"Heritage in Motion: Rethinking Conservation in the Face of Current Dynamics"

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Résumé:

For a long time, the protection of heritage was limited to historical buildings rendered unsuitable for contemporary uses.

Today, heritage is seen as a living process in constant renewal, a multidimensional value that characterizes our relationship with time. This cultural heritage is at the heart of public policies that undertake sustained efforts to ensure its conservation, protection and sustainable enhancement.

Adaptive approaches in these heritage policies can ensure the sustainability of these valuable cultural resources while addressing current challenges.

In this work, we will question the relevance of certain traditional instruments of protection and enhancement in the face of current challenges by a comparison between the heritage policies over time in France and Italy, this presentation will allow to understand the instruments and mechanisms that have proven themselves on the ground in terms of sustainable conservation of the architectural and urban heritage in all its diversity

Mots-clés

conservation; comparison; urban and architectural heritage; appropriate policies.

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Introduction :

Today, heritage has become an ambassador of the territory, a creator of jobs and a generator of economic returns. Therefore, it is important to preserve it, to value it. (GUTITI, 2022)

The notion of heritage goes beyond the single monument to the benefit of the urban fabric, its minor architectures, the traces of the plot. It also evokes the whole of the heritage that conjure the time and foundations the identity of the cities and the feeling of belonging to a territory(Lazhar,Gherzouli,2020)

However, in order to be designated as a heritage, whether it is material or intangible, it must receive recognition from the community concerned, which attributes value to it in connection with its history and expresses the desire to transmit it.(Vernières, 2015)

For a long time, the concept of heritage involved the protection of buildings in the name of "historical heritage", making them unsuitable for contemporary uses..(Hadbi, 2020) it was something relatively static, today it is seen as a living process that is constantly renewed. the heritage has become "a rising value", multidimensional, which now "characterizes our relationship to time and to the future" (Hartog, 2012). It is a moving reality, which is constantly redefining itself and reassembling itself according to places and times.

We focus exclusively on a part of the cultural heritage, namely urban and architectural heritage in its various manifestations and on different scales, contains a variety of interests and values, be they historical, archaeological, anthropological, aesthetic, etc. it is imperative to preserve all those riches, traces or symbols of our history that contribute to shaping our identity.(Idir, 2013)

This heritage is at the heart of the cultural policies of States, which are continuously making efforts and strategies to ensure its conservation.,(Mrabet, et al 2021) to ensure its protection and to promote its enhancement. By adopting a comprehensive and adaptive approach, architectural heritage conservation policies can help ensure the sustainability of these precious cultural resources while addressing current challenges. (Guerroudj, 2000)

The establishment of the legal framework for the protection of heritage sites began in the 19th century. During this period, various initiatives were undertaken to develop international conventions and treaties, as well as to establish societies that laid the foundation for the

emergence of a global movement for the preservation of heritage.(BANDARIN, 2007)

The historic sector has established management systems at various levels of government that are in line with international standards in many parts of the world to guarantee the effective and efficient conservation of built heritage.(Amar et al., 2023)

The long evolution of cultural heritage till today's wide meaning is intimately linked to europe, where this concept born in the 19th century, during the Revolution, the Empire and the Restoration.(Versaci, 2016) a growing awareness of the value of ancient urban fabrics led to significant initiatives in France and Italy, allowing for a parallel study of their historical policies. This gives us the opportunity to reflect on the fate of historical cities from a parallel reading of the evolution of heritage and urban policies in both countries.(Versaci, 2013)

1. At the foundation of the concept of heritage:

The concept of heritage is based on the idea that certain objects, sites, customs and traditions should be identified, preserved and passed on to future generations due to their cultural, historical or environmental value (Harrison, 2012)

"Heritage is the collection of all natural or human-created assets without limit of time or place. It constitutes the object of culture. This dynamic and forward-looking concept, prominently displayed in the development of our civilization, is essential to the health and survival of civilization. In addition to the mission of preservation and transmission, it implies the protection and utilization of acquired heritage and future heritage." (Poulot, 1998)

In our context, we are solely focusing on a subset of cultural heritage, namely urban and

1-1.architectural heritage.

Architectural Heritage: This encompasses all aspects of popular and vernacular architecture, as well as the architecture of rural settlements. It is primarily characterized by monuments, which can be individual creations or grouped structures that bear witness to a particular civilization or historical event.

1.2.Urban Heritage: The concept of urban heritage is relatively recent, and public awareness of it is currently quite low. It includes the fabric of cities and pre-industrial ensembles inherited from previous centuries. It encompasses all clusters of constructions that make up an urban area and, due to their unity, homogeneity, architectural, and aesthetic qualities, possess historical, archaeological, or artistic significance. (Urbanism Dictionary)

These definitions provide a framework for understanding and discussing urban and architectural heritage within the broader context of cultural heritage..

1.3. The Process of Patrimonialization

Traditionally, the concrete processes of patrimonialization can be distilled into six successive and interconnected stages. These stages range from the awareness of heritage to the valorization of heritage, encompassing essential phases such as selection and justification, preservation, and exhibition.(François et al., 2006)

1.4. Balancing Valorization and Preservation

It is no longer merely about protecting a monument; it is about associating the concept of enhancement with it. The enhancement of heritage involves the conscious capacity of architecture and history to modify a building with heritage character within its context while adapting it to contemporary and modern necessities (M. TOUZARD, 2018)

2. Cultural heritage policies:

Cultural heritage policies are evolving beyond just physical monuments to encompass intangible heritage, cultural industries, etc., though tangible asset conservation remains a priority(UNESCO - Intangible Heritage domains in the 2003 Convention, 2003). Policy goals now include improving heritage listing systems, reorganizing institutional governance, promoting heritage tourism, ensuring accessibility/education, and guaranteeing sustainability.(Giraud-Labalte et al., 2015) Internationally, there is considerable variety in organizational models, ranging from centralized heritage ministries to more decentralized systems where sub-national tiers have autonomy. Some countries integrate heritage functions across ministries while others use specialized agencies.(UNESCO World Heritage, 2024)

 The private sector and non-profits also play a growing implementation role. Key tools are: 1) Direct funding through budgets and grants, 2) Indirect support through tax incentives to increase private funding, and 3) Regulations like heritage asset listings. Trends point to more decentralization, reduced state intervention, and increased private funding leverage.(Lamy, 1990) However, policy impact assessment remains challenging due to limited indicators and data. A core issue is finding an optimal balance between public, private, non-profit and community interventions to maximize preservation and access as budgets tighten.(Kain, 1984)

Current Dynamics Reshaping Heritage:

Climate Change: Rising temperatures, sea levels, and extreme weather events threaten cultural and natural heritage sites worldwide. Conservation efforts must adapt to mitigate these impacts and ensure resilience. (U. W. H. UNESCO World Heritage, 2024)

Globalization and Urbanization: Rapid urbanization encroaches on historical sites and traditional practices. Conservation needs to consider community displacement, economic pressures, and integrate heritage into urban development plans.(New urban agenda, 2017)

Social and Political Shifts: Changing demographics, cultural values, and political ideologies impact how communities perceive and engage with heritage. Conservation should promote inclusivity and empower local communities to define and manage their heritage.(ICOM code of ethics for museums, 2017)

Technological Advancements: New technologies offer innovative tools for documentation, restoration, and interpretation, while also raising ethical concerns like digital access and virtual representations. Conservation should embrace these tools responsibly while fostering ethical frameworks.(European Union, 2023)

Rethinking Conservation:

The "Heritage in Motion" (Benyoucef, 2008; European Union, 2023; Pickard, 2002; UNESCO World Heritage, 2024) approach advocates for:

Dynamic Preservation: Recognizing heritage as ever-evolving, adapting conservation strategies to ensure its ongoing significance and relevance.

Holistic Approach: Integrating natural, cultural, and intangible heritage for comprehensive understanding and management.

Community Engagement: Empowering local communities to participate in decision-making, ensuring shared benefits and cultural continuity.

Sustainability: Considering environmental, social, and economic aspects in conservation practices for long-term viability.

Innovation: Embracing new technologies while addressing ethical and equity concerns to enhance engagement and accessibility

3. heritage conservation and sustainable development

The new approach sees heritage as a resource for sustainable development, not just a constraint. Conservation must allow adaptive re-use and innovations in design, energy efficiency, transit that respect historical landscape. The goal is vibrant, equitable cities that retain cultural memory while meeting modern needs

The relationship between heritage conservation and sustainable development is a complex and evolving one, as highlighted by a range of studies.(Guzmán et al., 2017) emphasizes the need for more efficient tools and methodologies to correlate cultural heritage protection with urban development. (Elnokaly et al., 2013) underscores the importance of maintaining the essential qualities of historic areas while adapting to modern requirements. (Skoglund & Svensson, 2010) discusses the changing relationship between heritage management and nature conservation in Sweden, advocating for community participation and public communication.(Labadi & Logan, 2015) explores the potential for an ethical, inclusive, and holistic approach to urban planning and heritage conservation to support the sustainable growth of cities. These studies collectively underscore the need for a more integrated and community-focused approach to heritage conservation and sustainable development.

4. broad overview of heritage policies in France

Over the years, France has cultivated a diverse cultural legacy, and its approach to heritage preservation, conservation, and public involvement has adapted to accommodate shifting perspectives..

In general, the concept of cultural heritage is deeply rooted in the French universalist doctrine introduced by the Revolution of 1789.(Butorac, 2021)

The concept of heritage and its preservation originated in France during the French Revolution, initially focused on recognizing monuments as representing national identity.

Over time, France expanded heritage protection from individual monuments to entire urban ensembles and landscapes, through laws like the 1962 Malraux Law creating historic preservation sectors.

Early historic preservation efforts were very monument-focused, often demolishing too much of the urban fabric around monuments. This led to a backlash and new approaches.

Recent French policy integrates heritage conservation into overall sustainable urban development, through new tools like the AVAP heritage protection zones.

A new 2015 French law further modernizes historic preservation by designating "historic cities", creating architectural experimentation zones, and protecting 20th century architecture.(Versaci, 2016)

Table

Century/Period	Key Points
19th Century	- Beginnings of heritage protection in France with the establishment of the Historical Monuments Commission in 1837 (Choay, 1969)
1900-1945	- Classification of additional monuments and expansion of preservation efforts in the early 20th century(Heinich, 2009)
Post-World War II	- Malraux Law of 1962: A landmark in French heritage policies, safeguarding historic districts and encouraging private restoration initiatives (Couturier, 2018)
1970s-1980s	- Development of broader cultural heritage legislation covering both monuments and intangible heritage(Callais et al., s. d.)

1990s-Present	- Shift toward viewing heritage as a social and economic asset, emphasizing sustainable development, tourism, and community involvement(Harvey, 2001)
Digital Heritage	- Embracing digital technologies (3D modeling, virtual reality) for heritage preservation in France(Cruz, 2018)
European Union	- Influence of European Union directives on France's heritage policies

Dynamic Preservation:
The Louvre Museum: Continuously evolving its collections and exhibitions to reflect diverse narratives and contemporary perspectives on art and history.
Canal Saint-Martin: Transformed from an industrial waterway into a vibrant public space, celebrating its heritage while adapting to modern recreational needs.

Holistic Approach:
Parc National des Écrins: Integrating natural and cultural heritage, managing landscapes, traditional practices, and archaeological sites holistically.
Fête de la Musique: Celebrating intangible heritage through nationwide music festivals, showcasing cultural diversity and community spirit.

Community Engagement:
Sauvegarde du patrimoine rural: Local communities in rural areas working together to preserve traditional architecture, crafts, and landscapes.
Réhabilitation de friches industrielles: Collaborative efforts to revitalize abandoned industrial sites, integrating them into urban fabric while respecting their historical significance.

Sustainability:
Vineyards of Bordeaux: Implementing sustainable viticulture practices to preserve the cultural landscape and mitigate climate change impacts.

Éco-musées: Combining heritage preservation with environmental education and sustainable development initiatives.
Innovation:
Cathédrale Notre-Dame de Paris: Utilizing virtual reality technology to recreate the cathedral after the fire, fostering engagement and understanding of its cultural significance.
Archives Nationales: Digitizing historical documents and making them accessible online, promoting broader engagement with French history.
Additional French Examples:
Rehabilitation of medieval villages like Rocamadour, integrating tourism with preservation efforts.
Revitalization of traditional crafts like Aubusson tapestries, adapting them to contemporary tastes while preserving their heritage.
Gastronomic festivals like Lyon's Fête du Beaujolais, celebrating intangible heritage linked to food culture and local identity.

4.1.The historic city of Bordeaux as a sustainable living city

The case of Bordeaux is emblematic to demonstrate the possible adaptation of urban conservation tools to take into account sustainability aims.

Bordeaux is an inhabited historic city inscribed on the UNESCO World Heritage List in 2007 for its outstanding urban and architectural ensemble. As a port city, it has undergone major urban transformations while preserving its heritage.(UNESCO World Heritage, 2007)

Sustainability has become a key concern for historic cities like Bordeaux. Urban conservation strategies need to integrate sustainable development goals related to social, environmental, economic and cultural aspects as per the 2011 UNESCO Recommendation on the Historic Urban Landscape.(*World Heritage Centre - Recommendation on the Historic Urban Landscape*, 2011)

Bordeaux has a robust system of heritage conservation tools covering almost the entire city, including protected monuments, buffer zones, a safeguarded sector with strict development controls, and an urban landscape conservation plan. This ensures protection of tangible and intangible heritage values.

At the same time, Bordeaux has undertaken major sustainable urban development projects focused on transportation, reconnecting the city with the Garonne river, and new eco-neighborhoods under its

"metropolitan challenge". This avoids "museumification" and ensures Bordeaux remains a living, evolving historic city.

Key heritage conservation tools like the Plan for Safeguarding and Development are being updated to align with the city's Sustainable Management and Development Plan. This allows heritage areas to meet sustainability imperatives related to urban quality, environment, economy, attractiveness and social equity.

The Bordeaux case demonstrates the adaptation of conservation tools to balance heritage preservation and sustainable development, which is still an emerging practice globally. Its UNESCO Management Plan is positioned to integrate conservation and development strategies.(Appendino, 2017)

5.broad overview of heritage policies in Italy

The privatization of cultural heritage in Italy, driven by urban regeneration policies, has been a contentious issue (Ponzini, 2010)This is further complicated by the large number of cultural assets managed by local governments, which have been affected by the financial crisis (Farneti et al., 2009)The historical context of the Italian collectable goods market has also influenced heritage preservation policies(Guerzoni, 1997) .The tension between centralization and decentralization in heritage management has been a key theme in reform attempts .(Zan et al., 2007)

Table

Century/Period	Key Points
19th Century	- Emergence of heritage preservation efforts driven by awareness of protecting historical monuments in Italy(Giorgio et al., 2021)
1920s-1930s	- Establishment of the Ministry of Cultural Heritage in 1923 to oversee cultural asset protection and promotion(Giorgio et al., 2021)
Post-World War II	- Codification of heritage legislation emphasizing protection against urban sprawl and industrialization(Pickard, 2002)

1960s-1970s	- Italy's role in drafting the Venice Charter (1964) with conservation principles for historic monuments
1990s-Present	- Adoption of integrated approaches, including sustainable tourism and community involvement(De Frantz, 2018)
European Union	- Active collaboration with European Union directives on heritage policies

Dynamic Preservation:

Colosseum "School of Gladiators": Reenactments and educational programs bring the amphitheater's history to life, offering dynamic interpretations beyond static preservation.

Le Murate: A former prison transformed into a cultural hub with art exhibitions, workshops, and community events, adapting its historical significance to contemporary use.

Holistic Approach:

Cinque Terre: Balancing tourism with the preservation of the unique cultural landscape, integrating natural beauty, traditional villages, and sustainable practices.

Valle dei Templi in Agrigento: Integrating archaeological sites with natural parks and museums, offering a holistic understanding of Greek heritage in Sicily.

Community Engagement:

Carnevale di Venezia: Local artisans craft masks and costumes, ensuring the festival's cultural continuity and economic benefits for the community.

Sagra del Melone Mantovano: Local farmers and chefs collaborate to celebrate the traditional melon of Mantua, showcasing intangible heritage and fostering community pride.

Sustainability:

Trulli of Alberobello: Utilizing traditional dry-stone construction techniques for restoration and new sustainable buildings, preserving heritage while adapting to environmental challenges.

"Ecomuseums" movement: Local communities manage museums focused on their cultural landscapes and traditional practices, promoting sustainable stewardship of heritage.

Innovation:

Pompeii Project: Utilizing 3D technology to virtually reconstruct the buried city, providing immersive understanding and attracting a wider audience.

Accademia Gallery in Florence: Interactive digital displays enhance visitor engagement with masterpieces like Michelangelo's David, enriching the art experience.

Additional Italian Examples:

Rehabilitation of canals in Venice, balancing traditional transportation with conservation and tourism management.

Revitalization of traditional pasta-making skills, ensuring their transmission to future generations while adapting to modern food trends.

Opera festivals like the Arena di Verona, showcasing intangible heritage linked to music and performance while drawing international audiences.

Italy's commitment to preserving its rich cultural heritage remains steadfast, balancing tradition with innovation.
In summary, while both countries share common goals in preserving their cultural heritage, Italy's early and comprehensive protection measures stand out

6. Urban heritage management and policies :

The politics of urban heritage management is a complex and multifaceted issue, as highlighted by (Knecht & Niedermüller, 2002)and (De Frantz, 2018) emphasizes the social and political aspects

of ethnic cultural heritage, particularly in the context of urban festivals. Frantz (2018) further explores the manipulation of cultural heritage for tourism marketing, which can lead to political conflict and public contention. This manipulation is evident in the case of the Museums quartier Vienna. The use of heritage as a political and economic tool is also evident in the case of post-colonial Hong Kong, where (Lu, 2016)discusses the construction of 'urban heritage' as a means of empowerment and political expression. The influence of conservation planning structures on urban heritage management is further explored by (Pietrostefani & Holman, 2021), who highlights the variations in conservation planning outcomes between different contexts.

Conclusion

conservation strategies have to be integrated within the large goals of sustainable development, as affirmed by the recent UNESCO's Recommendation on the Historic Urban Landscape adopted in 2011. The Recommendation reflects the actual international attention given in order to find a holistic approach, which integrates urban conservation and development in balance with social, environmental, economic and cultural sustainable considerations(Appendino, 2017).

Architectural and urban heritage conservation has evolved from a focus on protecting individual structures to integrating preservation into sustainable development of vibrant historic cities that retain cultural memory while adapting to meet modern needs.

Key points:

Countries use different terminology and criteria for defining and categorizing heritage assets for protection. Most protect the "whole" asset but some allow for partial protection or definition of associated land/settings.

Protection is enacted through heritage-specific laws or cultural heritage laws (common) as well as planning/development laws and policies (common in Ireland, UK).

Administration of heritage protection involves rules and procedures for authorizing alterations, changes of use, demolition etc.

Integrating development consents and heritage consents is increasingly common.

All countries have sanctions to enforce protection, including fines, repairs notices, injunctions, ultimately expropriation, though penalties are not always strong deterrents.

"Integrated conservation" (linking heritage and planning/development) is increasingly embedded, seen as crucial for sustainability, through various planning policies, mechanisms and zones.

Funding for conservation relies on grants, tax relief incentives, loans, foundations etc - though levels are inadequate in some countries. Grants may require public access agreements.

Identification through inventories aids protection; recording techniques and databases are improving. Inventory information can assist management.

recommendations :

- Develop a comprehensive national heritage policy that integrates conservation with sustainable development.
- Strengthen legal and administrative frameworks for heritage protection.
- Increase funding for heritage conservation.
- Promote public awareness and education about heritage.
- Encourage community participation in heritage conservation.
- Support international cooperation in heritage conservation.

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