



IPSIG lunchtime talk • 14 October 2026

Global standards, local practice

International cultural heritage standards

Presenters

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Session map

01 Finance and context

How lender due diligence changes the scope of cultural heritage projects.

02 Standards

Institutional frameworks, values, definitions and implications for delivering projects.

03 Project delivery

Aspects where UK competence transfers well, and where assumptions can create gaps.

04 Future directions in professional practice

Some trends shaping the next decade.



Rock art, AlUla, Saudi Arabia

Global actors and transnational networks

01 Finance and context

Interacting sources of expectations and accountability



Intergovernmental

International frameworks

Environmental, cultural, Indigenous and human-rights law

UN-sponsored cross-boundary organisations

Advisory committees and secretariats



Standards and regulation

Equator Principles

IFI Performance Standards
and Guidance Notes

General and industry-specific
Environment, Health & Safety Guidelines

Host-country legislation,
other standards and regulations



Non-governmental

Communities and civil society

Social benefit organisations

Civil society and NGOs

Issue-based campaigns

Indigenous groups and local communities

Religious and cultural groups

Knowledge, markets and influence

Scientists and journalists

Trade and industry groups

Ethical banking and shareholder pressure

Why international standards matter

01 Finance and context

International financial institutions and project requirements

SHARED DEVELOPMENT AIMS

Reduce poverty and improve living standards

Support sustainable development, regional cooperation and integration

World Bank Group

IBRD	International Bank for Reconstruction and Development
IDA	International Development Association
IFC	International Finance Corporation
MIGA	Multilateral Investment Guarantee Agency
ICSID	International Centre for Settlement of Investment Disputes

Regional and other institutions

EBRD European Bank for Reconstruction and Development
AfDB African Development Bank
ADB Asian Development Bank
EIB European Investment Bank

Further examples

IDB, NDB, IsDB, CAF, CDB and CABI

IMF

International Monetary Fund
Separate from the World Bank Group

Export finance and trade support

UK Export Finance
US Export–Import Bank (EXIM)
German Federal Government : Hermes cover (Hermesdeckung)
JETRO: Japan External Trade Organization

WHAT THIS MEANS FOR HERITAGE

Lender requirements cover cultural heritage and other disciplines. They can apply worldwide, including UK projects.

National law, professional ethics and applicable lender requirements operate together.

International Financial Institutions and development finance

01 Finance and context

Finance and expertise to support sustainable development?

Purpose, structure and sectors

IFIs provide financial support and technical assistance for economic development across countries.

Typically formed by multiple governments, they operate globally or regionally.

Projects include infrastructure, education, health, energy, climate resilience and cultural heritage.

Loans: often at low interest rates to governments or public institutions.

Grants: specific development goals, often in low-income countries.

Equity: private-sector projects aligned with development goals.

Technical assistance: expertise, training and policy advice.



Evolution of international cultural heritage safeguards



NEWER GUIDANCE MAKES EXPECTATIONS MORE EXPLICIT

Multiple layers of standards and guidance

02 Standards

National obligations and international expectations shape heritage decisions



Host-country law

Protected assets
Investigation permits
Antiquities ownership
Investigation licences
Export rules
Planning and EIA requirements



Finance framework

IFC PS8, World Bank ESS8, EBRD ESR8, ADB ESS8, EIB Standard 10 and Equator Principles define risk-management expectations.



Good international practice

UNESCO conventions
ICOMOS charters
ICOMOS WHS Heritage Impact Assessment (HIA) guidance
UNDP heritage requirements
UN tourism and World Indigenous Tourism Alliance recommendations
ICIP (Indigenous Cultural and Intellectual Property) principles
Professional technical standards ...

Heritage due diligence should connect responsible investment with protection on the ground

Lender expectations

- Identify, avoid, manage and monitor risks throughout the project lifecycle.
- Applicable frameworks may exceed host-country law or address regulatory gaps.

Environmental due diligence ensures that funded projects:

- Avoid or mitigate harm to ecosystems and communities
- Comply with international and national environmental laws
- Promote long-term sustainability and climate resilience
- Safeguard reputational and financial risks for the institution

Project consequences

- Heritage evidence supports financing decisions, management plans, covenants and independent review.
- Late discovery can affect cost, programme, reputation, community relations and access to finance.



Performance Standards



Cultural heritage duties across PS1, PS7 and PS8

02 Standards

Applicable IFC Performance Standards



PS1 Risk management

Risk assessment and management systems for all environmental topics
Stakeholder engagement
Delivery commitments and grievance handling



PS7 Indigenous Peoples

Rights, culture and resource-based livelihoods
Informed consultation and participation
Free, Prior and Informed Consent in defined circumstances



PS8 Cultural heritage

Protection and preservation
Equitable benefit sharing from heritage use
Places, natural features and relevant cultural practices

PS8 / ESS8 in the project lifecycle

International standards reward early avoidance and auditable follow-through



Two recurrent failures:

- Archaeology commissioned after the footprint is fixed
- Commitments not transferred into contracts and construction systems

Lender standards

02 Standards

Holistic approaches to cultural heritage



Munlochy Cloutie Well, Black Isle, Scotland

Core standards

- IFC Performance Standard 8
- World Bank ESS8
- EBRD Performance Requirement 8

Definitions

Tangible cultural heritage – movable or immovable objects, sites, structures, etc., with archaeological, **paleontological**, historical, cultural, artistic, or religious values

Unique natural features embodying cultural values – sacred groves, rocks, lakes

Certain instances of **intangible forms of culture** proposed for commercial purposes – cultural knowledge, innovations, and practices.

Key themes

- Apply internationally recognised field study and documentation practices
- Tangible and intangible heritage
- Terrestrial and underwater
- Community heritage values and consultation, including communities that use the heritage
- Avoidance hierarchy: siting and design that avoid significant adverse impacts
- Evaluation and mitigation, chance finds procedures

Intangible cultural heritage

Communities define the traditions that connect their past, present and future



Coast Salish Nation graffiti, Vancouver, Canada

02 Standards

ICH is the **traditional, contemporary and living** practices in which diverse cultural groups take part

- ICH is **Inclusive**, contributing to social cohesion and being part of societies, giving us a sense of identity and continuity
- ICH is **Representative** and depends on being passed on from generation to generation, or to other communities
- ICH is **Community-based** and can only be heritage when it is recognised as such by the communities, groups or individuals that create, maintain and transmit it – **without their recognition, nobody else can decide for them that a given expression or practice is their heritage**

UNESCO defines Intangible Cultural Heritage (ICH) as the **living** practices, representations, expressions, knowledge, skills – as well as the associated instruments, objects, artefacts and cultural spaces – that communities, groups or individuals **themselves** recognise as part of their cultural heritage.

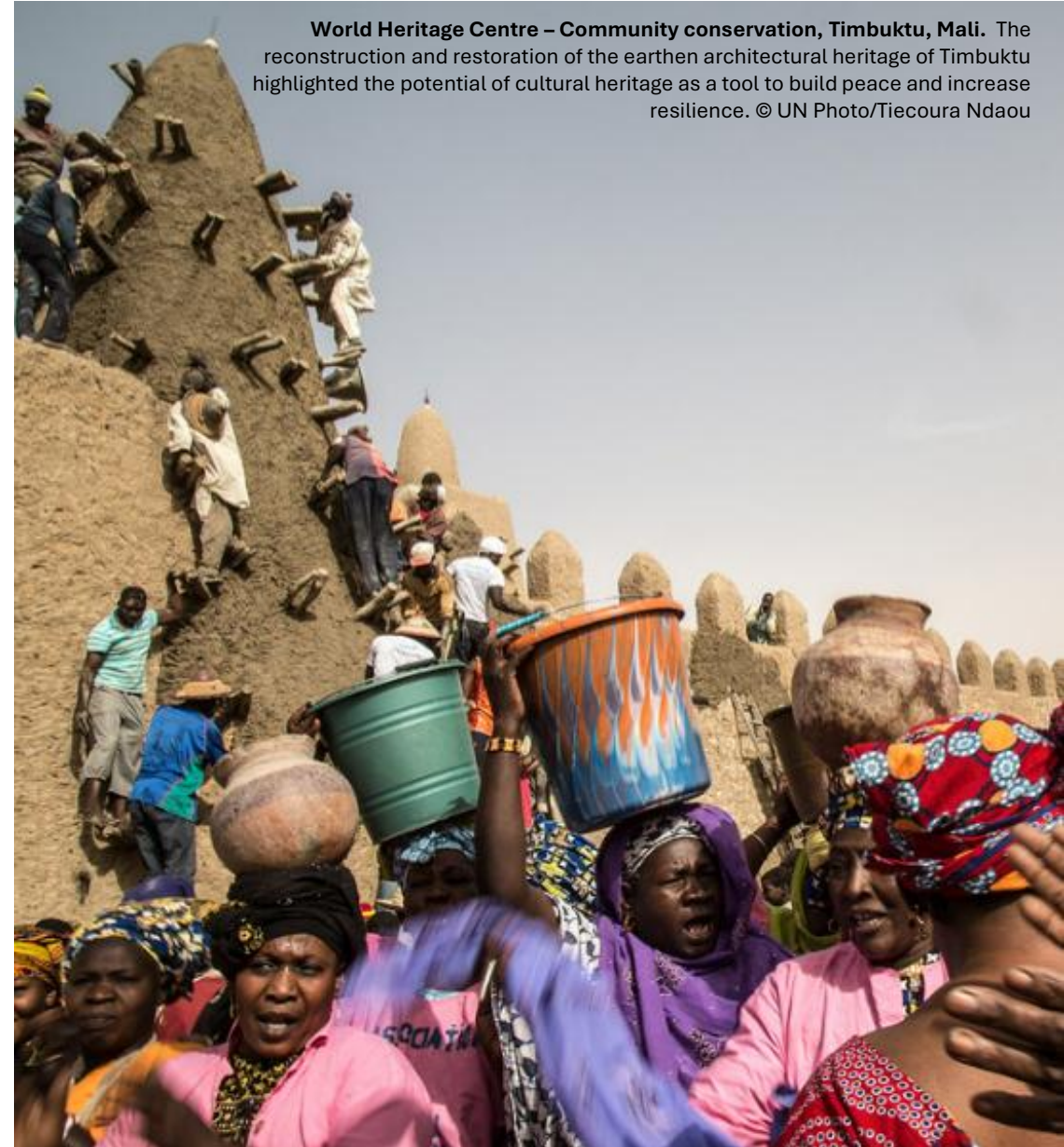
UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage, 2003

Participatory and Rights-Based Approaches

Understanding heritage starts with respecting the rights and knowledge of those who sustain it.

- Participatory and Rights-Based Approaches are key to fully exploring cultural heritage **values and significance**.
- **Research ethics**
- Considering a **diversity of views** – individuals and groups, local communities, national and international academic and bureaucratic experts
- Importance of **indigenous peoples** and **ancestral knowledge**
- Long-term stewardship, safeguarding, interpretation, transmission and **sustainability** of heritage sites

The **ICOMOS 2018 Buenos Aires Declaration** marking the 70th anniversary of the Universal Declaration of Human Rights entrenches human rights into cultural heritage activities.



World Heritage Centre – Community conservation, Timbuktu, Mali. The reconstruction and restoration of the earthen architectural heritage of Timbuktu highlighted the potential of cultural heritage as a tool to build peace and increase resilience. © UN Photo/Tiecoura Ndaou

Stakeholder consultation and engagement

Meaningful consultation brings community knowledge into project decisions

Trust and permissions

Build relationships through dialogue and mutual respect. Obtain statutory and community permissions before survey work.

Stakeholders and evidence

Identify affected groups and Indigenous Peoples. Consult authorities and local knowledge-holders to inform the baseline.

Consultation in the field

Use interviews and accompanied site visits to understand community values and bring them into project decisions.



New Libreville Airport, Gabon, 2016. Consultation of elders



South West Absheron Project, 2015. Sufi burial place (Pirali Baba), Azerbaijan. Visit accompanied by local Imam and site guardian.

Opening, closure and relocation ceremonies, resettlement and compensation

Managing physical changes also means addressing spiritual ties and cultural continuity

Rights and cultural continuity

Identify community rights to sacred places, cultural practices and natural materials.

Baseline and compensation

Use a locally informed, independent baseline and formal inventories. Coordinate valuation and compensation with the relevant authorities.

Ceremonies and relocation

Agree requirements for opening and closure ceremonies, sacred-place relocation and formal grave relocation or reburial.



RTG / Cérémonie de cession du site d'aménagement de la centrale hydro-électrique FE2 par Guy Mapangou

76 views • 18 Apr 2016

0 0 0 SHARE SAVE ...



Archaeological watching brief on new graves being excavated to relocate burials from the development site to the new resettlement village
New Libreville International Airport Project, Gabon, 2019

‘Capacity building’ and local skills training

International collaboration should strengthen local expertise and give proper credit

Local leadership

Support local archaeologists through training and field monitoring without displacing their work.

Shared credit and data

Share data and recognise local discoveries. Support locally managed archives and publication.

Lasting partnerships

Build continuing partnerships that strengthen local capacity to investigate, record and pass on heritage.



Omar Bongo University archaeology students excavating NKO-64 Iron Age settlement site, Libreville Airport, Gabon, 2017 © Richard Ostisly



How many trainee archaeologists does it take to dig a test pit?
Neolithic occupation site WB011, Tasiast Gold Mine, Inchari, Mauritania 2013
© Ethmane Ould Dadi/IMRS

Living resources and cultural uses

02 Standards

Natural resources sustain cultural practices as well as livelihoods

Cultural uses

Identify sacred, medicinal, craft and food uses of plants and other living resources.



Access and livelihoods

Understand who uses resources, the rules governing access and production, and their cultural and economic value.



Specialist collaboration

Connect heritage with health, biodiversity, ecosystem services and compensation assessments. Work with local practitioners and technical specialists.



Heritage, Tourism and Visitor Management

Considering a wide range of aspects including:

- **Destination attributes**
- **Carrying capacity** and visitor footfall impacts on fabric of physical heritage assets
- **Conservation management**
- **Authenticity, quality** and **accessibility** of presentation and interpretation
- Visitor attendance **data** and characteristics
- Independent and **travel** trade
- Visitor **origins, seasonality**
- Visitor **experience, footfall and flow management**
- **Tourist infrastructure**, hotels, transport
- Impacts on **employment**, creative & cultural industries
- Public visibility, **branding**, marketing and outreach



What makes international practice different?

03 Project delivery

UK Practice vs. international lender emphasis

Normal UK emphasis	International lender emphasis
Designated assets	Wider cultural heritage, including intangible cultural heritage (often top-down)
Significance	Significance + social value
Archaeology	Holistic approach to mapping cultural and natural heritage assets
EIA compliance	Environmental and social outcomes
Expert-led	Stakeholder-centred
Known assets	Unknown heritage and chance finds

What UK practice already does well

03 Project delivery

Established UK methods provide a foundation for working on international heritage assessment projects
International relevance depends on adaptation

UK practice strength

- Significance assessment
- Setting assessment
- Environmental impact assessment
- Mitigation strategies
- Historic landscape characterisation
- Desk-based assessment methodologies
- Professional foundation, ClfA Universal Standards and specific guidance

Application on international projects

- Combine expert evidence with community values.
- Assess effects on setting, relationships and access.
- Link heritage evidence to ESIA, design and lender review.
- Define mitigation, delivery responsibilities and monitoring.
- Assess wider cultural landscapes and land use.
- Target evidence gaps through consultation and field survey.
- Universal information complements jurisdiction-specific guidance. Local law, ethics and community values continue to shape delivery.



Lake District World Heritage Site, Cumbria

Six common skills gaps

03 Project delivery

Areas where competent UK practitioners can still be exposed



Scoping beyond archaeology

Built heritage, movable heritage, underwater archaeology, palaeontology, natural features and living heritage.



Social methods

Stakeholder mapping, culturally appropriate consultation, consent and grievance interfaces.



Lender literacy

Applicability, categorisation, covenants, Environmental and Social Action Plans (ESAPs), independent review and evidence trails.



Multidisciplinary ESIA

Working with social, biodiversity, resettlement, human rights, design and construction teams.



Implementation

Writing Cultural Heritage Management Plans (CHMPs), chance-find systems, contractor clauses, KPIs, audits and close-out evidence.



International delivery

Local partners, permits, language, security, logistics, ethics, data sovereignty and context.

Future directions in cultural heritage practice

04 Future directions

Shared directions, distinct institutional requirements

Operational guidance

EBRD and ADB: templates, assessment techniques, CHMP content and chance-find procedures
Construction controls, monitoring, reporting and corrective action
Evidence of implementation

Lifecycle and governance

Earlier alternatives and strategic assessment
Operation, closure and legacy
Data management and continuing review

Rights and living heritage

Living heritage, traditional users, access and socioeconomic benefits
Human rights, Indigenous Peoples, vulnerability, livelihoods and grievance systems
Community-defined value and benefit sharing

Landscape and community

Natural and cultural heritage at landscape scale
Ecosystem services, traditional knowledge and community use
Social value and heritage's contribution to development

Climate and resilience

Climate risks to assets and practices
Adaptation and resilience in heritage management
Tensions between renewable energy projects and cultural heritage

Harmonisation and differences

The 2026 IFC comparison identifies shared architecture across institutions.
Definitions, triggers and institutional processes still differ.
Harmonisation does not mean uniformity.

Nature, culture and living heritage

04 Future directions

International lender frameworks can add explicit duties for cultural use, access and community rights

UK practice foundation

Nature–culture integration

- Growing convergence between natural and cultural heritage
- Landscape-scale assessment

Living heritage

- Greater focus on communities and use values
- Heritage as a living practice
- Heritage as a development asset

These issues also arise in UK work – the difference is in the scope and evidence required

Additional international requirements

Assess natural features with cultural significance, such as sacred groves, with ecosystem services.

Link heritage, biodiversity and livelihood assessments across the wider landscape.

Identify community use and access, then include safeguards in project design and management.

Consult affected communities on living practices and heritage values, with culturally appropriate methods.

Check Indigenous Peoples' safeguards and free, prior and informed consent where the applicable standard requires it.

For commercial use of community heritage, address informed participation and equitable benefit-sharing.



Yuanyang Rice Terraces, Honghe, Yunnan, China © ICOMOS

Climate change and cultural heritage

04 Future directions

Integrated risk assessment, climate change and cultural heritage

Climate risk and vulnerability assessment

Heritage input to the project CRVA

Assess exposure to flood, heat, wildfire and erosion alongside heritage sensitivity and adaptive capacity. Record data gaps and uncertainty.

Adaptation and resilience

Heritage at risk and living practices

Work with local custodians and climate specialists to compare adaptation options. Consider drainage, maintenance, emergency planning and continued community access.

Renewable energy projects

Climate benefits and heritage impacts

Test siting and design alternatives early for wind, solar and associated infrastructure. Assess archaeological, landscape and living-heritage impacts within the wider ESIA.

International delivery

Clear evidence and responsibilities

Connect climate findings to the Cultural Heritage Management Plan. Set responsibilities, budgets, monitoring indicators and review triggers with the project team.



Digital innovation and legacy

Practical application on international heritage assignments

Digital innovation

Digital twins and shared records

Link heritage inventories and 3D records to design alternatives. Agree data standards and access with local partners, including a usable record for handover.

AI-assisted heritage inventories

Use AI to triage datasets, then validate findings with specialists and local knowledge. Record uncertainty and protect sensitive site and community information.

Remote sensing and monitoring

Combine satellite or drone observations with field checks across remote project areas. Include change indicators and follow-up actions in the heritage management plan.

Mitigation outcomes

Heritage enhancement beyond mitigation

Agree conservation, access and interpretation priorities with communities and authorities. Heritage enhancement should not justify avoidable loss.

Culture-led regeneration

Explore adaptive reuse, traditional skills and locally led tourism. Agree who decides and benefits, with safeguards for the continuity of living heritage.

Legacy planning and evidence

Fund long-term care and local capacity, with clear responsibilities and archive handover. Monitor agreed outcomes, including condition, access and continuity of cultural practice.

04 Future directions



Heritage safeguards: difficult choices in practice

04 Future directions

Compliance alone cannot resolve questions of value, capacity and cultural change

Whose heritage counts, and who decides?

Expert evidence and community knowledge may reveal different priorities. Legal permission does not establish social legitimacy. How can consultation give Indigenous Peoples and other affected groups meaningful influence?

Can assessment commitments survive delivery?

Limited time, budgets and specialist capacity constrain assessment and monitoring. Overlapping legal and lender duties complicate delivery. Who resolves evidence gaps, supports meaningful participation and funds long-term follow-through?

What can mitigation actually sustain?

Land and resource changes can disrupt livelihoods, sacred places and knowledge transmission. Cultural appropriation adds ethical risks.

Slow, cumulative changes to identity and community ties are hard to measure. Can mitigation protect cultural continuity?

Who defines success, monitors loss and remains accountable over time?



Five priorities for future heritage practice

04 Future directions

Closing takeaways and future directions

01 Earlier influence

Establish baseline data as early as possible to identify constraints and influence design.
Test spatial alternatives before the footprint and design are fixed.

02 People and places

Identify users, custodians, communities and rights-holders.
Include living heritage, cultural landscapes, climate, nature and cumulative change.
Centre community-defined value, participation and benefit sharing.

03 Auditable commitments

Connect requirements, evidence, commitments, owners and verification.
Use remote sensing, digital inventories, data governance and continuous monitoring to support.

04 Continuing delivery

Follow CHMPs, contracts, training, monitoring and corrective action.
Extend adaptive management by monitoring operation, closure, legacy and post-project outcomes.

05 Professional boundaries

Use multidisciplinary teams and local expertise without overclaiming competence.
Connect evidence and community knowledge with design and finance.

Where does your current role stop, and where should it extend?

Closing reflections

04 Future directions

UK Practice vs. international lender emphasis

- International standards increasingly shape heritage practice worldwide.
- Cultural heritage is both an environmental and social receptor.
- UK archaeologists possess many core technical skills needed internationally.
- Success requires engagement with local partners and communities, attention to social outcomes and interdisciplinary practice.
- The profession is moving from protecting sites towards managing cultural heritage as part of sustainable development.



Lake District World Heritage Site, Cumbria

Thank you!



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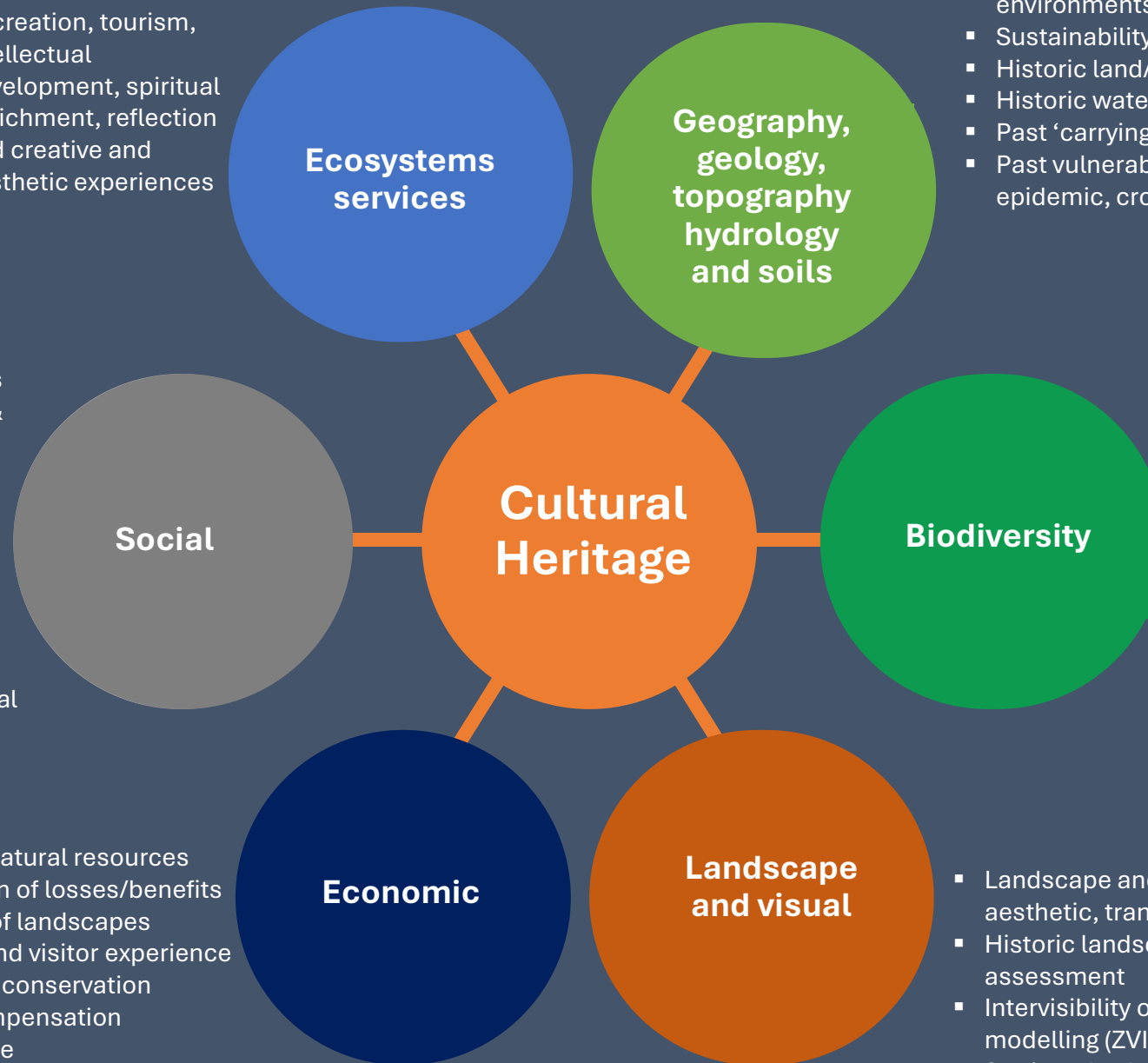
Relationships with other disciplines

Understanding heritage impacts needs knowledge from across disciplines

- Existing or potential emerging conflicts
- Cultural and spiritual identity, values & practices
- Customs & traditions, language
- Social structures
- Community cohesion
- Legal and customary rights, inc. indigenous peoples/vulnerable/minorities
- Health and traditional medicine
- Education, transmission and traditional values/knowledge
- Culturally appropriate project benefits

- Property rights
- Traditional uses of natural resources
- Economic evaluation of losses/benefits
- Recreational value of landscapes
- Tourism economy and visitor experience
- Tourism impacts on conservation
- Livelihoods and compensation
- Demographic change
- Power and gender relations

- Non-material benefits
- Recreation, tourism, intellectual development, spiritual enrichment, reflection and creative and aesthetic experiences



- Palaeoclimate and human adaptation to past environments
- Sustainability and climate change
- Historic land/resource use patterns and practices
- Historic water sources and irrigation practices
- Past 'carrying capacity' of environment
- Past vulnerabilities to climate change, desertification, epidemic, crop failures etc.

- Traditional/local ecological knowledge
- Revered/protected animals
- Medicinal and sacred plants/trees
- Bushmeat and wild game
- Fodder, fuel wood, construction materials, timber
- Forest management
- Attitudes toward sustainable natural resource management

- Landscape and visual aspects – aesthetic, tranquillity
- Historic landscape character assessment
- Intervisibility of sites and landscape modelling (ZVI/ZTV)
- Setting of cultural heritage and sacred landscapes

Holistic approaches to cultural heritage



Aligning ESG & Cultural Heritage

Integrating heritage into ESG helps protect places and the people who value them

Environmental

- **Archaeological sites are part of the environment** – often in sensitive landscapes (e.g. wetlands, coastlines, deserts) and can be affected by or contribute to environmental degradation.
- **Sustainable site management** – Integrating archaeological knowledge can help avoid damaging heritage during construction
- **Climate adaptation** – Archaeological records provide long-term environmental data that can inform climate resilience strategies.

Social

- **Cultural heritage is a social asset** – contributes to identity, cohesion, and wellbeing. Projects that respect and integrate local heritage are more likely to gain community support.
- **Inclusive development** – Consulting with communities about their heritage ensures that development is equitable and culturally sensitive.
- **Education and engagement** – Heritage projects can support social goals like education, tourism, and local employment.

Governance

- **Legal and ethical compliance** – Development must comply with heritage protection laws (e.g. UNESCO conventions, national planning frameworks).
- **Transparency and accountability** – Proper archaeological assessments and heritage impact statements demonstrate responsible governance.
- **Risk management** – Ignoring heritage can lead to legal delays, reputational damage, or loss of social license to operate.