

# **Hadrian's Wall World Heritage Site**

## English Heritage

A Case Study

The Getty Conservation Institute, Los Angeles

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# Introduction

Over the past five years, the GCI has undertaken research on the values of heritage. Following work on the nature of values, on the relationship between economic and cultural values, and on methods of assessing values,<sup>1</sup> the current effort aims to illustrate how values are identified and assessed, how they play into management policies and objectives, and what impact management decisions have on the values. This analysis of Hadrian's Wall World Heritage Site is one of four studies of heritage sites undertaken by this project.

## **Site Management—Traditional and Values-Based**

Heritage site management can be defined simply as “the way that those responsible [for the site] choose to use it, exploit it, or conserve it.”<sup>2</sup> Authorities, however, seldom make these choices solely on their own. As the interest in heritage and heritage sites has grown, people have come to anticipate benefits from these resources, and authorities must take into consideration these expectations. Many cultural sites are appreciated for their cultural and educational benefits; some are seen primarily as places of recreation; and others are expected to act as economic engines for communities, regions, or nations. Sometimes the expectations of different groups can be incompatible and can result in serious conflicts.

Although heritage practitioners generally agree that the principal goals of cultural management are the conservation of cultural resources and/or their presentation to the public, in reality, cultural sites almost always have multiple management objectives. The result is that often the various activities that take place at these sites—such as conservation interventions, visitor management, infrastructure development, and interpretation—are handled separately, without a unifying process that focuses all decisions on the common goals.

In recent years, the field of heritage preservation has started to develop more integrated approaches to site management and planning that provide clearer guidance

for decisions. The approaches most often favored are those called *values-based*.

Values-based site management is the coordinated and structured operation of a heritage site with the primary purpose of protecting the significance of the place as defined by designation criteria, government authorities or other owners, experts of various stripes, and other citizens with legitimate interests in the place.

Values-based approaches start by analyzing the values and significance attributed to cultural resources. They then consider how those values can be protected most effectively. This systematic analysis of values distinguishes these management approaches from more traditional ones, which are more likely to focus on resolving specific problems or issues without formal consideration of the impact of solutions on the totality of the site or its values. While there are variations in the terminology and specifics of the processes followed, values-based management is characterized by its ability to accommodate many heritage types, to address the range of threats to which heritage may be exposed, to serve the diversity of interest groups with a stake in its protection, and to suggest a longer-term view of management.

There are many sources of information that can be tapped to establish the values of a site. Historical records and previous research findings have been the most used in the past, and they are generally consulted first. Values-based management places great importance on the consultation of stakeholders—individuals or groups who have an interest in a site and who can provide valuable information about the contemporary values attributed to the place. Traditional stakeholders of cultural sites have been professionals in various disciplines—such as history, archaeology, architecture, ecology, biology, and so on—whose input is expressed through their research or expert opinions. More recently other groups who value heritage sites for different reasons have been recognized as stakeholders too. These new stakeholders can be communities living close to a site, groups with traditional ties or with interests in particular aspects of the site. Stakeholders

with wide-ranging and sometimes conflicting interests in a place may perceive its values quite differently. However, most of the values articulated in a values-elicitation or consultation process are legitimate, and thus merit serious consideration and protection as the site is used.

In its strictest definition, values-based management does not assume a priori the primacy of traditional values—historic, aesthetic, or scientific—over others that have gained recognition more recently, such as social ones. However, in the case of sites of national or regional significance, the principal values recognized are almost always defined by the authorities at the time of designation. In those instances, the values behind that significance ordinarily have primacy over all others that exist or might eventually be identified. In all sites (national and others) some of the ascribed values will be deemed more important than others as the significance of a place is clarified.

Once the values of a site have been identified and its significance established, a critical step to assure their conservation—and one of the most challenging aspects of this approach—is determining where the values reside. In its most literal sense, this step can mean mapping the values on the features of the site and answering questions about which features capture the essence of a given value. What about them must be guarded in order to retain that value? If a view is seen to be important to the value of the place, what are its essential elements? What amount of change is possible before the value is compromised? A clear understanding of where the values reside allows site managers to protect that which makes a site significant.

Values-based heritage management has been most thoroughly formalized in Australia, where the Burra Charter guides practitioners.<sup>3</sup> Faced with the technical and philosophical challenges posed by aboriginal places, nonarchitectural sites, and vernacular heritage, Australian heritage professionals found that the existing guidance in the field (such as the deeply western European Venice Charter) failed to provide adequate language and sensitivities. Building on the basic ethics and principles of the Venice Charter, they devised guidelines for heritage management that became the Burra Charter, a site-specific approach that calls for an examination of the values ascribed to the place by all its stakeholders and calls for the precise articulation of what constitutes the site's particular significance. While it is officially endorsed only in Australia, the Burra Charter is an adaptable model for site management in other parts of the world because the planning process it advocates requires the integration of local cultural values.

## VALUE AND SIGNIFICANCE

Value and significance are terms frequently used in site management with various definitions. This holds true for the organizations involved in this case study project; each of them uses these terms slightly differently, and they are often guided by wording included in legal or regulatory documents.<sup>4</sup>

In this study, *value* is used to mean the characteristics attributed to heritage objects and places by legislation, governing authorities, and/or other stakeholders. These characteristics are what make a site significant, and they are often the reason why stakeholders and authorities are interested in a specific cultural site or object. In general, these groups (or stakeholders) expect benefits from the value they attribute to the resource.

*Significance* is used to mean the overall importance of a site, determined through an analysis of the totality of the values attributed to it. Significance also reflects the degree of importance a place has with respect to one or several of its values or attributes, and in relation to other comparable sites.

## The Case Study Project

Since 1987 the Getty Conservation Institute has been involved with values-based site management planning through research efforts, professional training courses, symposia, and field projects. As an extension of this commitment, and associated with a related research and publication effort on values and heritage conservation, the Institute has led an effort to produce a series of case studies that demonstrate how values-driven site management has been interpreted, employed, and evaluated by four key organizations. In this project, the GCI has collaborated with the Australian Heritage Commission, English Heritage, Parks Canada, and the U.S. National Park Service.

All four national agencies employ approaches to the management of their own properties that reflect their own histories and legal environments. However, they all have expanded their approaches to define, accommodate, and protect a broader range of values than a stock set traditionally associated with heritage places.

The case studies in this series focus on values and their protection by examining the place of values in management. By looking at individual sites and the management context in which they exist, they provide a detailed example that describes and analyzes the processes that connect theoretical management guidelines with

management planning and its practical application. The analysis of the management of values in each site has been structured around the following questions:

- How are the values associated with the site understood and articulated?
- How are these values taken into account in the site's management principles, policies, and strategies?
- How do management decisions and actions on site affect the values?

The four sites studied as part of this project—Grosse Île and the Irish Memorial National Historic Site in Canada, Port Arthur Historic Site in Australia, Chaco Culture National Historical Park in the United States, and Hadrian's Wall World Heritage Site in the United Kingdom—were identified by their national organizations. Each of the sites examined in this study was put forth as an example of how values issues have been addressed by their respective stewards. The studies do not attempt to measure the success of a given management model against some arbitrary standard, nor should they be construed as explaining how an agency handles all its sites. Rather, they illustrate and explain how four different groups have dealt with the protection of values in the management of four specific sites and how they are helped or hindered in these efforts by legislation, regulations, and other policies. In those instances where the negative impact of policies or actions has been noted, it has been done to illustrate the complexity of managing sites with multiple values. These comments should not be taken as a judgment of the actions of the site authorities.

The organizations participating in this project share a belief in the potential usefulness of values-based management in a broad range of international contexts. These studies have a didactic intent, and they are intended for use by institutions and individuals engaged in the study and/or practice of site management, conservation planning, and historic preservation. As such, they assume that the reader is familiar with heritage management concepts, international charters and guidance, and general conservation principles.

### **About This Case Study**

This case study looks at the management of Hadrian's Wall World Heritage Site. Hadrian's Wall is a remarkable, extensive Roman ruin that has been valued as an archaeological remain for more than two centuries. Today, the designated World Heritage Site includes the Wall, its asso-

ciated archaeological features such as forts, milecastles, and vallum ditches, and the "setting," a "visual envelope" and buffer zone extending from 1 to 6 kilometers from the Wall itself. A number of agencies, government bodies, and private landowners are involved in the management of the site under the coordination of English Heritage. This study focuses on the values-based management of these resources since the site's World Heritage listing in 1987.

Throughout this case study, references to "the site" indicate the entire World Heritage Site—the Wall, its associated remains, and its immediate surroundings. According to planning documents, the site and the setting are understood as distinct geographic entities in this report.<sup>5</sup>

However, most of the general references to the site refer also to the setting. If some uncertainty remains in these definitions, their use in this case study closely mirrors that in the 2002 Hadrian's World Heritage Site Management Plan. In the plan, the setting is considered part of the site and is described as distinct from it. When referring to some overarching aspect of the site—for example, "visitors to . . .," "perception of . . .," or "government policies toward . . ."—the setting is implicitly included. In other instances, the setting is referred to specifically as a terrain separate from and enveloping the Wall. The lack of a rigorous and clear distinction in the plan seems intentional in that it conveys the loose, flexible nature of the partnership-driven management structure of the site. In the end, the values according to which the Hadrian's Wall landscape is managed are understood as pertaining to the whole entity, site and setting. It is possible that if the plan defined the setting as part of the core managed territory of the site—instead of defining it as a "visual envelope"—it would engender political opposition. Such was one of the lessons learned during the boundary-setting debate raised by the 1995–96 plan.

The long history of Hadrian's Wall as a heritage site provides an excellent illustration of how values emerge and evolve with changing use and new knowledge as well as how they are influenced by changing values in society. More specifically, this case explores how the values of an extensive site, with a complex set of landowners and stakeholders (and where there is no unified ownership of the land or historical features of the World Heritage Site), are conserved and managed in collaborative arrangements. Of interest are issues arising from the large-scale partnership model of management as well as issues



related to the conservation and development of specific sites within the regional management framework.

An analysis is presented in the next two sections. The first of these, "Management Context and History of Hadrian's Wall World Heritage Site," provides general background information on the site and its management, gives a geographic description of the site, and summarizes the history of Hadrian's Wall. Also discussed is the management environment of the site, including the numerous partners involved at national and local levels, as well as relevant legislation and policy.

The last section, "Understanding and Protecting the Values of the Site," looks at the connections between values and management in three ways. First, the values ascribed to the site are summarized, as they have been reflected in successive planning and management documents. Second, the role of values in determining the management policy of the current World Heritage Site regime is examined. Finally, management policies and decisions are analyzed as to their impact on the site's values.

# Management Context and History of Hadrian's Wall World Heritage Site

## Physical and Geographic Description

Hadrian's Wall World Heritage Site is located in northern England. The site extends approximately 118 kilometers (73 miles) east to west, following the line of Hadrian's Wall across the Tyne-Solway isthmus and spreading down the Cumbrian coast to include Roman coastal defenses. The specific geographic boundaries of the site<sup>6</sup> are based on the extent of the Wall and associated sites and ruins that are protected as scheduled monuments under the *Ancient Monuments and Archaeological Areas Act of 1979*.<sup>7</sup> The setting consists of the viewshed around the site itself.

The Romans, in search of a location on which to build a defensive military network against hostile inhabitants to the north, chose the narrowest east-west path in this region of Britain and used many of the area's topographic features to their advantage. Today, the archaeological remains of the Wall and its associated structures take many forms, and a great deal of archaeological research has been conducted on them. Features of the Wall have been adapted, altered, reused, dismantled, and conserved on an ongoing basis since its construction began in 122 C.E.

In many places, the Wall stands above ground in its original position, though not in its original dimensions (nowhere does the Wall survive at its full height). On the western and eastern ends there are few aboveground remains. Wall features are best preserved and most readable in the central section of the site, where a significant portion, called the Clayton Wall, has been conserved and

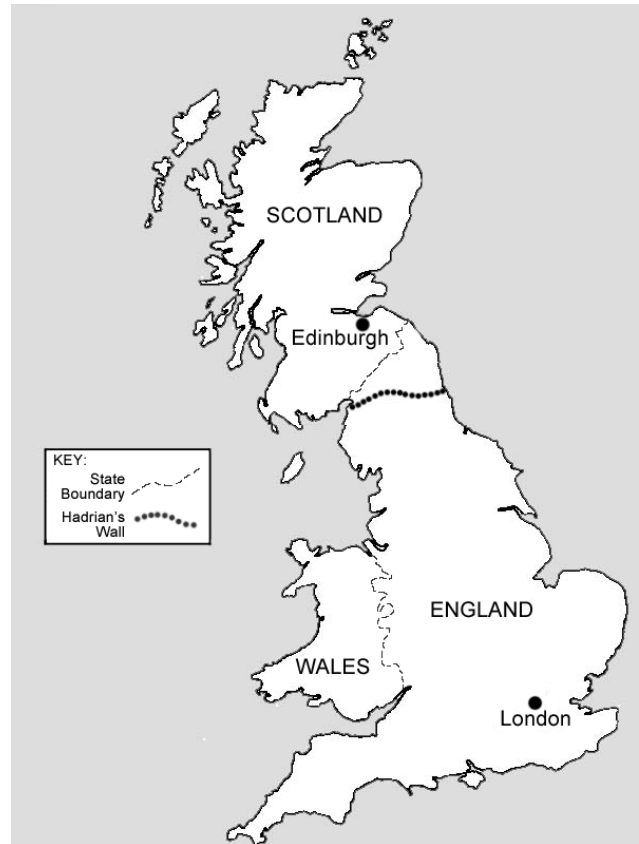


Figure 1. Map of the United Kingdom, indicating the location of Hadrian's Wall. The Wall was built by the Roman army in 122 C.E. across the narrowest part of its island territory

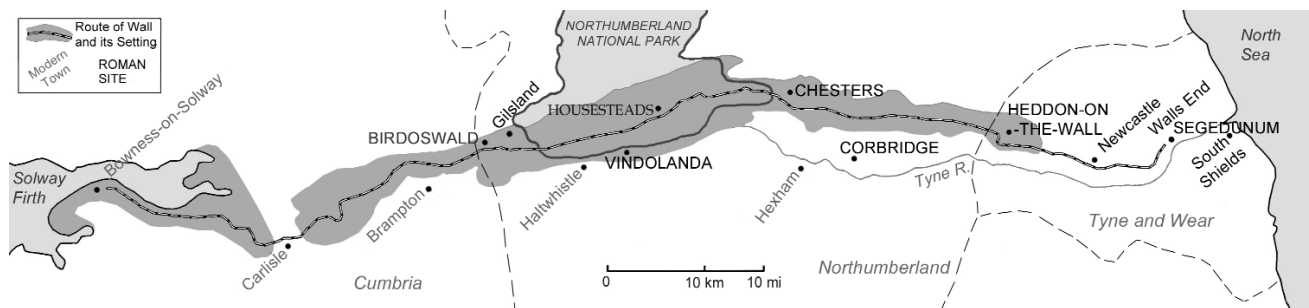


Figure 2. Map of the Wall and its setting.



**Figure 3.** A long view of the Wall. This portion of the Wall is typical of the central section of the World Heritage Site. Photo: Margaret MacLean.

rebuilt.<sup>8</sup> Many landscape features—vallum ditches and other earthworks—survive. Dozens of milecastles, forts, and fortlets are still evident in excavated and conserved remains, and many of these are interpreted for the public. Since the 1880s most of the Wall’s visible remains have been conserved and consolidated in some measure. The Wall has been totally destroyed in only a few places, where highways, pipelines, or quarries cross or cover its line.<sup>9</sup>

Topographically, the site can be divided roughly into three regions. The first is the eastern lowland region known as the Tyne and Wear Lowlands, which lie between South Shields and Chollerford. From Wallsend, the Wall runs westward from the North Sea coast across low-profile terrain and through the lower Tyne River valley. After the industrial revolution, the urban center of Newcastle upon Tyne emerged as the commercial capital of England’s northeast, a position the city still maintains.



**Figure 4.** One of numerous sections of the Wall that cut through working farms. Photo: David Myers.

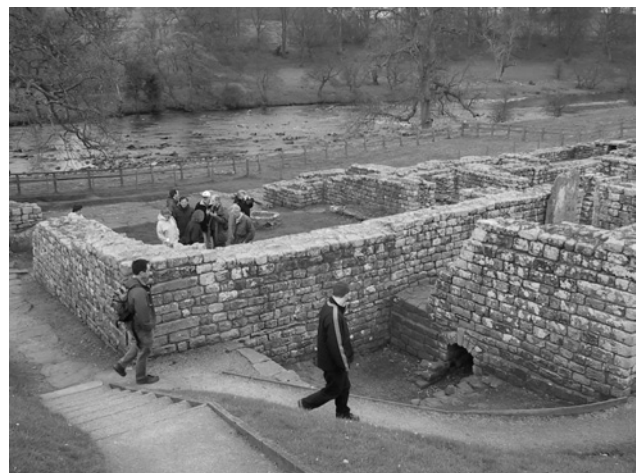


**Figure 5.** The exposed foundations of a fort at South Shields. Photo: Margaret MacLean.

This sprawling urban area (now called Tyneside) dominates the eastern region of the site. Within Tyneside, the Wall exists mostly as below-ground or excavated/conserved ruin.

The continuous course of aboveground Wall runs westward, beginning at Heddon and extending toward Birdoswald, and forms the second, central region of the site.

The third region lies to the west and consists of lowlands between Brampton and the Solway Firth, a tidal estuary characterized by marshes and mudflats. Today, this area is dominated by livestock pastures and agricultural cultivation. Farther inland is the Carlisle Basin, a broad valley drained by the rivers Irthing, Eden, Esk, and



**Figure 6.** The remains of a well-preserved regimental bathhouse associated with the Roman fort at Chesters, situated astride the Wall on the North Tyne River. Photo: Margaret MacLean.



Figure 7. Detail of a conserved section of the Wall near Birdoswald. The stone contains an original Roman inscription. Photo: David Myers.

Caldew, all of which flow into the Solway Firth. Rural land in the basin is used mainly for livestock grazing. Situated at the head of the Solway Firth is the historic city of Carlisle, the region's urban hub. Between the basin and the central region of exposed uplands is a transitional zone of rolling hills divided by valleys.

Although the wall ends at Bowness-on-Solway along the Solway Firth, remnants of the Romans' defensive network, in the form of freestanding fortlets and towers, are found to the southwest along the Cumbrian coast as far as Maryport at the periphery of the Lake District. Here the landscape becomes more rolling, with the coast marked by sea cliffs. Occasional fort sites continue as far south as Ravenglass, the southernmost point of the World Heritage Site.



Figure 8. The Romans took advantage of the landscape's natural barriers, situating the wall atop the high ridges of Whin Sill, east of Housesteads. Photo: Marta de la Torre.

A maritime influence creates a temperate climate year round in Great Britain, in spite of its relatively high latitude.<sup>10</sup> The region of the site is characterized by regular high humidity, cloudiness, and a high percentage of days with precipitation.<sup>11</sup>

### History of Hadrian's Wall<sup>12</sup>

The history of the Wall's creation by Roman legions, and of the Roman period of U.K. history, has been extensively documented.<sup>13</sup> This section focuses on the post-Roman period and emphasizes the history of the Wall as a heritage site and the gradual acknowledgment of the landscape in which the Wall is situated as part of the site.

In the centuries following the Romans' abandonment of the Military Zone, the stones of the masonry structures of the Wall and its associated fortifications were removed and reused in the construction of castles, churches, dwellings, field walls, and other structures. Thus the Wall provided great utilitarian value as a source of building material. Land records dating back to the Norman period also show that the Wall was an important boundary between property holdings, agricultural fields, and parishes. In addition, it inspired place-names throughout the region, giving rise to Walton, Walwick, Thirlwall, and Walby.

Although the Wall has been described in written and cartographic works dating back to the eighth century, the first relatively large-scale account appeared in 1599, when antiquarian William Camden published a survey and explanation of the Wall and its structures in the fifth edition of his *Britannia*.

Throughout the eighteenth and nineteenth centuries, the Wall continued to be used as a source of building material. The 1750s saw the construction of the Military Road, which is approximately 48 kilometers (30 miles) long, between Newcastle and Carlisle.<sup>14</sup> The road was built on the top of the Wall to minimize damage to the fields of local landowners and to save costs by using the Wall's remnants as a road foundation and as a source for stone.<sup>15</sup>

The steady erosion of the Wall led to concerted efforts to study it, as well as a growing interest in conserving it. In the eighteenth century, several antiquarian studies were made, including William Hutton's *The First Man to Walk Hadrian's Wall* in 1801. Ten years later, Hutton saved a section of the Wall at Planetrees from being pillaged to make field walls, an event considered the first successful effort of conservation.<sup>16</sup>

John Clayton was an important figure in the understanding and conservation of the Wall. In 1832, he inherited land containing Chesters Roman Fort. The nineteenth century was a period “when [Wall] sites were owned by privileged individuals . . . who could use them for their own research—and the pleasure of themselves and of their friends.”<sup>17</sup> For nearly six decades, Clayton funded the excavation, protection, and reconstruction of remains of the Wall. In the process, he amassed a collection of Roman objects from various locations along the Wall. Clayton acquired and worked on five Roman sites in the area of Chesters and led excavations at the fort sites of Housesteads (1849–present), Carrawburgh (1873–76), and Carvoran (1886).

The nineteenth century was also marked by the establishment of “learned societies” for the study of antiquities. This development came at a time when there was a strong interest in all things Roman and the view that the Roman Empire was a model for England’s own vast imperial holdings. These societies increased interest in and access to the Wall, introducing it to broader audiences, although membership was limited to the social and economic elite. The proliferation of these groups coincided with the emergence of the Romantic movement, which fostered an appreciation for the aesthetic qualities of the ruins and the natural or naturalistic landscapes in which they were situated.<sup>18</sup> In 1849, the first pilgrimage traveling the full length of Hadrian’s Wall was led by John Collingwood Bruce. Two years later, Bruce published the first edition of *The Roman Wall*, which summarized the results of Clayton’s excavations at Chesters Roman Fort and publicized John Hodgson’s theory of the Wall’s construction under the emperor Hadrian.<sup>19</sup> In 1863, Bruce also published his *Handbook of the Roman Wall*, an important historical guide to this day.<sup>20</sup>

The latter part of the century saw the first public acquisition of part of the Wall and the creation of the first museum to display its Roman relics. In 1875, the South Shields Urban District Council established the Roman Remains Park at South Shields, marking the first public acquisition and display of part of the Wall by a public authority.<sup>21</sup> Later, in 1896, the museum at Chesters Roman Fort was constructed to house John Clayton’s collection of Roman objects.

Government efforts to protect the Wall increased through further public and trust ownership in the twentieth century. These decades also witnessed an extraordinary growth of tourist visitation. A new generation of academically trained, professional archaeologists rose to

prominence in Wall studies and replaced the amateur antiquarians. With the passage of national legislation providing for the protection of archaeology, a first portion of the Wall was scheduled as an ancient monument in 1927.

In 1932, continued quarrying threatened the archaeological fabric of the Wall, motivating the national government to introduce new, more powerful national ancient monuments legislation. This led to the adoption of the Hadrian’s Wall and Vallum Preservation Scheme, a first step toward comprehensive public protection of the central part of the Wall and some buffer areas surrounding it.<sup>22</sup> The National Trust also received as a donation the core of its Hadrian’s Wall holdings at Housesteads in the central region, a Wall site that has proven to be the most popular among tourists. In 1935, the National Trust opened the Housesteads Museum to the public.<sup>23</sup>

Mass tourism began in the years following World War II, when the growth in automobile ownership and increases in leisure time brought more and more visitors to the Wall. Visitation peaked in 1973, then quickly dropped as a result of a spike in fuel prices (see figure 9). From the start, the experiences available to tourists have been quite varied and remain so today, ranging from well-staffed and thoroughly managed sites with interpretive schemes, gift shops, and amenities, to large stretches accessible informally by simply walking through the countryside.

In 1970, the Vindolanda Trust, an independent archaeological charitable organization, was founded at the fort site of Vindolanda (formerly Chesterholm). Its mission was the excavation, preservation, and presentation of the Roman remains. Later, in the mid-1980s, another fort site went into public ownership when the Cumbria County Council acquired the Birdoswald estate. Likewise, Rudchester was acquired by Northumberland County, North Tyneside acquired Wallsend, and South Tyneside expanded its holdings at South Shields. English Heritage (EH), created by Parliament in 1984, has served as an active force in the conservation, management, and presentation of the Wall. The agency opened the Corbridge Museum in 1984 and launched its Wall Recording Project the following year. The project provides detailed documentation of the visible remains of the Wall and its associated features.<sup>24</sup> EH continues to care for many parts of the Wall.

As a culmination of its long history of heritage and stewardship, Hadrian’s Wall was inscribed by the United Nations Educational, Scientific and Cultural Organization (UNESCO) as a World Heritage Site in 1987.

The inscription cites criteria C (ii), (iii), and (iv) (see below). Since this designation, a number of measures have been implemented to coordinate management of the site. The Hadrian's Wall Tourism Partnership (HWTP) was created in 1993 to coordinate the development of sustainable tourism for the Hadrian's Wall World Heritage Site area. Early work focused on coordinating marketing and visitor information. Shortly thereafter, the secretary of state approved a proposal for the Hadrian's Wall Path, a new National Trail enabling visitors to walk the length of the Wall. The path opened in 2003. In 1996, a Hadrian's Wall World Heritage Site management plan for the period 1996-2001 was published after extensive consultation. The first plan to coordinate management of the entire site, it established the World Heritage Site Management Plan Committee (WHSMPC, or MPC) "to act as the primary forum for issues concerning the management of the World Heritage Site."<sup>25</sup> EH established the Hadrian's Wall Co-ordination Unit, based in Hexham, to oversee implementation of the plan. The plan was updated in 2002.

#### *World Heritage List Criteria for Cultural Properties<sup>26</sup>*

A monument, group of buildings or site—as defined above—which is nominated for inclusion in the World Heritage List, will be considered to be of outstanding universal value for the purpose of the Convention when the Committee finds that it meets one or more of the following criteria and the test of authenticity. These criteria are defined by the Committee in its Operational Guidelines. Each property nominated should:

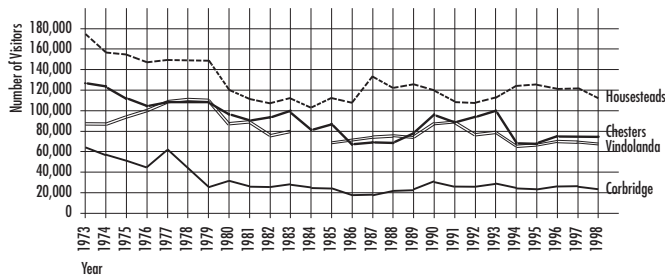
- i. represent a masterpiece of human creative genius; or
- ii. exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town-planning or landscape design; or
- iii. bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared; or
- iv. be an outstanding example of a type of building or architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history; or
- v. be an outstanding example of a traditional human settlement or land-use which is representative of a culture (or cultures), especially when it has become vulnerable under the impact of irreversible change; or

vi. be directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance (the Committee considers that this criterion should justify inclusion in the List only in exceptional circumstances and in conjunction with other criteria cultural or natural).

The 1987 inscription of Hadrian's Wall Military Zone to the World Heritage List cites criteria C (ii), (iii), and (iv).

In recent decades, local entities have implemented a variety of strategies to attract more visitors to the site. These efforts have been motivated in part by the weakening of other industries in the region, such as shipbuilding, coal mining, iron making, and steelmaking. In 1988, the Tyne and Wear Museums completed reconstruction of the West Gate at Arbeia Roman Fort at South Shields, which Ewin notes was "the first reconstruction of a standing remain associated with Hadrian's Wall and was consequently controversial."<sup>27</sup> Work is now under way to reconstruct the Commanding Officer's quarters and a soldiers' barracks block. At the eastern end of the Wall in Maryport, the Senhouse Museum Trust opened the Senhouse Roman Museum in 1990, which houses the Netherhall collection of Roman artifacts. In 2000, the Segedunum Roman Fort, Bath House and Museum in Wallsend opened to the public. The development, which reuses part of a shipyard on the Tyne River, is operated by the Tyne and Wear Museums and includes a working reconstruction of a Roman bathhouse as well as a viewing tower approximately 34 meters (116 feet) in height.

Faced with rising numbers of visitors to the Wall, the 1996 Management Plan expressed concerns about the negative impact on historic resources by increased tourism (especially by walkers and other informal visitors<sup>28</sup>). That upward trend was reversed, however, in 2001 with the outbreak of foot and mouth disease (FMD). The epidemic caused the closure of the countryside in many rural areas of the region to avoid the spread of the disease. Access to sections of the Wall on farmland was impeded, and the most popular managed site—Housesteads—was closed to the public all but ten days during that year. Footpaths remained closed most of the year. However, managed rural sites with exclusive visitor access either stayed open or reopened after safety assessments were completed. Urban sites suffered indirectly via general downturns in the numbers of overseas and education / group visits to the region.



**Figure 9.** “The graph shows some longer term trends. Whilst the numbers of visitors to the forts and museums shown have declined since the 1970s, the numbers of people out walking around the Wall area, particularly in the central sector have increased. . . . Approximately 23% of visitors in the central sector of Hadrian’s Wall are from overseas. Approximately 69% of visitors in this area are on holiday.” Source: “Tourism Facts & Figures.” [http://www.hadrians-wall.org/]

FMD severely damaged the region’s agricultural economy, necessitating the slaughter of all infected or potentially infected livestock, and had a secondary negative impact by reducing tourism to the site to a fraction of its pre-existing levels. Latest figures indicate that tourism promotion and other efforts to recover from FMD have been effective vis-à-vis tourism traffic. Total visitation to staffed sites in the region reached 562,571 in 2002—a 23.7 percent increase on 2001 figures and a 5.1 percent increase on 2000 figures.<sup>29</sup>

### Management Context

Heritage preservation in the United Kingdom began with modest efforts to protect individual archaeological sites of interest. The preservation movement became more formalized in 1882 with the passage of the *Ancient Monuments Protection Act*. Over time, historic buildings, landscapes, parks, battlefields, and other places attracted the interest and concern of preservationists and government, and efforts proliferated to record, restore, and preserve such places for posterity. The main legislation concerning archaeological resources at this time is the *Ancient Monuments and Archaeological Areas Act* of 1979. Other protections now in place are numerous, flexible, and almost entirely integrated into the planning processes from the national level down to the county council level, and are supported by the various governmental and nongovernmental organizations that administer heritage places.

Hadrian’s Wall is a constellation of scheduled monuments and listed buildings with unique status at the national level; it is also inscribed as a World Heritage Site,

*continued on page 13*

### Foot and Mouth Disease: The Effects of External Forces

The agricultural economy and pastoral landscape that predominate much of the central section of the Wall are important contributors to contemporary values of the World Heritage Site and its setting. These came under direct threat in 2001 with the outbreak of foot and mouth disease (FMD) among livestock populations in the United Kingdom. FMD is a viral disease that is deadly to some livestock and other mammals, including cattle, sheep, pigs, goats, and deer.<sup>1</sup> The outbreak had disastrous economic effects in the area of Hadrian’s Wall, along with a number of secondary effects on the values and management of other aspects of the site.

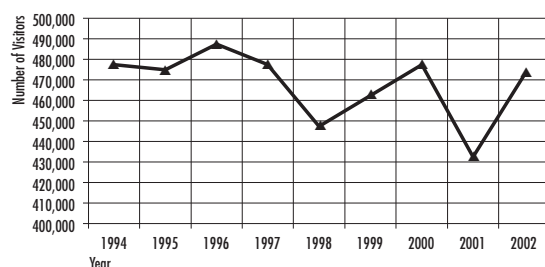
The FMD crisis effectively closed large areas around the Wall for months. It dealt a major blow to the agricultural and tourism economies of the region and has had lasting effects on the surrounding communities and landscape. Cumbria was the county hardest hit: “Approximately 80% of farms within the World Heritage Site and its setting had their stock destroyed.”<sup>2</sup> Visitor traffic to much of the site came to a virtual halt as parts of the country were quarantined, although some sites along the Wall remained open. Fear and negative perception kept people away perhaps as much as the actual closures did.

Assisting farmers and rescuing the agricultural economy and landscape—a fundamental part of the World Heritage Setting and perhaps the key contributor to its widely perceived aesthetic value—were the necessary, immediate responses to the crisis. In the longer term, FMD heightened partners’ perceptions of the importance of agriculture in managing the landscape. Farmers, who are important stewards of historic and aesthetic values, are economic operators and key participants in the production and enjoyment of the site’s contemporary values. Thus, threats to their livelihood translated into threats to their stewardship roles: if they could no longer farm, how would that impact the management of the site? A new agricultural farming economy based on tillage or forestry instead of pasturage, or new kinds of commercial or industrial development seen as alternatives to pasturage, could drastically affect the character of the setting. The Countryside Stewardship Scheme, developed by the Department of Environment, Food, and Rural Affairs (DEFRA), has been addressing these types of transitions for a decade, but FMD dramatically emphasized how serious the effects could be.

The FMD crisis also highlighted the importance of tourism to the regional economy—particularly in rural areas along the Wall—and the relationship between agricultural practices

and management of the site. For decades the Wall had provided economic value as a tourist attraction; balancing this with conservation of heritage values was the central challenge for planning and management. The external force of FMD threatened this balance by focusing attention on economic values. Tourism (which suffered its own 40 percent drop in activity in the aftermath of the outbreak) became identified more fully as the “replacement” economic development strategy for agriculture, much as it had been for industry a generation earlier. Conservation of cultural values was not directly undermined by the FMD crisis, though damages to the tourism economy highlighted the vulnerability of the cultural sector to fluctuations in tourism-market revenue.

The most relevant lesson was learned through the difficulty encountered in responding to this kind of “slow-burn” disaster, given the much decentralized power structure of the partnership. A quick and sure response was hindered



Visitation to major sites near Hadrian’s Wall. There was a significant decrease in the number of visitors as a result of foot and mouth disease affecting the area during 2000–2001. However, the number of visitors increased quickly once the crisis had passed.



by the need for consultation and coordination among the partners. This factor would also come into play in the wake of similar natural disasters, environmental accidents, or economic dislocations. Though the FMD disaster is still quite recent and adjustments are still being made by landowners, organizations, communities, and other groups, a few insights can be drawn from the experience.

The 2002 Management Plan was greatly influenced by the fact that it was written during the FMD recovery period—illustrating that the conditions under which a plan is formulated have a strong impact on it. The emphasis on economic recovery and, consequently, on contemporary-use values has been the most obvious impact of the FMD crisis. Planners and partners have participated and continue to participate in determining the adjustments needed to find a new balance of diversified, sustainable agriculture that does not have adverse effects on the heritage resources of the site.

This balance of values has changed in response to the FMD tragedy and the resulting stresses on the Hadrian's Wall landscape and stakeholders. The Management Plan goals remain focused on sustainable management—which is to say, development within a conservation framework—but this sustainability has been redefined by FMD. By bolstering the economic use of the landscape for diversified

agriculture as well as for heritage tourism, the heritage values of the site and setting were protected. The basic structure of the site's management regime—flexible policies and a wide latitude for the actions of individual partners, held together by a mutual commitment to a common core of values—allowed participants to respond the way they did. At the same time, the decentralized partnership structure prevented a swifter response. The need for partners to act in concert and inform one another takes time and resources. Coming to an agreement on novel, contentious, unexpected issues also causes delays. There was much debate, for instance, on the pros and cons of which Wall venues would stay open during the crisis. And a great deal of effort was put into informational campaigns and discussions among agencies and institutions, which helped foster a mutual understanding between institutions with very different mandates and missions (e.g., DEFRA, HWTP, individual farmers, and heritage site operators).

Brought on by FMD, the heightened awareness of the connection between agricultural use/policy and management of the Wall and setting has been a learning experience for the management group of the Hadrian's Wall World Heritage Site. Management has accommodated a shift toward emphasizing the economic values of the Wall in the context of

conserving the core heritage values. In the new climate, the focus is now on tourism rather than on the crippled agricultural sector.

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## Notes

1. Accessed at <http://www.defra.gov.uk/footandmouth/about/index.htm> (April 5, 2003).
2. Accessed at <http://www.24hourmuseum.org.uk/nwh/ART13762.html> (10 July 2003).

*continued from page 10*

more as a conceptual entity than as a particular place. It is subject to a broad range of protections afforded by government authorities through statutes, regulations, and policy directives, and by the international community through the World Heritage Convention and its operational guidelines. Below is a brief description of the heritage classifications, agencies, and statutory authorities, which inform the management discussions that follow.

### DESIGNATED CLASSIFICATIONS

A primary means of heritage protection in England is statutory designation. The categories of heritage places covered by separate legislation are: scheduled ancient monuments, listed buildings, and conservation areas. World Heritage Sites, registered parks and gardens, and battlefields are protected through the integrated planning processes administered at the local to district levels.<sup>30</sup>

#### *Scheduled ancient monuments*

As prescribed by the *Ancient Monuments and Archaeological Areas Act* (1979), a scheduled ancient monument is one that meets specific criteria of age, rarity, documentation, group value, survival, fragility or vulnerability, diversity, and potential. The secretary of state approves those monuments meeting these criteria as well as the criterion of national importance, in consultation with English Heritage.

Of the three types of designated heritage, scheduled ancient monuments are the most rigorously protected by legislation. By law, the treatment of scheduled ancient monuments is handled at the national level and is not integrated into town and country planning policies. Scheduled monument consent must be obtained from the secretary of state for all works to scheduled monuments, including maintenance.<sup>31</sup> Certain authorities may be granted class consent to allow specific types of work to be carried out on monuments under their stewardship without specific applications. Planning guidance for work on such monuments—including that proposed in these management agreements—is provided in *Planning Policy Guidance 16 (PPG 16)*.<sup>32</sup>

Today, there are more than 13,000 such monuments under protection around the world. After being scheduled as an ancient monument, Hadrian's Wall later acquired status as a listed building and as a World Heritage Site.

### *Listed buildings*

The primary means of acquiring national protection of buildings is through listing. The secretary of state, again relying on the counsel of EH, is responsible for maintaining a statutory list of buildings determined to have special architectural interest, historic interest, close historical association, and group value. *PPG 15: Planning and the Historic Environment* contains the definitions, selection criteria, procedures, and considerations relevant to this designation, and provides guidance concerning the treatment of listed buildings.<sup>33</sup>

Listed buildings are ranked according to grades I, II\* (“two starred”), and II. Any works (repairs, upgrades, restorations, etc.) being considered for listed buildings must obtain consent. The secretary of state has delegated to local authorities most decisions concerning these consent applications. Applications for works to grade I, grade II\*, and demolitions of grade II buildings must be reviewed by EH or other relevant national bodies.

### *Conservation areas*

A conservation area is a territory that has been determined to have special architectural or historic interest. Conservation areas may be designated by local planning authorities, and local development plans contain descriptions of them and policies for their protection. Local authorities determine whether proposed new development will negatively impact a conservation area’s character and appearance. No conservation areas have been created to protect any part of the Hadrian’s Wall World Heritage Site or its setting.

### *World Heritage listing*

Since becoming a signatory to the World Heritage Convention in 1984, the United Kingdom has added twenty-four World Heritage Sites to the list in the natural and/or cultural categories. The operational guidelines of the World Heritage Convention include a recommendation to develop site management plans for each site being nominated to the list:

“States Parties are encouraged to prepare plans for the management of each natural site nominated and for the safeguarding of each cultural property nominated. All information concerning these plans should be made available when technical co-operation is requested.”<sup>34</sup>

While there is no legislation or regulation pertaining solely to World Heritage Sites or nominations, some official guidance makes specific reference to the operational guidelines that implement the Convention.

For example, *PPG 15* requires local authorities to devise policies to provide for the long-term protection of these sites, and that any development proposals be evaluated with regard to their potential impact on the prospective site and its setting, from an aesthetic as well as an environmental perspective.

Thus, national policy works with the guidelines so that World Heritage designation serves to stimulate the development of integrated conservation planning across the United Kingdom. Hadrian’s Wall has the distinction of having the first World Heritage Site management plan to be completed in the country (1996) and the first to be updated (2002).

### **NATIONAL HERITAGE-RELATED AGENCIES**

At the national level, heritage is managed by several departments and agencies. The Department for Culture, Media and Sport (DCMS) holds primary responsibility for the built heritage through its Architecture and Historic Environment Division.<sup>35</sup> Advised by EH, the secretary of state for culture, media and sport is responsible for the scheduling of ancient monuments, ruling on applications for scheduled monument consent and listing buildings of special architectural or historic interest. The secretary also works specifically with UNESCO on issues related to World Heritage Sites in the United Kingdom.

Land-use planning falls under the aegis of the Office of the Deputy Prime Minister, including national legislation and guidance documents such as the PPGs (see statutes, regulations, policy directives, and guidelines below). DEFRA, which handles countryside issues, also plays a significant role in the management and conservation of heritage. The Countryside Agency, which operates under DEFRA, is the national agency responsible for rural matters. It plays a less direct but noteworthy role in heritage affairs.

English Heritage serves as the government’s statutory adviser concerning all issues related to the conservation of England’s historic built environment. EH is classified as “an Executive Non-Departmental Public Body sponsored by the DCMS.”<sup>36</sup> It is responsible for the management (i.e., repair, maintenance, and presentation) of more than four hundred properties in public ownership and, more commonly, guardianship. EH interfaces with many aspects of the planning and consent system, as discussed further below. Funded in part by the government and in part by self-generated revenues, it also re-grants funding for the conservation of the built heritage. (Other key nongovernmental financial supporters of heritage in

the United Kingdom include the Heritage Lottery Fund and the European Union.)

The National Trust was established as a private charity in 1895 to safeguard threatened natural and cultural heritage sites.<sup>37</sup> Today, it holds in perpetuity more than 248,000 hectares (613,000 acres) of countryside in England, Wales, and Northern Ireland, almost six hundred miles of coastline, and more than two hundred buildings and gardens. It is a particularly important force in the region of Hadrian's Wall.

#### LOCAL HERITAGE AUTHORITIES

At the local level, responsibility for conservation of the historic built environment resides with 34 county councils, 238 district councils, and 46 unitary councils. These authorities handle most decisions regarding buildings and conservation areas, including consideration of applications for listed building consent and conservation area consent. Local authorities also issue monetary grants to outside groups and vendors for the repair and improvement of both designated and nondesignated elements of the historic built environment. In some cases, the local authorities own and manage their own heritage sites. Ten national parks in England and Wales also are independent local authorities with statutory responsibility for heritage. These include Northumberland National Park, a large portion of which coincides with the Hadrian's Wall World Heritage Site.

In addition to their role in determining the outcome of consent applications, the councils provide active protection of the historic built environment by placing specific policies into local town and country plans. A number of local authorities have incorporated specific provisions into these policies as a way of implementing the otherwise advisory and partnership-based Management Plan. As of summer 2002, thirteen local authorities at various levels had incorporated measures specific to Hadrian's Wall, based on the Management Plan, into local policies.<sup>38</sup>

#### *Statutes, Regulations, Policy Directives, and Guidelines*

A number of statutes, regulations, policy directives, and guidelines have a direct or important indirect bearing on the protection and management of Hadrian's Wall.

#### NATIONAL HERITAGE STATUTES AND POLICIES

Provisions for the national government's conservation of heritage are found in acts of Parliament, regulations, and policy documents. Statutory protection of heritage in Great Britain began with the enactment of the *Ancient*

*Monuments Protection Act* of 1882. Since that time, the adoption of new national statutes and policies has greatly expanded the extent of government control over cultural heritage, including towns and landscapes. Starting in the late 1960s, national conservation activities have been folded into the planning process. Rather than enforcing fixed rules, this discretionary planning system allows for flexible and responsive decision making. A listing of the principal statutes follows; those with annotations bear a specific relation to designation, enhancements of protection, and new approaches to planning and management.

#### *Historic Buildings and Monuments Act (1953)*

*Civic Amenities Act (1967)*. This act launched the trend of embedding heritage preservation in the planning processes at the county and district levels. It also legalized the group value of buildings and acknowledged the importance of conserving areas as opposed to individual buildings. Local planning authorities were given the responsibility of designating as conservation areas those places within their jurisdiction that were of special architectural or historic interest, the character or appearance of which it was desirable to preserve or enhance.

*Town and Country Amenities Act (1974)*. "It shall be the duty of a local planning authority to review the past exercise of functions under this section and to determine whether any parts or any further parts of their area should be designated as conservation areas; and, if they so determine, they shall designate those parts accordingly."

#### *Ancient Monuments and Archaeological Areas Act (1979)*

This act refined the definition of protected status designations—adding the category of archaeological area—which could be made either by the secretary of state or by local planning authorities, subject to confirmation by the secretary. The criterion of national-level significance remained in force. The act also strengthened protections by making certain offenses against scheduled monuments subject to criminal prosecution.

*Town and Country Planning Act (1990)*. The latest in a series that began in 1947 with the establishment of the English planning system, this act recognizes and assigns planning jurisdiction in various contexts. Any development of land or change in land use warrants an application for permission from the planning authority in force, thus reducing

the individual landowner's ability to change the character of a townscape or countryside in unacceptable ways.

*Planning (Listed Buildings and Conservation Areas) Act (1990).*<sup>39</sup> This act recognizes that the primary responsibility to list significant buildings lies with the secretary of state and his or her advisers. However, it emphasizes the roles and responsibilities of local planning councils to monitor the historic fabric in their jurisdictions, recommend buildings for listing, and limit changes that can be made to listed buildings.

*National Heritage Act (1983).* This act established English Heritage as a public body with responsibility for all aspects of protecting and promoting the historic environment.

*Heritage Lottery Fund (HLF) (1993).* The *National Lottery Act* of 1993 allowed for the creation of a revenue stream to support conservation projects for the physical upkeep of buildings and sites of national importance. While the legislation relating to the *National Lottery Act* is not prescriptive in regard to the heritage itself, 1998 saw the introduction of the requirement for a conservation plan for a site requesting HLF funds for works on historic sites.

*Planning Policy Guidance (PPG).* "Planning policy guidance notes set out Government policy on planning issues and provide guidance to local authorities and others on the operation of the planning system. They also explain the relationship between planning policies and other policies which have an important bearing on issues of development and land use. Local planning authorities must take their content into account in preparing their development plans."<sup>40</sup>

*PPG 15: Planning and the Historic Environment (September 1994; updated frequently)* focuses on the planning processes involving listed buildings and other aspects of the historic environment, including World Heritage Sites, parks and gardens, battlefields, conservation areas, associated roadways and traffic, and the broader historic landscape. No special statutes pertain specifically to World Heritage Sites. Rather, this PPG (section 2.22) articulates that local authorities must devise management plans that include policies to provide for the long-term protection of sites. Development proposals must be assessed with regard to their potential impact on a site and its setting, including the assessment of environmental impacts for development of significant magnitude.

*PPG 16: Archaeology and Planning (1990)* is a parallel manual for planning processes involving archaeology. It is directed at planning authorities, property owners, developers, archaeologists, amenity societies,<sup>41</sup> and the general public. "It sets out the Secretary of State's policy on archaeological remains on land, and how they should be preserved or recorded both in an urban setting and in the countryside. It gives advice on the handling of archaeological remains and discoveries under the development plan and control systems, including the weight to be given to them in planning decisions and the use of planning conditions."<sup>42</sup> Annex 3 of this document describes the special controls used for scheduled monuments.

#### OWNERSHIP AND MANAGEMENT DISTRIBUTION

Distribution of ownership and management within the site is varied and complex. There are approximately seven hundred private owners, accounting for 90 percent of the site. Land use is similarly diverse and includes urban neighborhoods, farms and pasturage, towns and villages. Many of the prime archaeological sites, however, are publicly owned or otherwise managed for conservation and public access.

Approximately 10 percent of the site is managed specifically for heritage conservation, access, presentation, research, and recreation. These owners and managers include seven local authorities, English Heritage, the National Trust, and the Vindolanda Trust. The local authorities with the most substantial holdings and management roles for particular Roman heritage sites are the Cumbria County Council (owns and manages Birdoswald), Northumberland County Council (owns and manages Rudchester), North Tyneside Council (owns Wallsend), and South Tyneside Metropolitan Borough Council (owns South Shields). Both Wallsend and South Shields are managed for their owners by the Tyne and Wear Museums. Northumberland National Park Authority also leases Thirwall Castle and manages a visitor center and car parks. The Allerdale District Council and Carlisle and Newcastle City Councils also own areas of Roman ruins related to Hadrian's Wall.

English Heritage manages approximately 8 kilometers (5 miles) of the Wall, three forts and parts of their civil settlements (including Roman Corbridge), two bridges, and most of the visible milecastles and turrets. It should be noted that many EH guardianship properties are owned by the Cumbria County Council, the National Trust, and the Vindolanda Trust, resulting in considerable overlap in management activities.

The estate of the National Trust in the site's central sector covers approximately 1,100 hectares (2,718 acres). Its main holdings include the fort at Housesteads, approximately 8 kilometers (5 miles) of the Wall, lengths of the vallum, two visible milecastles, and the fortlet and marching camps at Haltwhistle Common.

The Vindolanda Trust owns the forts and civil settlements at Vindolanda and Carvoran, and operates museums at both sites. The Senhouse Trust also operates a museum of Roman relics located next to the Roman fort at Maryport. Both the Newcastle Museum of Antiquities and Tullie House hold major collections related to Hadrian's Wall. A number of related Roman sites lie within the World Heritage Site but are under varied ownership.

#### MANAGEMENT COORDINATION

Coordination among the many owners, managers, stewards, and users of Hadrian's Wall and its setting is one of the leading challenges in conserving and managing the site. The 1987 designation of the Wall as a World Heritage Site clearly recognized the value of the Wall and its setting as a whole, not simply as a collection of individual sites and features. In addition, it highlighted the importance of coordinated management to preserve the Wall's values. Groundwork was laid for the present efforts of the Hadrian's Wall World Heritage Site Management Plan Committee (MPC) as far back as the 1976 Darlington Amenity Research Trust (DART) report and the 1984 Hadrian's Wall Consultative Committee document *Strategy for Hadrian's Wall*. Both documents were based on the intellectual-historical tradition of understanding the Wall



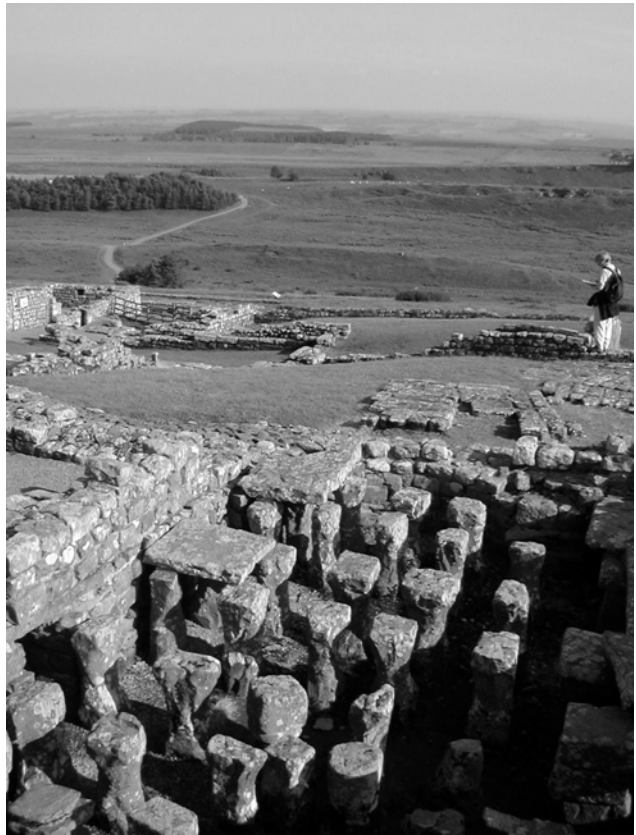
**Figure 10.** The English Heritage museum building just below the fort at Housesteads. Photo: Margaret MacLean.



**Figure 11.** View of a structural wall of Housesteads Fort in the foreground with Hadrian's Wall extending eastward into the distance. Photo: David Myers.

and its associated features holistically and asserted that the Wall should be managed as a whole.

The notion of Wall-wide management gained further momentum in 1990–91 as a result of major development proposals for open-cast coal mining and oil drilling in what would later be designated as the setting.



**Figure 12.** View of the excavated area at Housesteads Roman Fort looking south into the valley. Visitors cross this area as they walk from the car park up to the fort. Photo: Randy Mason.

Opponents of the development (including English Heritage and the Council for British Archaeology) prevailed, and the experience provided an important validation of the Wall's acknowledged values as well as the values of its landscape / setting. Furthermore, it emerged that *management* of the Wall and its surroundings—not just its designation and protection—would be key to its survival and development.

Prior to these pro-conservation outcomes, World Heritage designation had not been explicitly addressed in the legislation regarding the management of the historic built environment. These public controversies occurred *before PPG 15* was published in 1994; indeed, the inquiries that were held helped lead to the inclusion of specific World Heritage sections in *PPG 15*.

Around 1993, three distinct but related initiatives were developed, each bringing together a variety of partners and focusing efforts on the Wall and setting as an integrated whole. These three initiatives were the Hadrian's Wall Tourism Partnership (HWTP); the Hadrian's Wall Path National Trail, led by the Countryside Agency; and the start of the Management Plan process, led by English Heritage. Historically, ownership and control of the territory making up the site and setting had been fragmented. In response, these initiatives created institutions and partnerships to manage Wall and setting resources in ways that were coherent geographically and across sectors. They have led quite directly to the current management and planning regime. Behind the initiatives is a core set of individuals, connected informally and formally, who remain involved in the management of the site to this day.

In 1996, the first comprehensive management plan was adopted to provide a framework reconciling and balancing the variety of interests in the site, to articulate agreed-upon objectives, and to generate programs of work. Among the central provisions of this plan was the creation of the Management Plan Committee (MPC), which represents the stakeholders in the site and its setting. The 1996 plan spells out the MPC's responsibilities:

1. to oversee the implementation of general and specific recommendations made within the Management Plan, and to monitor the success in meeting the targets it sets;
2. to establish a forum for management issues, and to continue to co-ordinate efforts towards concerted management within the Hadrian's Wall World Heritage Site;

3. to receive reports from responsible bodies and agencies on projects which affect the Hadrian's Wall area;

4. to agree action programmes and priorities for developing specific aspects of the management plan;

5. to monitor the condition of the World Heritage Site, and develop and agree on appropriate action to deal with threats to its well-being;

6. to develop and agree further policies and codes of practice for protection, recording and research, access, interpretation, and preservation of the World Heritage Site, as well as safeguarding the livelihoods and interests of those living and working within the zone, and to encourage the adoption of such policies by responsible bodies and agencies;

7. within the overriding need to conserve the World Heritage Site, to promote the economy of the region;

8. to agree the work programme of, and provide general direction for the proposed Hadrian's Wall Co-ordination Unit;

9. to review the conclusions and recommendations within the management plan, to determine the frequency of the necessary updating of the plan, and to oversee this process when it occurs.<sup>43</sup>

The members of the MPC are:

Allerdale Borough Council

Association of Northeast Councils

Carlisle City Council

Carlisle County Council

Castle Morpeth Borough Council

Community Council of Northumberland

Copeland Borough Council

Council for British Archaeology

Country Land & Business Association

Countryside Agency

Cumbria County Council

Cumbria Tourist Board

Department of Culture, Media and Sport

Department of Environment, Food, and Rural Affairs

Durham University

English Heritage, Hadrian's Wall Co-ordination Unit

English Heritage, London

English Nature

European Liaison Unit

Forest Enterprise  
 Government Office North East  
 Hadrian's Wall Tourism Partnership  
 ICOMOS UK  
 Lake District National Park  
 National Farmers Union  
 The National Trust  
 Newcastle City Council  
 North Tyneside Metropolitan Borough Council  
 Northeast Museums, Libraries and Archives Council  
 Northumberland County Council  
 Northumberland National Park  
 Northumberland National Park  
 Northumbria Tourist Board  
 Tyne & Wear Museums  
 Tynedale District Council  
 Tynedale District Council  
 University of Newcastle  
 The Vindolanda Trust  
 Voluntary Action Cumbria

The MPC convenes biannually to review progress on the plan. The 1996 plan also created the Hadrian's Wall Co-ordination Unit (HWCU), which oversees implementation of the management plan on a day-to-day basis. Another important entity is the HWTP, which, like the HWCU, handles day-to-day responsibilities for managing activities at the site. The HWTP works to coordinate sustainable tourism marketing and development; it is discussed in more detail below.

#### THE ROLE OF ENGLISH HERITAGE

English Heritage is a key organization in this management scheme. It plays several roles simultaneously. At one level, it serves as partner and coordinator; at another level, it is the national authority that advises and approves or prevents certain interventions or activities of other partners. EH's core mandate—and its historical mission and *raison d'être*—as well as its statutory responsibilities identifies it closely with the historic, archaeological, and research values of the Wall. The management functions it has taken on for the Hadrian's Wall World Heritage Site (and others in England) have, however, more fully clarified its role in contemporary values. Congruent with this broadening of

mandate and of the types of values it recognizes in its site-specific work, EH sees itself as steward, advocate, and protector of historic landscapes and environments, rather than of sites and monuments.<sup>44</sup>

Of central importance to the success of management is the HWCU, set up in 1996 by EH to lead the implementation of the first Management Plan.<sup>45</sup> Currently, the HWCU consists of two staff members on loan from EH who, in collaboration with other individuals from other institutions, lead the implementation of this scheme across the totality of the site, aided by dozens of partner organizations and more than seven hundred landowners.

EH is the government's "lead body for the historic environment" and is the only national body with the remit to protect and conserve the World Heritage Site. Based on the 1979 *Ancient Monuments and Archaeological Areas Act* and the 1983 *National Heritage Act*, EH has statutory review authority for planning consent regarding scheduled monuments. EH also offers advice to owners of scheduled monuments and listed buildings and is the manager of several museums/historic sites and museums at the site (Corbridge, Housesteads, and Chesters).

Because of its key role in the HWCU and its legal mandate at a national level, EH is somewhat more than an equal partner in the scheme, and this creates an imbalance of power among the partners. EH holds a trump card in the form of its statutory review authority. If in certain situations the negotiation, consultation, and collaboration of the partnership fails to bring a result acceptable to EH, the organization has the authority to change the outcome. Evidently, this action is avoided to the largest extent possible. EH fills the complicated roles of manager, regulator, archaeologist, business partner, and referee. Furthermore, as an operator of historic sites, the organization needs to cultivate the site's economic and use values, and it is sometimes seen to be in competition with other sites. This puts EH in the position of advocating—and needing to balance—different kinds of values. Recognizing the complexity, EH and its partners have established other organizations, such as the HWTP and the National Trail, to bolster the sitewide presence and perspective and hedge reliance on one sole, coordinating entity.



## Reconstruction at Archaeological Sites: A Lens on Cultural Resource Policy

Reconstruction of aboveground features at archaeological sites is a source of great controversy in professional circles, and yet it is a fairly common practice. In situ reconstruction proposals often highlight conflicts of value: while reconstruction usually destroys archaeological and research value to some extent and may damage perceptions of a site's "authenticity," the "realism" suggested by the new structure can increase the number of visitors and therefore the economic and social value of the site. Ex situ reconstructions are less controversial because, in principle, they are not placed over archaeological deposits. The strategies and intentions behind reconstruction vary consid-



The bathhouse of Segedunum at Wallsend. In addition to a broad, excavated area and a new, award-winning museum, the site includes a Roman bathhouse reconstructed ex situ. The project has captured considerable interpretive and research values through the process of researching, constructing, and presenting the working Roman-style bathhouse. Since it was not built above archaeological resources and is presented as a modern structure, it does not undermine the research value of the site. Photo: Marta de la Torre.

erably from site to site along Hadrian's Wall, making reconstruction an excellent lens through which to view the varying, sometimes opposing, approaches to cultural resource policy that exist within the Management Plan framework.

Several examples of reconstructed buildings and features are present at individual sites across the World Heritage Site, and more are planned for the future. Even the Wall itself is an in situ reconstruction in some places. Partners have different standards for reconstruction, ranging from a strict avoidance of reconstruction as a conservation strategy, to its free use to generate interpretation and visitor attraction.

Reconstruction has been justified either as research in the use of construction materials and techniques or as a means of increasing awareness of the historic appearance of a site. The reconstructions illustrated here were conceived and executed to create stronger images and interpretive tools for conveying the central historic values of the Wall and its features as representing the Roman military frontier that so strongly shaped this part of the United Kingdom. Reconstructions often relate also to economic value, since it is theorized that a more easily visualized site will attract more visitors. A negative aspect of reconstruction, however,



Panoramic view of the actual remains of the fort at Segedunum, as seen from an observation tower, showing the reconstructed bathhouse at the far left. Photo: Margaret MacLean.

is the threat it poses to the authenticity—or perception of authenticity—of a site.

In general, the conservation field does not embrace reconstruction. The Venice Charter<sup>1</sup> states, “All reconstruction work should . . . be ruled out ‘a priori.’” PPG 15 terms reconstruction “not appropriate.” The 1998 Guide to the



The West Gate at Arbeia at South Shields. Located near Newcastle, the site of Arbeia has several reconstructions. The West Gate, reconstructed in 1988, was initially challenged by English Heritage and resulted in a public inquiry. Reconstruction was eventually approved, along with tacit approval of the idea of using reconstructions as a bold visitor attraction strategy. It is interesting to note that the same individual developed the plans for South Shields and Segedunum using reconstruction, excavation, and museum display methods but different overall approaches to each. Photo: Margaret MacLean.

Principles of the Conservation of Historic Buildings<sup>2</sup> instructs, “A presumption against restoration is a hallmark of the British approach to building conservation.” However, some experts believe reconstructions make sites easier to interpret and visualize by visitors, thus increasing public understanding, bolstering the marketability of sites, creating jobs, and boosting tourism expenditures and associated economic externalities.

Recently revised EH policy on reconstruction maintains basic conservation principles while carefully circumscribing certain conditions under which it can be accepted as conservation policy, and therefore in the interest of sustaining heritage values. Emphasis, however, remains on discouraging speculative reconstruction and precluding in situ reconstructions that damage original fabric.

The 2002 Management Plan adopts a policy generally supportive of reconstruction, citing several successful examples at the site and listing several advantages of selective



The reconstructed barracks at Arbeia at South Shields. At present, additional in situ reconstructions of barracks and houses are being undertaken within the excavated fort walls at Arbeia. Photo: Marta de la Torre.



The reconstructed temple at Vindolanda. The private Vindolanda Trust pursues an active program of excavation, research, conservation, and reconstruction with a strong entrepreneurial visitor orientation. Some of the Trust's initiatives have proven controversial. These include a number of ex situ reconstructions, for example this temple and segments of stone-and-turf wall. The Trust plans to reconstruct a large Roman fort on its properties, in a location that would have a strong visual impact on the Setting. Photo: Marta de la Torre.

reconstructions (in situ and otherwise). This marks a change from the traditional approach to archaeological values.

All in all, a lack of consensus still remains on reconstruction among the Hadrian's Wall partners. The issue has been divisive. Already in



Clayton's Wall, near Steel Rigg. Many segments of Hadrian's Wall could be considered reconstructions. For example, in some places much of the wall was mined for building stone in the post-Roman era. The extensive sections of Clayton's Wall reconstructed in the nineteenth century (followed by similar conservation in the twentieth century) consist of a core of excavated and reassembled Roman-era dry-laid wall with nineteenth-century course layered on the top. Few, if any, truly authentic segments of exposed wall survive. Photo: Marta de la Torre.

1984, prior to World Heritage designation, approval of the proposal for the reconstruction of the West Gate at South Shields did not come until after a public inquiry, the last step in resolving a reconstruction disagreement.

The interests in favor of reconstruction and its economic-development benefits won out over heritage conservation interests, led at that time by EH. Proposals for reconstruction are expected to continue as conservation and development activities proceed in the World Heritage Site. The absence of consensus is seen as an indicator of the health of the overall partnership: partners can disagree on specific approaches even though they agree on the general framework of values and their protection. "Generally, there can be no objections to reconstruction which is not in situ provided the

setting of the World Heritage Site is protected,” and, further, that principles of historical accuracy and reversibility are respected.<sup>3</sup> Hadrian’s Wall policy therefore reflects a branching away from rigid ideological pronouncements against reconstruction toward a more situational decision making based on recognition of the multiplicity of values involved. Future proposals for reconstruction present potentially divisive decisions for the partnership.

In the end, the key question about reconstruction is whether it threatens the overall integrity and authenticity of the Wall and setting, and therefore the heritage values of the entire site. Decisions ultimately will be made within the planning controls system—the scheduled monuments review conducted by EH to advise the consent decisions of the DCMS. A number of different attitudes toward reconstruction continue to coexist within the management plan framework, a situation that is not only permissible but desirable. The partners negotiated it this way in order to include and recognize everyone’s values.

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## Notes

1. ICOMOS, The Venice Charter, 1967.
2. British Standard on the Principles of the Conservation of Historic Buildings (BS7913, 1998), cited in *English Heritage Policy Statement on Restoration, Reconstruction, and Speculative Recreation of Archaeological Sites Including Ruins*, February 2001.
3. 2002 Management Plan, pp. 65–66.

# Understanding and Protecting the Values of the Site

## Values Associated with Hadrian's Wall

### HOW VALUING OF THE WALL HAS EVOLVED

In the preceding section of this report, the narrative on the history of Hadrian's Wall makes it clear that the Wall and its surrounding landscape have been valued for different reasons over the centuries.

Since the departure of the Roman legions centuries ago, local people and communities valued and made use of the Wall in a variety of utilitarian ways: as a source of quarried stone, as field boundaries, and so on. Antiquarian interest in Hadrian's Wall, and the conscious understanding of archaeological and historic value, began around 1600 and increased throughout the nineteenth century. Thus, use values *and* heritage values of the Wall stretch back over centuries.

Legislation protecting the Wall has been enacted over time, reflecting the changing values attributed to the site. The original legislation scheduling most of the Wall as a national monument dates from 1927 and focused exclusively on the Wall's Roman archaeological and historic values. This scheduling was updated by the 1932 Hadrian's Wall and Vallum Preservation Scheme, which extended the protected area.

The 1976 Darlington Amenity Research Trust (DART) report on conservation and visitors services, organized by the Countryside Commission, formulated a strategy to deal with the Wall in a geographically comprehensive way. It also addressed both the threats and opportunities presented by tourists drawn to the Wall, and recognized real and potential constraints presented by reconciling agricultural, tourist, and conservation uses of the Wall and its landscape. The DART report was the basis for the 1984 document *Strategy for Hadrian's Wall*, produced by the Hadrian's Wall Consultative Committee, which consisted of a few dozen national, regional, and local government agencies, as well as nonprofit groups representing a wide variety of stakeholders.<sup>46</sup> The balanced view of resources and/or conservation and development opportunities presented in the DART report were extended by the *Strategy*. The latter focused on sites

directly on or related to the Wall itself, and proposed a strategy of strengthening tourism use of larger, central sites along the Wall (Carvoran, Birdoswald, Chesters, and Corbridge). While concentrating on safeguarding the Wall, the document suggested efforts to protect and enhance its landscape setting. The four points of the strategy are:

- a. to safeguard the splendid heritage of Roman monuments and all associated remains so that they are not lost or spoilt for future generations;
- b. to protect, and where possible enhance, the quality of landscape setting of the Wall sites;
- c. to encourage appropriate public visiting of the Wall area, with convenient access and high-quality experience and (for those who seek it) understanding of the Roman monument and way of life;
- d. to ensure that local people derive the best possible benefits from tourism by way of income and employment, whilst ensuring that all appropriate steps are taken to minimise the adverse effects of tourism, particularly on agriculture.<sup>47</sup>

Though both the DART report and the *Strategy* had little immediate, practical effect, they did set a precedent for partnership building and a broadened view of the Wall's values. Both acknowledged contemporary and heritage values, and valued the Wall itself as well as the surrounding landscape. Equally important, these early initiatives launched an evolutionary process of conceiving the Wall and its values as *a whole entity* comprising the core archaeological resources as well as the landscape setting. Monument scheduling under the 1979 *Ancient Monuments and Archaeological Areas Act* revised the original designations. The Wall is now almost entirely scheduled.

UNESCO World Heritage inscription of Hadrian's Wall Military Zone in 1987 was based on Roman-era heritage values. "Built under the orders of Emperor Hadrian in about 122 A.D. on the border between England and Scotland, the 118-kilometer long wall is a striking example of the organisation of a military zone, which illustrates the techniques and strategic and geopolitical views of the Romans."<sup>48</sup> The inscription was a

catalyst for understanding *and managing* the Wall as a zone, not simply an archaeological resource.

Managing the site in a comprehensive and holistic way became the major challenge. The primary vehicle has been the Management Plans of 1996 and 2002. The plans dealt with contemporary-use values and the long-recognized, iconic archaeological and historic values of the Wall. They have stimulated the development of the partnership-based management model employed today, and in their formulation even embodied such an approach.

#### CURRENT UNDERSTANDING OF VALUES

The current understanding of the site's values is explicitly represented in the two Management Plans. The values are not listed per se in the 1996 plan. The site's historical and contemporary significance is well summarized as follows: "The Hadrian's Wall corridor is important . . . both for the concentration of Roman sites and for their survival and effect on today's landscape."<sup>49</sup> An articulation of values is presented in the significance of the Hadrian's Wall Military Zone:

- archaeological values of the Roman Wall remains, as well as its associated features (vallum, etc.), and outlier sites (e.g., fortlets and Stanegate features);
- the historical values associated with the Roman northern frontier and its subsequent influence;
- the varied surrounding landscape along the 80-mile length of the Wall;
- aesthetic and natural values of the surrounding landscape are also noted briefly; and
- the additional layer of World Heritage value is described.

Economic and other contemporary values were not explicitly articulated as a contributor to the site's significance in 1996, though they are tacitly addressed in plan policies and through the partnerships formed. In section 3.1, "Need for a Management Plan," the central management challenge is clearly defined as involving "four major factors which need to be balanced": (1) conserving archaeological resources (and associated landscape); (2) protecting the working agricultural landscape surrounding the Wall; (3) ensuring public access for visitors and local users, and making this access sustainable; and (4) recognizing the important contributions of the Wall to the local and regional economies.

A first-draft plan was issued in July 1995 and generated strong reactions during the public consultation period, resulting in revisions and a plan more responsive

to the concerns of a wider range of stakeholders.<sup>50</sup>

Hundreds of copies of the draft and 35,000 summary leaflets were distributed to a wide range of partners and individuals. The three-month consultation period was extended, and eventually more than two hundred responses were received. Most of the concerns were expressed by the archaeological community and by landowners and farmers, often channeled through local authorities. The overall number of responses was not large, and few were hostile, but specific concerns were strongly articulated:

- Fear of additional controls on farming throughout a wide zone.
- Fear of widespread enforced change to farming practices.
- Fear of increased bureaucracy and additional English Heritage controls.
- Concerns over traffic management on road B6318 (the Military Road).
- Fear of impact of tourism and of the National Trail on farming activities and archaeological remains.

English Heritage's response, as captured in the revised plan, was described by lead planner Christopher Young: "We rewrote the plan [after the public comment cycle] and made it more accessible. We also spent a lot of time talking to people and groups with concerns. In the end, apart from the boundaries, there was comparatively little difference in substance between the policies set out in 1995 and 1996 but we had achieved better understanding of what was intended as a result of the consultation process."<sup>51</sup>

The final 1996 plan addressed the primary concerns as follows:

- It adopted a tiered approach to land-use and monument controls, using normal ancient monument powers for archaeological cores and appropriate planning policies to protect the setting.
- It recognized the need for change in the agricultural landscape (not the fossilization of particular farming methods), and the development of positive landscape management on a voluntary basis with appropriate grant support.
- It clarified that EH sought no additional powers in establishing the Co-ordination Unit; the role of the unit was to provide a focus on the Wall as a whole, as well as coordination of efforts and carrying-out of tasks that did not fall to other agencies.

- It formalized the boundaries of the World Heritage Site and defined its setting.
- It pursued “sustainability” of tourism through working with the HWTP and through maintenance and management of traffic throughout the region.

The revised 2002–7 Management Plan is not a significant departure from the 1996 plan; rather, it is a refinement and continuation of it. The 2002 plan includes a point-by-point analysis of the progress accomplished on the nineteen objectives of the 1996 plan. Adjustments to “regulatory and administrative measures” for putting the plan into effect were considered to have been largely achieved. For the most part, objectives in the area of conservation and research were estimated not to have been achieved. Finally, in the areas of sustainable tourism and visitor access, it was determined that significant progress had been made both at specific sites and at the Wall-wide scale.<sup>52</sup> In the 2002 plan, the approach to value articulation was revised to suggest a new balance between heritage values (the basis of conservation policies) and contemporary-use values (the basis for access and development policies).

The core statement of significance makes the connection between archaeological values and their uses, both cultural and economic: “[Hadrian’s Wall Military Zone] is of significant value in terms of its scale and identity, the technical expertise of its builders and planners, its documentation, survival and rarity, and also in terms of *its economic, educational and cultural contribution to today’s world.*”<sup>53</sup>

#### *Statement of Significance*<sup>54</sup>

- Archaeological and historical values: tightly tied to Roman period, with some acknowledgment of the nineteenth- and twentieth-century values created by conservation . . . although the values are clearly centered on the Roman, the aboveground remains have (almost exclusively) been conserved, consolidated, and restored in situ over the last 150 years.
- Natural values: seven key types of habitat are represented in the World Heritage Site, many of them recognized as significant ecological resources at the national and international levels.
- Contemporary values: economic, recreation and educational, social and political.

- World Heritage values. The rationales for meeting WHC criteria (ii), (iii), and (iv) stem exclusively from Roman fabric and associations. [Though stated last, these really are at the center of articulated values for the Wall and its setting.]

Current management and policy is clearly focused on the archaeological values and associated historic values of the Roman Wall. Secondary to this but integrated as bases for policy are the aesthetic values of the setting and the economic values. The latter is perhaps the most important contemporary value of Hadrian’s Wall, and represents a departure from the 1996 plan.

The latest Management Plan does not reflect *all* the values held by *all* the partners. What are represented are the values and policies on which there is consensus, and which have emerged from the process of consultation and negotiation that created the multipartner plan. Each of the partner organizations and/or landowners is likely to have projects and hold values that are not accounted for in the plan.

Each partner sees management of the site from the perspective of its particular stake in the Wall and its value priorities. The core significance, range of values, and general policies for the World Heritage Site are shared by all. As expected, the values are arranged and prioritized differently by different partners as each pursues its goals within the Management Plan framework. For example, the 2002 bid for Single Regeneration Budget (SRB) regional economic development funding highlights economic values. These documents were submitted by the HWTP and reflect a collective decision by the members of HWTP (which include English Heritage).<sup>55</sup>

#### **How Management Policies and Strategies Take Values into Consideration**

This section describes how the evolving values of the Wall have been reflected and taken into consideration in the policies and strategies of the World Heritage Site Management Plans. The discussion is organized around several types of policies or management issues that provide a perspective on the particular challenges faced by management. These challenges include the setting of boundaries, the value shifts between the 1996 plan and the 2002 plan, tourism strategies and the creation of the HWTP, agricultural policy, and the central role of partnerships in management of the site.

## SETTING BOUNDARIES

Boundaries for the site were not included in the original nomination of Hadrian's Wall to the World Heritage List in the mid-1980s. The boundaries were set later, during formulation of the 1996 Management Plan. This lag gave the multipartner collaboration the opportunity to grow and develop before the contentious subject of boundary setting was addressed.

Primarily, boundaries were determined in accord with the parts of the Wall that had been scheduled as ancient monuments. Secondly, the setting was established as a viewshed of the Wall resources (from 1 to 6 kilometers distant) and as the areas that potentially contained significant archaeological resources. The resulting discussions and negotiations revealed the different values held by various groups and stakeholders. Disagreements arose with local authorities or landowners about specific properties to be included in the setting, and strategic decisions had to be made to exclude particular agricultural, town, or other lands lest landowners perceive even more regulatory controls and reviews were being imposed.

The 1995 draft plan proposed boundaries that approximated roughly to the area now defined as the Setting of the World Heritage Site. Also proposed, more tentatively, was the inclusion of a wide zone down the Cumbrian coast, down the north coast of the Solway estuary, and through a large area of the Tyne River valley around Corbridge and north of Hexham. This reflected an approach that viewed the World Heritage Site very much as a cultural landscape.

In practical terms, the 1995 draft plan presented a tiered approach to the management of this broadly defined site. The innermost tier, the archaeological core, would be protected by powers under ancient monuments legislation since it consisted of scheduled sites only, while developments in the outer part of the site would be controlled through planning policies in local authority plans. This was effectively the position reached, after exhaustive public consultation, in the 1996 plan—a tightly defined Site composed of the archaeological core and a Setting under local control. The end result was virtually the same.

Some argued in the 1995–96 public discussions that the World Heritage Site should not be concerned with the landscape as a whole since that landscape is not Roman and therefore not of outstanding universal value. This argument did not win out, owing to the logic that the Wall is where it is because of the landscape and has greatly influenced the development of the landscape since its construction.

The most powerful arguments offered regarding boundaries were not about the cultural value of the landscape, but rather about the potential impact on modern land management and the interests and freedoms of current landowners. There was widespread concern that formally designating such a large area as a World Heritage Site would lead to further controls. This issue was taken up at senior levels of government, and the eventual decision on boundaries was made at the ministerial level.

In the end, the practical management effect of setting the boundaries was very small—the planners' original conception and the eventual result are quite similar. Psychologically, though, many people felt more comfortable with a closely defined Site along with a broad Setting, which might be easier to alter in the future.<sup>56</sup>

## FROM THE 1996 PLAN TO THE 2002 PLAN

There are some subtle but significant differences between the 2002 and 1996 Management Plans, which reflect on the continuing evolution of site values.

Conceptually, over the course of this period, focus shifted from the Military Zone to “the Wall and its Setting.” Although the notion of Hadrian's Wall as a landscape and not simply as an archaeological resource was indicated in the 1995 draft and the 1996 plan, this central idea is much more evident in the 2002 plan. This shift reflects a broadening of the types of values toward a greater inclusion of aesthetic and contemporary values of the wider setting landscape. It also was a response to the FMD disaster and its impact on the values of the World Heritage Site. In addition, it symbolized a move toward a broader-scale and more holistic approach to planning. One could say that the older model of planning for an archaeological resource had been replaced by a model of planning for a living landscape that counts the 118-kilometer (73-mile) archaeological resource among its dearest elements.

Access, tourism revenue, tourism impact, agricultural viability, and economic development—issues that form the social context of conserving the Wall—have been discussed and debated since the 1970s. The Management Plans have grown progressively more detailed and proactive in dealing with these diverse issues that constitute the social context of the Wall's conservation, and integrating them with the more heritage-centered values and issues. The values articulated in the 2002 plan more explicitly recognize the importance of contemporary-use values. Correspondingly, the policies are more strongly shaped by contemporary values in the 2002 plan, though



not at the sacrifice of heritage values (which already were well articulated in the 1996 plan).

#### THE CENTRAL ROLE OF PARTNERSHIPS

Recognition and engagement of many diverse stakeholders is key to values-based management. The Hadrian's Wall plans are inclusive in this regard, taking into consideration the interests of future generations, of the world at large (universal value), of archaeologists and researchers, of tourists and visitors, and of government, landowners, farmers, and local communities. Development and implementation of management policies have relied strongly on the formation of institutional partnerships, with the HWCU, HWTP, or the Countryside Agency playing the coordinating roles. At one level, this regime of partnerships is a straightforward response to the decentralized patterns of ownership and stewardship in the territory of the Site and Setting—namely the seven hundred or so owners and dozens of government and nonprofit agencies with a stake in the site.

Fragmented landownership remains a prevalent pattern. Under the current partnership regime, there is no single manager for the whole site, but rather a fluid but fairly stable group of organizations led by a small core of coordinating partners.<sup>57</sup> This has been called a *partnership park* management model, in contrast to the traditional model of unified site ownership.<sup>58</sup> The core group of partners per force spends a great deal of energy managing the partnerships. These investments in sustaining partnerships are considerable but provide benefits beyond those that would accrue from individual partners acting alone and without coordination. That these benefits are seen as outweighing the costs holds true even for some individual partners—foremost, the Vindolanda Trust—who disagree with some of the main policies guiding the Management Plan, yet recognize the value of their participation in the partnership because of the substantial benefits they receive.

By making it a priority to coordinate and integrate the actions of partners at all geographic levels, the Management Plan serves the *range* of the landscape's values well. One risk of such a large partnership park is that of uncoordinated action, which not only can damage resources and threaten values directly but also can send a message that the entire partnership is not fully supported by all partners. Maintaining a spirit of cooperation and partners' ultimate deference to the values of the whole site, as discussed and recorded in the Management Plan, is central to the success of the partnership.

The overriding goal of the Hadrian's Wall partnerships has been to create a balanced program of conservation and development, as evidenced in the collaboration of three different organizations leading the effort: English Heritage, a conservation-driven agency; the HWTP, primarily an economic development agency; and the Countryside Agency, a statutory agency involved in many countryside issues and in developing the Hadrian's Wall Path National Trail. This is a departure from traditional conservation practice—which generally resisted or ignored development and its benefits, and too often focused on monuments rather than whole landscapes—and is aligned with similar efforts in other countries seeking to manage large heritage resources, complexes, or landscapes (for example, French regional parks and American heritage areas).

Through partnering and overlapping of responsibilities, the site's values have been well acknowledged in both depth and breadth. This acknowledgment probably comes more easily when the partners have diverse interests and values than in a case of centralized ownership and management. For instance, some partnerships focus on archaeological values, others on natural values or recreational use. With these collaborations spread out across the region, a critical task for management is one of coordination. The Wall's status as a World Heritage Site plays an anchoring role, keeping archaeological values, and historic value related to the Roman archaeology, as the focus of all efforts. Such buy-in on "Roman" values brings together all the stakeholders—not just the partners for which Wall-wide value understanding and management is the primary goal, but also local authorities, individual heritage sites, government agencies with divergent mandates, national government, and World Heritage stakeholders.

#### TOURISM STRATEGY

Tourism development activities and the economic values realized by tourism play a strong but not primary role in site management. The leading tourism strategy pursued has been spearheaded by the tourism development agency HWTP. The HWTP is itself a partnership, with an executive and more than a dozen funders and partners (government agencies, local councils, and others). The agency seeks to increase the economic benefits and sustainable uses of the heritage resources and other amenities available to visitors.

Since its formation in 1993, the HWTP's efforts have been closely coordinated with those of the Hadrian's

Wall Co-ordination Unit and other Wall-related entities, as reflected in the Management Plan.<sup>59</sup> This integration of tourism and management activities is evident in the list of HWTP objectives:

- To develop a high quality tourism product which meets the needs of identified target markets, within the overall objectives of the World Heritage Management Plan;
- To generate and spread benefits for businesses in the area, by improving communication and access to markets, attracting more high spending domestic and overseas visitors, and developing the 'shoulder' seasons;
- To encourage more people to leave their cars at home and to travel into and around the area by public transport and other means such as cycling and walking;
- To stimulate visitor interest in, and support for, the management and conservation of the World Heritage Site;
- To influence visitor behaviour, to spread the load in support of agreed site management objectives, to maximise benefits and minimise any adverse impacts on the host community.<sup>60</sup>

The agency engages in traditional marketing activities and plays an important part in regional branding and identity for both the Northeast and the Northwest (two governmental regions across which HWTP's work spans). It works with local businesses to improve their understanding and connections with the site and also organizes the Wall-wide bus service.<sup>61</sup>

The HWTP's involvement reflects the attitude that tourism values must be integrated with heritage values. The agency takes the lead in tourism promotion and Wall-based economic regeneration—within the framework of the Site's conservation mandate. It has launched a wide variety of successful services and initiatives (from the aforementioned bus service to a Web site to winning and administering a large government grant for tourism-led regional economic regeneration) to work toward these goals, operating on the idea that "heritage is a driver of economic regeneration." What sets the HWTP apart from other tourism agencies is its close partnership with EH and its full buy-in to the Management Plan, including the primacy of heritage conservation.

Through its objectives and activities, the HWTP defines and pursues what the Management Plan calls sustainability. *Sustainable*, as defined by the HWTP and its World Heritage Site partners, means (1) staying within the overall (conservation) objectives of the World Heritage Site and (2) balancing the pursuit of the various values

recognized in the plan, both contemporary and historic. As the Management Plan states on its very first page, it is "to provide a means for establishing an appropriate balance between the needs of conservation, access, sustainable economic development, and the interests of the local community."<sup>62</sup> Indeed, sustainability is anchored in values: "An underlying principle [of the plan] is that of 'sustainability' which strikes a balance between maximising enjoyment and use of the WHS while still preserving the values and fabric of the Site and its Setting and ensuring that their universal significance is not impaired for future generations."<sup>63</sup>

#### AGRICULTURAL POLICY, VALUES, AND USES

The practice of agriculture and agricultural policy has a significant effect on the Hadrian's Wall landscape and its management, especially in the central sections of the site. Agriculture has shaped the landscape for centuries and plays an exceedingly important role in the regional economy, rivaling tourism and tourism-related development as the most important contemporary-use values in the Setting.

The 2002 plan recognizes the interdependency between agriculture and heritage conservation. As part of the articulation of contemporary values, the plan's statement of significance notes the contribution of agriculture to the World Heritage Site's economic values.<sup>64</sup>

Sustaining agriculture, difficult in itself given economic pressures and globalization, is yet more complex in the context of the World Heritage Site. The maintenance of traditional agriculture (especially pasturage) is a powerful lever for managing the landscape, which has become an increasingly valued part of the site, as well as for conserving the archaeological resources of the Wall itself. Great aesthetic and historic value lies in the landscape of pasturage, stone walls, and sheep. Likewise, agriculture is essentially an economic activity, and economic pressures on agriculture are addressed by a number of government programs, such as the Countryside Stewardship Scheme, which provides grants and advice on diversification.

Farmers tend to see conservation and tourism as costs to bear, and even as a threat to economic sustainability. Nevertheless, they are partners in managing the site as a heritage place. DEFRA's Countryside Stewardship Scheme is one program used to manage the threats and opportunities of changing agricultural practices and their effect on heritage places. The scheme gives grants to farmers to encourage the conservation of landscape and ecological values. For example, by helping start farm-stays

instead of converting pasturage to tilled land or forestry, stewardship grants help farmers manage their land to conserve valued environments and cultural features while diversifying operations to achieve greater financial stability. The site is a target area for this national program, and applicants from within the area receive preferential treatment. Another benefit is the barn scheme, through which farmers secure grants to construct barns that are appropriate to the aesthetic values of the landscape and that allow them to shelter stock during winter and therefore manage a more lucrative operation. This program was strongly promoted by Northumberland National Park and is a good example of what can be achieved through partnership; indeed, such a program would not have been created by any one organization working independently.

Heritage protection is an important public good, and restricting some of the rights of private-property holders is a reasonable trade-off for guaranteeing public access to heritage. Heritage conservation of any kind thus has some perceived disadvantages, for instance, the constraints that monument scheduling might impose on free use of one's land. Although World Heritage designation brings advantages to some farmers, others see it as further constraint.

The foot and mouth disease crisis of 2001 reduced farming incomes some 60 percent in the region and pushed agricultural values to the forefront.<sup>65</sup> (See the sidebar on foot and mouth disease on page 10 for a more comprehensive discussion.) The impact on tourism, access, and the regional economy—along with the direct threat to agriculture—shaped the creation of the 2002 plan. The 2002 plan takes agricultural values into consideration more seriously, given that it was written when this region was recovering and responding to the FMD disaster. Even though the decimation of animal stocks threatened the very practice of pasturage in these places, the crisis is thought to have accelerated the pressures on agriculture but not to have changed them fundamentally. Economic pressures on farming will continue to spur diversification, changes in ownership (both fragmentation and amalgamation of farms), and conversion of farmland to other uses altogether.

At the regional scale and in the long-view time frame, the interrelationship between agricultural policy and management of the World Heritage Site is evident in several ways. Consider a scenario in which agriculture ceased to be viable in its traditional modes: open land would likely revert to scrub or forest, vastly changing the aesthetic of the landscape and the perception of its values.

Or, consider the wholesale transfer of pasture land to cultivation (although it is unlikely for reasons of climate and soil). This would result in potentially damaging effects of plowing on several kinds of site values, physically disturbing archaeological remains, accelerating erosion, and, again, changing the look of the landscape.

In the end, economic decisions of individual farmers must be reconciled with local effects as well as regional effects, not only on the Wall and Setting but also on environmental/ecological values. At the local level, co-ordinated conservation of archaeological resources, ecological resources, and economically robust agricultural practices is difficult for so few staff to manage.

### **Impact of Management Policies and Decisions on the Site's Values and Their Preservation**

This section outlines some of the impacts that the Management Plans, policies, and decisions have had on the site's values. The discussion highlights major innovations of and lessons learned from the Hadrian's Wall experience and identifies issues relevant to managers of similar sites and projects. In reality, of course, the effects of the site's management extend beyond what is covered here. The topics selected for discussion in this section are the impact of World Heritage designation on values; the balance between the values of the Wall and the values of the wider landscape; the effects of the partnership-driven model of management; and the nature of Management Plan policies.

World Heritage designation has reinforced, and even helped expand, the values of Hadrian's Wall. It has generated planning processes that have engaged a full range of values and integrated these into the management of the surrounding landscape. As a policy decision taken by the government, the World Heritage nomination has directly affected the perception and assessment of the values of this landscape and its resources. In primary ways, it has clearly articulated the site's "universal value," and in myriad secondary ways it has prompted value assessment, planning, and management action.

World Heritage status functions as both a conservation strategy and a marketing strategy and furthers the efforts of existing local, regional, and national bodies. It does so by creating the mechanisms for Wall-wide management through partnerships, which have resulted in a series of affirmative relationships and development

opportunities, while reinforcing existing statutory controls and refraining from imposing additional ones.

By adding an explicit layer of universal value, World Heritage status continues the decades-long evolution of the understanding and management of the Wall and its landscape. It facilitates moving from a narrow focus on the Roman archaeological remains to a more holistic, encompassing view of the heritage values. Because it has enabled and fostered regional cooperation, World Heritage designation has indeed added value in each of the categories articulated in the Management Plan.

As the basis for inscription, the emphasis on archaeological and historic values is a positive factor in management, though it may de-emphasize other historic values represented by non-Roman resources and landscape patterns (i.e., medieval or later agricultural features). The management planning activities, however, have resulted in a broad articulation of the values of Site and Setting (i.e., including natural, contemporary, and non-Roman cultural values along with the core Roman/universal values). By institutionalizing the connection between the management of the site *and* the setting, World Heritage status has reinforced the values of the living landscape, such as ecology and nature, visual qualities, and contemporary use.

The designation has also brought prestige to the Wall and probably helped attract the substantial amounts of government funding devoted to projects at the site (£10 million to £12 million from the Heritage Lottery Fund, for instance; more recently, £3.6 million in regional SRB grants). The result has been a more proactive, incentive-based attitude toward site development, as opposed to the traditional regulatory, restrictive approach.

World Heritage designation has been a unifying force, creating incentives (and in some ways requirements) for collaboration. Projects such as the HWTP programs or the National Trail benefit all and provide additional opportunities to enjoy, use, and understand the site. At the same time, designation enhances (marginally) pre-existing efforts to conserve the archaeological fabric of the Wall itself, although conservation efforts in the narrow sense have in effect given way to other initiatives. Inscription of the site is seen as the force behind the continuing exchange between different stakeholders—from different parts of the Wall, and from different perspectives on the value of the Wall. Given the fragmented ownership pattern, the number of government and other agencies involved with land management, and the competition for

tourism and grant revenue in times of economic stress, it is reasonable to think that there would not have been a Wall-wide plan or management scheme without the designation. Opinions on this interpretation differ, however. Some of those involved feel that some regional scheme would still have emerged without the designation's catalyzing effect.

All these benefits should not lead one to think that World Heritage status has been a panacea. The designation has not eliminated divisiveness and continued competition among stakeholders in the Site and Setting. Conflicts between owners and regulatory agencies remain, as do conflicts between conservation-driven interests and development-driven interests. The essential nature of this place's heritage and contemporary values—extraordinarily rich and very diverse—makes such disagreements inevitable, and a planning system in which this is recognized and dealt with collectively is a productive arrangement. Various agencies will continue to compete for resources. Indeed, various groups—the Roman archaeology community, or the owners of one or another site/attraction, for example—have selectively used the statement of significance to advance their own interests. This study, however, suggests that World Heritage designation and the management efforts that have resulted substantially outweigh these real and potential conflicts. The World Heritage efforts have led to effective management of the full range of the Wall's values.

#### BALANCING WALL VALUES AND LANDSCAPE VALUES

The Wall and its landscape are closely related but also distinct. The Wall is primarily an archaeological resource,<sup>66</sup> whereas the Setting is a working landscape defined by economic production, ecological values, aesthetic judgments, and so on. Site and Setting are valued differently yet managed in concert.

From the onset of modern historical interest in the eighteenth and nineteenth centuries, the values of the Wall were overwhelmingly construed in terms of Roman-era archaeological and historic remains. More recently, the perceived values have evolved and broadened quite dramatically to encompass a richly layered historic landscape representing many periods and narratives and carrying important contemporary values. Without diminishing the value of the Wall, the clear trend over the past thirty years or so has been to value the Wall *and* its surrounding landscape for both their heritage values and their contemporary-use values. This broader conception represents the

consensus today—that the Roman Wall is the core but not the totality of what is significant about this place—and the diversity of values presents a challenge for management.

A two-tiered geographic scheme was devised from the beginning of World Heritage inscription, identifying the core archaeological resources (including some associated resources not on the line of the wall itself) as well as a substantial buffer zone (the Setting). Such a territorially broad conception necessitates a broad consideration of values, given that much of the land is in active, nonconservation use and under the control of many separate owners. Today, the site is understood and described primarily as a landscape, though it is clear that the roots of the site's value lie in the archaeology and over time have evolved to include the landscape.

Some have observed a conceptual disconnect between the notion of the site as a place of universal value, based on Roman history, and the notion of a living landscape balancing both contemporary and heritage values. The Setting as it exists today has been attributed universal value. Yet in certain respects, it is not the landscape that existed during Roman times. It could be argued that the values of the Setting are different and should be appraised differently from the values of the core Site.

Nevertheless, the key element of Hadrian's Wall—and the set of values leading to the various legal protections and official recognition—is clearly the history of the Wall and its associated features as a Roman imperial frontier. A generation ago, it could be said that the Roman values obscured the other values. In the years following the 1987 inscription and the new management structures and initiatives formed in the 1990s, the strict focus on Roman archaeological and historic values has evolved to incorporate a broader range of values. This expanded range includes other heritage values (post-Roman uses of the Wall, or the nineteenth-century agricultural landscape) as well as contemporary-use values (associated with the practice of agriculture or tourism development). Today's management scheme endeavors to maintain a balance among the different kinds of values.

For instance, historic values related to the agricultural landscape created in the nineteenth century seem to be of little consequence in the planning and management of the landscape, though these values are reflected in the amount of territory. Features related to these values form a large portion of the landscape—pasturage, stone field walls, farmhouses, and barns—and there is ample

*continued on page 34*

## Limits of Acceptable Change Conference

A number of resource-, project-, and place-specific plans have been undertaken under the rubric of the Management Plan, including a local interpretive plan at Gilsland and conservation plans for the Roman fort sites of Chesters and Housesteads. The plans have been spearheaded by the particular partners involved, but, dictated by the Management Plan, efforts have been made to incorporate them into the larger regional framework of significance, values, and general policies.

Two overarching implementation issues must be addressed. The first is how to specify and implement the broad insights and decisions of the regional planning and management scheme at a local level, or for specific resources. The second is how to monitor values at such local, empirical scales that their improvement (or erosion) “on the ground” can be gauged and management can respond.

To address both these challenges, the Countryside Agency and English Heritage are leading an effort to complete a limits of acceptable change (LAC) study for the most highly visited and traveled stretch of the Wall—Housesteads to Steel Rigg.<sup>1</sup> This area is under the most intense use and pressure, and it also has a complicated, overlapping stewardship and owner-

ship pattern involving a number of institutions, including EH, the National Trust, and Northumberland National Park. An adaptation of carrying-capacity planning and impact assessment, LAC methods acknowledge the reality of landscape change and focus on identifying acceptable ranges of change. It is based on managing outcomes so that the different values and functions of a landscape remain balanced, as opposed to setting particular values as a priori targets for protection. These tolerances are not based on scientific studies, but rather are established through extensive consultation among the stakeholders.

The Housesteads LAC conference looked at five factors, each relating loosely to the heritage and contemporary values articulated for the World Heritage Site: archaeological resource quality; natural resource quality; disturbance to farming; recreational path quality; and quality of visitor experience. For each factor, clear benchmarks are outlined as limits—for example, “no deterioration in the archaeological resource” or “a maximum of 40 complaints from farmers per annum.” Monitoring is built in: “The LAC process relies upon a system of continual environmental monitoring that demonstrates when a quality threshold has been breached or is about to be breached.”<sup>2</sup> The five elements chosen for monitoring correlate well with World Heritage Site values and

goals. With the points for unacceptable change having been defined, a series of “management prescriptions” is drawn up to guide responses to specific changes (e.g., whom to consult before constructing a fence around a scheduled monument, or when it is acceptable to close certain parts of the walking path).

As with other plans in the World Heritage Site, the linchpin of the LAC approach to microlevel heritage landscape management is not the specific limits or actions described in the plan but the system of collaboration. The Housesteads LAC “brings together organisations and individuals with diverse interests (subsequently referred to as the Conference) to agree limits of acceptable change for specific parameters, how they should be monitored and the measures to be taken to prevent them being reached or if they are reached.” With the conference done and the plan in place, the actual work of monitoring and reporting is shared by the main stakeholder agencies.

The LAC stresses collaboration among partners as the key to balancing the values of the landscape, while also demonstrating detailed understanding of the resources and their use. This effort has nonetheless engendered criticism for being too exhaustive, intensive, and expensive to be pragmatic and useful as a widely adopted management method.

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## Notes

1. The source for much of the information on the LAC efforts is Rimmington and McGlade 2001.
2. Rimmington and McGlade 2001, 4.

*continued from page 32*

evidence of ongoing medieval habitation along and on the Wall.<sup>67</sup> The Roman focus on conservation and management can work against understanding and managing these post-Roman values. Defining the landscape as a “setting” for the Roman/Wall resources puts it in a secondary position. While this is rightly seen as necessary in terms of prioritizing values (identifying the ones of universal value and putting them at the center of management), the implications as to how the other, non-Roman historic values are recognized are not clear.

Contrary examples are evident in the several layers of post-Roman historic values that are well preserved and represented. The Birdoswald site has maintained buildings dating from the sixteenth to nineteenth centuries, carrying out conservation and interpretation within this context. The efforts to develop access and interpretation at this site are held up as a model in the framework of the Management Plan. The need for sensitivity and subtlety in balancing values is well recognized and wrestled with across the site.

These values coexist almost everywhere in the landscape. For example, the Roman historic values relate directly to contemporary values through tourism: the Wall is the source of many kinds of value and is perhaps the most important resource for regional economic development and regeneration. This has long been recognized as far back as the 1984 *Strategy* document (which in turn was based on a 1974 regional development report). The values are protected explicitly as a matter of policy, and many of the current and planned efforts to improve management are focused on the visual and other experiential qualities of the Wall setting. These have been the subject of the “limits of acceptable change” analyses done by the National Trail, the National Trust, and Northumberland National Park to manage the Housesteads area at a more local scale. Using the conserved archaeological and historic values of the Wall as a visitor attraction has been a driving force not only in the Wall-wide management scheme committed to paper but also in the creation of partnerships (especially with the HWTP and with national and local governments) and the attraction of funding to sustain all activities associated with the Wall (from strict conservation to more development-oriented schemes).

What has been the impact of the shift toward valuing the setting as well as the site? Highlighting World Heritage values—explicitly “universal”—seems largely to have bolstered the advancement of local and regional val-

ues associated with the landscape. The current management regime acknowledges that the Wall has shaped this landscape for the last nineteen hundred years, and that a broader story of landscape evolution and a broader range of values are the basis for its current value to society.

While the expansion of geographic scope and universal significance of the values to be conserved may have introduced more complexity and conflict, the more important result is positive: a greater range of values is assessed and conserved, and a more holistic framework for recognizing the significance of different kinds of values has become broadly accepted. The Management Plans reflect a balanced approach to managing the core heritage values (those associated with the Wall) and the other, often equally important, values of the context (i.e., the Setting).

#### THE EFFECTS OF A PARTNERSHIP MODEL ON VALUES

The partnership management structure used for Hadrian's Wall has an important impact on values.<sup>68</sup> In a general sense, involving more partners of varied kinds broadens the values that are being championed. For instance, including private landowners along with conservation groups and archaeologists places economic and other contemporary-use values on par with historic and research values. Some particular examples emerge in the following discussion.

The MPC emerged in the 1996 plan, but such cooperation and collaboration can be traced back to reports and plans formulated in the 1970s and 1980s. Similar arrangements have been employed elsewhere in the world over the past twenty years, but they reach a high level of articulation and refinement in the management of Hadrian's Wall.<sup>69</sup>

The institutionalized partnership of these agencies constitutes a comprehensive effort to manage a range of values larger than that held by any one partner. This range is clearly reflected in the Management Plans as well: archaeological, historic, aesthetic, economic, and other contemporary-use values are all accounted for at the regional scale. Such a thoroughly horizontal process of management, it could be said, leads to a continuous rebalancing of values and thus to plans well adjusted to achieving longer-term stewardship goals as well as shorter-term development goals. At one level, this approach is a response to the mosaic of complicated ownership and stewardship responsibilities. A generation ago, the list of potential partners was smaller (EH and landowners), but under the current regime the number has increased dra-

matically. The territory is controlled by more than six hundred owners and dozens of different organizations and agencies. The only sensible management model depends on partnership among the existing owners and stakeholders.

How does the partnership-dependent management structure affect values? Regional coordination works in at least two ways. First, by raising awareness of the integrity of the whole Wall as a Roman archaeological resource—not the individual, excavated sites—abets the conservation of this overarching, regional-scale cultural value, which otherwise would be difficult to achieve under a piecemeal arrangement of disparate sites. Second, marketing the Wall as a whole to visitors increases economic values. A collaborative marketing effort can create an image for the region as a whole, rendering it more distinctive to visitors in distant markets. Regional coordination also is spreading visitors elsewhere along the Wall, guiding them to lesser-known places. In some sites this is perceived as “reducing tourism pressure” and in others as “siphoning off visitors.”

Underlying the plans is an ethic of cooperation, and there is much evidence of cooperative work on the ground as well. Nearly every organization and site contacted for this study reported some kind of partnership as essential to its current activities and goals. The partnership model has also been successful in securing funds for new initiatives and cooperative projects. But the partnership structure also leaves room for competition among partners for funding, visitors, credit and visibility, control over land use, and other issues. A cooperative ticketing scheme with several participating sites was introduced but failed, as some operators felt the cross promotion was not working and opted out. There are indications that the older, prevailing attitude of competition among sites has not faded, although new managers tend to fall in line with the cooperative philosophy of the Management Plan.

The Vindolanda Trust's role in the partnership illustrates some of the issues raised by the partnership model. By definition, partnerships are a two-way arrangement: partners mutually contribute costs and enjoy benefits. Not every partner relates the same way to the whole Wall partnership, and Vindolanda is perhaps the clearest example of this. The trust sees the benefit in participating in regional marketing activities, but actively resists collaborating on issues of archaeological and reconstruction policy because of ideological disagreements, among other reasons. Nevertheless, the statutory relationship with EH remains (as a matter of law, not



choice). Thus, a limited partnership is sustained between Vindolanda and the MPC. On balance, the differences among partners are a reality that will continue and, from EH's viewpoint, "the fact that Vindolanda remains a partner" is seen as "a testament to the strength of the partnership."

Partnership models in general, and the Hadrian's Wall efforts in particular, are not without their inherent difficulties. There is no single accountability for the site's overall well-being. The organizations with sitewide mandate are coordinating or development entities, not management units. Some partners are involved in several different aspects at once—as owner, regulatory agency, financially interested party, neighbor—leaving ample room for conflicts of interest to develop, or the perception of them. One organization, or core of partners, has to take the lead yet must never appear too far out in front of the consensus on various issues. Recognizing individual partners who are taking uncoordinated actions or following divergent policies requires constant vigilance. Such difficulties and complications are best resolved not by exercises of raw power—though sometimes the need arises—but rather by a continuing series of discussions, exchanges, negotiations, compromises, and dispute resolution, all of which demand a great deal of resources (staff time, energy, material costs, etc.). Indeed, only landowners and EH have and exercise raw power. The partnership model operates under the hypothesis that the time and effort needed to manage complex partnerships is worthwhile.

The benefits of the partnership model speak directly to other issues that have arisen vis-à-vis values and management of the site—for instance, striking a balance between Wall values and setting values. DEFRA and the Countryside Agency wield the influence and have the incentive to manage the broader landscape, whereas the power of EH is fairly well focused on the Wall and its immediate surroundings. To manage the site and setting together requires a collaborative partnership.

#### MANAGEMENT PLANS AND THEIR POLICIES

It has already been pointed out which values are articulated in the Management Plans for Hadrian's Wall. The intent here is to describe how the approach to management and planning (1) is reflective of the broader, more inclusive attitude toward values that has evolved, and (2) is a response to the large scale of the resources and the need to foster local and resource-specific control over resources and their values.

Management Plan policies set the vision and provide direction, but they do not prescribe or proscribe actions. The plan differs from what is traditionally seen as a master plan in that it establishes principles of operation and general guidelines but does not chart out the specific work to be done. Instead, the plan creates a framework for and anticipates the creation of the regional- and local-level plans and contributions to determining local land-use policy. Specific regulatory controls remain in the hands of local authorities and, for national scheduled monuments themselves, with EH. For instance, the plan is designed to be implemented through adoption in existing local plans and regulations—and to a large extent, local and regional authorities have endorsed the Management Plan and incorporated its provisions into their own planning policies and schemes.<sup>70</sup>

The Management Plans for the site carry no statutory authority and are not tabled in Parliament (i.e., passed or endorsed officially by the government). The 2002 plan is "endorsed" by the MPC and "adopted" by the individual partners. In other words, the plan gains authority only to the extent to which it is adopted or implemented by local authorities. These local controls, the adoption of which is negotiated and not required, are complemented by existing national statutory controls (cf. PPG 15 and 16; scheduled monuments reviews) and are seen as sufficient legal protection. By endorsing the World Heritage listing of the site, however, the national government tacitly endorses the provisions of the plan. As a result, the intentions of the plan are backed by various statutory authorities, but these are neither centralized in any particular institution or agency nor tied directly to the MPC.

The primary focus is on the means (the process) of continuing to work together, pursue common goals, and/or pursue individual goals within the bounds of the agreed-upon framework. Some typical results of this flexible policy approach is the use of LAC methods to manage access to the Housesteads-Steel Rigg segment of the Wall, and the different approaches taken to creating local/small-area interpretive plans, carried out under the rubric of the regional scheme but performed by the local partners themselves. (See the sidebar on the LAC conference on page 32.) In all these types of local planning, the key value added by the MPC is the coordination of actions so that consistency and cooperation lead directly to leveraging all investments for positive, Wall-wide impact.

# Conclusions

The Hadrian's Wall management and planning scheme represents a highly developed, thoroughly consultative, and thoughtful system of values-based conservation. It has two hallmarks of sustainability: it encompasses the many types of values associated with the core resources and their contexts, and its implementation is based on partnerships. The scheme is explicitly driven by the identification of heritage and other values, and by actions undertaken to ensure their existence and sustained use. The current scheme has evolved over the past thirty years through the efforts of many organizations and has been strengthened by World Heritage designation and the United Kingdom's efforts to generate a thorough management response to this recognition of universal value.

Over the generation or so of planning and management examined in this case study, there has been a clear and progressive recognition of the breadth of values to be managed for this heritage place. What was once considered an archaeological resource tracing a line across the country has been transformed in a few decades into a complex, layered cultural landscape rich in both heritage and contemporary values. Management practices and plans have evolved as well and have helped shift attitudes toward values at every step. Overall, the recognition of partners' collective interests outweighs the importance of individual goals. The partnership has come to an agreement that Hadrian's Wall is a landscape and not a discrete monument. The two-tiered structure of boundaries follows the partnership model for managing the landscape: the core is agreed upon and protected tightly and uniformly, and the setting is managed according to the wishes of the local jurisdictions or owners, who have differing views of what should be protected and how. In seeking inclusion and recognition of the site's policies in local land-use policies and plans, the whole scheme recognizes the limits of a partnership model. Ultimately, control over the resources resides with the individual partners.

The collaborative, "horizontal" management scheme seems well suited to the resources and the patterns of landownership and control, and has resulted in benefits equal to (if not exceeding) its costs (real and

metaphoric). Its significant achievements have included the founding of the HWTP and its Wall-wide programs of marketing, transportation, and education; the establishment of the National Trail; the attraction of substantial grant funds; and the successful conservation and interpretation of a large and complex set of cultural resources. The Management Plan provides a framework and guidance for all partners and actors to carry out their work.

The partnership model has several features abundantly in evidence for Hadrian's Wall and contributing to its success:

- The positive results of the partnership since the mid-1990s are clear. Working in concert, a number of objectives have been achieved which, in the opinion of those on the ground, would not have been reached by organizations working independently.
- Managing by consensus is an exceedingly important principle and a major learning point. It is a replacement, one can say, for management by regulation and direct statutory control. There is a remarkably wide buy-in among partners on the protection of the setting as well as the Wall.
- There are a lot of "calculated ambiguities" in planning and management. The planning has remained at a strategic level, avoiding the prescription of particular actions for particular sites. This is appropriate given the extensive scale of the whole venture and the need to recognize (and perhaps decentralize) the distribution of power among the various partners and individuals who wield ultimate control over land and resources. It is also flexible and allows the partnership to respond to changing external forces, whether those forces are welcome opportunities (regional regeneration funds) or unwelcome threats (the ravages of FMD).

An integrated planning and management regime has been implemented at Hadrian's Wall that addresses a variety of situations and sets a framework for integrating policies and actions at different geographic scales. The approach used is also a "learning" system, as seen in the evolution from the 1996 plan to the 2002 plan. The latter is by no means a finished plan; it explicitly calls for the

implementation of policies (which necessarily relate to the region and the whole resource) at a local, actionable scale. Further, the partnership recognizes that one goal over the next several years should be the creation of monitoring mechanisms—ways to understand and track how values are being shaped, and to use this information in the management of the Wall and Setting.

The institutional arrangements seem well suited to managing values as well as conservation and development activities. The Hadrian's Wall scheme seems neither centralized nor decentralized. An effective center exists in the combination of the Hadrian's Wall Co-ordination Unit and the HWTP. This combination also includes partners from the private sector but is not so privatized as to be overly susceptible to market fluctuations. EH has a unique and complicated set of roles: for the region, it is a coordinator, convener, and consultant; for the Wall as an archaeological resource, it is a regulatory agency; for certain sites, it is a day-to-day manager; and for other sites, it is also the owner. As such, EH is potentially at odds with some of its own partners, but this has not proven to be a liability. It is not clear, however, whether this makes EH more or less effective in playing the lead coordinating role.

The partnership model is not without its downside. Competition among partners remains. There is little centralized or statutory authority to force resolution of issues when necessary. The partnership's successes have relied on large infusions of funds; if the incentives for funding and marketing dry up, there would be little more than the power of good ideas to hold together the whole partnership. Persuasion and perseverance are among the most important managers' tools in such a scheme, and these require enormous investments of time and human capital.

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## Notes

1. This work has been reported in three publications: See Mason 1999; Avrami, Mason, and de la Torre 2000; and de la Torre 2002.
2. Pearson and Sullivan 1995, 7.
3. The Burra Charter is the popular name for *The Australia ICOMOS charter for the conservation of places of cultural significance*, which was adopted by Australia ICOMOS in 1979 at Burra, Australia. The charter has since been revised and updated, and the sole version now in force was approved in 1999.

4. For the purposes of this study, *value* and *significance* are given consistent meanings; if the organizations involved in the site use the terms differently, it will be clarified.
5. English Heritage 2001, 2 and part 5, "Maps."
6. Reiterating what is noted in the introduction, *site* refers throughout to the World Heritage Site in totality—the Wall, associated remains, and the setting.
7. These include forts, fortlets, and other monuments to the south of Bowness (the western end of the Wall) along the Cumbrian coast, and other Roman sites near but not adjacent to the line of the Wall.
8. The Clayton Wall was rebuilt not to its original height, but to that sufficient to serve as a barrier to keep out livestock and create a property boundary.
9. Details on the archaeological remains and extant remains in the site can be found in the Management Plans, in particular section 1.2.6 of the 2002 plan [and guidebooks].
10. Hadrian's Wall World Heritage Site is situated at a latitude of 54°N.
11. McKnight 2001, 224–26.
12. A detailed time line appears in the appendix.
13. For a detailed history and description of the Wall, see Birley 1961; de la Bedoyere 1999; Breeze and Dobson 2000; and Ewin 2000.
14. Watson 1997, 23. Today, the Military Road is known as B6318.
15. Ewin 2000, 41.
16. English Heritage 2001, 13.
17. Ewin 2000, vii.
18. Ewin 2000, 2.
19. Hadrian's Wall Tourism Partnership, "Hadrian's Wall World Heritage Site: Research and Archaeology: Rev. Dr. John Collingwood Bruce, 1998–99." [http://www.hadrians-wall.org/randa/jcb.htm] (16 May 2002).
20. Ibid.
21. English Heritage 2001, 13.
22. Ewin 2000, 44. The archaeological protection acts passed during this period were the *Ancient Monuments Protection Act* of 1882, the *Ancient Monuments Act* of 1910, the *Ancient Monuments Consolidation and Amendment Act* of 1913, and the *Ancient Monuments Act* of 1932.
23. English Heritage, "Hadrian's Wall Museums." [http://www.eng-gov.uk/ArchRev/rev95\_6/hwmuseum.htm] (23 May 2002).
24. Hadrian's Wall Tourism Partnership, "Research and Archaeology: Wall Recording Project." [http://www.hadrians-wall.org/] (23 May 2002).
25. English Heritage 1996, paragraph 9.4.2.

26. Quoted from <http://whc.unesco.org/nwhc/pages/doc/mainf3.htm>. World Heritage List criteria for natural heritage properties are also available at this URL.
27. Ewin 2000, 31.
28. This concern was based on the perception that more walkers would come and have a negative impact. Once formal counts of footpath traffic were conducted, fears of overuse by walkers proved unfounded, illustrating the notion that accurate information and monitoring are essential for site management. Christopher Young, English Heritage, e-mail correspondence, 19 June 2003.
29. Jane Brantom, Hadrian's Wall Tourism Partnership, e-mail correspondence, 19 June 2003.
30. Kate Clark, personal communication, 2001, citing Mynors 1999.
31. If such consent is denied, the applicant has the right to public inquiry or informal hearing prior to a final ruling concerning the application.
32. *PPG 16: Archaeology and Planning*, Department of the Environment, 1990. Her Majesty's Stationery Office, London. May be found at <http://www.planning.odpm.gov.uk/ppg/ppg16/index.htm> (May 2003).
33. *PPG 15: Planning and the Historic Environment*, section 6.10. Department of the Environment and Department of National Heritage, 1994. Her Majesty's Stationery Office, London. Found at <http://www.planning.odpm.gov.uk/ppg/ppg15/pdf/ppg15.pdf>. Recent amendment may be found at <http://www.planning.odpm.gov.uk/circulars/or01/09.htm> (May 2003).
34. *UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage: Operational Guidelines*, part I.21.B.
35. This department is also responsible for matters related to the arts, sport, and recreation; the National Lottery; libraries, museums, and galleries; licensing for the export of cultural goods, film, broadcasting, and the royal estate; and regulation of the press.
36. Accessed at [www.english-heritage.org.uk](http://www.english-heritage.org.uk).
37. See <http://www.nationaltrust.org.uk/main/>.
38. These measures are summarized in appendix 4 of the 2002 Management Plan.
39. This document is found at [http://www.hmso.gov.uk/acts/acts1990/Ukpga\\_19900009\\_en\\_2.htm#mdiv1](http://www.hmso.gov.uk/acts/acts1990/Ukpga_19900009_en_2.htm#mdiv1).
40. *PPG 15*, explanatory note. <http://www.planning.odpm.gov.uk/ppg/ppg15/pdf/ppg15.pdf>.
41. Amenity societies in the United Kingdom include the Ancient Monuments Society, the Council for British Archaeology, the Georgian Group, the Society for the Protection of Ancient Buildings, the Victorian Society, and the Twentieth Century Society.
42. *PPG 16*, introduction.
43. English Heritage 1996, section 9.4.2.
44. It should also be noted that this change is congruent with philosophical shifts in the heritage field and related disciplines that more seriously recognize the geographic and value contexts of what are traditionally seen as historic resources.
45. 2002 Management Plan, pp. 20–21.
46. *Strategy* 1984.
47. *Strategy* 1984, 9.
48. Accessed at <http://whc.unesco.org/sites/430.htm> (5 April 2003).
49. 1996 Management Plan, paragraph 1.1.9.
50. Accessed at [http://www.eng-h.gov.uk/ArchRev/rev95\\_6/hadrian.htm](http://www.eng-h.gov.uk/ArchRev/rev95_6/hadrian.htm).
51. Christopher Young, English Heritage, e-mail correspondence, 11 April 2003.
52. 2002 Management Plan, section 2.1.1, pp. 33–42.
53. 2002 Management Plan, p. 28, emphasis added.
54. See 2002 Management Plan, pp. 28–32, for the full text of the statement of significance.
55. This document is available at <http://www.hadrians-wall.org/>. Click on Hadrian's Wall Tourism Partnership.
56. The source for much of the information in this section is drawn from correspondence with Christopher Young, English Heritage.
57. The core of the partners group is represented by the MPC.
58. This term is used increasingly, for instance, in the U.S. National Park Service to refer to the increasing decentralization of authority and funding through the inclusion of private, public, and nonprofit partners in the management of parks and historic sites. As an example, see the press release at <http://dataz.itc.nps.gov/release/Detail.cfm?ID=355>.
59. Available at <http://www.hadrians-wall.org/>.
60. Available at <http://www.hadrians-wall.org/>. Click on Hadrian's Wall Tourism Partnership.
61. The operation of the bus is funded by a number of bodies—not solely HWTP—including Northumberland National Park, which underwrites any losses.
62. 2002 Management Plan, p. 1.
63. 2002 Management Plan, p. 1.
64. 2002 Management Plan, p. 57.
65. 2002 Management Plan, p. 26.
66. It should be noted that “the Wall,” as used here and throughout, also encompasses related archaeological resources and sites not technically part of the Wall itself.
67. 2002 Management Plan, section 1.2.4.
68. Similar kinds of partnership-driven models have been used in other countries, and the increasing reliance on partner-

ships in all types of planning has been an area of innovation for at least the last thirty years.

69. In the United Kingdom, such partnership arrangements involving different national agencies as well as local and regional partners are quite common now, but those involving Hadrian's Wall have been a trendsetter.
70. Appendix 4 of the Hadrian's Wall World Heritage Site Management Plan lists the specific local plans and policies through which the plan is already being implemented.

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### Appendix: Time Line for Hadrian's Wall During Heritage Status

- 1599 Antiquarian William Camden visited the length of Hadrian's Wall except the central sector due to its dangerous condition. The following year he published his survey and explanation of the Wall and its structures in the fifth edition of his *Britannia*.<sup>1</sup>
- 1732 The Rev. John Horsley's work *Britannia Romana*, the first systematic study of Hadrian's Wall, was published.
- ca. 1750 The Military Road was constructed between Newcastle and Carlisle. Approximately 48 kilometers (30 miles) of the road was built on top of Hadrian's Wall between Newcastle and Sewingshields.<sup>2</sup>
- 1801 William Hutton walked the length of the Wall and wrote an account, now published under the title *The First Man to Walk Hadrian's Wall*.
- 1811 William Hutton saved a section of the Wall at Planetrees from being pillaged to make field walls.<sup>3</sup>
- 1832–90 In 1832, John Clayton inherited ownership of Chesters Roman Fort. From that time until his death in 1890, Clayton excavated and protected remains of the Wall and amassed a collection of Roman objects from various locations along the Wall. He acquired five Roman sites in the area of Chesters to provide for their preservation. He led excavations at the fort sites at Housesteads (1849 onward), Carrawburgh (1873–76), and Carvoran (1886). One conservation technique Clayton developed was encasing the surviving Wall remains in drystone facework topped with turf. Sections of the Wall built over in this fashion are today known as the Clayton Wall. He also published reports of his excavations, which were supplemented by a number of plans.<sup>4</sup>
- 1840 John Hodgson published his *History of Northumberland*, the first work to argue convincingly that the Wall had been constructed under the Roman emperor Hadrian. Hodgson also was the first to record thoroughly and in detail the structure of the Wall and its associated forts in the central sector.<sup>5</sup>
- 1849 The Newcastle Society of Antiquaries and the Cumberland and Westmoreland Antiquarian and Archaeological Society, led by John Collingwood Bruce, held their first pilgrimage along the length of the Wall. A second pilgrimage took place in 1886, and since that time the groups have led such pilgrimages every ten years.<sup>6</sup>
- 1851 John Collingwood Bruce published the first edition of *The Roman Wall*, which summarized the results of John Clayton's excavations at Chesters Roman Fort and publicized John Hodgson's theory of the Wall's construction under the emperor Hadrian.<sup>7</sup>
- 1863 John Collingwood Bruce published his *Handbook of the Roman Wall*, which has since served as an important guide to the Wall. Its thirteenth edition was published in 1978.<sup>8</sup>
- 1875 The South Shields Urban District Council established the Roman Remains Park at South Shields, marking the first public acquisition and display of a part of the Wall.<sup>9</sup>
- 1896 The museum at Chesters Roman Fort, which housed John Clayton's collection of objects.
- 1927 A first section of the Wall was scheduled as a monument.
- 1932 The *Ancient Monuments Act* was enacted in part as a result of threats to the Wall.<sup>10</sup> The Hadrian's Wall and Vallum Preservation Scheme also was adopted. The British government acquired its first parts of the Wall.<sup>11</sup>
- 1935 The Housesteads Museum was opened to the public.<sup>12</sup>
- 1970 The Vindolanda Trust, an independent archaeological charitable trust, was founded to excavate, preserve, and present the Roman remnants associated with land owned by the trust at Vindolanda.
- 1972 The Vindolanda Trust acquired the Roman site known as Carvoran, located 8 miles to the west of Vindolanda.

- 1973 Tourist visitation to the Wall peaked.
- 1976 Darlington Amenity Research Trust (DART) report was published, articulating the need for a Wall-wide conservation strategy, tourism scheme, and management attention.
- 1984 The document *Strategy for Hadrian's Wall* was published, proposing a regionwide framework for conservation and tourism.
- English Heritage opened the Corbridge Museum at Corbridge Roman site.
- The Cumbria County Council acquired the Birdoswald estate for the purpose of developing the remains of the Roman fort and other archaeological features there as a heritage site that would be open to the public.
- 1985 English Heritage began its Wall Recording Project, which provided the first detailed record of the visible remains of the Wall and its associated features. The finished drawings are used in the management and conservation of the Wall.<sup>12</sup>
- 1986 The Tyne and Wear Museums completed reconstruction of the west gate at Arbeia Roman Fort at South Shields.
- 1987 Hadrian's Wall Military Zone inscribed by UNESCO as a World Heritage Site under criteria C (ii), (iii), and (iv).
- The first visitor center opened at Birdoswald Roman Fort.
- 1990 The Senhouse Museum Trust opened the Senhouse Roman Museum, which houses the Netherhall collection of Roman artifacts, in Maryport.
- 1993 The Hadrian's Wall Tourism Partnership was created.
- 1994 The secretary of state approved proposals for the Hadrian's Wall Path, a new National Trail.
- 1996 The Hadrian's Wall World Heritage Site Management Plan for the period 1996–2001 was published after extensive consultation. The plan established the World Heritage Site Management Plan Committee “to act as the primary forum for issues concerning the management of the World Heritage Site.”<sup>14</sup> English Heritage established the Hadrian's Wall Co-ordination Unit, based in Hexham, to oversee implementation of the plan.
- 2000 The Segedunum Roman Fort, Bath House and Museum in Wallsend opened to the public. The development, operated by the Tyne and Wear Museums, included a working reconstruction of a Roman bathhouse and a viewing tower approximately 34 meters (112 feet) in height.
- 2001 The Hadrian's Wall region was severely damaged by the foot and mouth disease epidemic.
- 2002 Management Plan 2002–2007 was released.

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### Notes

1. English Heritage 2001, 23.
2. Watson 1997, 23.
3. English Heritage 2001, 13.
4. English Heritage 1999, 42–43.
5. Hadrian's Wall Tourism Partnership, “Hadrian's Wall World Heritage Site: Research and Archaeology: Rev. John Hodgson,” <http://www.hadrians-wall.org/> (23 May 2002).
6. English Heritage 2001, 24.
7. Hadrian's Wall Tourism Partnership, “Hadrian's Wall World Heritage Site: Research and Archaeology: Rev. Dr. John Collingwood Bruce, 1998–99,” <http://www.hadrians-wall.org/randa/jcb.htm> (16 May 2002).
8. Ibid.
9. English Heritage 2001, 13.
10. English Heritage 1996, 13.
11. English Heritage 2001, 13.
12. English Heritage, “Hadrian's Wall Museums,” [http://www.eng-h.gov.uk/ArchRev/rev95\\_6/hwmuseum.htm](http://www.eng-h.gov.uk/ArchRev/rev95_6/hwmuseum.htm) (23 May 2002).
13. Hadrian's Wall Tourism Partnership, “Research and Archaeology: Wall Recording Project,” <http://www.hadrians-wall.org/> (23 May 2002).
14. English Heritage 1996, paragraph 9.4.2.

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