Guidance for Conservation Management Planning for Historic Sites and Monuments in Antarctica

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Working Paper submitted by the United Kingdom, Australia, New Zealand, Norway and the United States

**Summary**

The CEP Five-year Work Plan includes an action to consider how the CEP can better develop Conservation Management Plans (CMPs) as tools to protect Antarctic heritage. This paper proposes new guidance to be adopted to support Parties in developing such plans for the heritage under their care.

The United Kingdom, Australia, New Zealand, Norway and the United States recommend that the CEP:

* Reaffirms the value of Conservation Management Plans as an effective tool for the responsible stewardship of heritage in Antarctica;
* Agrees to update the *Guidelines for the assessment and management of Heritage in Antarctica* with the guidance as proposed at Annex I, and forwards the revised Guidelines to the ATCM for adoption by means of a Resolution (draft at Annex II); and
* Encourages Members to continue to share their Conservation Management Plans and expertise with each other to improve the standard of heritage stewardship, and considers how this could be facilitated.

**Background**

Antarctica holds internationally important heritage, which is protected under the designation of Historic Sites and Monuments (HSM) in accordance with Annex V of the Environment Protocol.

At ATCM XLII the CEP welcomed and adopted the recommendations of WP058 (<https://documents.ats.aq/ATCM42/wp/ATCM42_wp058_e.doc>) which outlined the benefits of good conservation management planning in the responsible care of heritage in Antarctica. The CEP Five-year Work Plan includes an action to consider how the CEP can better develop CMPs as tools to protect Antarctic heritage during the Intersessional period 2021/2022, and an action to review proposals relating to how CMPs can contribute to the management of HSMs at CEP XXIV 2022. The United Kingdom, Australia, New Zealand, Norway and the United States have developed guidance to be included in the *Guidelines for the assessment and management of Heritage in Antarctica* (ATCM Resolution 2 (2018)) to support Parties when drawing up CMPs for the heritage in their care.

**Proposal**

At its most basic, conservation management planning is a valuable tool to enable a greater understanding of heritage and its potential. Questions concerning the heritage’s significance, interpretation, threats and risks, opportunities for improvements, and potential for use are all considered during the process of developing a CMP. The resultant answers to these questions should create a better understanding of the heritage in question, and provide a clear plan for its future.

Effective conservation management planning can be an invaluable tool for caring for heritage for the long term. CMPs should be flexible, working documents tailored to the heritage in questions, and which help guide future decisions and activity at the site. CMPs should evolve as circumstances change, but they should help manage the site for the long term, balancing the various priorities, issues and ambitions and enabling good decision-making for the heritage.

Recognising the benefits of CMPs, we have developed guidance (Annex I) to support Parties in developing CMPs for Antarctic heritage in their care. The aim is to encourage and empower Parties to execute their responsibilities for heritage in Antarctica to a consistent standard that is in line with the principles of the Antarctic Treaty and Environment Protocol, and comparable to the stewardship of heritage in other parts of the world. The guidance offers practical suggestions on considerations for good conservation management planning. It recognises that not all heritage sites will require a CMP, and that any such plans should be adapted and tailored according to the nature and needs of the heritage in question. The guidance should empower Parties to both demonstrate the significance of their heritage and explicitly share how this heritage will be cared for into the future.

**Recommendations**

The United Kingdom, Australia, New Zealand, Norway and the United States recommend that the CEP:

* Reaffirms the value of Conservation Management Plans as an effective tool for the responsible stewardship of heritage in Antarctica;
* Agrees to update the *Guidelines for the assessment and management of Heritage in Antarctica* with the guidance as proposed at Annex I, and forwards the revised Guidelines to the ATCM for adoption by means of a Resolution (draft at Annex II); and
* Encourages Members to continue to share their Conservation Management Plans and expertise with each other to improve the standard of heritage stewardship, and considers how this could be facilitated.

**Annex I**

Guidance for Conservation Management Planning for Historic Sites and monuments in Antarctica

*To replace section 7.2.1 of the Guidelines for the assessment and management of Heritage in Antarctica:*

**7.2.1 Conservation Management Plans**

A Conservation Management Plan (CMP) can provide a useful guiding document for the conservation and management of a heritage site or object. Through such a plan it will be possible to identify what policies are required to ensure the heritage values of the site/object are retained in its future use and development. A CMP will also provide an important framework for ensuring that the management of the heritage site or object has the least possible impacts on the environment. Each CMP will vary and will need to be tailored to each site/object, based on the type and size of its place, heritage attributes and needs. A CMP provides guidance in managing change in the heritage site or object without compromising the heritage significance of its place.

At its most basic, conservation management planning is a valuable tool to enable a greater understanding of heritage. Questions concerning significance, interpretation, threats and risks, opportunities for improvements and potential for use are all considered during the process and the answers should create a better understanding and a clear plan for its future.

A considerable amount of information has been published which can inform good decision-making for heritage management, and there are many exemplars of excellent heritage stewardship from Antarctica and around the world (see references).

The guidance contained in Appendix A, informed by international standards and best practice, offers suggestions on what might be included in a CMP. This guidance is not intended to be a template nor to provide a strict set of instructions. Each HSM will be different and may require its own approach. It should be noted that a CMP may not be appropriate for every HSM; it’s important that the approach is fit for purpose.

*To be added as a new Appendix to the Guidelines for the assessment and management of Heritage in Antarctica:*

**Appendix A**

**The approach to developing a Conservation Management Plan:**

The following guidance offers suggestions of the sort of information that may be useful to include in a CMP. While each of the sections below might not be relevant for every HSM, it can be a useful exercise to work through them. A good CMP can be divided into five sections, which can be as detailed or as brief as is appropriate. Photographs, illustrations, drawings, historical documents and maps are all extremely useful as supporting information.

1. **Description of the heritage**

* Describe each of the different elements of the heritage on the site including artefacts, buildings, structures, vehicles, and archaeology, as relevant.
* Describe the context of the heritage, explaining where it is and what is around it, including any important environment, wildlife or landscape elements.
* Describe its condition, including completeness and repair status (individual details on this can be stored in an appendix).
* Describe its history, including how it became to be there, and what has happened to it over time. Here is a good place to use historical sources to illustrate its story.
* Describe how it relates more widely, including how it compares with other sites or events.
* Describe how the heritage is currently looked after, how the site is managed and by whom.
* Consider the use of digital referencing for the site and associated individual objects. This could aid future monitoring, as well as identification of artefacts for particular management actions.

1. **Significance of the heritage**

* Describe what is important about this heritage, and to whom. It might be a whole site, or there may be elements within the site that have special significance. The description could include:
  + Whether the heritage is part of any wider designation (such as an ASPA or ASMA).
  + Historical associations - people, events, activities, stories.
  + Aesthetic value, if the heritage is an integral part of the visual landscape.
  + Scientific value – landscape, geology, wildlife, scientific data collection.
  + Rarity – is it, or are elements of it, unique or rare?
* Describe clearly those elements that are crucial and cannot be lost or compromised.
* Describe also elements of the heritage that might not be original. In the case of restorations, some elements will be historic, while others might be the result of modern interventions.
* It would be useful to include summaries of archaeological reports, results of research, or other expert analysis that may contribute to the understanding of the heritage’s significance.

1. **Risks and Opportunities**

* Describe the ways in which the heritage might be vulnerable and any threats to its future survival. These could include:
  + Environmental risks: including from climate change and environmental conditions, as well as wildlife.
  + Ongoing science operations: if the site is still used or part of an operational site, operations may impact the heritage. There may be tensions between conservation and operation.
  + Resource requirements: are there sufficient financial resources and expertise to look after the heritage?
  + Access: consider whether the heritage site can easily be visited for inspection. Does the site receive large numbers of visitors, and what are the associated risks (wear and tear damage, theft, vandalism)?
* Describe any risks to the environment from deterioration of materials, or dispersal of fabric from the heritage.
* Describe particular hazards or hazardous materials. If the site deteriorates does it become more dangerous? Is access difficult or potentially dangerous?
* Describe also the opportunities for improving protection of the heritage, and creating better access to it. These could include:
  + Considering whether conservation actions would improve the longevity of the site or elements of it.
  + Considering whether visits could be better managed, including by improving safety or accessibility to the site, or improving the site’s sustainability.
  + Considering alternative ways to tell the site’s story, such as by using digital technology to engage people virtually.

1. **Managing the heritage - policies**

* It is important to set out the policies that will guide actions and activities to manage the heritage. These policies may be as brief or comprehensive as needed, and will likely be guided by the level of intervention required to manage the heritage (which could range from minimal intervention to a full-scale conservation programme). As a minimum, it is important to set out the overarching aims for the future of the heritage (for example, to maintain and preserve the historic site, to provide a visitor experience, or to protect the whole site and its character). Clear aims and guiding policies will inform all future activity related to the heritage. Relevant policies may include:
  + Conservation and repair – description of how the condition will be maintained, including any principles or guidelines that should be followed during repair or maintenance work.
  + Access and visiting – how visits to the site should be managed, including any requirements for booking, supervision, and reporting.
  + Health and safety – description of any policies for hazards, fire, disasters, or incident reporting.
  + Managing the environment – policies for any environmental or wildlife considerations.
  + Research – description of policies related to further surveys or study of the heritage (including archaeological, digital, geophysical, or ecological) and any constraints around the techniques to be used (use of RPAS, laser scanning, excavation).
  + Climate change and environment – description of the vulnerability of the site to a changing climate and description of policies for mitigation or adaptation to the impacts of a changing climate.
  + Documentation of interventions – description of how repairs and other measures taken to preserve, stabilise, or maintain the site and artefacts should be documented to keep a history of changes.
  + Information – description of how information and data about the site will be managed (including where the information will be stored, and whether it will be made publicly available).

1. **Appendices**

* Supporting detailed information related to the conservation management of the heritage should be included in appendices. Any available data or information can be useful in understanding and managing the site. Helpful information could include data from archives, surveys, and research projects, action plans and reports, or images.

*To be added to Section 12 of the Guidelines for the assessment and management of Heritage in Antarctica:*

**12.6 Conservation Management Planning**

Selected Bibliography

Petzet, Michael. (2004) Principles of Preservation: An Introduction to the International Charters for Conservation and Restoration 40 years after the Venice Charter. <https://www.icomos.org/venicecharter2004/petzet.pdf>

Semple Kerr, James. (2013) The Conservation Plan. 7th Edition. Australia ICOMOS  
<https://australia.icomos.org/publications/the-conservation-plan/>

Organisations

The World Heritage Centre  
<https://whc.unesco.org/>

International Council on Monuments and Sites  
<https://www.icomos.org/>

<http://openarchive.icomos.org/2146/>

<https://www.iccrom.org/sites/default/files/2018-02/1998_feilden_management_guidelines_eng_70071_light_0.pdf>

UNESCO World Heritage Centre can provide detailed guidance and case studies of heritage management.

Existing Conservation Programmes for Antarctic HSMs

UK Antarctic Heritage Trust  
<http://www.ukaht.org>

NZ Antarctic Heritage Trust  
<https://nzaht.org/>

Mawson’s Huts   
<http://www.antarctica.gov.au/environment/cultural-heritage/mawsons-huts-cape-denison>

Annex II

**Resolution X (2022)**

**Revised Guidelines for the assessment and management of Heritage in Antarctica**

**The Representatives,**

Recalling that Article 8 of Annex V to the Protocol on Environmental Protection to the Antarctic Treaty (“the Protocol”) provides for sites or monuments of recognised historic value to be listed as Historic Sites and Monuments (“HSM”), which shall not be damaged, removed or destroyed;

Recalling also Measure 23 (2021), which revised and updated the List of Historic Sites and Monuments;

Recalling further Resolution 3 (2009), which recommended that the Guidelines for the designation and protection of Historic Sites and Monuments be used by Parties as guidance on questions related to the designation, protection and preservation of historic sites, monuments, artefacts and other historic remains in Antarctica;

Recalling furthermore Resolution 2 (2018), which recommended to their Governments that the non-mandatory Guidelines for the assessment and management of Heritage in Antarctica be used by Parties as additional guidance on questions related to the assessment and management of sites/objects with heritage values in Antarctica;

Noting the growing expertise in the management of Antarctic heritage values;

Desiring to support Parties to, where appropriate, develop Conservation Management Plans to appropriately balance environmental protection and heritage conservation considerations in the management of HSM;

Welcoming the work of the Committee for Environmental Protection (CEP) to develop guidance for conservation management planning for Historic Sites and Monuments, for inclusion in the Guidelines for the assessment and management of Heritage in Antarctica;

**Recommend** to their Governments that:

1. the *Guidelines for the assessment and management of Heritage in Antarctica* annexed to this Resolution replace the Guidelines annexed to Resolution 2 (2018);
2. the revised Guidelines be used by Parties as additional guidance on questions related to the assessment and management of sites/objects with heritage values in Antarctica; and
3. the Secretariat of the Antarctic Treaty post the text of Resolution 2 (2018) on its website in a way that makes clear that it is no longer current*.*