



Institute for Analytical Philately, Inc.

Solving Philately's Puzzles through Science™

Fakes, Forgeries and Experts

"Purpose" and "Responsibility"

Chicago 19 November 2015



Jonas Hällström

INTRODUCTION



Jonas Hällström
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- ✓ Born 1972
- ✓ Philatelist since age 4
- ✓ Exhibitor since 1986
- ✓ International (FIP) Large Golds and Golds
 - ✓ Postal History
 - ✓ Postal Stationery
 - ✓ Thematic Philately
- ✓ FIP Judge and Teamleader since 2006
- ✓ Chairman of the FIP Commission for Thematic Philately (2012-2014)
- ✓ Philatelic author, writer and publisher
- ✓ Organizer & Chair of Malmö Philatelic Summits
- ✓ Editor of *Fakes, Forgeries & Experts Journal* #17-#18

- ✓ **My field of expertise:**
 - ✓ Exhibiting
 - ✓ Judging
 - ✓ Development and treatment of exhibits in all disciplines
 - ✓ Philatelic Organisation

SCOPE

"Purpose" and "Responsibility"

1. A general characterization of the purpose, role, and responsibilities of expertising groups
2. The resources, prescribed strengths, benefits, values and limitations of such group's opinions

Addressing

Fakes

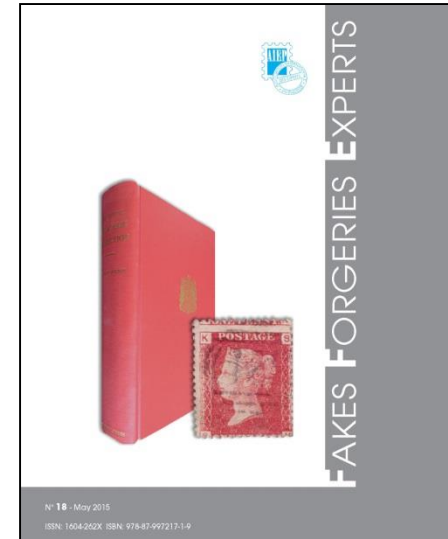
Forgeries

Damaged Material

WHY

Why I started to think about the role and responsibilities of expertising groups ...

The face side of FFE's responsibility



- FFE addresses all philatelists, advanced collectors, exhibitors, experts, dealers, auction houses and philatelic organisations
- The clear and consistent purpose of FFE is to inform collectors and exhibitors about faked and forged items.
- FFE also explains how philatelic experts function in their specialties and countries.
- Protecting philatelists from being swindled.

CONTEXT

FIP regulations GREV
- The reference source with
high impact

FIP's "General Regulations for the Evaluation of Competitive Exhibits at FIP Exhibitions" (GREV) makes statements about quality of the philatelic material:

*Article 3.4. The material displayed should be fully consistent with the subject chosen. The selection should show the appreciation of the exhibitor as to what is available in the context of his chosen subject. It should also include the fullest range of relevant philatelic material of the **highest available quality**.*

*Article 4.8. The criteria of "Condition and Rarity" require an **evaluation of the quality** of the displayed material **considering the standard of the material that exists for the chosen subject**, the rarity and the relative difficulty of acquisition of the selected material.*

STATEMENT

Although a quiet hobby on the surface, philately is very active socially and is therefore continuously changing because of its social and financial angles.

The role of the expert may change in response to the other broader changes in the hobby.

- Many philatelic researchers have attained a high level of knowledge that enables them to express opinions in their area of specialization

James Gough named APS Champion of Champions

By Jay Bigalke

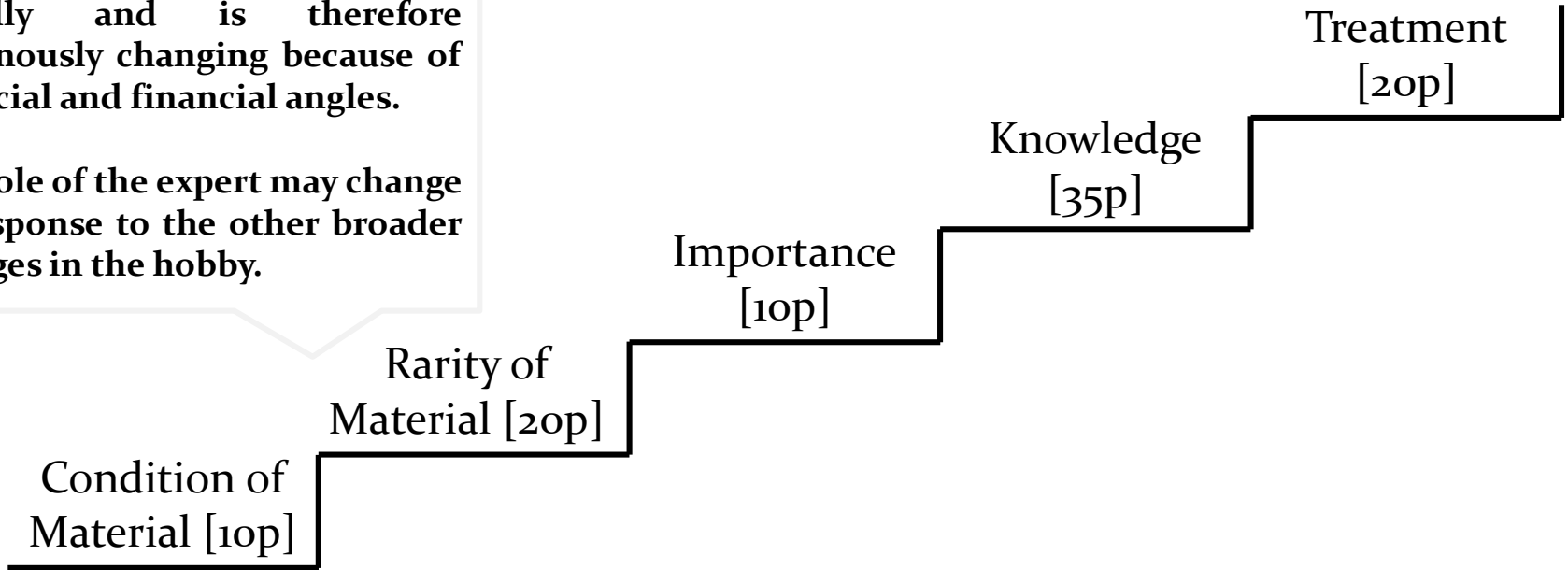
The exhibit "The UPU and Its Impact on Global Postal Services, 1875-1920" by James Peter Gough won the Champion of Champions award at the annual American Philatelic Society Stampshow, Aug. 8-11, in Milwaukee, Wis.

According to the title page, the exhibit demonstrates how congresses and special conferences shaped the early years of the Universal Postal Union.

Gough states, "This is an international story, using material from many different countries. However, in doing so, only the finest, rarest, most interesting
Please turn to page 18



Philatelic exhibitor James Peter Gough (center) is presented the American Philatelic Society Champion of Champions award by APS president Stephen Reinhard (left) and APS immediate past president Wade Saadi (right). The award was given Aug. 10 during the APS Stampshow banquet in Milwaukee, Wis. *Linn's Stamp News* photograph by Jay Bigalke.



- Dealers and auction houses are the main customers of the experts. Therefore we need to address the duty & conflicts philatelic experts:
 - Experts should remain vigilant in protecting their integrity in serving their clients
 - The challenges inherent in self-interest when the dealer becomes the expert

DISCOURSE

Reliability

1. What qualifies someone to become a stamp expert?
2. Who appoints experts?
3. What makes “self-appointed” experts so bold in their assertions to be experts?
4. What do you actually get from an expert?
5. In what situation should a stamp or cover be expertized?

[John M Hotchner Linn's Stamp News 2014]

5. With a hobby that places such importance on the condition of its objects, there should be agreement as to what is damaged.
6. Propose definitions to help clarify the relationship between damaged material suitable for exhibiting without penalty and damaged material that should be penalized.

[Bell & Ramkisson in "The Philatelic Exhibitor" 2012-2013]

DISCOURSE

As Editor of FFE I invited
 "experts" to write about it:
 Daisy Todd (British Library)
 in FFE #18

However this beautification of items through destructive and often deceptive means is one of the main reasons why conservation has received such a bad rap by philatelists over the years.

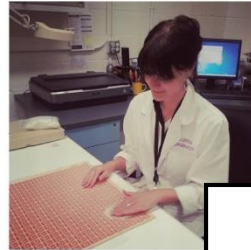
So What is the Difference?

First and foremost the difference between conservation and restoration is that conservation is a profession. Conservation qualifies as a 'profession', like accounting or medical practising, because it is carried out by highly qualified and skilled practitioners, whom are governed by a standardised behavioural conduct, in accordance to a Code of Ethics, issued by an autonomous professional organisation. Organisations such as the AIC (American Institute for Conservation of Historic and Artistic Works), ICON (The Institute of Conservation), UNESCO and ICOM (The International Council of Museums) amongst others, have awakened a new sense of responsibility, integrity and accountability in the conservation profession by creating new channels through which to communicate current concerns within the cultural heritage sector.

The competency of a conservator, unlike a restorer, is also assessed through sequential entry routes into the profession. To gain entry into the conservation profession an MA level qualification, vocational training courses, and multiple internships and fellowships in conservation and/or related fields are required. Added loopholes include national accreditation schemes, and preferred amounts of experience for job applicants. To put it into perspective: Becoming qualified as a conservator takes longer than becoming a vet or an architect.

What Role does Conservation Play in the Philatelic World?

Within the world of philately, conservators are often under the microscope. Their work is often misunderstood through a variety of reasons. These include the use of aqueous washes, lining, tape, and rehousing. At times, the use of these techniques is necessary to meet the needs of each individual item. However, the use of negative staining materials, and the use of non-archival adhesives, are not acceptable in the philatelic world.



The author Daisy Todd executing conservation treatment at the Smithsonian National Postal Museum.

I will attempt to clarify some of these boundaries by discussing some of the conservation treatments carried out at the National Postal Museum:

As you will know, certified plate proofs printed proof of the plate before printing the Bureau of Engraving and Printing. A set of fcs were mechanically cleaned (to reduce in surface dirt), humidified (to relax the paper washed (for stain reduction), and de-acidified.

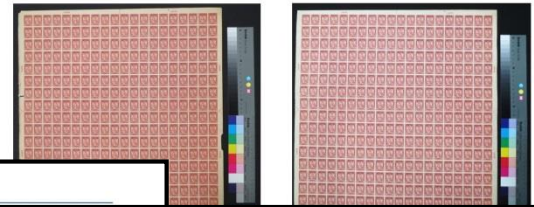
STOP ASSOCIATING 'CONSERVATION' WITH 'RESTORATION'

DAISY TODD

Preamble

It's glaringly obvious through general conversation with philatelists, and through reading philatelic articles, that there is much confusion about the use of the terms 'conservation' and 'restoration.' It follows that as a professionally trained 'conservator', that I am customarily regarded as a 'restorer.' It is true, that when I meet people and they ask what I do for a living, I say 'art restoration' because the gist of this term will be far better understood than if I say 'I am a conservator specialising in the conservation of paper-based artefacts.' This colloquial and interchangeable use of the two terms however, is altering the perception and acceptance of conservation in the philatelic arena, to the detriment of philatelic collections all over the world. In order to stop this misguided association of conservation with 'restoration', and thus 'alteration', 'manipulation' and 'forgery', this article will clarify the terms of conservation and restoration, and explain exactly how they each relate to philately.

STOP ASSOCIATING 'CONSERVATION' WITH 'RESTORATION'



Example of Tonal Infill



1. A lignin-free western paper of similar weight and surface texture is towed to match the paper substrate.

2. The chromants be slightly pink detectable.



3. The infill is cut to shape and adhered with wheat starch paste (WSP).



4. The fibres



5. A strip of Japanese tissue is adhered to reinforce and harmonize the job.



6. The infill is cut

STOP ASSOCIATING 'CONSERVATION' WITH 'RESTORATION'



Engle Album Page/Recto/Before Treatment.



Engle Album Page/Recto/After Treatment.

Bleaching is also unsuitable for use on philatelic materials because the bleach itself should be washed after it has been applied, and due to the high solubility of most philatelic media this process would likely be destructive.

It is important for philatelists to understand that conservation is not a 'cosmetic improvement' process. Its aim is not to restore an item to its original state, but to conserve it in its current state. The popular question of 'how far' philatelic conservation treatments should go is governed only by the material needs of the object, professional standards and best practice: Not by the desire or request of the owner. Any treatment, no matter how minimal, obviously has an effect on the object. The conservator is one of very few people permitted to interfere with the object in such a way as to beneficially affect its physical or chemical structure. It is therefore a matter of common sense that those who are not professionally trained in conservation should never attempt to undertake conservation treatments.

It is imperative that philatelists realise that they are only temporary possessors of valuable cultural material, and begin to re-evaluate and enhance the conservation and preservation techniques that will ensure the longevity of their collections. In fact it seems bizarre that conservation is so often disregarded, when the condition of philatelic materials is so highly valued in the philatelic arena as a whole. It is about time that the separate professions of dealers and conservators began working with one another professionally in the interest of both public and private philatelic collections.

THE AUTHOR

DAISY TODD

Daisy Todd (MA) is paper conservator, with concentrations in analytical philately. She has undertaken vocational training in libraries, art galleries and museums in the UK, Australia, France, Greece and the USA, and is currently working as a paper conservator at The Smithsonian National Postal Museum. This is Daisy's first appearance in FFE.

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EXAMPLE 1

1877 registered letter mail from Puntarenas to Liberia with mixed franking

My own experience/collecting



Before the restoration

After the restoration



[Hector R. Mena, an expert of Costa Rican classic philately, has written about a few examples of philatelic material which has been restored. In The Oxcart, the philatelic journal for the Society for Costa Rica Collectors, Mena has published a few very important examples of restored material.]

EXAMPLE 2

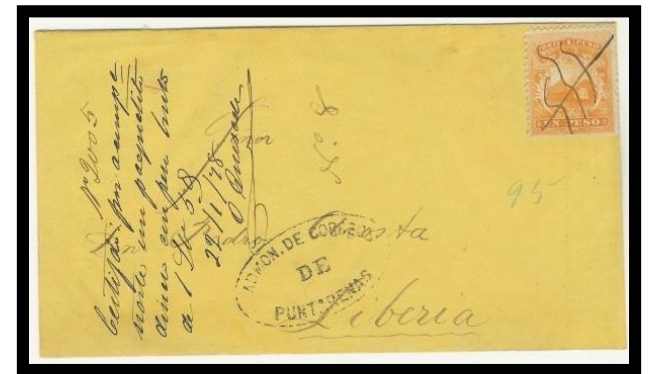
1878 registered letter mail from Puntarenas to Liberia with 1 peso single franking

My own experience/collecting



Before the restoration

After the restoration

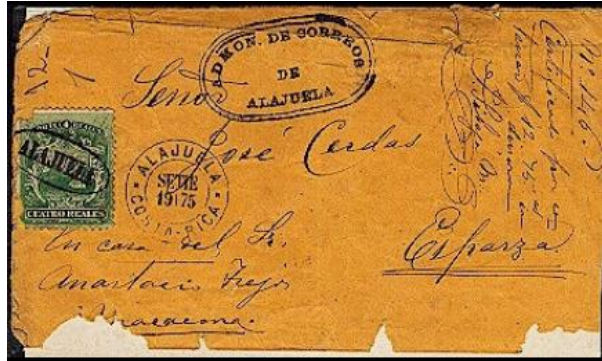


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EXAMPLE 3

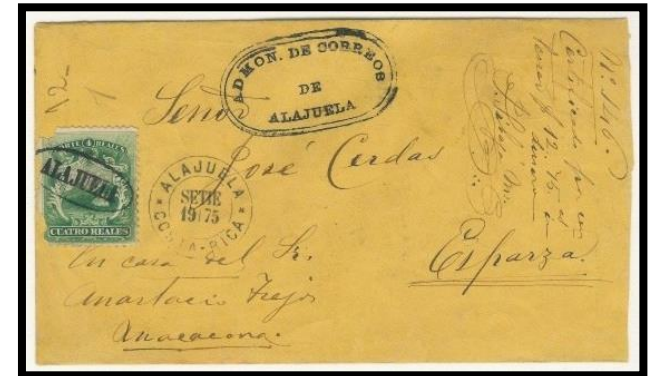
1875 registered letter mail from Alajuela to Esparza with 4 reales single franking

My own experience/collecting



Before the restoration

After the restoration



[Hector R. Mena, an expert of Costa Rican classic philately, has written about a few examples of philatelic material which has been restored. In The Oxcart, the philatelic journal for the Society for Costa Rica Collectors, Mena has published a few very important examples of restored material.]

EXAMPLE 3

1875 registered letter mail from Alajuela to Esparza
with 4 reales single franking

My own experience/collecting



The 4 reales stamp before and
after the first restoration



The 4 reales stamp after
the second restoration

[Hector R. Mena, an expert of Costa Rican classic philately, has written about a few examples of philatelic material which has been restored. In The Oxcart, the philatelic journal for the Society for Costa Rica Collectors, Mena has published a few very important examples of restored material.]

EXAMPLE 3

1875 registered letter mail from Alajuela to Esparza with 4 reales single franking

My own experience/collecting



After the second restoration

[Hector R. Mena, an expert of Costa Rican classic philately, has written about a few examples of philatelic material which has been restored. In The Oxcart, the philatelic journal for the Society for Costa Rica Collectors, Mena has published a few very important examples of restored material.]

FINDINGS

It is only when the repairing is done to defraud the buyer, and is not marked as a repaired stamp or cover, that the practice of restoration is condemned

1. An expert is expected to give his opinion concerning the quality of the item as well as its “genuineness in all regards.”
2. Difficult-to-acquire covers that have been damaged or that consist of poor quality paper are often restored by a professional for both preservation and appearance for exhibition purpose
3. Guidance to exhibitors is needed on when to repair and when not to repair and whether repairing enhances, diminishes, or has no effect on the medal level
 - Such items should be noted in the exhibit write-up as “restored”
 - Does repairing an item that is described as such, benefit or detract from the exhibit as a whole
 - Is it acceptable to restore covers for preservation reasons? ... but not to alter, enhance or add markings?
 - Is it correct that a damaged cover may be acceptable in one situation but not in others?

EXCELLENT GUIDANCE

**Stamp expertizing: more than
just identification**

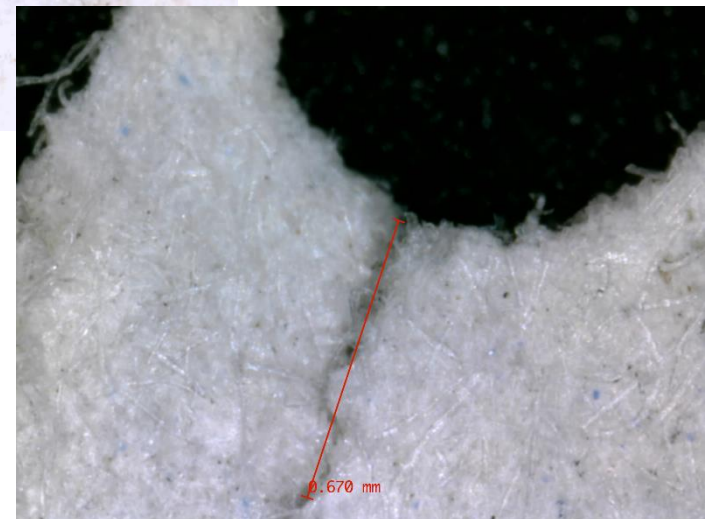
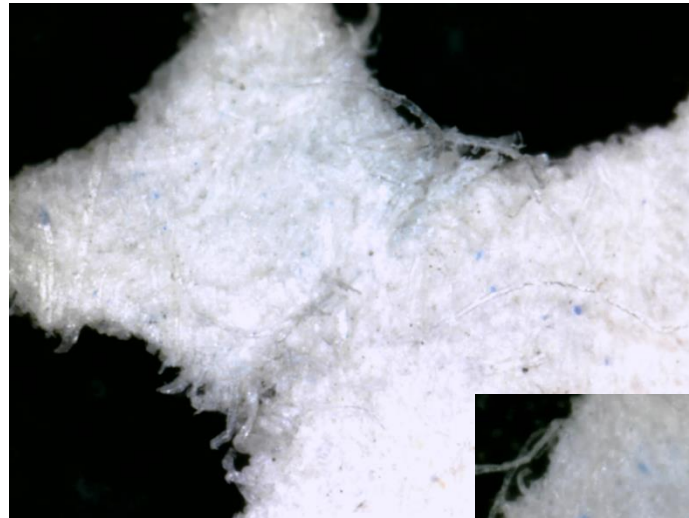
1. Only factual descriptions should be provided
 - Descriptions like “rich color” or “superior centering” are left for those who market the material, not for expert services
2. It is now standard practice to accurately describe all condition problems on the certificate
3. A collector who is considering buying a stamp with a certificate should carefully compare the stamp with both the photograph and the word description on the certificate
4. Common terminology should be used among all experts in the descriptions
5. What you get from an expert is only an opinion.
 - It might be and can be questioned by other experts
6. Certificates from earlier days are sometimes reversed in the current era
 - Anything with a pre-1990 certificate is recommended to be re-evaluated in most cases.

[John M Hotchner Linn's Stamp News 2014]

EXPERTS

1. Accomplishments
2. Years of involvement in their philatelic area
3. Knowledgeable
4. Accessing the tools needed for expertizing

What qualifies someone to become a stamp expertizer?



JAY SMITH
in LINN' s 18/4/2014

John Wayne is quoted as saying:

*“Courage is being scared to death,
but saddling up anyway.”*

- In contrast to today' s attitude that “everybody can be an instant expert about everything,” it took me about 25 years to feel that I was reaching the point where the knowledge I had accumulated could be useful to others
- Seeing a philatelic item once or a few times does not qualify one as knowing very much about it
- As a dealer, I have a responsibility to my clients to make sure that the descriptions of the stamps I offer for sale are correct and complete, and that they tell the full story of the item, not just the good parts
- In fact, my invoices state, “Our exclusive money-back lifetime guarantee assures, to the purchaser, that every item is genuine and as described.” The lifetime being referred to is mine
- I do make mistakes. Any dealer who says he does not is delusional. But I want to be sure to correct my mistakes whenever possible
- The expertizer is often playing an essential role in a financial transaction between two other parties. The expertizer' s opinion can mean that one party or the other will make or lose a lot of money

JAY SMITH
in LINN' s 18/4/2014

My personal view is that Jay Smith's thoughts and statements are very mature and should be followed by all "Experts"

- The eventual buyer of that stamp relies on the expert's opinion, sometimes meaning that the buyer makes a decision to spend thousands of dollars on a stamp because he trusts the expert's opinion
- It is often said that an expert's opinion is just that, an opinion. Never forget that. It is an opinion, not a fact. It is the expert's best judgement based on experience. The opinion can be wrong, and sometimes it takes decades for the error to come to light
- When I started formally doing expertizing work, I thought it was going to be enjoyable. I quickly came to realize that I was wrong — very wrong. I discovered that the process was, for me, uncomfortable. But that is as it should be
- This responsibility, and the potential consequences, keeps me focused on taking the time to come to the correct opinion, and reminds me to respect the limits of my philatelic knowledge

STATEMENT

For sure there are
"driving forces" ...

"Competitive Context"

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Treatment
[20p]

Knowledge
[35p]

Importance
[10p]

Rarity of
Material [20p]

Condition of
Material [10p]

SUMMARY

"Purpose" and "Responsibility"

Damaged Material

Expertising groups

- Purpose
- Role
- Characterization
- Responsibilities
- Values
- Prescribed strengths
- Limitations
- Benefits
- Resources