation and exclusion, as well as inclusion and belonging (Meskell 2002: 566). This has led some to argue that cultural heritage is, by its nature, "contested" and "dissonant" (Tunbridge & Ashworth 1996; Silverman 2011), and indeed that conflict is a sign of a vibrant engagement with the historic environment (Ucko 2000). Tensions arise between different groups where a number of competing claims, underpinned by a range of social values, are made to the same site. In this context, historic sites can become conduits for various competing political, religious, ethnic, national and professional agendas. However, some of the most commonplace forms of contested ownership in the UK take the form of tensions between national and local claims relating to ownership, conservation, management and interpretation. Such conflicts tend to surface when the policies and practices surrounding designated heritage sites fail to recognise, or conflict with, local meanings, memories and forms of identity, leading to more oppositional claims by local communities (e.g. see Jones 2004).
- 3.14 Disagreements over whose values are represented and how sites should be managed are often complex and difficult to negotiate. This is particularly evident when the purpose or meaning of historic monuments has radically changed in the course of their history. For instance, the Great Mosque in Córdoba was reused as a cathedral for the Catholic majority following the expulsion of Muslim groups from Spain in the late fifteenth century. However, a new wave of Muslim migrants has recently claimed the historic Mosque as a site of worship (Ruggles 2011). Both communities are able to demonstrate historical links and a sense of spiritual continuity and/or attachment. In such cases, competing social values may be irreconcilable or at least resistant to reconciliation. Controversial historical and political legacies also present complex heritage management issues. For example, the former Maze/Long Kesh prison site in Northern Ireland has been subject to competing claims over its interpretation and future management (Graham & McDowell 2007; McAttackney 2008). Some Republican groups wish to preserve the site as a heritage centre, whereas Unionist communities and the Northern Ireland Prison Officers Association would prefer the site to be "bulldozed" (Graham & McDowell 2007: 359).
- 3.15 The dynamic and changing nature of the social values produced through the historic environment has been a prominent feature of recent studies. Byrne *et al.* (2003: 58) maintain that social meanings and the communities that produce them are often transient and contested. They argue that contemporary communities actively rework and reproduce the materiality and meaning of the historical landscape through the active negotiation of identities, as well as social and generational memories (Byrne *et al.* 2003: 58-59; see also DeSilvey 2010; Jones 2010b). For example, in his study of former leper asylums in Singapore, Loh (2011: 239) suggests that "cultures of heritage", by which he refers to the discourses surrounding stakeholder meanings and values, are "themselves fluid and likely to evolve over time like the memories on which they are based". However, it should also be noted that despite the fluid nature of community values, they are sometimes rooted in a sense of continuity and stability. For example, the "Save Penwith Moors" campaign surfaced when the National Trust made plans to reintroduce cattle grazing within a landscape containing many interspersed ancient

and historic monuments. Local communities felt that transforming the landscape in this way would threaten their sense of "spiritual connection" to the place that is established through an experience of the "wild" and "undomesticated" character of the landscape (DeSilvey & Naylor 2011: 13-14).

- 3.16 There is a growing body of research that focuses on forms of "unofficial" or "counter" heritage that crystallise around undesignated and unacknowledged monuments, buildings and places. Whilst such historic places have significant social value, they are not subject to forms of official conservation, management and interpretation, often because they are only considered to be of minor or negligible historical significance. Rodney Harrison's (2004, 2010) research with members of the Muruwari community at undesignated abandoned settlements on the Dennawan reserve in New South Wales reveals that contact with these remains evokes social memories and spiritual connections (Harrison 2010: 255). Despite lacking "official" heritage recognition, oral histories, family ties and spiritual associations generate a highly significant sense of place (*ibid.*: 258-9). Such forms of heritage are by no means restricted to indigenous or local/descendent communities. The role of graffiti and "guerrilla art" in the production of meaning, value and a sense of place in urban contexts provides a contrasting example of such unofficial forms of heritage (see Avery 2009; Harris 2011). Likewise, Bradley Garrett's (2011, 2013) ethnographic research into urban exploration practices reveals how discovery, documentation and exploration of derelict buildings facilitate the production of a sense of place, allowing those involved to forge an intimate connection to aspects of the historic environment that have been neglected by the heritage industry. Jones (2004) ethnographic research in the village of Hilton of Cadboll provides many other examples of undesignated heritage that is highly significant in local contexts, including: historic wells; beauty spots; areas associated with former recreation and leisure activities; a coastal cave where people marked their names before emigrating.
- 3.17 The forms of value attached to the historic environment by ethnic minority communities have also been neglected until relatively recently when they have formed a significant component of political discourses on inclusion (Crang & Tolka-Kelly 2010; Pendlebury *et al.* 2004). Research has shown that both the forms of social value attached to the historic monument by minority groups, and the sites and monuments that are of significance to such groups, have been marginalised or neglected in heritage conservation and management. For example, in England, a series of commissioned studies, such as *Power of Place* (English Heritage 2000) and *People and Places* (Department for Culture, Media and Sport 2002), highlighted how people of African, Afro-Caribbean and Asian descent feel underrepresented and alienated within national heritage agendas, and in turn indifferent to many officially designated sites and places. Research, such as Gard'ner's (2004) study of the significance of the Brick Lane area to the Bangalee community, reveals a strong sense of place and belonging connected to various memorial, religious and historic sites within the landscape. However, few of these are recognised by national heritage bodies and, until recently, routine heritage assessments failed to identify the social significance and value attributed to these places (Gard'ner 2004).
- 3.18 Nevertheless, research has shown that unofficial forms of black and ethnic minority heritage are produced through a range of practices, which act as counter-points to authorised forms of heritage (Harrison 2011; Smith 2006). For example, Bressey (2009) outlines a number of local history and community archive projects that have sought to illuminate the black presence in official British histories. Furthermore, Harrison (2011: 93-4) examines the ways in which some local minority communities in the UK have engaged with "formal heritage practices, such

as walking tours and bus tours, to develop alternate histories of place" (see also Martin 2005: 175; cf. Hayden 1995: 54-55). Harrison cites the example of Jay Brown, who runs a Black Heritage walking tour of Brixton, exploring its distinctive British African Caribbean heritage. He argues that by "walking the streets and speaking to visitors and locals she is actively engaged in a process of building new histories and new narrative trails through the landscape", resulting in a renewed sense of place for members of the local community (Harrison 2011: 93-4).

- 3.19 Some have argued that these issues are compounded by resistance to minority values within "authorised" discourses, which are structured around the production and maintenance of normative heritage values privileging white middle class histories (Bressey 2009; Jones 2005b; Naidoo 2005; Smith 2009: 34-6). Recent research suggests that labour heritage within the UK (and elsewhere) also tends to sit outside of officially recognised places and practices (Dicks 2000, 2008; Markwell *et al.* 2004; Reeves *et al.* 2011; Waterton 2011; Watson 2011). However, as with ethnic minority groups, this body of research also demonstrates a strong desire to commemorate and negotiate working class heritage and identities (see Smith *et al.* 2011). For example, Smith & Campbell (2011) reveal the ways in which heritage, memory and class, informed by the legacy of trade union movements in Castleford, an ex-mining town, are drawn upon to create a sense of place and to negotiate turbulent economic and cultural shifts in the contemporary environment.
- 3.20 Whilst the absence of active conservation and management has significant implications for such "unofficial" heritage places and practices, forms of designation, such as listing and scheduling, can also have a significant impact upon social value. Recent research has explored how these processes impact on people's encounters with familiar and valued historic places (e.g. Bell 2011; Teather & Chow 2003). Designation of World Heritage Sites and the ramifications for local, descendant and/or indigenous communities has received particular attention (Buckley 2004; Hall 2006; McClanahan 2004, 2006; Wang 2011). For instance, Wang's (2011) research reveals that the restriction of daily activities in the courtyards of Pingyao's historic temples following World Heritage designation has had a significant impact on local resident's sense of place and identity. In the UK, research regarding the affects of heritage designation upon post-war housing and modernist architecture (Bell 2011; Pendlebury *et al.* 2009; Tait & While 2009) has provided important insights into how people re-evaluate and negotiate historic places as a result. For example, Pendlebury *et al.* (2009) argue that listing drew greater attention to the Byker Estate in Newcastle-upon-Tyne amongst residents and professionals, shaping the ways in which people understand their homes and community and in particular facilitating the production of positive social values in the face of negative external impressions. At Spa Green housing estate in London, Bell (2011) demonstrates that heritage nomination served to transform everyday lived experience. The new special status of Spa Green as an historic place attracted new residents and mediated existing inhabitants' impressions and experiences of their homes leading to new forms of decoration and curation. Bell argues that, "the moment of listing renders these estates spectacular and severs them from this banal past so that they become heritage available for consumption" (*ibid.*: 239).
- 3.21 A number of studies highlight the issues and tensions that can arise between the conservation of myriad forms of social significance and the conservation and management of historic monuments, buildings and places. Social values often intersect with other values – including historical and aesthetic ones – but in many instances they diverge from one another (Byrne *et al.* 2003). This is often the case with sites that are considered to be "living heritage" or "living religious heritage" (e.g. Miura 2005; Poulios 2011; Stovel *et al.* 2005). For example, Chatzigogas (2005) highlights the difficulties of reconciling "the requirements of faith" at Mount

Athos, with conservation agendas. Byrne (1995) and Karlström's (2009) examinations of Buddhist religious architecture in Southeast Asia, also have similar resonances. Western values that stress the importance of preserving historical material may in certain circumstances obstruct the continuity of social value, as spiritual continuity is often achieved through the destruction, relocation and redistribution of powerful religious artefacts (Byrne 1995).

- 3.22 The relationship between authenticity and social value has been the focus of recent research. Traditionally, it has been seen as an objective and measurable attribute, integral to the physical fabric and 'truthfulness' of historic objects and monuments (Clavir 2002; Pye 2001). However, recent studies have shown that the perception of authenticity is contingent upon the culturally specific meanings and social relationships that are embedded in encounters with heritage sites (Dicks 2000; Holtorf 2005). For instance, Andrews' (2012: 359-361) highlights the various ways in which authentic identities in Bermuda are constructed and negotiated through the contemporary meanings and values associated with maritime heritage practices and places. In a study of the designation of the Vanuatu practice of *sandroing* (sand drawing) as a 'masterpiece of intangible cultural heritage', Alivizatou (2012) also draws attention to social value, stating that "authenticity is not about meeting some predefined criteria...but rather about how local communities understand, engage with and re-appropriate their past" (*ibid.*: 138). Guttormsen & Fageraas (2011) provide further evidence of such processes in their study of Røros, an historic urban landscape and World Heritage site in Norway, which reveals that the management of an "attractive authenticity" lies at the heart of tensions over local social values and a sense of place. In such research authenticity is taken to be a product of broader intangible, social and spiritual meanings, even though these are often linked to the materiality of place (Alivizatou 2012; Domicelj 2009; Karlström 2009). Furthermore, many studies highlight the dynamic and fluid ways in which authenticity is used in the production and negotiation of specific local identities in the present (Dicks 2000; Guttormsen & Fageraas 2011; Jones 2009, 2010a; Macdonald 1997b). As Jones argues, "people use the experience of authenticity in relation to the historic environment to work out genuine or truthful relationships between objects, people, and places for themselves" (2009: 144), often resulting in strong, almost primordial, attachments to place (Jones 2010a: 199-200).
- 3.23 In terms of social value, the biographies of monuments have also been shown to play an extremely important role in the production of meaning, identity, memory, and place (see Hamilakis 1999; Hingley *et al.* 2012; Jones 2006; Stephens 2013). For instance, Hingley *et al.* (2012) present a biography of Hadrian's Wall, which challenges its prevailing classification as a "Roman" monument. The work highlights the shifting meanings attributed to the structure over time, suggesting that whilst early stages in the lives of monuments are important, presentation should "refer to their long and varied biographies, not just to the purpose and conception of their original builders" (*ibid.*: 770). The ways in which the biographies of people and things become entangled with one another is intrinsic to the production of social value. For instance, Jones' (2004: 41, 2006) ethnographic research surrounding the Hilton of Cadboll cross-slab, highlights the manner in which its complex and fragmented biography is "interwoven in various ways with personal and family histories, and embedded in the oral history and folklore" of local villages. Mutual histories of fragmentation and displacement frame the conception of the monument as a "living" and "breathing" member of the community (Jones 2006). Moreover, such biographies are actively negotiated in the production of contemporary social values. Stephens (2013) study of the biography of the Gallipoli war memorial in Katanning, Australia, reveals decades of tension, mourning, intervention and protest.

## 4. Implications for policy and practice

- 4.1 The historic environment has great value, informing contemporary meaning, identity, sense of place, spiritual attachment and social memory. Accordingly, social value is widely recognised as an aspect of cultural significance in international conservation instruments, national regulatory frameworks and the policies produced by heritage organisations (see section 2). These stress the importance of establishing cultural significance prior to designation and the development of conservation strategies/plans (e.g. ICOMOS Australia 1999 [1979] Article 6.1; Historic Scotland 2011). Research into the social values relating to specific sites should therefore be a preliminary stage in any conservation process.
- 4.2 Whilst the need for an assessment of social value is already recognised, it is still eclipsed in most cases by historic, scientific and aesthetic values, because the means of evaluating the latter are long established (Bell 1997: 17; de la Torre & Mason 2002: 3-4). Indeed social value is still often defined in terms of an academic interpretation of significance, rather than "any of the benefits which the population might be able to gain from the 'cultural heritage' by and for themselves" (Bell 1997: 14). Much depends on the judgments and insights of individual heritage professionals. To achieve a more systematic and thorough understanding of social value this historical imbalance needs redressing (see Byrne *et al.* 2003: 133; Johnston 1994).
- 4.3 In many instances, social values and meanings may prove difficult to access. Some insight can often be gained through the use of written sources such as local history volumes, folklore and newspaper reports. However, the deeper symbolic and metaphorical meanings that underpin social value, and have a powerful impact on identity, memory and sense of place, are unlikely to be identified in this way. Studies have shown that qualitative and participatory research methods can produce a better understanding of these aspects (e.g. Jackson 2006; Jones 2004; McClanahan 2004; Waterton 2011). However, at present, their application is not widespread in heritage management (Gibson 2009: 74), and there is a strong case for more extensive use in routine practice (Graham *et al.* 2009: 30; Taplin *et al.* 2002: 80). There are knock-on implications in terms of expertise and resources (Byrne *et al.* 2003), but models have been developed for use in heritage contexts (see section 5).
- 4.4 Social values and meanings may have historical dimensions, but these are by no means always commensurate with historical value, particularly as defined by heritage professionals (Byrne *et al.* 2003). Indeed places that are deemed to be of relatively minor historical value may be extremely important in terms of oral history, memory, spiritual attachment and symbolic meaning (e.g. Harvey 2010; Jones 2004; O'Brien 2008; Schofield 2005). This is particularly pertinent in the case of ethnic minorities, working class and other communities who may feel underrepresented by national heritage agendas, and indifferent to many officially designated sites and places. There is then a strong case for a more rigorous assessment of social value, as distinct from historical value, even though the two may intersect.
- 4.5 Biographies of historic buildings, monuments and places play an active role in the production and negotiation of people's identity, memory and sense of place. Whilst early phases in the life of a site may be important, attention to social value also often highlights the significance of very recent meanings, memories and practices (Hingley *et al.* 2012; Jones 2006; Stephens 2013). This challenges the persistent emphasis on earlier phases, particularly in respect to physical fabric, and suggests

that the significance of the entire life of a site must be considered. Just as with historical and aesthetic value, not all phases will be of equal weight in terms of social value.

- 4.6 Aspects of social value, such as symbolic meaning, memory, and spiritual attachment, may not be directly linked to the physical fabric of a historic building, monument or place. As Johnston (1994: 10) states, "meanings may not be obvious in the fabric of the place, and may not be apparent to the disinterested observer". Indeed, they may not even be subject to overt expression within communities, remaining latent in daily practices and long-term associations with place (see Jones 2004; O'Brien 2008; Orange 2011: 108-109). Qualitative research is therefore essential to access such aspects of social value (see section 4.3), which are unlikely to come to light through more superficial consultation processes.
- 4.7 Perceptions of authenticity are an important aspect of social value. Authenticity is rooted in specific regimes of meaning, which vary in different cultural contexts (e.g. Larsen 1995a; Stanley-Price & King 2009). Moreover, authenticity is not simply embedded in physical fabric, but is also a product of wider aspects of setting and cultural/spiritual significance (ICOMOS 1994; Karlström 2009; UNESCO 2006). Indeed Jones (2009, 2010a) has argued that the experience of authenticity is a product of the networks of relationships between people and places, past and present, which are sustained through the historic environment. To maintain the experience of authenticity, greater attention needs to be accorded to these elements alongside material aspects.
- 4.8 Social value is often rooted in specific forms of practice and engagement. These can include everyday practices, forms of recreation, graffiti and others means of marking place, public events, ceremonial activities and festivals. Local or 'unofficial' heritage practices may produce great social value in the absence of any officially recognised historic value (e.g. Avery 2009; Cox 2008; Garrett 2011; Harrison 2010). They may also rely on various forms of sensory engagement. Visual perception has been granted a privileged role in the way sites are presented and experienced, but as discussed in section 3, other forms of sensory engagement are also important. Touch can be especially important in terms of facilitating a sense of connection between people and places in the past and the present. Multiple forms of access and interpretation are therefore often required to maintain social value. Whilst this is already recognised in CHM, problems remain where forms of engagement conflict with the protection and preservation of physical fabric.
- 4.9 Contemporary communities can claim privileged relationships with specific historic buildings, monuments and places. Such claims are usually based on feelings of inalienable belonging rooted in a sense of identity, continuity, and/or place (see Jones 2005a; Carman 2005; Waterton 2005). If these perceived relationships are dislocated, an important aspect of the social value of the historic environment is undermined. Forms of shared custodianship offer an interesting way forward that will be discussed in section 5. These can actively support community identities and social well-being (Byrne *et al.* 2003: 143), whilst also facilitating and distributing conservation of the historic environment.
- 4.10 Communities are actively constructed and their boundaries are based upon categories of sameness and difference - between those who are perceived to belong and those who do not. The historic environment often informs these processes, acting as a conduit for the negotiation of identities and memories through the construction of relationships to past communities (see Smith 2006: 48; Smith & Waterton 2009: 45). As a result, heritage sites can become sites of conflict between and within communities, with multiple claims to the same historic

places (e.g. Bruce & Creighton 2006; Silverman 2011; Yalouri 2001). Identification of representative 'stakeholder' communities in such complex social environments can be problematic and alternative approaches may be necessary (Mason 2002: 17).

- 4.11 Inevitably, failure to accommodate social value in the assessment of significance and any ensuing designation, conservation and presentation of the historic environment can lead to friction and in some instances outright protest. Social value can have a powerful impact and often inform the mobilisation of communities in defense of place. Furthermore, in contexts of perceived threat communities can become "outcome driven" producing new forms of oppositional value (Byrne *et al.* 2003). Knowledge and understanding can contribute towards a more holistic approach to conservation of the historic environment. It can also help anticipate and mitigate potential conflicts over values.
- 4.12 Whilst social value may intersect with all other values – including historical, aesthetic and economic ones – it may not be commensurate with them. Furthermore, forms of engagement that are central to social value may not align in a straightforward manner with conventional approaches to physical preservation. Social value therefore needs to be weighed up against other forms of value and the physical condition of the site. Conservation interventions, such as removal of carved stone to museums, the use of glass structures, and the management of visitor access, actively mediate social value and can, at times, be detrimental to it. It is therefore important to consider whether managed forms of deterioration are acceptable on the basis of maintaining social value (Jones 2006; Walderhaug Saetersdal 2000).
- 4.13 Change is recognised as an inevitable feature of the historic environment. Indeed, the active management of change is one of the key elements in the current Scottish *Historic Environment Policy Review*. Social meanings and values, and the communities that produce them, are often fluid, transient and contested (DeSilvey & Naylor 2011: 13-14; Loh 2011: 239-241; Robertson 2009). In this sense the dynamic nature of social values and their at times elusive and intangible qualities, often sit in stark contrast to other forms of value that have traditionally been seen as more intrinsic and therefore more stable over time (although recent studies have shown them to be equally dynamic). More regular cycles of review and assessment, and more flexible modes of response, are needed to fully address social value. Furthermore, designation and conservation themselves constitute forms of change, which can shape people's identities and reconfigure their encounters within familiar historic landscapes (e.g. Bell 2011; Teather & Chow 2003). Where possible the consequences of these, and other forms of change need to be considered.

## 5. Addressing Social Value: Methods and Approaches

- 5.1. Many of the implications of recent research on social value summarised in the previous section will be familiar to heritage professionals whose roles involve direct contact with various community 'stakeholders'. These professionals might include monument conservation unit staff, monument wardens, and heritage managers involved in designation, casework and assessment of cultural significance. Those based at monuments such as site custodians or visitor services staff can also acquire a wealth of knowledge about the social meanings and values attached to particular monuments, buildings and places. However, such knowledge and understanding tends to be acquired and deployed on an *ad hoc* basis and much depends on the individuals concerned. Despite important exceptions, on the whole, existing structures and resources do not facilitate a more systematic assessment of social value by such individuals.
- 5.2. Cultural significance assessment is one arena where there is already an attempt to evaluate social value alongside other kinds of value. In the designation of scheduled monuments the guidelines for assessing significance place social value mainly in the domain of 'associative value'. Whereas in the interim statements of cultural significance produced for properties in care, social and spiritual values are addressed as distinct categories. Nevertheless, in many cases there has been insufficient research into the social value of specific sites to provide anything more than a very partial characterisation. The assessments are therefore necessarily brief and anecdotal. Furthermore, as noted in the introduction, social value is often conflated with historical value, or simply refers to public events, activities, folklore, and so forth. Certain mechanisms for addressing social value are thus in place, in theory, but in practice, the level of existing knowledge and understanding is often inadequate to the task. This predicament is by no means peculiar to Scotland and elsewhere in the UK. As the Department of Environment, Climate Change and Water, New South Wales (2010: v), stresses in *Cultural Landscapes: a practical guide for park management*, research into social values is almost always a requirement prior to development of management plans, because existing knowledge is insufficient to support planning and decision making at a "landscape scale".
- 5.3. One relatively simple step to improving the assessment of social value is to produce guidelines for those involved, drawing on existing research and practice. These might consist of published technical guidelines or internal guidance. Such guidelines could identify the range of different aspects of social value that should be considered, as well as possible sources and methods of investigation (*cf.* Department of Environment, Climate Change and Water, New South Wales 2010). They could also set criteria for identifying at what point further research into social value is necessary; just as archaeological research might be commissioned prior to the development of a conservation strategy, research into social value might be appropriate in some cases. Finally, it was noted in the previous section that social value is not always commensurate with, and indeed can run counter to, other values, such as historic, scientific and aesthetic ones. Guidance might also be improved on how to weigh up competing values that suggest divergent conservation strategies, although ultimately this will need to be resolved on a case-by-case basis.
- 5.4. In terms of the investigation of social value, there is a strong case for the introduction of new forms of expertise and methodologies alongside existing ones. Traditionally, conservation of the historic environment has been based on archaeological, historical, architectural, scientific and craft expertise. Whilst these

forms of expertise are crucial, they do not lend themselves automatically to an understanding of social value, which would benefit from sociological or anthropological knowledge and understanding. In countries where social and spiritual values have been foregrounded over a number of decades (e.g. Australia and the U.S.), it has been found that this kind of expertise is important. Often this involves both heritage professionals who have acquired this kind of expertise, and the use of consultants or contractors who are ethnographically trained.

- 5.5. As emphasised in the previous section, social value is a product of manifold forms of practice, engagement, meaning, and memory, which are unlikely to be obvious in the fabric of a place or readily apparent to the outside observer. Consultation alone has not proved particularly effective in terms of assessing social value, partly because it is generally used for communication and resolution, and partly because it favours those community members with particular forms of cultural capital and communication skills. As a result specific methodologies need to be employed to gain a greater understanding of social value. Various methods have been used including analysis of archival documents and historic photographs, individual and group interviews, oral and life histories, activity mapping, collaborative site visits (with community representatives), participant observation, and focus groups. The use of such methodologies to record forms of social value and meaning that are inherently dynamic inevitably creates a snapshot of a particular landscape and requires regular review and revision. Nevertheless, it would create a much more sophisticated body of knowledge to make informed choices about the conservation and management of the historic environment.
- 5.6. One the best examples of existing practice is the U.S. National Parks Service "Park Ethnography Program", which employs ethnographic and qualitative research methods to inform park planning, management and interpretation. It is a means of identifying social values that may not be apparent to outsiders and incorporating them into the management process (National Parks Service 1998). Also in a U.S context, a method of Rapid Ethnographic Assessment has been developed to address a manager's need to make informed choices about alternative courses of action in the context of the National Environmental Policy Act (NEPA). Rapid Ethnographic Assessment is usually carried out by researchers with ethnographic training and involves a battery of methods including focus groups, transect walks, and community mapping (see Taplin *et al.* 2002). It is not regarded as a substitute for more in-depth research, but it does provide a level of knowledge and understanding within resource constraints. Jackson (2006) provides examples of the application of such methods exploring the forms of social value produced at former slave plantation sites within US National Parks.
- 5.7. Australia has also been at the vanguard of developing new approaches to social value in the heritage sector. For instance, the National Parks and Wildlife Service in New South Wales, has developed a successful suite of methodologies for identifying and recording contemporary meanings and memories. Over the past decade, these have focused on "mapping" attachments and social values in relation to the historic environment through work with both indigenous and non-indigenous communities (Byrne & Nugent 2004; Department of Environment, Climate Change and Water, New South Wales 2010; English 2002; Harrison 2004, 2011). Such mapping involves the integration of archival evidence, such as maps and aerial photographs, with other qualitative research methods such as place-based oral history interviews, site walks with community members, and audio-visual recordings (see Harrison 2011). For example, Byrne & Nugent (2004) encouraged participating members of the community to mark their memories, movements, and practices on maps during interviews and field visits. This data set was then used to create composite digital data sets using GIS, allowing intangible heritage to be recorded

in a tangible form. In New South Wales, this is encouraged within routine heritage assessments and practices, as it provides particularly useful and clear information about frequently complex issues and values for developers, landowners, heritage planners and the community stakeholders concerned (Department of Environment, Climate Change and Water, New South Wales 2010; Harrison 2004, 2011). This information can be used to make more informed choices about the management of the historic environment. Furthermore, it offers a means to identify social values prior to the designation and scheduling of historic sites, as well as integrating them during the heritage planning process (as required by the *Burra Charter* (ICOMOS Australia 1999 [1979]).

- 5.8. So far, we have considered ways in which social value can be more effectively addressed within the professional heritage management domain. However, another important area of development is the increasing use of community-led initiatives. These can focus on community-led identification and recording of social values, community-led designation, as well as forms of community custodianship and active community-led conservation. Community-led initiatives tend to focus on non-designated sites although there are also examples of shared custodianship and conservation partnerships between community groups and heritage organisations. Such schemes are usually initiated and promoted by one or more heritage organisations, and involve various forms of guidance, support and/or training. Examples of different kinds of initiative include: the *Adopt a Monument Scheme*, managed by Archaeology Scotland with the support of Historic Scotland; *Scotland's Rural Past*, led by the RCAHMS; English Heritage's *Good Practice Guide for Local Heritage Listing* (2012); and Heritage Victoria's *Protecting Local Heritage Places: a national guide for local government and the community* (2009).
- 5.9. An emerging distinction between professional-led assessment of significance in the domain of designated sites and relatively new community-led initiatives in relation to non-designated heritage is worthy of consideration. Whilst it is perhaps an inevitable distinction relating to levels of significance, nationally and internationally significant sites are of course also of local and regional significance. In some countries, for instance Australia, specific communities have been encouraged to participate in the designation of nationally significant sites (e.g. *Nominating Places to the National Heritage List: a guide for indigenous communities*, Australian Heritage Council 2012). Another dimension relating to designation is the question of whether the existing criteria gives sufficient weight to social and spiritual values, alongside historical value.
- 5.10. Community-led initiatives often appeal when there is pressure on the economic resources available for the historic environment and/or when political policies favour the transfer of resources and assets to local communities. However, it is important to consider the advantages and disadvantages of community-led initiatives, independent of these issues. One of the main advantages is that they encourage members of communities to identify historic places that are of value to them, and support communities in maintaining connections and taking custodianship. In this respect community values are intrinsic to such schemes, but at the same time they often still privilege traditional historic values as the basis for identification and conservation. Consideration of social value is given very little weight in most of the current guidance provided to communities in the UK. There is great potential for the development of community-led mapping of contemporary social values and forms of memory, as English (2002: 61) argues for the Australian context. However, although community-led initiatives may seem resource efficient, it is important that they have appropriate levels of support, training and guidance if they are to be effective and systematic in their coverage (*ibid.*). Finally, whilst in principle community-led initiatives empower communities it needs to be recognised

that they can privilege those with particular kinds of cultural capital, often with higher levels of education, rather than disenfranchised communities. Thus, strategies need to be in place to counter forms of social exclusion that might characterise such initiatives.

- 5.11. The most productive approach to addressing social value more effectively arguably lies in forms of collaborative work involving both professionals and members of relevant communities. There is already considerable interaction and collaboration between professionals and stakeholders in respect to conserving and managing the historic environment in the UK. However, this rarely extends to the investigation of social values, at least not in any systematic sense in the context of routine heritage management. Excellent models exist for collaborative recording of social value where professionals and community members work alongside one another. In particular the Australian models of collaborative mapping through interviews, field visits and memory work discussed above would be a fruitful avenue to explore (see section 5.7). The routine application of such methodologies could contribute to a much more holistic model for managing heritage objects, places and landscapes for their historical, scientific, aesthetic, spiritual *and* social values.
- 5.12. Finally there are specific forms of conservation and kinds of technology that have been identified in relation to addressing social value. New information and communication technologies can support the social production of heritage (Giaccardi & Palen 2008). The use of technologies such as GPS and GIS can be used to record and integrate tangible material traces with intangible beliefs, stories, and other forms of cultural knowledge to create "multi-vocal, textured representations" of historic places (Harrison 2011). Wiki technologies and participatory GIS can facilitate community-led identification of heritage places as well as intangible aspects of heritage (for instance the *ICH in Scotland Wiki Inventory* (see section 2.33) or the *Britain from Above* web site (<http://www.britainfromabove.org.uk>), launched by English Heritage and the Royal Commissions on the Ancient and Historical Monuments of Scotland and Wales, which encourages people to share memories). There are also models of conservation practice, such as managed deterioration and 'palliative care' (see DeSilvey 2011, 2012), which may be used to address severe conservation problems, but which also might be employed to maintain important forms of social and spiritual value that would be harmed or destroyed by more proactive or aggressive kinds of conservation.

## 6 Conclusions

- 6.1 In the history of western conservation an intrinsic sense of worth has been attached to historic monuments and buildings as both historical documents and works of art. By the mid-twentieth century this was firmly entrenched in international heritage instruments like the *Venice Charter* (1964), which established a consensus based on a moral duty of care. Such frameworks were imbued with a sense of universalism and the values attributed to the historic environment were taken to be 'given' or intrinsic characteristics that simply required appropriate recognition and preservation (Avrami *et al.* 2000: 69; Smith 2006: 91). However, during the later twentieth century these universalising assumptions underpinning the heritage sector were undermined. As in other areas academic critiques revealed the culturally constructed nature of values (e.g. Byrne 1995; Lowenthal 1986). Furthermore, non-western heritage organisations and indigenous groups questioned the imposition of Western values, and in response international heritage instruments attempted to accommodate culturally specific notions of authenticity and value (e.g. the Nara Document 1994 and the Burra Charter 1999 [1979]). The latter document introduced the concept of social value as an apparently equal category of value, alongside historic, aesthetic and scientific value, and as a group the four categories are seen to constitute the 'cultural significance' of an historic place (*cf.* Throsby's (2001) components of cultural value).
- 6.2 Despite a growing recognition of the importance of social value, it has proven difficult to give full consideration to this aspect of cultural significance within routine heritage management and conservation. The legislation underpinning designation in the UK places considerable emphasis on authenticity of historic fabric, alongside historic and architectural value. Thus, whilst social value is receiving increasing weight in relation to broad principles of heritage management, it necessarily has a secondary place in the designation of monuments and buildings. Furthermore, there is currently an insufficient knowledge and understanding of the social value of many sites to provide more than a very partial assessment, often based on anecdotal references to contemporary public events. Constraints and demands on the resources and forms of expertise available within heritage organisations often mitigate against the active investigation of social value in the context of routine conservation and management. Traditional forms of value, in particular historical and architectural value, also continue to prevail in the context of significance assessment, such that social value is often conflated with them, rather than treated as a definitive category in its own right (Byrne *et al.* 2003; Gibson 2009: 74). More broadly, wider tensions between the respective roles of professionals and stakeholders have at times unhelpfully become associated with attention to the social value of the historic environment.
- 6.3 These shifts in the values underpinning heritage management and conservation have created a number of philosophical and practical issues. A sense of the intrinsic aesthetic and historical value of heritage remains and contemporary social value has often been treated as a culturally relative and/or instrumental form of value. This creates a hierarchy of value when many would argue that the other forms of value are also a product of particular cultural and historical contexts (e.g. see Smith 2006). Social value is also a focus of competing political and economic agendas ranging from the desire to accommodate minority forms of heritage, to the need to demonstrate the benefit of heritage to society in a difficult financial environment, where the allocation of funding is informed by cost-benefit analysis (O'Brien 2010).

6.4 This project has attempted to draw together a significant body of qualitative cross-disciplinary research to produce what O'Brien (2010: 41-42) has called a narrative account of value. Stemming from heritage studies, cultural geography, anthropology, sociology and archaeology, this research offers a more sophisticated and nuanced understanding of the dynamic role of the historic environment in the production of meaning, memory, identity and sense of place. The synthesis contained in this report highlights that:

- Contemporary meanings are by no means restricted to the official histories. The ways in which communities come to understand historic places may be rooted in oral narratives, folktales, spiritual associations, and everyday practices, which often sit outside official narratives and at times can even be incommensurate with them.
- Communal identities are predicated upon categories of sameness and difference that create group boundaries. Research has shown that the historic environment plays an important role in the construction of boundaries, informing perceptions of belonging and difference. This is evident in relation to broader collective identities such as nationality, ethnicity and class, as well as local community identities.
- Performances and practices play an important role in the establishment of social value at heritage sites. These may include: community festivals; ritual and ceremonial activities; everyday practices; recreation and leisure; memorial events; and 'mark-making' performances, such as graffiti. Moreover, these practices and performances are often mediated through various forms of embodied and sensory experience.
- Social memory plays an important role in framing contemporary understandings of the past, but it rarely conforms to conventional linear chronologies. Instead, social memory consists of a dynamic collection of fragmented stories that revolve around family histories, events, myths, and community places. These stories are continually reworked in everyday contexts where they are passed within and between generations.
- Studies have shown that historic monuments, buildings and places are often subject to multiple claims by various stakeholders and community groups resulting in sites of conflict. Disagreements over whose values are represented and how heritage places should be managed are often complex and difficult to negotiate. This is because contemporary communities actively rework the materiality and meaning of the historical landscape in the negotiation of identity and memory.
- There is a growing body of research that focuses on forms of 'unofficial' or 'counter' heritage that crystallise around undesignated and unacknowledged monuments, buildings and places. Whilst such historic places have significant social value, they are not subject to forms of official conservation, management and interpretation, often because they are only considered to be of minor or negligible historical significance

6.5 The research project has also highlighted a number of important implications for heritage policy and practice. Social values and meanings may have historical dimensions, but these are by no means always commensurate with historical value, particularly as defined by heritage professionals. Places that are deemed to be of relatively minor historical value may be extremely important in terms of oral history, memory, spiritual attachment and symbolic meaning, particularly in the case of ethnic minorities, working class and other communities who may feel underrepresented by national heritage agendas. Furthermore, aspects of social value, such as symbolic meaning, memory, and spiritual attachment, may not be directly linked to the physical fabric of a historic building, monument or place. Indeed, they may not even be subject to overt expression within communities,

remaining latent in daily practices and long-term associations with place. It is therefore extremely important that effective methodologies are used to investigate the forms of social value surrounding specific heritage places.

- 6.6 This project suggests that it is in the arena of methodology that greatest diversity and disagreement prevails. A range of approaches to social value have emerged, informed by different definitions, questions and methodologies, creating great complexity and a good degree of confusion. In terms of heritage management and conservation, expert judgement and scientific research are still the main mechanisms for understanding and narrating value. Occasionally sociological and anthropological methods are applied to understanding social value, but these are more commonplace in the context of indigenous heritage and are rarely employed in the UK. Instead, forms of quantitative or economic assessment have proliferated, which attempt to measure people's attitudes and preferences to the historic environment, as well as its impact on their wellbeing (see Maeer & Killick 2013 for a very useful synthesis). Examples include, English Heritage's *Power of Place* (2000); regular surveys and reports in *Heritage Counts*; and the application of contingent valuation to specific sites (e.g. Willis 1994). Whilst these have their place given the economic realities the heritage sector faces, they are frequently limited in their scope and risk creating an impoverished understanding of the role of the historic environment in people's lives.
- 6.7 This report makes a strong case for the use of qualitative research to create rigorous narrative accounts of social value. A range of methods are applicable including analysis of archival documents and historic photographs, individual and group interviews, oral and life histories, activity mapping, collaborative site visits (with community representatives), participant observation, and focus groups. The use of such methodologies to record forms of social value and meaning that are inherently dynamic inevitably creates a snapshot of a particular landscape and requires regular review and revision. Nevertheless, they could contribute to a more sophisticated body of knowledge to make informed choices about the conservation and management of the historic environment. Many of these qualitative methodologies are also capable of capturing the dynamic processes of *valuing* the historic environment associated with modes of embodied experience and practice, reducing the risk of objectifying types of value.
- 6.8 The most productive approach to addressing social value more effectively arguably lies in forms of collaborative work involving both professionals and members of relevant communities. Good models exist for collaborative recording of social value where professionals and community members work alongside one another. In particular the Australian models of collaborative mapping through interviews, field visits and memory work discussed in section 5 would be a fruitful avenue to explore. The routine application of such methodologies could contribute to a much more holistic model for managing heritage objects, places and landscapes, taking into account their historical, scientific, aesthetic, spiritual *and* social values. Finally, the use of technologies such as GPS and GIS can be used to record and integrate tangible material traces with intangible beliefs, stories, and other forms of cultural knowledge to provide more in-depth, multi-layered evidence of the values associated with particular places.
- 6.9 The complex issues facing the heritage sector with regard to value intersect with wider issues raised by the Cultural Value Project. The dynamic, iterative, embodied nature of people's relationships with heritage, and the value that is created through these relationships, has been highlighted. Furthermore, it has been shown that practice and experience provide the locus for the creation of meaning in relation to the historic environment. However, there is a tension between the need for greater

understanding of these processes within the heritage sector, and the increasing demands that the benefits of heritage to society be evidenced. Further work is necessary in this area to overcome the tensions between qualitative attempts to articulate the dynamic forms of social value created through experience, and quantitative approaches that seek to define types of value that can be measured and tracked. Otherwise, the pressures that direct resources towards evidencing value through cost-benefit type analysis, risk undermining the very benefits they seek to secure.

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## Appendix 1: Valuing the Historic Environment Workshop Report

### Introduction

This report provides a summary of the *Valuing the Historic Environment Workshop*, which took place at the University of Manchester on 26<sup>th</sup> November 2013. The workshop provided a platform for participants from the heritage and academic sectors to discuss issues surrounding current approaches to social value. This was framed by wider discussion of a value-led approach to the historic environment. 'Social value' was broadly defined in terms of the significance of the historic environment to contemporary communities, encompassing people's sense of identity, distinctiveness, belonging and place, as well as forms of memory and spiritual association.

### Workshop Aims and Objectives

The aim of the workshop was to bring representatives of partner organizations together with others working in the field to discuss a range of issues relating to valuing the historic environment:

- (i) conceptual and theoretical issues relating to current research on social value and the historic environment
- (ii) existing methodologies for evidencing social value in this sphere
- (iii) the implications for the conservation and management of heritage sites

### Workshop structure

The workshop agenda was established in consultation with the project partners: The Council for British Archaeology; English Heritage; Historic Scotland; and The Royal Commission on the Ancient and Historical Monuments of Scotland. Consultation meetings between the principal investigator and individual representatives from the partner organisations identified areas of interest and concern with regards to social value, which in-turn informed the structure of the event.

In total, 13 delegates participated in the workshop. These were drawn from a broad cross-section of the heritage sector, including the National Trust for Scotland and the HLF, as well as the four project partners. In addition, there were a number of academics, an independent heritage consultant and a member of the new Historic Environment Policy Unit of the Scottish Government. Participants included investigators from two other AHRC Cultural Value projects, which provided the basis for some fruitful cross-fertilization. *NB Participants contributed in an individual capacity rather than as representatives of the organizations they work for. Therefore the views expressed in this report do not necessarily reflect the positions of the organizations listed to above.*

The workshop consisted of four thematic sessions, each framed by informal presentations from project partners, intended to raise issues for discussion, with reference to case examples and professional practice. These presentations were interspersed with in-depth round table discussion and breakout groups. For a list of participants see Appendix 1

### Workshop participants

Robin Turner, Royal Commission on the Ancient and Historic Monuments of Scotland  
Judith Anderson, Historic Scotland  
Luke Wormald, Historic Environment Policy Unit, Scottish Government  
Mike Heyworth, Council For British Archaeology  
Keith Emerick, English Heritage  
Siân Jones, University of Manchester

Steven Leech, University of Manchester  
Rachel Hasted, Heritage Consultant  
Nicholas Meny, National Trust for Scotland  
Gareth Maeer, Heritage Lottery Fund  
Gill Chitty, University of York  
Abi Gilmour, University of Manchester  
Rob McCombe, University of Manchester  
Helen Graham, University of Leeds

NB The views summarized in this report represent those of the individual participants not the organizations they work for.

## **Proceedings**

### ***Workshop Introduction***

The workshop began with an introduction from Siân Jones (University of Manchester). The centrality of a value-based approach in the heritage sector was highlighted, alongside recognized issues associated with the accommodation of social value within heritage management contexts. It was suggested that despite a growing influence in policy contexts, social value is perhaps less evident in heritage practice (designation, conservation, management, interpretation) for a number of reasons. Several issues were outlined: the prevalence of a hierarchy of value that still privileges other kinds of value (such as architectural, historical and evidential); distinctions between intrinsic and instrumental forms of value; difficulties of weighing up different kinds of value against one another; and difficulties in identifying, capturing and measuring social value. Drawing from her own research in Scotland, she raised a number of questions for consideration:

- How is social value defined and approached in the heritage sector? How is it dealt with in different frameworks and agendas?
- To what extent is social value treated as a more superficial or 'instrumental' value in contrast with more 'intrinsic' values?
- What kinds of methodologies are currently applied to assessing and measuring social value and how might these be developed?
- How are different forms of value weighed up against each other in practice?
- Contemporary social values are often dynamic, contested and at times incommensurable with each other? What strategies are there for dealing with this complexity and fluidity?
- Is an emphasis on the identification of values conceptually problematic in regard to more fluid contemporary forms of engagement? Would a focus on processes of *valuing* the historic environment associated with modes of embodied experience and practice be more appropriate?

### ***Session 1: Valuing the historic environment – issues and problems***

This session encompassed a wide range of issues relating to a values-led approach to conserving and managing the historic environment. This included how value is articulated and defined in different areas of the heritage sector, as well as how value (or 'benefit') is measured and demonstrated in the context of public policy.

### **Framing presentations: key points**

The first session began with three short presentations from Robin Turner (Royal Commission on the Ancient and Historic Monuments of Scotland), Luke Wormald (Historic Environment Policy Unit, Scottish Government) and Gareth Maeer (Heritage

Lottery Fund). The speakers introduced areas in which the concept of value is mobilized and negotiated in the context of heritage management, historic environment policy and legislation, and grant funding. Value has been central to recent heritage reviews and reform in the UK. The speakers emphasized that (prospective) changes and developments within heritage bodies have provided an opportunity to reflect upon the delivery of values in relation to the historic environment. Key points:

- The commonplace distinction between 'intrinsic' and 'instrumental' values was identified as a problematic area in need of further discussion.
- All three speakers alluded to a distinction between 'values' and 'benefits' and asked whether it is a helpful distinction? 'Benefit' was acknowledged to be particularly important in the language of current public policy and funding.
- It was suggested that it might be useful to think of 'values' as dynamic and irreducible aspects of how people experience the historic environment, whereas 'benefits' could be seen as measurable outcomes that flow from this meaningful encounter. This approach has been adopted by the HLF (following the Cultural Value Framework developed by Holden and Hewison) and participants were encouraged to reflect on its utility.
- Speakers also asked, whether the historic environment can be thought of as a 'high-level benefit' that enhances 'quality of life' and also contributes to wider governmental targets and agendas focused upon well-being and sustainable development. Indeed, is this desirable?
- Finally, they raised the thorny question of how we define values that are difficult to articulate and/or contested within heritage management and policy framework contexts?

### **Round table discussions: key points organized thematically**

#### *'Benefits' and 'values':*

- Value appears to be treated differently within various spheres. For example, there is less emphasis on benefits in a conservation context where values are identified in order to manage change in relation to specific aspects of the historic environment. The concept of benefit is prominent within arenas that respond to government policies and agendas, which frequently seek measurable outcomes.
- Nevertheless, the notion of 'public benefit' is increasingly important in routine heritage management in terms of facilitating sustainable development. In practice, the public benefit of development needs to be weighed up against the significance and value of heritage sites and objects. There is a pressing need therefore, to demonstrate the public benefit of the latter in broad social terms (and for some participants this includes the benefits of the historic environment for sustainable economic development).

#### *Intrinsic and instrumental values:*

- Some participants suggested that in practice certain kinds of value are considered to be more intrinsic to heritage objects and places than others. Although there was wide agreement amongst the delegates that all values are culturally situated and socially constituted, there remain contexts in which the historic environment is managed as if certain values are inherent to the fabric of sites.
- Several delegates felt that this was a problem of semantics and that the word 'intrinsic' was not fit for purpose. Alternatives such as 'inherited' value were posed as a means to acknowledge the transmission of value over time. Nevertheless, others highlighted the long-standing traditions of judgment and taste that underpin so-called intrinsic values and authorize their deployment in designation and management contexts. These were suggested to privilege certain kinds of values such as historic, aesthetic and scientific.

#### *Legislation and designation:*

- The question of whether the present heritage designation and planning legislation in the UK is fit for purpose in regard to social value was raised. Some felt that the age of some of the acts and statutes created difficulties with addressing social value effectively in routine designation and management processes.
- However, this was far from a unanimous view. Others argued that both listing and scheduling legislation offers the possibility of designating a site on the basis of social value through associative value. It was suggested that failure to recognize heritage places on the basis of their social values may be derived from the reticence of heritage managers to work with new or unfamiliar value sets

*Communities and the democratization of values:*

- Participants explored whether there are more effective ways of dealing with values in the heritage sector. For example, is there merit in shifting from 'product to process' in which values surrounding the historic environment are negotiated in collaboration with communities, as opposed to seeking value as a knowledge base for professional/expert decision-making processes? Is this a more democratic approach?
- It was noted that such approaches have been put in place elsewhere, such as indigenous and aboriginal heritage management contexts. Whilst these were acknowledged to represent a significant and positive step, a number of caveats were also highlighted. For example, a simple equation of democratic process with equality is likely to overlook the power relations at work within and outside of communities and their relationships to heritage places.
- Nevertheless, there was a general view that the traditional approach in which experts identify the purported intrinsic values of heritage for a general public needs reconsideration. It was felt that experts should play an important role as facilitators and interpreters of heritage. This was seen as particularly important as a means of preventing the privileging of some constituencies and interests and the marginalization of others.

### **Session 2: Social and Communal Values**

This session focused on the nature of social value and its place in managing and conserving the historic environment. There was a notable concentration on the politics of social value in the discussion.

#### **Framing Presentations: key points**

The session began with two short presentations from Keith Emerick (English Heritage) and Mike Heyworth (Council for British Archaeology). Keith Emerick offered insights into the ways in which social and communal values have been negotiated in the context of heritage management practices and during the development of English Heritage's (2008) *Conservation Principles*. He also highlighted a number of key issues relating to international heritage charters, national policy frameworks and specific examples in historic property management. Mike Heyworth used a number of cases to illustrate the complexities of social and communal values in the UK, particularly with regard to undesignated heritage. Topics ranged from the definition of community, the adequacy of methods for recording, identifying and managing social value, to the difficulties of providing equal access and weight to conflicting communal practices and interpretations.

A number of key problems and questions were identified in the opening presentations:

- Notwithstanding their importance, international charters and instruments that foreground social value and significance have failed to address the way in which different values and meanings attached to a place are negotiated.
- Communities of interest can have diverse and opposing views at times. How should such competing values be dealt with in heritage management and conservation?

- There is a need to better understand the role of designation and wider forms of conservation practice in shaping social and community values.
- Both speakers touched on the problems relating to designation on the basis of social value, particularly where there is little or no obvious relationship to the historical fabric.
- Can communal and social value be effectively communicated through traditional forms of documentation, recording and representation (e.g. through the incorporation of a site into the historic environment records)?
- What does it mean to manage and designate sites of a more ephemeral nature? How do you deal with the values surrounding heritage places that are likely to disappear and degrade over a relatively short space of time?
- The values and opinions of experts can come into direct conflict with those of community groups and create distrust. This may also create a sense of disconnection to the historic environment.

### **Breakout groups and general discussion: key questions and debates**

#### *Social value and its relation to intangible/tangible heritage*

- For many participants, social value was strongly associated with intangible experiential aspects of heritage. There was broad agreement that both intangible heritage and social value have increasing prominence in the UK heritage sector. For instance, the new *Scottish Historic Environment Strategy* includes feelings, senses and connections to place in its definition of the historic environment. There is also more attention to sense of place, spiritual value, commemoration and places of communal value. However, it was widely agreed that there is still much resistance to recognizing social value in contexts where there is no clear link to historic fabric.
- There was some debate about how tangible and intangible heritage interrelate. Many of the key examples discussed highlighted the mutually constitutive nature of tangible and intangible heritage.
- The concept of *affordances* was introduced by one breakout group as a means of offering a fresh perspective on tangible and intangible significance. This concept focuses on what kinds of relationships particular historic places afford – e.g. historically, symbolically and materially – instead of what they intrinsically embody. This might offer a means of thinking about the values associated with tangible and intangible heritage in a more nuanced manner.
- Some participants asked whether social values always have to be positive? Contest and conflict are central to people's engagements with heritage and are indicative of a passion and care. Can these be harnessed positively with regards to social value? Do we need a shift from celebration to commemoration to recognize the social value of negative and traumatic experiences?

#### *The politics of value*

- There was much concern about whose values are being represented. Due to the difficulties inherent in defining the constituencies attached to heritage places, there was broad agreement that new methods and approaches are required for engagement and collaboration.
- The desire, or pressure, to create more democratic spaces for debates surrounding the historic environment was also a preoccupation. Models developed in community-led planning were cited as a means to create spaces in which many or multiple voices can be heard.
- It was noted that heritage is at times an arena in which individuals and communities can attempt to influence change in their local environment, often in ways that are not available to them by other means. Requests for designation of historic places in the context of development are often a product of limited alternative mechanisms.

- Expert authority/approval was acknowledged as something that reinforces value, but this can have negative consequences for those whose values are under-represented.
- There was some debate about whether social value is about underrepresented heritage and marginalized or silenced communities. This ties in with a concern that the heritage sector is unrepresentative and should make greater efforts to bring more diverse perspectives into the mainstream of heritage management. Others suggested that this is more about 'missing voices' than social value, though the two are interrelated.

#### *Accommodating social value*

- There was some discussion about how social value might be accommodated within a framework that privileges 'evidence' as a foundation for identification, management and representation of value? What form should evidence for social value take?
- Some suggested that social values could be seen as 'non-expert values', which are more transitory and therefore less reliable as a basis to manage change. Others felt that the distinction between non-expert and expert values is problematic and that a model that recognizes different forms of expertise would be more appropriate.
- Some argued that the concept of 'affordance' discussed above offers a means of accommodating social value. Another break-out group suggested that it might be better to simply focus on the question 'why does this place matter?' rather than attempt to identify discrete values.
- Still others suggested that in relation to social value, heritage professionals would need to take on the role of facilitators rather than experts who define value and regulate change. However, for others this once again raised issues relating to the politics of value and the need for accountability and consistency especially in a planning context.
- Local listing and neighbourhood planning were highlighted as potentially positive developments regarding recognition of social value, but serious concerns were expressed about political commitment to delivering them in the context of austerity.

### **Session 3: Assessing, measuring and communicating social values**

The third session focused on methods for assessing, measuring and communicating social values. During the consultation meetings at the start of the project this had emerged as a key priority, accompanied by a strong sense that social and communal values were difficult to identify, evidence and measure. In the workshop there was a great deal of discussion about the pros and cons of expert versus community-led characterization of social value.

#### **Framing presentations: key points**

As before there were two brief opening presentations, in this session by Judith Anderson (Historic Scotland) and Rachel Hasted (Independent Heritage Consultant). Judith Anderson used the powerful example of Dumbarton Rock to illustrate some of the challenges associated with addressing social value in the context of conservation planning. She recounted how, despite a wide-ranging consideration of its cultural significance, Dumbarton Rock emerged as the focus of a plethora of unanticipated symbolic, social and spiritual values in the face of active conservation. In particular, removal of graffiti from the rock to preserve the historical and aesthetic values of the environment was seen as a threat to social and aesthetic values by the climbing community. Rachel Hasted's presentation focused on the work of English Heritage's Social Inclusion and Equality Unit relating to overlooked and underrepresented heritage. In terms of addressing underrepresented values she explained how EH had taken a

thematic approach focusing on particular topics (eg slavery and the British country house). Other strategies included research with audiences, as well as mapping current research directions and relevant expertise.

Key issues raised by the presentations:

- How do we ensure that a wide range of social values are understood and assessed in the process of conservation planning so that the consequences of particular decisions can be weighed up? Or do social values only crystallize in the context of threat, making it difficult to take a comprehensive view of them in advance?
- Tensions surrounding issues of social value can be harnessed to establish positive, multi-community dialogue. But how do we deal with certain groups who lack the mechanisms and resources to express their dissatisfaction or who refuse to engage?
- Instead of a singular focus upon the notion of 'community', is there potential in reaching out to public history groups and local history experts who are relatively ignored by mainstream heritage institutions?
- How do we develop wider recognition of values that are currently underrepresented in the heritage sector? What strategies should be used to accommodate a wider range of expertise and evidence? What is the role of expertise in this process?

### **Breakout groups and general discussion: key questions and debates**

*The definition and role of expertise:*

- Again the role of expertise was a key concern. Participants debated the extent to which expertise should be seen as the preserve of professionals or academics. It was generally recognized that there are many forms of expertise and these should be accommodated where possible.
- One breakout group suggested that a knowledge base could be created through discussion with communities that could then be used as 'evidence' to inform expert decision-making. Others felt that the role of the 'expert' in the articulation and representation of social value might be best served as a facilitator.
- There was some discussion about whether new kinds of expertise and training are necessary within the heritage sector to deal with social value. There was a general feeling that there is a need, but little consensus about what form this expertise and training should take (ranging from sociological expertise through to community-facilitation). The nature of concrete proposals was in part dependent on whether an expert- or community-led approach is favoured.

*Methods for measuring, capturing and describing social value:*

- There was little discussion of 'measurement', and few references to quantification. If anything, emphasis was placed upon the creation of qualitative accounts describing and evidencing value.
- The issue of robust evidence was raised, particularly in relation to 'public benefit'. Many felt that quantitative evaluation of benefits and qualitative accounts of value should be seen as complementary; addressing different needs and audiences. Particularly in the arenas of wider government policy and funding quantifiable measures of public benefit are important.
- Nevertheless, some participants still questioned the application of quantitative measures in some of the commissioned research. Whilst statistical research is often presented as more rigorous, it was felt that such methods struggle to capture the depth and complexity of people's relationships with the historic environment and the values associated with this.
- Some participants suggested that it was important to get away from checklist approach to value. Rigorous qualitative accounts of social value might start from the question, 'why does this place matter?'

- Participants were optimistic about the potential of online spaces and social media as tools for facilitating social value. For some, new media was one means of promoting a sense of ownership and an active interaction with the historic environment. However, successful examples were often led by particular constituencies (often ones with considerable 'cultural capital') and were spontaneous responses to specific heritage places. There were more reservations about the potential of official online spaces as a means to gather rigorous accounts of social value. The 'representativeness' of such material was queried and therefore its status as 'evidence'.
- There was some discussion about how to involve those who reject institutions of authority and their conventions? Is there a means to engage with those whose values are seen by others to be harmful? If not, is there a limit to the usefulness of social value as a concept in this context?

*Current mechanisms for dealing with social value:*

- There was further debate about the effectiveness of designation as a tool for dealing with social value and reservations were expressed. It is often seen as a tool by specific interest groups who seek to oppose development. However, many people expressed reservations about its appropriateness for dealing with social value. Would it lead to a kind of ossification that undermines the dynamic nature of social value?
- A number of participants noted that local listing is a promising development as regards social value. Inevitably, however, the problem of providing resources for such a programme is a recurrent and thorny issue.
- The question of documentation and archiving was a source of debate. Whilst most participants agreed that all statements of cultural significance should include a section on social value there was considerable ambivalence towards the idea of including accounts of social value (oral histories, community-led narratives, anthropological/sociological studies etc) in national monument records.
- Yet, official recognition was seen to be very important for certain constituencies, particularly underrepresented or marginalized communities. Some argued strongly that inclusion within the national heritage 'canon' is something that reinforces value.
- On the other hand, a number of workshop participants pointed out that processes of designation, conservation and public presentation could alter the nature of heritage places thus undermining certain kinds of value. For instance, urban explorers value forms of heritage that have little active management/conservation for their often inaccessible and ruinous qualities. In a rather different vein, the dynamic nature of oral history/tradition can be qualitatively changed through processes of recording and archiving.
- Finally, some participants were concerned that the role of narrative and storytelling should not be forgotten. Can one compelling story have a greater discernable affect than demarcating different types of value?

***Closing Session: Implications for conserving and managing the historic environment – key issues and future directions***

During the closing session, participants reflected upon the key implications of issues raised in the workshop.

**Suggested Implications:**

- There is a need for the heritage sector to be more strategic and considered about how social value is characterized and managed. Different kinds of evidence will be required for different contexts, as already recognized, for instance by the HLF's use of a distinction between values and benefits. However, there is a need for

more concerted reflection on who we're producing information for and for what purpose.

- The effectiveness of 'protection' as a means of managing dynamic social values is debatable, and a shift to 'recognition' might be more appropriate. Nevertheless, forms of recognition also have their limitations, not least because people often desire some kind of protection when valued sites and objects are threatened in some way.
- Case studies discussed at the workshop suggest that mechanisms for identifying social value during routine heritage management practices could be improved. This might be achieved through more concerted attention to social value within existing mechanisms such as statements of significance. It might also be delivered by changes in the institutional culture of heritage organizations. However, new forms of accommodating social value might be required.
- Mechanisms for facilitating and recognizing more ephemeral histories and values, such as oral histories, need to be improved. Thematic initiatives focusing on particular aspects of the historic environment, or particular historic events, might facilitate progress in this regard.
- There is a need for greater knowledge of social value. It was generally agreed that a wider range of voices need to be included and also that social value should not simply be equated with local community values.
- The balance between expert assessment of social value and self-evaluation by relevant communities/constituencies needs to be reconsidered. A combination of expert- and community-led evaluation might be most effective, but relevant methodologies need to be carefully considered.
- New methods of communication and engagement need to be developed so that there is a consistent means for communities to identify aspects of social value outside of expert frameworks. The Internet has potential in this regard, especially through the use of Wiki type technologies that allow people to record their own values. However, it was also recognized that such forums usually need some kind of active facilitation or mediation. They are also inevitably selective in terms of which communities/constituencies engage with them.
- Flexible, diverse methodologies should be developed to gain access to as wide a range of social value as possible. This will also require new forms of expertise and skill, ranging from social scientific expertise to facilitation and community engagement.
- Finally, there are implications regarding the place of social value within existing historic environment records, which require further thought. For the purposes of managing change there is a need to access information on social value alongside other kinds of value, as well as evidence about tangible historic fabric. It was argued that social values should not be seen as a form of 'throw-away' history and there is a need for greater consideration regarding their documentation and preservation. However, it is also necessary to take into account the dynamic nature of social value and the creation of value through process.



The Cultural Value Project seeks to make a major contribution to how we think about the value of arts and culture to individuals and to society. The project will establish a framework that will advance the way in which we talk about the value of cultural engagement and the methods by which we evaluate it. The framework will, on the one hand, be an examination of the cultural experience itself, its impact on individuals and its benefit to society; and on the other, articulate a set of evaluative approaches and methodologies appropriate to the different ways in which cultural value is manifested. This means that qualitative methodologies and case studies will sit alongside quantitative approaches.