**NEW THEMATIC GUIDELINES – CHANGES**

This paper identifies the main changes in the new Thematic Guidelines. Revised and new text is shown in *red italics*.

**CHANGES TO PRINCIPLES OF EXHIBIT COMPOSITION**

1. C**oncept of a story**

The definition of Thematic Treatment has additional words:

*A thematic exhibit illustrates the theme chosen by the exhibitor, or better, tells a story related to this theme. The theme or story is presented in the thematic text and illustrated with appropriate philatelic material.*

*The pages of an exhibit ought to present the chosen theme, as presented by the title and detailed in the plan, in its entirety, i.e. important parts of the chosen theme must not be omitted.*

The need for the story illustrated by philately is stressed:

*Each item must be connected to the chosen theme and present its thematic information in the clearest and most effective way.*

The introduction of the story concept is also reflected in the guidelines for the Plan:

*Ideally, the beginning of the following chapter has a logical link with that preceding. This helps to create an interesting story instead of an unconnected “list of contents". The best is when the chapters (and subchapters) themselves are structured like a story.*

One of the main differences between Thematic and Topical is highlighted by the new words under Plan

*The plan should, as much as possible, present the synthesis of the story told by the exhibit. It should not be a mere list (e.g. lexicon approach).*

1. **Relevance of material**

New words stress the need for relevance in both Treatment and Knowledge

*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*

1. **The definition of Innovation was added for clarity.**

*Innovation is the personal approach of the exhibitor, highlighting the results of his/her ability to create an interesting story and illustrate it with the best material available.*

1. **Philatelic text**

*A short explanation is required only when the material is not self-explanatory or there is a need to illustrate special research*.

1. **CHOICE OF MATERIAL IS CLARIFIED**

Clarification is given on the material than can and cannot be used in a thematic exhibit. The rules always stated that items “must be **postal-philatelic**”. New words help understand and better interpret the term:

*The appropriate postal-philatelic material is that which, for the purpose of transmitting mail or other postal communications, has been issued, intended for issue, or produced in the preparation for issue, used, or treated as valid for postage by governmental, local or private postal agencies, or by other duly commissioned or empowered authorities.*

*Covers and other sorts of mail usually have several characteristics: stamp(s), postmark(s), labels and markings indicating the special treatment of this mailing, and sometimes indications for postage privileges. These are the elements of postal origin and/or significance, which can be used for thematic treatment. Other characteristics of the same mailing, like sender’s name and address information, decorative printings or illustrations on the envelope/card, or the message and other parts of the content, are the non-postal (= private) elements which cannot be used for thematic treatment.*

*This distinction between postal elements and private elements (maybe on the same item which went through the post) is the one and only rule for defining appropriate philatelic material in thematic philately. Therefore, it is fundamental for understanding the nature of “postal-philatelic material” in thematic philately, in contrast to social philately and open class, which both allow for the private elements of a mailing to be used in treatment.*

When selecting appropriate postal-philatelic material:

|  |  |
| --- | --- |
| Preference given to: | Instead of: |
| Items that are the cornerstone of philately (stamps, postal stationery, cancellations and postmarks) | Items with a lower postal connotation, even if their issue or use has been duly authorised by the post |
| Issues where contents bear a direct relation to the issuing country from a political, historical, cultural, economic and/or similar standpoint | Speculative issues, which exploit the "fashion trends" especially issues not following the code of ethics of the UPU |
| Normal issues | Parallel imperforate issues (stamps and souvenir sheets) |
| Genuinely cancelled items | Items cancelled to order |
| Genuinely carried commercial mail with relevant cancellations | Souvenir documents and items created for collectors, e.g. decorated FDCs and maximum cards (even when issued by the postal service), |
| Genuinely carried items with correct postage and relevant thematic cancellations | Favour cancellations, often with underfranked postage, or cancellations on stampless covers unless due to a free postage privilege |
| Documents with individual, differing addressees, | Documents received by the same addressee as a result of a subscription |
| Correct postage frankings, preferably as multiple franking of a thematically important stamp | Overfrankings due to philatelic reasons (e.g. complete sets) |
| Meter frankings with correct postage | Favour cancellations (e.g. “000”), unless the latter is a "specimen" or it has a justified postal reason |

Inappropriate material split into:

1. (A) Inappropriate items that should never be shown
* fantasy issues from non-existent postal territories
* issues of exiled governments
* issues of organizations without postal services
* abusive, illegal and undesirable issues, as defined by the UPU and the FIP Philatelic Congress of 1976 (and available on the website of the FIP Fight against forgeries commission)
* picture postcards, unless they are postal stationery produced by a Postal Authority
* privately printed or manuscript annotated military postcards and lettercards (e.g. Feldpost), unless accepted or authorized by Postal authorities as admitted to the postal privilege without other official markings
1. (B) Borderline items that can be shown if no compliant material exists for important aspects of the theme (must be justified)
* private additional cancellations and cachets applied by a sender or a supplier before mailing the documents
* private additional prints on postal stationery (also known as “repiquages”)
* administrative marks (not postal), when they do not give any postal privilege
* private decorations and decorative overprints on envelopes and cards
* private vignettes (advertising labels), whatever the purpose of their use

**CHANGES TO PCRITERIA FOR EVALUATION**

1. **Consistent judging - Basic Requirements and Extra Achievements**

Prescriptive marking scales, while not in the previous approved guidelines (Mexico 2000), had been introduced into Thematics. This was recommended in qualifying seminars and used by international judges, especially in FEPA.

For example, the prescriptive marking scale for Rarity was:

* Maximum 10 points: Normal and modern with no unusual items
* Maximum 12 points: Normal and modern material plus some unusual and scarce items
* Maximum 14 points: Several unusual and scarce items plus some rare item
* Maximum 16 points: Several rare items and many scarce ones
* Maximum 18 points: Overall presence of rare items, some world rarities
* Above 18 points: Overall presence of rare and significant world rarities

In Bangkok this convention of marking was debated. It was decided to instead define “Basic Requirements” and “Achievements” for each of the criteria to help achieve consistent judging. The new guidelines state:

* *Basic requirements. When all of them are fulfilled a score equal to 80% of the maximum is assigned. When any of them is not fulfilled, a mistake occurs, and the 80% score is reduced accordingly.*
* *Achievements. These requirements are gradual goals on the road to make the exhibit outstanding. They are worth >80% of the maximum and the fulfilment of all of them implies the top score.*

**Title and Plan**

*Basic requirements* presence of the plan page; adequacy of the plan page; consistency between the plan and the title; correct, logical and balanced structure (divisions and subdivisions); coverage of all major aspects necessary to develop the theme

*Achievements:* the degree to which the plan tells a story

**Development**

*Basic requirements* correct assembly and positioning of the items in conformity with the plan; a connection between the items and the thematic text; elaboration of all aspects of the plan; presence of a “red thread” that connects the single pages and chapters into a continuous story

*Achievements:* balance, by giving to each thematic point the importance corresponding to its significance within the theme; depth, shown through connections, cross-references, ramifications, causes and effects

**Thematic Knowledge**

*Basic requirements* appropriate, concise and correct thematic text; correct use of thematic material

*Achievements:* thematic details in text and material; presence of new thematic findings for the chosen theme; “surprising” material (does not belong to the subject, but thematically fits into the story of that page)

**Philatelic Knowledge**

*Basic requirements* full compliance with the rules of postal philately; appropriateness of postal documents; appropriateness and correctness of the philatelic text, when needed; presence of good range of postal-philatelic material throughout the exhibit and on single pages

Achievements: presence of widest possible range of postal-philatelic material and its balanced use; presence of material which has not yet been researched for that theme, or where there has been very little research; presence of philatelic studies and skilful use of important philatelic material

**Rarity:**

*Basic requirements* normal and modern material plus unusual and scarce items

*Achievements* presence of rare items

**Condition:**

*Basic requirements* normal and modern material in excellent quality, plus all unusual in good quality and rare material in average condition

*Achievements:* rarities in above average up to the best quality, particularly from traditional philately, postal history and postal stationery

1. **Clarity of Thematic Treatment**

The words in the old guidelines about treatment were not clear and open to lose interpretation. Clarity is provided,

*In assessing treatment judges are looking for:*

* *A logical development that is easy to follow*
* *A clear and concise write up*
* *A balanced exhibit for the theme chosen*
* *The degree to which the plan tells a story*

*They will check that the exhibit:*

* *Reflects the theme implied by the title*
* *Is developed in accordance with the plan*

The need to “tell a story” is emphasised in Treatment, both in the Plan and in Development

*The best plans are those in which the chapters (and subchapters) themselves are structured to tell a story and are evaluated much higher than those structured like a “list of contents".*

*The storyline as presented by the plan should be developed on the single pages and written as a continuous story flowing through each page and through all pages. It should be read as in a book from top left to bottom right.*

1. **Philatelic Knowledge to include presentation and material selection**

*Postal-philatelic items (e.g. stamps, postal stationery, proofs, sketches.) should be shown in their entirety. Overlapping is allowed when showing varieties of postal stationery, in a way that the detail with the variety itself is clearly visible. Windowing of cancellation and imprint on a postal stationery is allowed when the thematic text refers to the cancellation. Windowing or folding is allowed for very large items such as large telegrams, complete sheets of stamps etc.*

*Very limited exceptions (at most one per frame on average) to this general rule are admitted, when the selected philatelic material significantly enhances the relation to the thematic text or is the only way to illustrate it. This refers to the inclusion of both borderline items or items of non-postal nature (e.g. commercially used old repiquages, revenue stamps, covers with addresses sent to personalities subject of the theme, private prints, marks, vignettes and other similar material, if on postally travelled cover or document). In such cases the items must be fully justified as exceptions, thus proving the philatelic knowledge of the exhibitor.*

1. **Rarity is clarified**

*Judges will primarily be looking for:*

* *rarities of general significance in philately, if available for the theme*
* *rarities of specific significance for the chosen theme known to exist*
* *how easy it is to duplicate the exhibit*

*Judges will also be looking for:*

* *scarce and uncommon items, particularly from traditional philately, postal history and postal stationery*
1. **Condition and Presentation words are standardised to other Sections**
2. **One Frame Guidelines have been added**