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# Not restoration but plannet and preventive conservation

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## **Abstract**

Cultural heritage is exposed to a continuous risk of degradation that may be more or less worsened and accelerated by the environmental conditions in which the property is located. Both technological innovation (new investigation techniques and new materials) and process innovation (new methods of prevention and conservation) may help to reduce or delay the degradation or, at least, the costs of maintenance and restoration. However, the solutions adopted so far in our country seem to be characterized by a poor diffusion of technological and process innovation, according to the aforementioned definitions, and this is due mostly not to a particular lack of knowledge and research in the field, but rather to a limited implementation of conservative quality processes in which these technologies can be applied. The diffusion of technological and process innovation is particularly deficient in the area regarding the historical-architectural and archaeological heritage, which is exposed to a high risk of degradation by external agents. In this context, although the Code of Cultural Heritage and Landscape (Legislative Decree 42/2004, art. 29) has stated the need to spread the conservation planning approach, stressing that the conservative process must be based on "a coordinated, coherent and planned activity of study, prevention, maintenance and restoration", there are still few interventions based on the use of innovative technologies.

Policies are mostly concentrated on large restorations, often dictated by conditions of urgency or communication, and neglect instead investments in continuing care in time of the cultural heritage and in the diffusion of a good practice among the institutions and the owners of the assets. Nevertheless, it should be noted that, at the national level, there are currently some protocols for the diagnosis and monitoring. Furthermore, in restricted areas, some Guidelines for the programmed Conservation have been defined and computer applications have been implemented for the conservation plans of monuments. That being so, the widespread adoption of innovative methods in the context of the planned conservation practice can become a tool for the development of the sector, generating cognitive, conservative and economic benefits for the cultural heritage.

The contribution that we would like to present in this forum regards two cases of study, for which specific methods, experiments and actions have been developed and tested to conduct the policy of heritage conservation, by virtue of the adoption of technological and process innovation, essential elements for the sustainable management of the cultural heritage of our country.

The projects were organized in three stages: Mind, the study of a methodological approach, scientifically verifiable at different levels. Knowledge, understood as appropriation of information across multiple subjects activities made available by various sectors of diagnostics (understood as surveys and investigations to verify the preservation conditions of the heritage and the causes of degradation, and to identify preventive interventions designed to limit risk situations) and as monitoring of the historical research and of the direct investigation (understood as activities of regular and systematic control of the condition of the asset in its context).

Experience, tested on two heterogeneous case of studies which have completed a first fundamental step to ensure their care.

Keywords: Preventive and planned conservation, maintenance building, conservation officer

**Principles** 

After a ten-year debate about the theme of planned preservation, this is the time for assessment. In this context there have been numerous occasions when various actors have shown their interest in historical heritage, funds have been invested and new ideas have emerged in order to develop tools and methods of execution to assess and validate the operations for the preservation of artifacts. Thanks to this new discipline, new work activities have been promoted, while old procedures, which had been abandoned as obsolete, have been rediscovered and long debates about the methods and the practice of the new approach have ensued.

Before describing the results of two highly dissimilar experiences, both of which have the possibility of receiving non-repayable money to be spent on the promotion of planned preservation activities, it would be

useful to go over the stages that have led to the definition of this discipline.

When talking about restoration in relation to planned preservation, the first aspect that needs immediate consideration is the ambiguity behind the description of the maintenance activities relating to the architectural heritage. Maintenance is often superficially regarded as the occasion for small, minor restorations. Maintenance was meant to be a care prevention activity but it simultaneously introduced interventions which were not properly executed with respect to preservation. This fact seems all the more serious if we consider the fact that existing buildings care works have used the preservation excuse, seemingly innocently, to avoid bureaucratically long planning procedures.

The lack of planning, even of minor interventions, results in a casual series of actions, which do not correspond to the activation of a "preservation process". This process is characterized by the necessity to include a sequence of distinct consecutive stages (scheduling, planning, execution and management)

instead of limiting actions to existing buildings to a restricted time period.

In accordance with what has been affirmed above, without a vision defined as "process-related" it is not

possible to ensure that planned and reliable preservation will be achieved.

The cultural trend that needs to be promoted is a life cycle oriented approach, which relies on constant care to suggest positive, ongoing, sustainable practices. The sustainability of this method lies in the smaller impact of single interventions on factories, in less economic commitments in the long run, and in the constant

checking of the "health state" of artifacts.

The second principle of "planned preventive Conservation" depends on the awareness that any and all interventions on existing buildings are possible thanks to the multidisciplinary contributions of operators who have realized that it is not possible to go on working independently. Today, more than ever before, every choice relating to historical factories requires assessments that are not limited to architectural conservation only. Today, knowledge is implemented by the support of disciplines such as archiving, history, archeology, use of modern scientific methods (chemical, physical and mechanical investigations), modelling, and monitoring.

The evolution of architectural conservation objectives has gradually turned the restoration site from a place of traditional (knowledge based) learning, into an occasion for innovation. Today, with modern techniques and new tools now available, it is possible to revise material culture, to learn historical building techniques and to discover the materials features and devices that have ensured the durability and sustainability of the

factories of the past.

The third key aspect to develop this knowledge is found in the definition of maintenance, that is, the "set of necessary operations to preserve the proper efficiency and functionality of something".

This definition may lead to dangerous and hasty conclusions.

In fact, historical factories are not usually in operation and they rarely reach the level of efficiency. In fact, with the parameters (conventionally used) that are suitable for new buildings, efficiency is rarely achieved and, at any rate, only after restoration. At this point, it seems difficult to carry out maintenance work on a historical artifact because, in most cases, it is not ready for further use.

Here, the definition of maintenance must shift to the definition of planned conservation. Contrary to maintenance, the latter does not imply efficiency, but rather, consists of constant care interventions. The interventions are useful to slow down and keep the process of slow deterioration under control and help

avoid any serious degradation of artifacts.

The difference between conservation and maintenance becomes less clear as every maintenance action "acquires the relevance and the awareness that are typical of the conservation project".

However, this process may involve disciplines which, thanks to their pragmatic approach, are not greatly related to the world of restoration. These include management economics, which is particularly useful to gain involvement of local people that take up the proactive roles of promoting activities of development and enhancement.

From this perspective, it is important to recall the key words given as guidelines for the preservation process of existing buildings. They are the conceptual links that support the idea that conservation is not bound to theoretical or abstract logics, but to practical systems that imply constant and regular activity. As far as organization is concerned, constantly proposed virtuous strategies, planning abilities, the high quality of execution and assessment competence can maximize conservation. Meanwhile access, enhancement and

positive economic results allow for money and reinvestment of resources.

The procedural framework is reflected in current regulations, which are intended to preserve material authenticity, to check the deterioration evolution and to adopt interventions that are valid and effective for the existing buildings. In this way, management possibilities may find positive synergies with historic architecture and may guarantee redevelopment.

Last, but not least, is the ability to learn as a natural consequence from constant visits to the property.

According to the role of the different actors involved, there are different levels.

The managers of the property (owners or directors) must become aware that their role is decisive. It mainly consists in "living" the factory, reporting possible faults and identifying experienced consultants and operators.

The management of activity needs to be run according to a shared plan. Therefore, it is important for technicians and operators to use the same language and to share their experiences, which will be at the disposal of visitors to factories.

The projects concerning the Chiesa della Disciplina in Verolanuova and three castles in Valtenesi have been developed following the three suggested steps, namely Mind, Knowledge, Experience.

Mind is the study of a specific methodology that is scientifically verifiable at different levels. Knowledge is the appropriation of information through the wide range of multi-disciplinary activities made available by the various sectors of diagnostics (surveys and inspections to check the conservation conditions of properties and the causes for deterioration and to identify preventive actions in order to limit risk situations), of monitoring (regular and systematic controls of the property conditions in its context), of historical research and of direct survey.

"Experience" tested on two heterogeneous study cases that have completed the first key step to ensure their proper care.

## The castles of the Valtenesi

Defensive structures of Valtenesi can be found along the shores of the western part of Garda Lake, and they are close to any town in the surroundings. These castles were built on top of moraine hills; over time, many small villages rose. In some cases, their walls have been demolished, which led to a partial loss of artifacts. "Recetto Castles", so called because inside their walls people settled their houses, never had a military purpose. In case of attack, people just used to shelter in there, but no other defensive action was undertaken. This quite marginal aim is the reason why these castles never caught Venetian governors' attention: just in a small percentage of travel reports of the time can accounts of these ancient buildings be found. The lack of interest provoked that only few documents were written about the topic, the majority of them consisting of singles sentences.

Different ways were to be found in order to study the subject. Specifically, attention was paid to direct analysis of buildings that presented analogies in their constructive phases, shapes, techniques, materials, status of conservation, ownership. In particular, uniqueness of ownership was a fundamental aspect in the project: in fact, walls and towers belong to towns, and towns are the only authority to speak to and interact with.

At the beginning of 2000, local administrations undertook some very expensive restoration works of the castles, and after some 7/8 years, those projects provoked critical damages, because the artifacts were weather-beaten, but not well protected. Unluckily, the economical situation made impossible another expensive intervention, so it was decided to organize a more precise and accurate project. In this case, the main goal was to safeguard an optimal level of preservation of the castles, by adopting innovative technological systems and good maintenance works. In this way, technological devices were supposed to keep their own functionality. The second goal was to optimize and standardize interventions on similar and close buildings, promoting in this way an economy of scale. Lastly, the third goal was to create professionals who, as public employees, guaranteed over time their presence and potential intervention.

During the years spent observing pathologies spotted on the buildings (the inspection began in 2006, even before planning a specific project of conservation), their own evolution could be evaluated, previous inappropriate interventions (such as stucco and tinge works) were registered and reported. Then, as stated in the publication by Regione Lombardia (Lombardy Region) "La conservazione programmata del patrimonio storico architettonico. Linee guida per il piano di manutenzione ed il consuntivo scientifico" (The programmed conservation of historical architectural heritage. Guidelines for maintenance plan and scientific evaluation.), technological devices were named; this operation highlighted how inappropriate the proposed method of cataloguing was, because it couldn't be adopted for single buildings such as city walls and towers. Analyzing the strategy of action prearranged and the one actually adopted, a delay of some operations, such as organizing the construction site, or undertaking other activities previously set as side-works. Especially, a good decision was to postpone some physiochemical analyses in occasion of the availability of structures for sample taking, as positive was also modifying the kind of these structures in order to optimize the catalogue of gathered information.

Similar changes were made in the study of humidity and dynamic action on towers. It was proved that food results about the same goals could be obtained with some equipment already in the building site, and in this way a good deal of money was saved. After the results of the investigation, and after reporting them to authorities, maintenance works proved positive the strategy adopted and announced during the education course held for administration staff and external technicians. Plus, the relatively low cost of scaffolding was another determining factor that stimulated the preservative project, even after obtaining a free grant. Indeed, from a previous research, a main issue was reported to be the excessive cost of scaffolding. On average, the burden of scaffolding reached a bearing of 1/3 or ½ of sum total.

Beside these economical considerations, there are also reasons of conservation that lead to consider the scaffolding to have a negative impact. When there are possibilities to set a scaffolding, it needs to hook to the real estate, thus provoking holes on surfaces, even precious ones, and no attention enough is paid to this qualitative aspect by workers: they just proceed in a hasty way. Plus, care for surfaces is left behind also because the choice of grip connectors is made according to specific considerations, and there are no wide

possibilities of choice.

Using some lift platforms proved pointless too. In the territory around each castle it is not always possible to come close to their walls with this special kind of instruments, because of the very morphological shape of the ground. Either the platforms have their sides on the slopes, or there is a moat between the walls and the zone accessible to vehicles. The entry arcs of strongholds and of ravelins are an obstacle too to entering the site with lift machines, because usually these structures are very short and narrow. Even trees and woods grown around the walls can be an impediment. Final basket rotations and their limited extent make very difficult to get closer to the walls covered in branches. Moreover, even though rental charges are relatively low, also the "dead" time need to be taken into the account when evaluating rental days: it is the time required to climb up and down the machines.

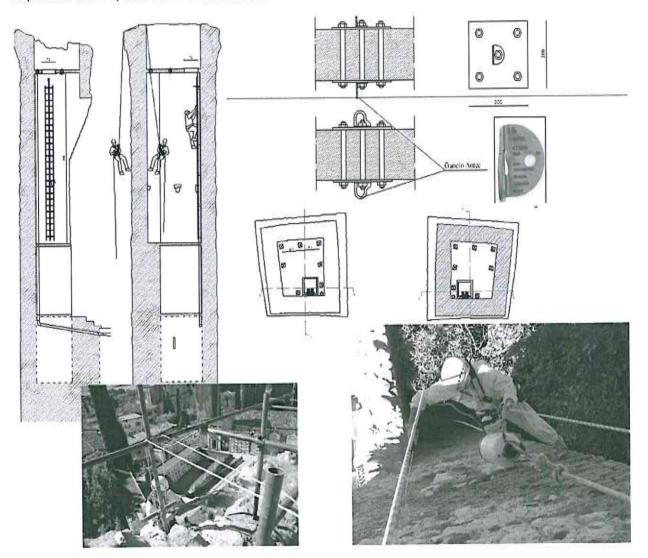


Fig. 1: Castle of San Felice del Benaco

In other cases, finally, also the architecture itself of the building can be an obstacle to observation trough these platforms, as it happens for the towers: in order to be viewed from any perspective, it is necessary to figure out at least two accessible areas where to place the lift machine to go full circle around the towers.

Of course, these castles were built in order to defend and protect those within their walls, so it is quite natural that some obstacle comes up even nowadays, when it comes to "attacking" them.

What follows from these observations is that an intervention on an historical building can be undertaken just as long as the sum total of operations of restoration is determined in a limited percentage by the fixed cost of rental charges.

If the cost of operation on an artifact is moderate, not only can the project be set, but no discussion about the topic is even required. The added value to the restoration of the castles lays in carrying out the works just without any scaffolding: hooks were secured within the walls, so that the workers, licensed OG2 and for activities on rope, could fasten and climb down the ramparts and easily reach any surface to treat. Of course, the places where to set the hooks were studied on purpose, in order not only to be of help for workers, but also to facilitate some structural requirements. For example, when it came to set an anti-seismic metallic protection all around the wooden attics or on topping of towers, some eye-bolds (golfari) were used with a double purpose: securing the insert and sustaining the workers.

The idea not to use scaffolding on the towers highlighted a major problem. During the public tender it was noticed that double-licensed companies are very rare. Workers with a license for rope-working are not capable of dealing smoothly with cultural goods, because they're just used to activities on rocky surfaces. Promoting this kind of activity among restorers might prove a good lever for a growing occupation.



Fig. 2: Castle of Manerba del Garda

The particular project adopted for Valtenesi castles proved very positive, especially because of the spreading awareness about the tools and strategies used. In these kind of operation it is not possible to envisage a spot operation, which is by definition occasional and random. It is impossible to foresee how and where the vegetation will grow, because it is determined by the weather.

The highness of the castles and their unbreachability inspired an "assault" through ropes, displaying an economy that is likely to guarantee a long-lasting care of the buildings, if well administered. The construction

site for the "programmed maintenance" assumes the shapes of a "day-hospital", and it carries out focused intervention, done with specific timing and moderate costs.

With the data gathered, a "medical record" was filled out, in order to allow a comparison between planning and operational experiences.

Wish is that these data can be of renewed interest and help in following operations.



Fig. 3: Castle of San Felice del Benaco

# The church of the Disciplina di Santa Croce in Verolanuova

The church of the Disciplina in Verolanuova is a complex and articulated monument that differs in many historical, archaeological and social aspects that have stimulated interest and solicited knowledge. The present church of the Disciplina di Santa Croce was the parish of San Lorenzo in Verolanuova, before the new basilica was built in 1633 in an adjacent area. After being given the title of parish the church was assigned to the Disciplini who promoted a campaign of structural changes that met the needs of the congregation. Since that time, various events have produced constructive and decorative changes, up to the current architectural conformation. In the last century, there has been less focus on the antique church, so much so that the original vivacity is replaced by a period of inactivity that culminates with the collapse of a portion of an external wall that supports the embankment adjacent to the church in 1930. This shows the precarious state in which some parts of the building were found. There was a long period until relatively recently (80's and 90's of the 900) when necessary restorations were made to guarantee the stability of the church. The works required a considerable investment but unfortunately it did not start the virtuous circuit necessary for the conservation of the temple and it was closed to the public again. Interest for cultural patrimony reflects the values in which the local society sees itself.

The forced closure of the church of the Disciplina, used as a storage place, as well as representing a general inattention provided occasions for wrong doers to damage and loot items of furnishings and works of art. Time, on the other hand, had proceeded to deteriorate the architecture that had completely lacked maintenance for years.

Only in more recent years (2007) following some site inspections, a series of virtuous interventions were undertaken to clean the inside, to catalogue goods that were still conserved and to periodically open the church, thanks to the availability of volunteers. As a result of a fortunate situation, the Cariplo Foundation promoted a competition, within the cultural sector with the purpose of "spreading innovative technology for the programed conservation of historical architectural patrimony". The objective of using the cultural heritage as a driving force for the economic and social development of the territory, provided the occasion to start a profitable campaign to promote knowledge about the historical building for its architectural restoration and functional recovery.

A cultural responsibility for maintenance, individuation and transfer of good practice for programed conservation, diffusion of new methodologies and diagnostic technology represent only a few of the key elements of the presented project that while aimed at the church of Disciplina, can be extended, from a methodological and organisational point of view, to many other artistic heritage around the territory.

Knowledge, prevention, inspection, organization of interventions, dealt with through the collaboration and synergy of various professionals, have substituted the idea of restoration as a way of bringing back the original aspect (renovation) and without further changes, to promote the concept of conservation seen as an evolution open to the relationship between man and built heritage. The result of these principles, a testimony of the proposal and project outcome, is the richness of the contributions that offered, overall, a complete evaluation of the church of the Disciplini, the transformation process that had an effect on it, and the degradation phenomena that regard it.

The first part of the program concentrated on the historical background where it originated and the transformation of the temple. In this case, the archival documents that were examined in the "Notarile Brescia" fund were vast and ample. They were found at the State Archive during the "Pastoral visits" and conserved at the episcopal archive, in the hospital archive in Verolanuova and in the parish archive. The research shows how the visiting sub-delegate of Borromeo, considered the church as the private chapel of the Gambara palace, which was an important artistic commission in the Verolanuova territory and in general in the province of Brescia.

The cognitive methological approach then led to planning the interventions directly after examining its architectural, material and structural characteristics. The architectural research done during the tests to verify the state of conservation of the foundation exploited seven test excavations to provide useful answers correlated to the archealogical literature. This helped to understand the long history of this church that underwent continuous and irreversible transformations that were often barely visible but evidenced by the stratigraphic research on the coatings and the pictorial finishes. The occasion permitted to highlight the still present evidence regarding the decorations of the renaissance period that showed various conditions of conservation that were them in good condition in some areas, while in others, the paintings, if not torn showed very bad conservation conditions.

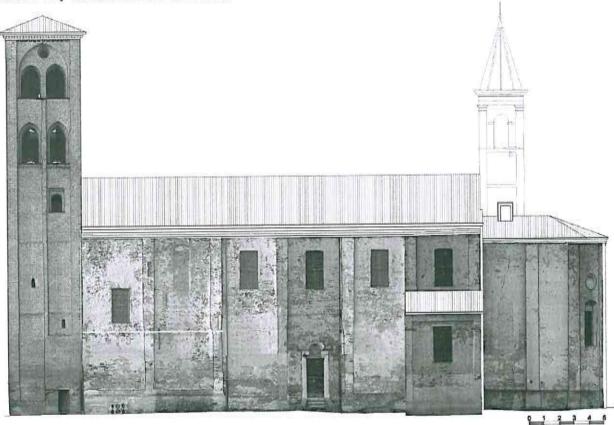


Fig. 4: Church of the Disciplina Santa Croce: prospectus

The direct reading of the building finished with the study of the vault in "cameracanna" that was built for the arrival of the Disciplini in the church. This constructional method was very diffused in churches and buildings

not only in the geographic area considered but also in other regions. It was an answer to the need or want to hide the existing coverage to radically change its aspect or the function it had in its setting also as a result of a change in style. The vaults made in "cantinelle" were lighter and faster to build with respect to those in masonry and more economical using construction technics that were still poorly understood. This revealed a series of critical situations regarding conservation that derived from the materials as well as from the solutions that were developed.

The last part of the program, finally, addressed a series of investigations that focused on a more accurate assessment of the problems of the building. The wide range of research done on the inside of the church prompts reflection: The acquisition of preliminary knowledge for conservation interventions, shared at most levels, in order to be effective, must be guided and governed inside a global frame that collects and organizes information from research that traces mutual connections and generates new relationships.

The valid choice of an analysis program and not less importantly, the correct management, interpretation, and use of results, constitute a guarantee and a quality base for the conservation project. In this respect, the first part of the test used the cognitive possibilities given by the thermography. The environmental situation on the inside of the church was verified including the reaction on the surface of the paintings that were subjected to various solicitations, in particular to fluorensce UV and to infrared riflettology. Small samples of material were used to recover samples of mortar for physical-chemical analysis. The characterization campaign was mainly addressed to the enticement mortar of the perimetral walls in order to have information to relate to the historic data in possession.

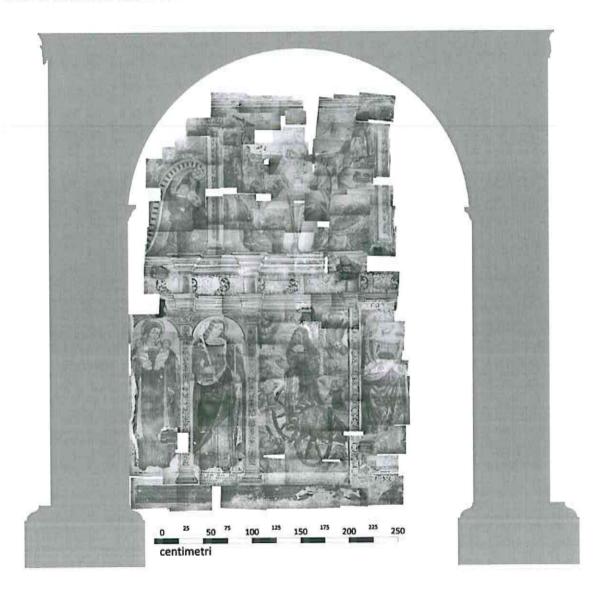


Fig. 5: Church of the Disciplina Santa Croce: photomontage of the painting hidden by a curtain

A different topic regarded the studies aimed at an in -depth analysis of the geomorphologic situation in the area and of the structure with the objective of offering a complete image of the subsoil and to obtain numerical and physical data to use in a consolidation project for anti-seismic purposes. An accurate analysis done by coring in depth was integrated with the collected data from the georadar directed in specific areas where construction elements that were not visible could be present. The process ended with the mechanical characterization and the prevision of the seismic behavior of the walls.

#### Conclusion

The two cases under analysis clearly show that the two operating paths pursued greatly differ each other. None of them exhibits higher quality with respect to the other, having the architectures traced the most suitable path depending on building features, typology and materials and having the usage triggered substantial transformation processes in some cases.

The different paths share the same objective, that is to identify the most suitable restoration work for the factory and to create a "medical record" or "identity card" transmissible to the personnel in charge of the property. In the first case the preliminary investigation process was more limited. The majority of the information have become visible only at the beginning of project. At the same stage some preliminary assumptions have been ascertained. It has been perceived that the standard cataloguing procedure applied to technological elements of the factory was both redundant and unable to clarify specific issues. Of primary importance has revealed the management of the building site, being conscious that within the military architecture an enclosure wall or a tower have played an important a role.

The second case depicts a more traditional investigation process suitable for a wider typology of buildings. Professionals with different background have kept in touch with the aim of sharing opinions about problems and expectations.

The valuable expertise in hand has demonstrated that the conservation intervention plan is prone to the understanding of the available expertise itself and, like a doctor, leads the therapy of the patient.

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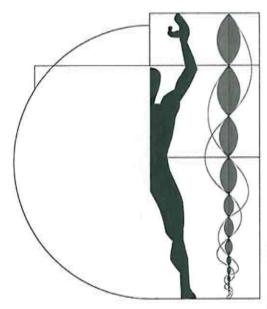
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## Peer review

Scholars has been invited to submit researches on theoretical and methodological aspects related to Heritage and Technology, and show real applications and experiences carried out on this themes.

Based on blind peer review, abstracts has been accepted, conditionally accepted, or rejected.

Authors of accepted and conditionally accepted papers has been invited to submit full papers. These has been again peer-reviewed and selected for the oral session and publication, or only for the publication in the conference proceedings.

# Conference report

357 abstracts received from:

Albania, Argentina, Australia, Benin, Brazil, Bulgaria, Canada, Croatia, Egypt, France, Greece, Iraq, Israel, Italy, Japan, Latvia, Malta, Mexico, Norway, Poland, Portugal, P.R. China, Russia, Slovakia, Spain, Turkey, United Kingdom, USA.

More than 500 authors involved.

291 papers published.

# Table of contents

P. 35	Preface Carmine GAMBARDELLA
P. 36	ID 002 Architectural Restoration projects in metropolitan areas: the case of the Su-pyo Bridge Beniamino POLIMENI
P. 46	ID 003 Windows of memory: perspective panels to communicate archeological heritage Alessandra PAGLIANO, Mariano MARMO, Roberta MONTELLA, Angelo TRIGGIANESE
P. 55	ID 004 Heritage enhancement and communication: "Palazzo Te allo Specchio" follow-up Alessandro BIANCHI
P. 64	ID 007 Influences of building techniques on the annual primary energy requirement of buildings in Frignano (Italy) Luigi MOLLO
P. 69	ID 008 The sentry of Castellino Tanaro: the structural recovery of an ancient medieval tower Cesare Renzo ROMEO
P. 77	ID 010 Environmental monitoring of electromagnetic fields of urban territory of Samara Region of Russia Andrey VASILYEV
P. 85	ID 011 Methods and results of environmental monitoring of soil pollution by oily waste Andrey VASILYEV, Dmitry E. BYKOV, Andrey A. PIMENOV
P. 90	ID 012 Approaches to soil treatment from oily products and results of it approbation Andrey VASILYEV, Vlada V. ZABOLOTSKIKH
P. 95	ID 013 Besides the design: the analysis and documentation of the ancient "Via Pretoria" in Potenza. The most significant transformations of a Roman road axis in the historic city Enza TOLLA, Antonio BIXIO, Giuseppe DAMONE
P. 104	ID 014 Referential interpretation of vernacular heritage in recent architectural design Emrah ASLAN, Dogan Sevinc ERTUR, Zafer ERTURK
P. 114	ID 015 Teaching and Practice of Architecture in Recife (Brazil) 1959 – 2009 Enio LAPROVITERA DA MOTTA
P. 124	ID 016 The Architect and the People of Recife (Brazil): 1959 – 2009 Enio LAPROVITERA DA MOTTA

P. 132 ID 018

Student-Centred Learning as an Approach to Design Primary Schools' Outdoors Doaa HASSAN

P. 143 ID 019

Superkilen, Copenhagen

Mario PISANI

P. 151 ID 020

Revitalisation of historical landscape areas in UNESCO city of Banská Štiavnica

Ingrid BELĆÁKOVÁ

P. 158 ID 022

Retrofit and conservation of historical concrete buildings in Turin (Italy)

Alessandro P. FANTILLI, Barbara FRIGO, Bernardino CHIAIA

P. 166 ID 024

Turin in 1815 Nadia FABRIS

P. 174 ID 026

The new and the old in the perception of cultural heritage. The language of innovative materials between conservation, protection and enjoyment

Gigliola AUSIELLO

P. 181 ID 027

The traditional sacral wooden construction in Lithuania. An illustrated catalogue of building techniques for the safeguard and recovery of cultural heritage

Liucija BEREŽANSKYTĖ, Tiziana CAMPISI

P. 191 ID 029

Public buildings in the construction tradition of the 20<sup>th</sup> -century Italian suburbs

Alessandro CAMPOLONGO

P. 199 ID 030

Projectivity and the homological relationship as a verification of the computer mathematical representation: the representation of plane and skew curves in graphical models.

Antonio MOLLICONE

P. 210 ID 031

New urban models | San Pablo case /// 'Luis Buñuel'

José Javier GALLARDO ORTEGA

P. 218 ID 032

Designing by strata: notes from the underground. Hypogeous spaces and the archeological

museum of Pompei

Corrado DI DOMENICO

P. 228 ID 038

Cover, overlapping and layering: protection and promotion of archaeological heritage in Paris

Alice PALMIERI

P. 238 ID 039

The other side of the Ring-Bruxelles

Rosalba DE FELICE

P. 248 ID 040

Metropolitan cities of Italy: law, environment and sustainable development

Michele RUSSO

P. 257 ID 041

Urban landscape and new venustas

Salvatore LOSCO

P. 266 ID 043

The Technology of an Early Reinforced Concrete Structure in Turkey: The Great Storehouse of the Kayseri Sümerbank Textile Factory (1932-1935)

Nilüfer BATURAYOĞLU YÖNEY, Burak ASİLİSKENDER

P. 275 ID 044

Fedele Fischetti and the Gallery of Real Casino Carditello

Antonella DIANA

P. 283 ID 045

Contemporary design drawings as cultural heritage: interpretation and communication. Towards

a digital archive of Rosani's industrial projects

Roberta SPALLONE, Francesca PALUAN

P. 293 ID 046

Exploring and interpreting the landscape using technological innovative systems

Giacinto TAIBI, Rita VALENTI, Mariangela LIUZZO

P. 302 ID 047

Architecture and subtraction: Ostiense square in Rome

**Assunta NATALE** 

P. 312 ID 048

Surveying for documentation and management the Renaissance building of Royal Hospital in

Granada (Spain)

Juan Francisco REINOSO-GORDO, José Luis RAMÍREZ-MACÍAS, Francisco Javier

ARIZALÓPEZ, Carlos LEÓN-ROBLES, Antonio GÓMEZ-BLANCO, Concepción

RODRÍGUEZMORENO, Íñigo ARIZA-LÓPEZ

P. 318 ID 049

Data quality elements for BIM applied to heritage monuments

Íñigo ARIZA-LÓPEZ, Francisco Javier ARIZA-LÓPEZ, Juan Francisco REINOSO-GORDO, Antonio GÓMEZ-BLANCO, Concepción RODRÍGUEZ-MORENO, Carlos LEÓN-ROBLES

P. 326 ID 050

San Francisco Schools, 1839. Virtual reconstruction of The Franciscan convent of Betanzos

and its transformations, in the XIX Century, (Galicia, Spain)

Marta COLÓN, Fernando FRAGA

P. 336 ID 051

Wandering Experience in Napoli

Idit GOLDFISHER, Shani ZIV, Talila YEHIEL

P. 343 ID 052

The representation of the memory: the analogic-digital survey of two funeral monuments in the

Verano cemetery of Rome

Laura CARNEVALI, Fabio LANFRANCHI, Mariella LA MANTIA

P. 353 ID 053

Archaeology and architectural design. New studies and projects for the Acropolis of Athens

Luisa FERRO

P. 363 ID 054

Multilevel planning regional management. A GIS Platform Structure

Francesco ZULLO, Serena CIABO', Lorena FIORINI, Alessandro MARUCCI, Simona

OLIVIERI, Stefano PERAZZITTI, Bernardino ROMANO

#### P. 372 ID 055

"col cerviello et non con le mani" New hypotheses on the Michelangelo plaster works of the Fine Arts Academy of Perugia

Paolo BELARDI, Luca MARTINI, Michele MARTORELLI

#### P. 382 ID 056

The lost imperial palace of Antioch on the Orontes (now Antakya, Turkey) Stefano BORSI

## P. 387 ID 058

New technologies for knowledge and the physical space of the museum Gioconda CAFIERO

### P. 396 ID 059

A pyramidal kitchen vault in a gothic-renaissance palace. Oliva, Valencia, Spain Alba SOLER ESTRELA, Rafael SOLER VERDÚ, Manuel CABEZA GONZALEZ

#### P. 404 ID 060

LANDY. LANdscape DYnamics. Survey, representation, monitoring and communication of the dynamics of the landscape and risks related to them

Enrico CICALÓ1, Maurizio Minchilli, Loredana Tedeschi, Mara Balestrieri, Gianfranco
Capra, Alessandra Casu, Arnaldo Cecchini, Tania Congiu, Baffaella Loyenglio, Antonella

Capra, Alessandra Casu, Arnaldo Cecchini, Tanja Congiu, Raffaella Lovreglio, Antonella Lugliè, Giuseppe Onni, Bachisio Mario Padedda, Paola Pittaluga, Clara Pusceddu, Paola Rizzi, Nicola Sechi, Silvia Serreli, Sergio Vacca

## P. 409 ID 061

A strategic plan of investigation into the urban areas carried out together with public bodies Giacinto TAIBI, Rita VALENTI, Michele LIISTRO, Sebastiano GIULIANO

## P. 418 ID 062

Reticular valorization model for castles in Central-Eastern Europe. The Slovak experience Mirko CAPUTO

# P. 428 ID 063

Methods and Techniques "to work on the built" Maria Antonia GIANNINO

## P. 435 ID 064

Villa Cambi – the discovery of an unpublished posthumous building of G. Michelucci realized by B. Sacchi

Frida BAZZOCCHI, Vincenzo DI NASO, Andrea MASI, Charles Michael STARNINE

## P. 445 ID 065

"Sensing to the past" like a new paradigm: knowledge and experience on fortified architectures Alessandra QUENDOLO, Claudia BATTAINO, Maria Paola GATTI

## P. 455 ID 067

Introduction to the study of the Apice territory.

Assunta CAMPI

# P. 465 ID 068

Unveilings. Mnemonic project of the archaeo- logical invisible landscapes Claudia BATTAINO, Luca ZECCHIN

#### P. 475 ID 069

UAV surveys for representing and document the cultural heritage Mauro CAPRIOLI, Francesco MANCINI, Francesco MAZZONE, Mario SCARANO, Rosamaria TRIZZINO

P. 483 ID 070

The environmental engineering in Vesuvius National Park

Ferdinando ORABONA

P. 490 ID 072

Methodological study on the application of the stratigraphic analysis to the New Towns of the Middle Age

Barbara BONGIOVANNI

P. 498 ID 074

The immaterial city. An innovative look at the unrealized projects for 20th century Spoleto

Valeria MENCHETELLI, Laura NARDI, Giovanna RAMACCINI

P. 508 ID 075

Planning dimension of restoration

Antoniuca DI PAOLA

P. 513 ID 078

A dialogue between architecture and technology. Methodological processes for the knowledge

and preservation of buildings of value in the eastern part of Sicily

Giacinto TAIBI, Rita VALENTI, Sebastiano GIULIANO, Emanuela PATERNÒ

P. 521 ID 079

Morphological Investigations and Virtual Reconstructions of the Domus of the Northeast Quarter

of Volubilis (Morocco)

Concepcion RODRIGUEZ-MORENO, Jose Antonio FERNANDEZ-RUIZ

P. 531 ID 080

A model of strategies used for traffic calming in an urban environment

Alma AFEZOLLI, Elfrida SHEHU

P. 541 ID 081

Cultural heritage confiscated from racketeering. A course toward adaptive reuse and effective

management

Stefania DE MEDICI

P. 551 ID 082

Tighremt Aslim\_ Aguddim Taliwin: cases study in the Draa Valley

Marinella ARENA

P. 560 ID 083

The management of private properties with heritage values

Elfrida SHEHU, Alma AFEZOLLI

P. 569 ID 084

Pompeii - World Heritage Site: the buffer zone urban structures and spaces of collective interest

Enrico DE CENZO, Giovanni BELLO

P. 579 ID 085

Building techniques in the Umbrian Middle Ages: from history to conservation

Eleonora SCOPINARO

# P. 588 ID 086

Development of a GIS environment for archaeological multipurpose applications: the Fano historic centre

Roberto PIERDICCA, Eva Savina MALINVERNI, Paolo CLINI, Adriano MANCINI, Carlo Alberto BOZZI, Paolo CLINI, Romina NESPECA

## P. 598 ID 089

HISTORY BUILDS, SURVEYING RE-BUILDS: conservation work of a medieval building through the representation of its (most likely) construction history.

Hilde Grazia Teresita ROMANAZZI

## P. 607 ID 091

Design + Nursing: From laboratories to Users, The Transformation of Concussion Prevention Steven DOEHLER, Roberta LEE, Jeanine GOODEN, Jean ANTHONY, Kimberly HASSELFELD

## P. 615 ID 092

Oscar Niemeyer, the architect of the curve surfaces. The freehand relief as tool for investigation of modern Brazilian architecture

Domenico SPINELLI

## P. 623 ID 093

Survey on the landscape and morphological singularities of the Cliff of Aci Castello Mariangela LIUZZO, Sebastiano GIULIANO, Salvatore SAVARINO

## P. 632 ID 094

The use of external claddings in the functional recovery of disused industrial buildings. Giulia MATERAZZI, Nicola CAVALAGLI, Vittorio GUSELLA

## P. 641 ID 095

Structure and stone cladding in building constructions in L'Aquila, Abruzzo, Italy, from the 12th to the 18th century: methods used for the analysis and indexing of masonry categories and related performances in response to seismic activities

Stefano CECAMONE

## P. 650 ID 096

Structural calculations by horizontal and vertical interoperability for the redevelopment of existing buildings

Bernardino CHIAIA, Sanaz DAVARDOUST, Anna OSELLO

## P. 659 ID 097

Cultural built heritage in cemeteries, between architecture and urban design. The Serramanna Cemetery Chapel
Vincenzo BAGNOLO

## P. 666 ID 098

The single hall churches in the historic centre of Catania (Italy): a cognitive method behind the design of sustainable refurbishment.

Alessandro LO FARO, Attilio MONDELLO, Angelo SALEMI

# P. 676 ID 099

Unveiling a heritage through digital enlightenment: the Lisbon Royal Opera House of Tagus Pedro Miguel Gomes JANUÁRIO, Maria João Mendonça Pereira NETO, MárioSay Ming KONG

#### P. 686 ID 100

Heritage and technology: novel approaches to 3D documentation and communication of architectural heritage

Mariateresa GALIZIA, Laura INZERILLO, Cettina SANTAGATI

## P. 696 ID 101

Aljezur, "between vision" of Place and Memory: The use of new technologies for the protection of a place and its heritage

Maria João Pereira NETO, Pedro Gomes JANUÁRIO, Mário Say Ming KONG, Raffaella MADDALUNO

## P. 701 ID 102

Building Color Survey of Four Districts for Preserving a Group of Traditional Buildings in Japan Kiwamu MAKI

## P. 709 ID 103

Experience, Immersion and Perception: Communication Design for Urban and Natural Environments

Daniela CALABI, Elisa CHIODO, Sabrina SCURI

## P. 718 ID 104

Pompeii - Nature and Architecture

Clelia CIRILLO, Luigi SCARPA, Giovanna ACAMPORA, Barbara BERTOLI, Raffaela ESPOSITO, Marina RUSSO

## P. 729 ID 105

Galeazzo Alessi: narration, representation and contemporary theatricality fora XVI c. architectural heritage

Maria Linda FALCIDIENO, Massimo MALAGUGINI, Maria Elisabetta RUGGIERO

## P. 739 ID 106

A Geographic Information System for the documentation of the medieval and modern fortifications. The district of "Castello" in Cagliari.

Andrea PIRINU

# P. 747 ID 107

Building in / Building on. Composition strategies for re-conversion of productive buildings Gaspare OLIVA

# P. 757 ID 108

The intangible visuality of invisible cultural landscapes. The aerial view for the knowledge of the past.

**Davide MASTROIANNI** 

# P. 766 ID 112

The roles of industrial heritage areas on urban renewal: the case of "Ödemiş" Julide KAZAS PEKCAN

## P. 777 ID 113

St. Erasmus in Isernia: a medieval cave church

Piero BARLOZZINI

## P. 784 ID 115

Implications of earthquake return periods on the building quality Sandra TONNA, Claudio CHESI

P. 794 ID 116

Architectural History from a Performance Perspective. The Latent Potential of Knowledge embedded in the Built Environment

Michael HENSEL, Defne SUNGUROĞLU HENSEL

P. 803 ID 117

The underground city between design and survey: the greek hollow of Poggioreale Maria Ines PASCARIELLO, Raffaele MARTINELLI

P. 813 ID 120

Strategies for the building stone and damage mapping applied to the historical center of Catania Giulia SANFILIPPO, Angelo SALEMI, Erica AQUILIA, Germana BARONE, Paolo MAZZOLENI, Angelo SALEMI

P. 823

The invisible roads of contemporary businesses

Agostino URSO

P. 833 ID 122

Fragments and memory of landscape: preservation of some fragile architectures Emanuele ROMEO, Emanuele MOREZZI, Riccardo RUDIERO

P. 842 ID 123

Development of the urban-rural network in the metropolitan area of the Strait of Messina through the recovery of the historical and cultural obsolete heritage. Alessandra MANIACI, Gianfranco SALEMI SCARCELLA

P. 851

Revisiting residential architecture in the city of João Pessoa, Paraíba, Brazil ... Maria Berthilde MOURA FILHA, Ivan CAVALCANTI FILHO

P. 860 ID 127

Development of a database using GIS technology: study and intervention in vulnerable neighbourhoods AGUSTÍN HERNÁNDEZ, Miguel SANCHO MIR, Noelia CERVERO SANCHÉZ

P. 869

Development of indicators to graphically and geometrically define state subsidised residential blocks in Zaragoza. Spain. Geometrical exposure to sun. Aurelio VALLESPIN MUNIESA, Angélica FERNÁNDEZ MORALES, Zaira PEINADO CHECA

P. 878 ID 130

Integrated methodologies for documentation and restoration of Modern architecture: survey and representation of the "Casa das Canoas" by Niemeyer Marcello BALZANI, Federica MAIETTI

P. 888

Three-dimensional morphometric database for visualisation and critical analysis of the San Sebastiano in Mantua by Leon Battista Alberti Marcello BALZANI, Federico FERRARI

P. 896 ID 133

Restoration works and valorization strategies of the architectural complex of S. Francesco in Amantea (CS)

Renato OLIVITO, Alessandro TEDESCO

P. 906 ID 134

Realistic 3D view as a form of interpretation and presentation of historic gardens Ivan STANKOCI, Tamara REHÁČKOVÁ

P. 915 ID 135

Augmented reality for the understanding of cultural heritage. The case study of the monument of Giuseppe Sirtori in Milan

Carlo BATTINI

P. 920 ID 136

Adjustments. Repairing and reinventing damaged landscapes

Fabrizia IPPOLITO

P. 926 ID 138

The Recovery of Urban Post-War Landscape Middle-Class Housing in Naples

Chiara INGROSSO, Luca MOLINARI

P. 932 ID 139

Guidelines for the drafting of Maintenance plan dedicated to Archaeological Heritage: case-

study Villa di Poppea, Oplonti

Maria Rita PINTO, Flavia LEONE

P. 941 ID 141

The Influence of Colouring on Style Expression of Industrial Architecture

Eva BELLÁKOVÁ, Eva ŠPERKA

P. 949 ID 143

The role of non invasive diagnosis for preventive archaeology in the frame of projects of

industrial and energetic plants.

Pasquale MARINO

P. 953 ID 144

Sustainable development of hospital structures

Marsida TUXHARI, Denada VEIZAJ

P. 960 ID 145

World heritage and technology, the different understanding

Christina RAIDESTINOU APERGI

P. 968 ID 151

Utility and necessity in architecture: design, construction and transformation of alpine buildings

Maria Paola GATTI, Giorgio CACCIAGUERRA, Andrea DONELLI

P. 976 ID 152

Use of TLS technology for the fem-based structural analysis of the anatomy theatre

Alberto GUARNIERI, Andrea MASIERO, Livia PIERMATTEI, Francesco PIROTTI, Antonio

VETTORE

P. 984 ID 153

A planning & design approach for the rehabilitation of historic centres in Iraq

Giuseppe CINÀ

P. 997 ID 154

Survey of Architecture. Complex models for analysis, valorisation, restoration

Aldo DE SANCTIS

P. 1004 ID 155

The Industrial Building Heritage: first steps for the Damages Evaluation of Innocenti-Maserati Strucutral Plants

Pietro CRESPI, Alberto FRANCHI, Paola RONCA, Antonio MIGLIACCI, Alessandro ZICHI

P. 1012 ID 156

In-situ tests, analytical and numerical studies for the assessment capacity of a historic building in l'Aquila

Alberto FRANCHI, Pietro CRESPI, Paola RONCA, Nicola GIORDANO, Giulia RANSENIGO

P. 1020 ID 157

The Trezzo sull'Adda's Castle: restoration consolidation and reuse of the Cultural Heritage for a sustainable future use.

Pietro CRESPI, Fausto NEGRI, Giovanni FRANCHI, Paola RONCA, Alessandro ZICHI

P. 1027 ID 158

A methodology able to investigate the phenomenon of Unauthorized building: the case of

Giugliano in Campania

Claudia DE BIASE

P. 1037 ID 159

Landscapes of repentance and of compensation

**Esther GIANI** 

P. 1043 ID 160

From the knowledge process to the representation of the built environment. The case of the

"Istituto del Rifugio" in Naples

Lia Maria PAPA, Pierpaolo D'AGOSTINO, Giuseppe ANTUONO

P. 1051 ID 162

Which survey for which digital model: critical analysis and interconnections.

Andrea GIORDANO, Paolo BORIN, Maria Rosaria CUNDARI

P. 1059 ID 163

3D modelling in Architecture: from tangible to virtual model

Tatiana KIRILOVA KIROVA, Davide MEZZINO

P. 1074 ID 165

Innovation and Creativity of Architectural as a tool to Confrontation and Observation the

Changes in the Mosque Architecture During Different Eras

Wafeek Mohamed Ibrahim MOHAMED

P. 1094 ID 166

An online multilingual dictionary as a technology platform for heritage studies and development

Monika BOGDANOWSKA

P. 1101 ID 167

Geophysics and Cultural Heritage

Pier Matteo BARONE, Carlotta FERRARA

P. 1111 ID 168

The architectonic perspectives in the villa of Oplonti: a space over the real

Barbara MESSINA, Maria Ines PASCARIELLO

P. 1121 ID 170

Investigations on building techniques of the defensive walls in Kınık Höyük excavation (Turkey) Valentina CINIERI, Emanuele ZAMPERINI, Marco MORANDOTTI

P. 1131 ID 171

Surveying and Restoration of St. Basilio Monastery in L'Aquila

Mario CENTOFANTI, Stefano BRUSAPORCI, Francesca CERASOLI

P. 1140 ID 172

A system for dating changes in building fabric via nail spectra

Chris HOW

P. 1150 ID 173

The aesthetic vision of the landscape in nineteenth century Piedmontese painting

Anna CIOTTA

P. 1159 ID 174

Grotesque forms and representations in baroque balconies of eastern Sicily.

Caterina GULLO

P. 1166 ID 176

The water and its monuments in Provence

Laura BLOTTO

P. 1176 ID 178

Knowledge and innovation in the field of Cultural Heritage

Caterina GATTUSO

P. 1180 ID 179

Cultural Heritage 2.0. Toward innovative tools for the communication of cultural and historical

asset.

Stefano ZAGGIA, Angelo BERTOLAZZI, Federico PANAROTTO

P. 1188 ID 180

Self Explaining City

Luigi STENDARDO, Raffaele SPERA, Angelo BERTOLAZZI

P. 1298 ID 181

Protection of Cultural Heritage on the Example of Krakow Tenement Houses from the End of

the 19th and the Beginning of the 20th Century

Beata MAKOWSKA

P. 1203 ID 182

Urban presence: the fountain

Federica CAPRIOLO

P. 1210 ID 183

Structural analysis of finite element models of masonry balconies and overhangs obtained by

B.I.M.

Ingrid TITOMANLIO Giuseppe FAELLA

P. 1218 ID 184

Building Information Modeling for the static and seismic safety of masonry balconies and

overhangs

Ingrid TITOMANLIO

P. 1227 ID 185

Construction of the Museum of Fine Arts in Riga (1903-1905)

**Arturs LAPINS** 

P. 1233 ID 186

The Impressionist Range Of Creativity And Technical Innovation Of The Heritage Cities Between Cosmic And Heritage Concept And Reformulation Of The Mental Image Wafeek Mohammed Ibrahim MOHAMED

P. 1249 ID 187

A tower for Shangai Anna MANDIA

P. 1252 ID 188

Protecting unpopular heritage. The difficulties of listing 1950s architecture and postwar planning in Plymouth. UK

Daniel BARRERA FERNÁNDEZ

P. 1261 ID 189

Sharing knowledge, grasping Cultural Heritage: a digital multidisciplinary approach to the historical process of architecture and urban changes

Rosa TAMBORRINO, Fulvio RINAUDO

P. 1271 ID 190

Algorithmic transformation between heritage and innovation in design

Michela ROSSI, Giorgio BURATTI

P. 1279 ID 191

Structure and geometry
Vito Maria Benito VOZZA

P. 1289 ID 195

The redraw of the architecture in the smart city Vito Maria Benito VOZZA Luigi CORNIELLO

P. 1299 ID 196

Architecture as living sculpture.

Stefania DI DONATO

P. 1309 ID 197

Bathing facilities: memory and survey of a forgotten coastal heritage

Antonella SALUCCI

P. 1317 ID 199

Representing the time: the role of sequences representation in the design of visual information

Stefano CHIARENZA

P. 1326 ID 200

Hollow clay elements of typical Calabrian tradition: typologies and construction techniques

Renato Sante OLIVITO, Caterina GATTUSO, Carmelo SCURO

P. 1333 ID 201

Best practice or bad practice? Technological perspectives, Administrative proceedings and

urban perceptions in the historic cities: the case of Royal Arsenals of Seville.

Daniela LALLONE, Fernando AMORES

P. 1343 ID 202

> Analysis of ecological criteria for traditional housing and its adaptation to new housing design Ebubekir GÜNDOĞDU, Emel BİRER

P. 1353

Technologies to know and share the Cultural Heritage between East and West: geometric patterns in the decorations

Anna MAROTTA

P. 1363 ID 205

> Identity+Innovation: how to give hope and opportunities to forgot suburbs. A comparative study between EU and China.

Tiziano CATTANEO, Yongjie SHA, Emanuele GIORGI, Giorgio Davide MANZONI

P. 1373

Not restoration but plannet and preventive conservation

Barbara SCALA

P. 1383 ID 208

Construction site information modelling and operational planning

Manuele CASSANO, Marco Lorenzo TRANI, Stefano DELLA TORRE, Benedetta BOSSI

P. 1393

Key Enabling Technologies for an accessible Cultural Heritage: methods of application of the EU 2014-20 Programme strategy for Culture

Valeria DI FRATTA, Valeria AMORETTI

P. 1403 ID 210

> Environmental protection versus simplification and development policy: searching for a difficult (but achievable) balance

Marco CALABRO'

P. 1411 ID 211

Wayfinding Accessible Design

Roberto DE PAOLIS, Silvia GUERINI

P. 1421

A style between two centuries: the Great Hall of the Faculty of Architecture of Rome Laura CARNEVALI, Giovanni Maria BAGORDO

P. 1427

The rehabilitation of the school building heritage in Potenza (Italy)

Ippolita MECCA, Tiziana CARDINALE

P. 1436 ID 215

Cultural Heritage communication between narrative and creativity. 3D Video Mapping Projection

and new suggestions of Augmented Space Iolanda DI NATALE, Alice PALMIERI

P. 1446 ID 216

Urban symbiotic architecture in Pavia. The origins of Giancarlo De Carlo's Building

Development Plan for Pavia University

Simone LUCENTI, Emanuele ZAMPERINI

P. 1456

Different futures in the labyrinth of the carto-iconographical heritage of Milan

Maria Pompeiana IAROSSI, Sara CONTE, Marco INTROINI

P. 1465 ID 218

Ancient villages: the Eco-museums to Eno-museums Francesca MUZZILLO, Fosca TORTORELLI

P. 1471 ID 219

Pompei between Archaeology and "Agritecture"

Fosca TORTORELLI

P. 1476 ID 222

Conservation Practices in Turkey in Last Decade, Two Monuments from Two Eras: the 4th-Century Laodikeia Church and the 16th-Century Rabi Madrasa

Ege Uluca TUMER

P. 1485 ID 224

Intersecting lives: Giovanni Battista Naldini and Giovanni Antonio Dosio

Antonella MARCIANO

P. 1495 ID 225

The Augustan Bridge at Narni: Documentation and Analysis by Laser Survey and 3D Modeling

Alberto CUSTODI, Flora SCAIA

P. 1505 ID 226

Morpho-architectural analysis, constructive modalities and structural diagnostics for the

restoration of the Church of SS Bartholomew and Stephen in Bergamo

Alessio CARDACI, Antonella VERSACI, Davide INDELICATO

P. 1515 ID 227

The twenty-seven buildings of the Littorio rural village in Candiana. Hypotheses of

recomposition

**Enrico PIETROGRANDE** 

P. 1525 ID 228

Survey and Representation of the complexity of ancient theaters and amphitheatres

Giuseppe DI GREGORIO, Angelo MONTELEONE

P. 1535 ID 229

The experience of the journey. Digital technologies and visual itineraries to enjoyment of the

city's cultural heritage

Elena IPPOLITI, Alessandra MESCHINI

P. 1545 ID 230

Golden Cartelline from the Wall Mosaic of S. Giovanni in Fonte. Remarks and Scientific

Analyses on the Constituent Materials

Ciro PICCIOLI, Caterina GATTUSO, Valentina ROVIELLO

P. 1554 ID 231

Strategies for the sustainable development of historical town centre and compatible

conservation and reuse of the built heritage

Giuliana QUATTRONE, Elena GIGLIARELLI

P. 1562 ID 232

Structures for the museumification of underwater cultural heritage

Marco RUSSO

## P. 1572 ID 233

Architectural and Environmental Compositional Aspect for Technological Innovation in the Built Environment

Mario GROSSO, Giacomo CHIESA, Marianna NIGRA

## P. 1582 ID 235

UAV Remote Sensing for the Preservation and Restoration of Houses of Worship. Potential and Limitations

Margaret BICCO

## P. 1589 ID 236

From ruin to hinge of urban renewal: the restoration of the church of St. Demetrius in Ceglie Messapica (BR)

Antonio BIXIO, Ippolita MECCA

## P. 1599 ID 237

Architecture of Light Case study St. Cross Church in Nin, Croatia Ivanka STIPANČIĆ-KLAIĆ, Davor ANDRIĆ, Anja KOSTANJŠAK

#### P. 1608 ID 240

Innovative working spaces: the case study of Novartis and the "InNova" project Lorenzo CAPOBIANCO, Giuliana CHIERCHIELLO

#### P. 1616 ID 241

Sanfelice Palace, the house of a genius: some insights about the geometrical relations Gerardo Maria CENNAMO

## P. 1625 ID 242

Toward the "Smart Polis": methods, tools and strategies of intervention for the sustainable regeneration of historic urban centres

Elena GIGLIARELLI, Lu BIN, Luciano CESSARI

#### P. 1632 ID 244

Remote sensing evaluation of fire hazard: towards operational tools for improving the security of citizens and protecting the environment

Carmine MAFFEI, Carmine GAMBARDELLA, Massimo MENENTI

# P. 1640 ID 246

Marble sculptures FRP-based reinstating and consolidating practices

Ignazio CRIVELLI VISCONTI, Marina D'APRILE, Domenico BRIGANTE, Claudio CIGLIANO

## P. 1650 ID 247

New fiber composite materials for Cultural Heritage conservation

Giuseppe CHIDICHIMO, Amerigo BENEDUCI, Caterina GATTUSO, Alessandro SENATORE, Francesco DALENA, Valentina ROVIELLO

# P. 1654 ID 248

Sustainable reutilization of the Pombaline System essentially based on the properties of the socalled "Gaiola Pombalina"

António José MORAIS, Alexandra AI QUINTAS

P. 1661 ID 249

The Roman Theatre in Trieste. Digital Analysis and 3D Visualizazion

Alberto SDEGNO, Paolo CASARI, Piero MICEU, Marco JEZ, Lisa MINIUSSI

P. 1671 ID 250

Pressure of tourism on heritage and technologies for an inclusive society

Valeria MINUCCIANI, Gabriele GARNERO

P. 1675 ID 251

The spatial-temporal journeys and the urban filters

Vincenzo CIRILLO

P. 1685 ID 254

New heritage: Architecture and biological sciences

Rossella BICCO

P. 1691 ID 256

Ordinary maintenance in the Venice "minor". Problems in nontrivial resilience

Piero PEDROCCO

P. 1701 ID 257

HafenCity Hamburg

Agrippino GRANIERO

P. 1709 ID 259

Survive the Saracoglu District - Preservation of Architectural Heritage of Ankara

Duygu KOCA

P. 1716 ID 262

"School Project EXPO 2015": LANDesign BREEDING-GROUND SALERNO

Maria Dolores MORELLI

P. 1723 ID 263

"Universities for EXPO 2015": LANDesign in Mostra d'Oltremare

Sabina MARTUSCIELLO

P. 1735 ID 265

The influence of colors on the sound environment perception

Virginia PUYANA ROMERO, Giuseppe CIABURRO, Luigi MAFFEI

P. 1742 ID 266

Additive technology and design process: an innovative tool to drive and assist product

development

Francesco TAMBURRINO, Valeria PERROTTA, Raffaella AVERSA, Antonio APICELLA

P. 1748 ID 268

Applying Geographical Information Systems for documenting and managing Iraqi archaeological

heritage: the case study of the Akre Castle in Kurdistan

Angela LOMBARDI, Jambaly MOHAMMED, Abdulkareem SAMAN

P. 1758 ID 269

The recomposition of fragmented objects: the case study of St. Andrea statue at Stiffe, L'Aquila Marco CANCIANI, Corrado FALCOLINI, Mauro SACCONE, Lorenza D'ALESSANDRO,

Giorgio CAPRIOTTI

P. 1765 ID 270

Democratic evaluation of architectural heritage

Marta BERNI

P. 1775 ID 271

Cultural Landscape: Sintra, the Shock of the Past into the Future

Alexandra Al QUINTAS, António José MORAIS

P. 1783 ID 272

My concrete is damaged?

Andrea BASILE, Giorgio FRUNZIO, Giuseppe MATTIELLO

P. 1792 ID 273

Build on natural tendencies to strengthen resilience of cultural and environmental heritage

Serena BAIANI, Antonella VALITUTTI

P. 1798 ID 274

"Additional services" in the management of Cultural Heritage: the paradox of archeological site

of Pompei

Fabiana FORTE, Roberta FORMISANO

P. 1805 ID 275

Sponsorship in the enhancement of Cultural Heritage and the role of Creative Industry: some

evaluative aspects.

Fabiana FORTE Manuela RUPE

P. 1813 ID 276

Signs of popular religiousness in the Southern Piedmont territory. The drawing of votive pillars

Maria Paola MARABOTTO

P. 1820 ID 277

Geldo's Castle Palace, at Castellón Province, Spain.

Joaquín MARTINEZ MOYA, María Jesús MAÑEZ PITARCH, José Teodoro GARFELLA

**RUBIO** 

P. 1828 ID 278

The instructions of s. Carlo Borromeo in the Vistabella church, Castellón, España.

Joaquín MARTINEZ MOYA, María Jesús MAÑEZ PITARCH, José Teodoro GARFELLA

**RUBIO** 

P. 1836 ID 279

Evolution of techniques in osteoarcheology: a proposal for a new on-field schedule for

preliminary study of ancient population

Valeria AMORETTI, Vittorio NAZIONALE

P. 1848 ID 281

Naples, the modern living sense. A comparison between residence and society after World War

Marco CARUSONE

P. 1855 ID 282

Figura praesentis urbis Nolae: geometric theorems and learned sources in Renaissance's

urbanism and in De Nola of Ambrogio Leone.

Maria Carolina CAMPONE

P. 1864 ID 284

The dams of Rio Grande's basin (Amelia TR)
Fabio BIANCONI, Marco FILIPPUCCI

P. 1875 ID 285

From the acquisition of cartography, the latest methods of representation

Vincenzo POLLINI

P. 1884 ID 286

Italian architects and transformations of Tirana, regulatory plans of the new capital in the years

1925-1943

Armand VOKSHI

P. 1894 ID 287

New qualities for the revitalization of the ancient villages

Mariarosaria ARENA, Antonio BOSCO, Sergio RINALDI

P. 1906 ID 288

Triumph Arch in the archaeological site in Tyre (Lebanon): a new approach to GIS analysis of

vertical elements in 3D environment

Laura BARATIN, Sara BERTOZZI, Elvio MORETTI

P. 1915 ID 289

Theories and techniques to solve complex systems

Antonio APICELLA, Giuseppe D'ANGELO

P. 1922 ID 290

An application of optimization processes in the evaluation of a security basket

Maria Cristina MIGLIONICO, Giuseppe D'ANGELO

P. 1930 ID 291

BIOMATERIALS: the synthetic biology applied to architecture

Antonella VIOLANO, Ayşen CIRAVOĞLU, Semin ERKENEZ, Veronica MONTANIERO,

Francesca VERDE

P. 1940 ID 292

BUILDING WITH WOOD: the summer energy performance according the UNITS 11300:2014-I

Antonella VIOLANO, Monica CANNAVIELLO, Antonella DELLA CIOPPA

P. 1948 ID 293

Innovative fence systems as best practice for the sustainable construction site

Lucia MELCHIORRE

P. 1956 ID 294

The Basilica of Santa Restituta in Naples. Towards an information and interactive model.

Giovanni Maria BAGORDO, Gian Carlo CUNDARI, Maria Rosaria CUNDARI

P. 1962 ID 295

A multisensorial visiting experience simulation in an immersive virtual reality environment.

Aniello PASCALE, Francesco SORRENTINO, Massimiliano MASULLO

P. 1967 ID 297

Consolidation with reinforced concrete for the ecclesiastical architecture in l'Aquila (Italy):

observations after the earthquake

Claudia CENNAMO, Concetta CUSANO

P. 1977 ID 298

Daylighting measurements and evaluation of the energy saving in an historical building Giovanni CIAMPI, Antonio ROSATO, Michelangelo SCORPIO, Sergio SIBILIO

P. 1985 ID 299

Primary energy calculation of italian residential applications via a national standard and a dynamic simulation software

Giovanni CIAMPI, Raffaele COLUCCI, Antonio ROSATO, Michelangelo SCORPIO, Sergio SIBILIO

P. 1995 ID 302

Analysis of historic urban fabric of sariyer in Istanbul. In terms of sustainability and proposals for its conservation

İpek Z. KAPTANOGLU, Elif MIHCIOGLU BILGI

P. 2004 ID 304

Art and Technology. The Guggenheim Museum Helsinki.

Efisio PITZALIS

P. 2012 ID 305

Structural modeling and conservation of single columns in archaeological areas

Giuliana CHIERCHIELLO, Antonio GESUALDO, Antonino IANNUZZO, Michela MONACO,

Maria Teresa SAVINO

P. 2021 ID 306

Archaeological Environmental Park of Sennacherib's irrigation system (Iraqi Kurdistan)

Roberto ORAZI, Francesca COLOSI

P. 2031 ID 307

Project for the Archaeological Park of Chan Chan, Peru

Francesca COLOSI, Roberto ORAZI

P. 2041 ID 309

Empatic forms for relational spaces

Marco BORRELLI

P. 2051 ID 310

REMOTE SENSING: hightech tool for law enforcement in crimes perpetrated against

environment

Flaviano TESSITORE

P. 2059 ID 311

Innovative Strategies for Urban Regeneration in Coastal Areas - the Case Study of the

Metropolitan Coast of Naples

Massimo CLEMENTE, Eleonora GIOVENE DI GIRASOLE

P. 2069 ID 312

A Comparative Study of Ottoman and European Bridal Gowns During 18th and 19th Centuries

Sema YALÇIN

P. 2077 ID 313

A generative design algorithm for the architectural design

Carlo COPPOLA, Rosa BUONANNO, Vincenzo NIGRO, Andrea DI ROSA

P. 2085 ID 314

The signage and communication systems in the ancient city of Pompei

Sabrina MATALUNA

P. 2092 ID 315

The archaeological site of Pompeii: multimedia systems' analysis.

Maria Grazia GIULIANO

P. 2101 ID 316

Seismic joints: architectural integration and structural safety Caterina FRETTOLOSO, Mariateresa GUADAGNUOLO

P. 2108 ID 317

Floor masonry beams reinforced by BFRG

Mariateresa GUADAGNUOLO, Giuseppe FAELLA

P. 2115 ID 318

The Pompeii Artifact Life History Project: Conceptual Basis, Methods and Results of First Three Seasons

J. Theodore PEÑA, Caroline CHEUNG

P. 2124 ID 319

The virtual representation of the past.

Paola D'AURIA

P. 2130 ID 320

The impermanent project. Animation and 'multiplicative persistence' in contemporary urban

space

Silvana SEGAPELI

P. 2138 ID 321

Heritage - Religious buildings in the routes of restoration: the case of the church of St. Gennaro

at the elm

Roberto CASTELLUCCIO, Veronica VITIELLO

P. 2147 ID 322

Relation between sustainable economic growth and Safety, security in Albania and the region

Artur BEU

P. 2153 ID 323

From Pompeii in Nola: the restoration of Mediterranean habitat. The De Nola of Ambrogio

Leone.

Saverio CARILLO

P. 2163 ID 324

The non-finiteness heritage. A project strategy

Francesco COSTANZO, Gaspare OLIVA, Giuseppe DI CATERINO

P. 2173 ID 325

From Borbonic Royal Gunpowder to mouth of the river Sarno: a redevelopment project

architectural and landscape

Andrea SANTACROCE

P. 2181 ID 326

The rebirth of the water in Rome. Aqueducts and fountains

**Maria MARTONE** 

P. 2191 ID 327

Knowledge in Apollonia. The Medieval Monastery and the territory

Luigi CORNIELLO

P. 2201 ID 328

Mario Botta, the man's house in the New Stone Age

Lorenzo GIORDANO

P. 2209 ID 329

Museum Quarter as the "core of urban balance" in the post-industrial city

Elena SHLIENKOVA

P. 2222 ID 330 Roman period survivals in modern farms: the case of Masseria Tuoro in Vitulazio Margherita DI NIOLA P. 2232 ID 331 The Waterway from the Royal Palace of Caserta to the Royal Palace of Carditello. Federica DEL PIANO, Valeria DI SALVATORE P. 2241 Among smart governance and smart communities. A survey in the city of Milan Nunzia BORRELLI, Davide DIAMANTINI, Giulia MURA, Monica BERNARDI P. 2249 **ID 333** The design for the modification of the Marina and the Sentiero Terramare in Praiano Paolo GIORDANO P. 2261 ID 334 Istanbul World Heritage property. Representing and cataloguing the material and intangible assets for local sustainable development. Alessandro CIAMBRONE P. 2270 Analysis and Landscape Planning. The Landscape Project of Taburno-Camposauro. Concetta CUSANO P. 2280 The Caserta's Centre: cataloging as an instrument for knowledge Luciana ABATE P. 2290 Virtual architecture: 3D representation in archeology - a new approach to the presentation of ancient architecture -Ciro FERRANDES P. 2295 ID 338 Design and communication for the Volturno rivers, between Capua and the Mediterranean sea Ludovico MASCIA P. 2203 ID 339 Knowledge, survey, technology for carbon neutral restoration: from an old hospital to a luxury Paolo GIANDEBIAGGI P. 2311 Italian military engineers in the court of the King of Spain in the 18th century Giada LUISO P. 2317 Neo-gothic influences on the academic architecture of Giovanbattista Patturelli. Concetta GIULIANO P. 2322 Reading the Territory, sign graphics and remote sensing images. The case study of Historic Center of Naples Rosaria PARENTE P. 2332 **ID 343** 

Digital Invasion at the Royal Palace of Caserta. Telling a story/Telling your story

Alessandra CIRAFICI, Manuela PISCITELLI

P. 2341 ID 344

Charles and Georges Rohault de Fleury illustrators and historians of the medieval architecture. Danila JACAZZI, Antonio MENALE

P. 2354 ID 345

Modern churches in the province of Caserta

Riccardo SERRAGLIO

P. 2364 ID 347

Images of possible futures. Rapresenting changing landscape Alessandra CIRAFICI, Antonella VIOLANO, Antonio MAIO

P. 2371 ID 348

Urban farming as an eco-oriented tool for redevelopment of urban contexts Raffaela DE MARTINO, Rossella FRANCHINO, Caterina FRETTOLOSO

P. 2379 ID 350

Nisida: integrated and transdisciplinary survey for interpretation of sources

Claudia CENNAMO, Ornella ZERLENGA, Salvatore PETRILLO, Domenico PIGNATA, Ciro

SCOGNAMIGLIO

P. 2389 ID 351

Architecture and material culture: the construction of the working-class neighborhood of the new

Pompei

Pasquale VAIANO

P. 2399 ID 352

Beyond the visible Remote sensing and Photointerpretation

Francesco MAIOLINO

P. 2409 ID 353

A methodical approach to knowledge the sacred heritage of Aversa

Luciana ABATE, Davide MASTROIANNI, Rosaria PARENTE

P. 2419 ID 354

Perception and fruition of open spaces in the historical centers

Manuela PISCITELLI, Milena KICHEKOVA

P. 2429 ID 355

Multisensor and multiscale surveying into Pompeii's archeological site. Three case studies.

Carmine GAMBARDELLA, Nicola PISACANE, Alessandra AVELLA, Pasquale

**ARGENZIANO** 

P. 2469 ID 356

Metropolitan Strategies. Urban planning scenarios for a territorial system

Giuseppe GUIDA

P. 2478 ID 357

Smart Planning

Ottavia GAMBARDELLA

P. 2489 ID 358

THE MUTABLE VISION: The study case of Montesanto Metro Station

Elena DI GRAZIA, Giuliana CHIERCHIELLO, Valerio PALMIERI

P. 2498 ID 359

"Environmental networks" as complex management tool of the urbanized territory

Raffaela DE MARTINO, Rossella FRANCHINO

P. 2505 ID 360

Urban Regeneration - Largo Ex-Gesuitico - Piazza A. Moro - Ortanova (FG)

Gianluca CIOFFI

P. 2512 ID 361

Evolution of design and application of a method

Gilda EMANUELE