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SUSTAINABLE HERITAGE MANAGEMENT

APPLYING CONCEPTS OF
SUSTAINABILITY TO
ASSESSMENT AND
MANAGEMENT OF HISTORIC
AND CULTURAL HERITAGE.

The Parliamentary Commissioner for the Environment's report on historic and cultural heritage management is based on the premise that planning and management of historic and cultural heritage should be seen as an exercise in sustainable management as defined in the *Resource Management Act* (RMA). This is justified since heritage items are clearly a "physical resource" and part of the "environment" as defined in the RMA, and hence there is an obligation to manage that resource sustainably and to avoid, remedy or mitigate adverse impacts on it. The commissioner's conclusions suggest that the current management system does not meet this obligation and is not sustainable. Phil Hughes' article in this issue, page 10, discusses how local government could exercise their responsibilities for sustainable management. In this article, I briefly discuss what the concept of sustainability means for management of historic and cultural heritage.

CONCEPTS OF SUSTAINABILITY

Sustainable management is generally accepted to have three, inter-related components: biophysical or ecological, economic, and social or cultural. The relative importance of these components may change from time to time in particular circumstances, but at least in the long term, all components must be satisfied for sustainability to be achieved.

I believe the same broad framework can apply to the management of historic and cultural heritage. Firstly, the physical aspect is the bricks and mortar, the earthworks, the material object which is valued. The continued existence, in good condition, of heritage items provides a very clear "bottom line" for the sustainability of heritage management. Secondly, the economic aspect. Ultimately no management can be sustainable unless it is economically viable. Of course this does not mean that each and every heritage item must have an economic use in a narrow monetary sense. However, for any

particular historic place, one of two conditions must be satisfied: either an enduring or new use is found which is financially viable and pays directly for that place's upkeep, or its value is non-monetary but perceived as high and therefore some party – public or private – pays for its preservation. Especially in the second case, the assessment of the place's value can be crucial and I discuss this aspect further below.

The less tangible social, historical, cultural or spiritual aspects of historic places constitute the final component of sustainable management: sometimes these aspects can be maintained without a physical presence. For example, a place may have tremendous significance as a wahi tapu, a landing place, or an old battleground, even in the absence of any physical sign of this significance, but to ensure its heritage value is sustained, the physical or economic management of that place may need to be modified. This raises an interesting aspect of the RMA principles with respect to heritage. The purpose of the Act as expressed in section 5, focuses on the sustainable management of physical, ie, tangible, resources. However, under the Act both the definition of "environment" and the principle which gives the primary mandate for historic and cultural heritage management ["Recognition and protection of the heritage values of sites, buildings, places, or areas" – section 7 (e)] require, or at least allow, all the values of historic and cultural heritage, both tangible and intangible, to be given particular regard to. Thus, sustainable management of historic and cultural heritage means that all its values need to be taken into account.

Assessment of social values is occurring in some public authority heritage planning, but several aspects appear to be still very problematic, eg, separating social values, especially those at the micro (small community) level, from wider historical or architectural values.

As for any form of sustainable management, robust assessment and careful long-term planning is needed to take account of all values. The heritage "stock" of an area or a nation is a

dynamic entity, rather like the notion of an ecosystem which is the central object of management for ecological sustainability. As with populations, species and habitats, all historic heritage losses are permanent, although some losses can be balanced by the establishment of "new" heritage and do not necessarily affect the sustainability of the whole system. However, losses and gains must be kept in balance and the scale of change needs to be carefully monitored. In any dynamic situation, information about the system components, both existing and past, is an essential part of the assessment of sustainability. Records and archives are the "gene banks" of historic and cultural heritage.

VALUATION OF HISTORIC AND CULTURAL HERITAGE FOR SUSTAINABLE MANAGEMENT

Closer examination of the economic aspect of sustainability brings us back to the question: how should heritage be valued, in both its monetary and non-monetary senses, so that its economic sustainability can be assessed and provided for? It is clear that there are public values and benefits for heritage, even when the heritage is in private ownership, thus recognition of private property rights is involved. Principles for establishing the values of heritage assets include the following:

- the value cannot be determined only by the market, where the price will reflect a more restricted time horizon and set of values;
- the benefit of retaining the asset is thus an externality, which has uneven effects on individuals;
- much of this externality, especially relating to social value, is intangible, and therefore particularly difficult to value, but often contributing very highly to a community's "sense of place";
- however, it would be nonsense to claim that for everything that has historic and cultural heritage value the external value is sufficiently high to make the object "priceless";
- heritage valuation must therefore be a pragmatic process, with transparent reliance on clear priority-setting and review, consistent assessment according to a number of well-justified criteria, and participation by an informed public;
- the concept of depletion costs applies, meaning that the more heritage is lost, the greater is the value (at least the externality component) of the remaining heritage.



Art Deco buildings in Napier and Wellington: relative importance of different assessment criteria differs significantly.

AN EXAMPLE

As a legacy of the 1931 earthquake, Napier has a large group of commercial buildings of the Art Deco style, for which it is world-renowned. There are a considerable number of Art Deco buildings in other New Zealand cities, but usually these are single buildings: nowhere else but Napier do the Art Deco buildings form such a coherent precinct.

Now compare two individual Art Deco buildings, one in Napier and one in, say, Wellington. Let us say that in terms of architectural, historical and social factors they are comparable. In terms of rarity within the city, the Napier building is likely to be less valuable than the Wellington building, simply because there are more Art Deco buildings.

According to the last principle above, does this mean that for sustainable management the preservation of the Napier building could be relatively less important than for Wellington? Probably not, because the contextual values of the Napier building are likely to be higher if that building forms an integral part of a precinct which in terms of rarity and historical value is unique in New Zealand and very rare internationally. Also, the contribution of that Art Deco building to the "cultural identity" of the city may be arguably greater in Napier than in Wellington.

Therefore not only do the relative importance of the "rarity" and "context"-type criteria need to be assessed, the geographical scale of rarity needs

to be taken into account as well, just as for assessing social values. The rarity value of our Wellington example would probably be even higher if there was no Napier precinct. To give a further example of this, there are no comparable buildings around Pompallier House to give it a rich context, yet its importance in New Zealand's historic heritage is enormous because it is unique in the whole country.

CONCLUSION

Sustainable management of historic and cultural heritage involves similar concepts to sustainable management of other types of natural and physical resources, with particular attention to valuation of public and private benefits. The principles for valuation of historic and cultural heritage outlined above, include a need for objective assessment and priority-setting. It is likely that any robust assessment process needs to use a number of diverse criteria. The criteria given in section 23 of the *Historic Places Act* define broad legislative parameters for the development of assessment criteria, even if these are varied according to the needs of local communities and districts. My brief discussion and example should serve to show the importance of the concepts of scale of assessment and context for assessment, two of the most vital concepts for the sustainable management of historic heritage. 