

FROM PRESERVATION TO RESTORATION: POLICIES AND METHODS APPLIED TO HISTORIC GARDENS

DA PRESERVAÇÃO À RESTAURAÇÃO: POLÍTICAS E MÉTODOS APLICADOS AOS JARDINS HISTÓRICOS

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ABSTRACT

This article discusses the issue of the treatment of the historic garden in the international and national heritage scenario regarding heritage policies as well as their methodologies for restoration/intervention. The main objective is to present an overview of how the garden has been treated in the heritage area and to point out updated questions; at first, focusing on heritage policies, showing the transformations in the concept of historic garden, initially linked to the notion of monument and currently converging to the concept of cultural landscape. It also discusses the classification system of the garden made at the National Institute of Historical and Artistic Heritage (Iphan), concerning its listing as well as the instruments of protection. Finally, it analyzes the specific restoration methods for gardens, drawing attention to their specificities through a comparative study of two specific methodologies, an international one published by the International Committee for Historic Gardens (ICOMOS-IFLA) authored by Carmen Añón (1989) and the other, a national one, of Carlos Delphim's authorship (2005), adopted by Iphan.

Keywords: Cultural heritage. Gardens. Landscape heritage. Restoration.

RESUMO

O presente artigo aborda a questão do tratamento dos jardins históricos no âmbito patrimonial internacional e nacional tanto nas políticas patrimoniais quanto nas metodologias de restauração/intervenção nos mesmos. Objetivando expor um panorama de como o jardim foi abordado no domínio do patrimônio e apontar questionamentos atualizados, em um primeiro momento centra-se nas políticas patrimoniais, versando sobre as transformações do conceito de jardim histórico, inicialmente vinculado à noção de monumento e hoje convergindo para o conceito de paisagem cultural. Discute-se também a classificação do jardim pelo Instituto Nacional do Patrimônio Histórico e Artístico Nacional (Iphan) tanto o tombamento como nos instrumentos de proteção. Finalmente analisam-se os métodos de restauro dos jardins ressaltando suas especificidades por meio de estudo comparativo de duas metodologias específicas: uma internacional, publicada pelo Comitê Internacional dos Jardins Históricos (ICOMOS-IFLA), de Carmen Añón (1989), e outra nacional, de Carlos Delphim (2005), adotada pelo Iphan. Palavras-chave: Patrimônio cultural. Jardins. Patrimônio paisagístico. Restauração.

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1 INTRODUCTION

To Cauquelin (2007) it is through its separation from nature that the garden was formed: “This is the long theory of gardens, *kepos-hortus*, resting and meditation places, which, when breaking away from an undetermined space or super invested with marks by and for a story, build their distinctive traits far from the city”. (CAUQUELIN, 2007, p. 13). Thus, as a human product, the garden takes on characteristics common to other forms of expression, connecting with the superior format of artistic expressions.

The garden is, according to Fariello (2008) an aesthetic composition which can assume the value of an artwork since, in garden art, certain recurring compositional and ordering principles “[...] present a close analogy because it has its origin and basis in the mysterious laws of the universe that are revealed in the harmony of the musical relationships and in certain combinations of shapes, space and colors”. (FARIELLO, 2008, pp. 10-11). Yet, a garden can also be considered as a document, and shows “[...] traces of the origins and evolution of man and that, therefore, forms an unquestioning part of the roots that give identity to people”. (BERTRUY, 2009, p. 323). In addition to an undeniable artistic value, the landscape works have documentary importance, the product of man’s positioning in face of nature and the historical moment in which he lives.

The recognition of the artistic and historical values of the gardens made them become appropriate for heritage policies throughout the world. Trying to understand how they were treated on the heritage perspective, this article aims to expose the different approaches of the object “garden” in this context. Therefore, the present paper¹ is structured in three parts. The first part is dedicated to diachronically showing the transformations of the concept of landscape heritage, focusing on historic gardens, originally seen as a monument and currently converging to the concept of cultural landscape. Furthermore, it investigates the main recommendations, charters and documents on the listing of gardens considered worthy of some kind of protection and puts in evidence the role played by the international institutions.²

In the international context, the discussions concentrate on the Athens Charter (1931), the Venice Charter (1964), the creation of the International Committee for Historic Gardens (IFLA, 1964), the International Symposium on protection and restoration of historical gardens at Fontainebleau (1971), the Charter of Florence (1981) and the garden insertion in the cultural landscape approach.

Then, in the national case, it describes the Institute of Historical and Artistic Heritage’s (*Iphan*) views in exploring how the historic gardens are treated in Brazil.

¹ Part of the analyses presented were object of the Master’s degree research, **O jardim como patrimônio: a obra de Burle Marx em Brasília (The Garden as Heritage: Burle Marx’s work in Brasília)**: the dissertation was defended in 2012 in the University of Brasília (UnB) on the Graduate Program in Architecture and Landscaping, under the supervision of Professor Elane Ribeiro Peixoto, PhD. Alterations and updates have been made for this article.

² The United Nations Educational, Scientific and Cultural Organization (UNESCO), The International Council on Monuments and Sites (ICOMOS) and International Federation of Landscape Architects (ICOMOS-IFLA).

In this sense, it is evidenced both the heritage policies (the *Bagé* Charter 2007; the *Serra da Bodoquena* Charter 2009; the seal (*Chancela*) of the Brazilian Cultural Landscape 2009 and the Brazilian Historic Gardens Charter 2010) as the questions on protection policies (*tombamento*), specific issues relating to classification and registration of Brazilian historical gardens in the Books of *Tombo* (books of protection policies) and as how the garden object is understood by this institution.

Finally, it discusses the subject of the gardens restoration, comparing two methods³: one designed by Carmen Añón, published by the International Committee of Historic Gardens (ICOMOS-IFLA) in 1989 and the other by Carlos Delphim, published by *Iphan* in 2005 entitled “Manual of Interventions on Historic Gardens”.

2 THE GARDEN HISTORY AND HERITAGE: A PROCESS IN CONSTRUCTION

The inclusion of a cultural perspective in historiography resulted in the reformulation of the concept of heritage, with approaches beyond the political and social history, incorporating cultural values and symbolic dimensions, involving the numerous practices and human activities resulting, as a consequence, in the term “cultural heritage”⁴. And at this moment, the adoption of the culturalist approach in the field of heritage inserted the garden issue in national and international discussions since, as stated Bertruy (2009), the **historic gardens** are considered testimonies of art, history and the culture of mankind, and they are part of society’s heritage.

In this perspective, Marcondes (2009) emphasizes that even though being an important historical and cultural legacy, the gardens theme in the early discussions concerning heritage was very closely associated with the monuments that would be preserved. In the recommendation of the Athens Charter (1931), for example, the third topic (AESTHETIC ENHANCEMENT OF ANCIENT MONUMENTS) of the “General Conclusions”, emphasizes: “[...] a study should also be made of the ornamental vegetation most suited to certain monuments or groups of monuments from the point of view of preserving their ancient character”. (*Iphan*, 2004, p. 14). While recognizing its importance, it is clear that the Athens Charter of 1931 ascribes to the garden a secondary role, valuing the monument framed by the garden more than the landscape work itself.

In 1964, the Charter of Venice, a result of the 2nd International Congress of Architects and Technicians of Historic Monuments, held in Venice, between the 25th and the 31st of May, 1964, established guidelines as to the conservation and restoration of monuments and sites. This document defined in its first article that the historic monument “[...] embraces not only the single architectural work but also

³ Methodology understood as the set of procedures that are necessary for the preservation of historic gardens.

⁴ Choay (2011) warns that André Malraux first used the term, accompanied by the adjective ‘cultural’, in France in 1959 when he became Minister for Culture.

the urban or rural setting in which evidence of a particular civilization is found, a significant development or a historic event". (CHARTER OF VENICE, 1964)⁵. Thus, an increased interest in works relating to the landscape is perceived in this document, but the discussions about their conservation and restoration are still incipient. However, the most important thing about this Charter is that it remains the base document for the International Council on Monuments and Sites, ICOMOS, an advisory body administered by UNESCO in 1965.

Being of equal importance to the preservation of the gardens is the ICOMOS union with the *International Federation of Landscape Architects* (IFLA). This organization, according Berjman (2011), was founded in 1948 by Sir Geoffrey Jellicoe and René Pechère with the support of fifteen European countries. About the founding event Marcke states:

[...] during the IFLA General Assembly in Sardinia in 1968, a Gardens and Historical Sites Commission was created, whose responsibility was attributed to René Pechère [...] with the help of a German colleague, Gerda Gollwitzer, he prepared a list of historic gardens all around the world. They were surprised to find that there were only 2,000, which was very little compared to the historical monuments! They understood it was necessary to expand their sources of information and create a team that not only included landscape architects, but historians, architects, archaeologists and botanists, as well. It was then, when René Pechère appealed to Professor Raymond Lemaire, Secretary General of ICOMOS at that time, and its President Piero Gazzola. After months [...] he was designated to start organizing, with the ICOMOS logistics collaboration, a conference every two years, and establishing a joint committee with IFLA. (MARCKE, s/d, pp. 2 and 3)⁶.

The partnership of these two advisory bodies – ICOMOS-IFLA⁷ – through conferences has led the main discussions on the preservation and intervention of historic gardens in the world. The first of these conferences took place between September 13th and 18th, 1971 at the Château de Fontainebleau in France and discussed, among other issues, the main threats to gardens, such as the uncontrolled growth of large cities, pollution, changes in lifestyles, the absence of specific legislation and the lack of visitations to these areas. This meeting was also responsible for the definition of historic garden, "[...] an architectural and horticultural composition of interest to the public from the historical and artistic point of view". (ICOMOS, 1993, p. 41).

The exclusive focus on the preservation of the gardens is addressed by the patrimonial charter, the Florence Charter, also known as Historic Gardens Charter,

⁵ Available at: <www.icomos.org/charters/Venice%20Charter%20-%20Portuguese.DOC>. Accessed on Jul 20, 2016.

⁶ Translated by Marianna Gomes Pimentel Cardoso.

⁷ UNESCO and the great interest in landscaping, highly regarded nowadays, led to the Committee's suggesting a change of name, adding Cultural Landscapes: International Committee for Cultural Gardens and Landscapes. This took place in Aranjuez on September 23rd, 1998.

only at the beginning of the 80s, in an attempt to complement the Venice Charter (1964). The Florence Charter features the historic garden in the same way as the definition proposed by the meeting in Fontainebleau "Article 1: A historic garden is an architectural and horticultural composition that, from the historical or artistic point of view, presents a public interest. As such, it is to be considered as a monument". (Iphan, 2004, p. 253). The 5th Article of the Charter further states that the garden is:

An expression of narrow relationships between civilization and nature, and as a place of enjoyment, suited to meditation or repose, the garden thus acquires the cosmic significance of an idealized image of the world, a paradise in the etymological sense of the term, and yet a testimony of a culture, a style, an age, and often of the originality of a creative artist. (Iphan, 2004, p. 254).

The undeniable importance that the historic garden gained in the last years of the twentieth century provided a significant increase in the discussions on the topic. As a result, researchers of the subject no longer use the classification of "monument". According to Berjman (2001) the concept of historic garden "evolved" and now historic gardens are mentioned as a category within the cultural landscapes, they are nature landscapes modified by humans. The historic garden started to be classified then as a kind of cultural landscape. This concept of cultural landscape has its origins in the 17th session of the UNESCO General Conference in 1972, which promoted the Convention on Cultural and Natural Heritage Protection. According to Araújo, (2009) in this year would be established:

[...] the first efforts for the conservation of cultural and natural heritage in face of the finding of increasing threats of destruction, emerged not only because of traditional causes, but also by the social and economic transformations that the world was going through. (ARAÚJO, 2009).

This Convention has made a distinction between cultural and natural heritage, in order to further establish specific policies for each type of heritage. However, in addition to establishing the differences between the two themes, cultural and natural, the Convention of 1972 has fundamental importance in creating the registration parameters on the World Heritage List and on the List of Endangered World Heritage.

It can be concluded that the landscaping works are more connected to the cultural character than to the natural, because even though making use of nature elements in its compositions, they are manifestations of the human *savoir-faire*. It is important to note, however, that the issue of the landscape today⁸ is treated in

⁸ The concept of landscape changes throughout history and in order to avoid an anachronistic mistake the temporality of what is understood by landscape is emphasised. Cauquelin (2007) in the work "The Invention of Landscape" explains that during the Italian Renaissance landscape presented a close relation to painting and that currently the meaning of landscape embraces both the different approaches to nature and the dialectics of the real and the image in the contemporary world, introducing the idea of virtual landscapes.

an interdisciplinary way, not restricted to natural environments. In this sense Vieira states that the landscape study has an approach that:

[...] from the landscape painting (a chapter of art history) and landscaping (part incorporated into the architecture and urbanism), the theme has overlapped with geography (whether physical or human), ecology (on account of the environmental movement), history, film studies, and also tourism and literature, for there are already studies of the landscape from travelers' accounts, and travel guides. Also, being such a vast theme, the use of the term went beyond the territory of such knowledge, and today, the word has become a metaphor, when there is the desire to place any subject that one wants to discuss in a panorama. (VIEIRA, 2006, p. 2).

In the context of preservationist practice, the World Heritage Convention of 1992, held in Santa Fe in Mexico adopted a new concept for the classification of heritage: the **cultural landscape**. Ribeiro declares that according to the report in this Convention, the landscapes:

[...] are considered illustrative of the evolution of human society and its settlements over time, under the influence of physical contingencies and/or opportunities presented by the natural environment and by successive social, economic and cultural forces that interfere in them. They should be selected for their universal value and representation in terms of a clearly defined Geo-cultural region and also for their ability to illustrate essential cultural and distinct elements of this region. (RIBEIRO, 2007, p. 41).

As Castriota remarks, the Convention of 1992 was the first international legal instrument to recognize and protect this complex type of heritage: the cultural landscape, "focused on the interaction between nature and culture and at the same time, also linked closely to the traditional ways of living". (CASTRIOTA, 2009, p. 12). This way, three groups for the classification of cultural landscapes were designed, as described in table 1.

Table 1 Classification of Cultural Landscapes by UNESCO

LANDSCAPES CLEARLY DEFINED	Designed and created intentionally, in which are included gardens and parks constructed for aesthetic reasons.
ORGANICALLY EVOLVED LANDSCAPE	Results from an initial social imperative, economic, administrative and /or religious and that has developed its present form by association with its natural environment and in response to it.
ASSOCIATIVE CULTURAL LANDSCAPE	These are the landscapes that have value given in terms of associations that are made around them, even if there are no material manifestations of human intervention.

Source: Marianna Gomes Pimentel Cardoso – adapted from Ribeiro (2007).

The historical gardens are classified as “clearly defined landscapes”, since they express the cultural and aesthetic manifestations of a people and/or period in the landscape. This “label” shows a present tendency in the international arena to include the historic gardens in the global context of the cultural landscape. On the other hand, given the fact that the discussion is recent, one is inclined to assume that the definition of the historic garden is a concept still in transformation, where the monumental character gives increasing rise to a culturalist approach.

3 PROTECTION POLICIES APPLIED TO HISTORIC GARDENS IN BRAZIL

Until now there are important recommendations that assist in the preservation of Brazilian gardens. But concerning the protection (*tombamento*)⁹, the *Iphan*, since its creation in the 1930s, classifies the historic gardens, among the four Books of Listed Heritage (*Livros do Tombo*)¹⁰, in the Archaeological, Ethnographic and Landscape Book. However, when analyzing in detail the registration of the gardens in the Books of *Tombo*, it is possible to notice that there are few independent historic gardens, in other words gardens dissociated from architectural complexes and urban or natural landscapes.

In a survey conducted in Noronha Santos Archive and in the detailed List of Protection and Ongoing Processes (*Lista de Bens Tombados e Processos em Andamento, 1938-2015*), available on *Iphan*'s official website, a variety of categories with the inscription “historic garden” is observed, whereas most of these gardens are in fact parks. It is also detected that, in some cases, the gardens are classified in the Historical Book or Fine Arts Book or, in other cases, more than one book as shown in table 2.

The selection analyzed on the list¹¹ presents some gardens associated with protected architectural complexes, such as the *Solar Grandjean de Montigny* and garden; Warchavchik's Modernist House in *Santa Cruz Street* – comprising the house, the garden and the woods that surround it –, the Palace of *Benfica*, including the ground, the villa, the garden and other constructions existing in it; and *Valongo Garden* and *Morro*: architectural and landscape complex. All the gardens are also unequally inscribed in the books.

⁹ Form of protection ruled by the *Decreto-Lei Federal nº 25 de 30 de novembro de 1937* (federal law). It organizes the protection of the national artistic and historic heritage. Published in the **Diário Oficial da União, 6 dez. 1937**, p. 24056.

¹⁰ *Iphan* classifies the material heritage as the ensemble of cultural assets that can be sorted according to the four Books of Listed Heritage: Archaeological, Ethnographic and Landscape; Historic; Fine Arts; Applied Arts.

¹¹ It is worth pointing out that there is also the category “landscape” and the term “Landscape ensembles”, which, in general, refer to the natural/ environmental heritage – mountains and hills – which sometimes are associated to listed urban complexes.

Region	Designation	Year	Nº	Name	Archaeological ethnographic and landscape Book	Historical Book	Fine Arts Book	Applied Arts Book
RJ	Historic garden	1938	99	Public Promenade: Fountain of the Caymans, obelisks and Mestre Valentin's gate		Jun-38	Jun-38	
RJ	Historic garden	1938	157	Botanical Garden (Specifically the Gate of the Old Gunpowder Factory and the Old Portico of The Imperial Academy of Fine Arts)	May-38			
BA	Historic garden	1939	202	Hospital São João de Deus: garden	Jul-40			
PE	Historic garden	1953	523	Fields of the Guararapes battles, currently National Historical Park of Guararapes		Oct-61		
RJ	Historic garden	1957	537	Henrique Lage Park (Landscape)		Jun-57		
RJ	Historic garden	1961	633	<i>Horto Florestal</i> : architectural ensemble	Dec-73			
CE	Historic garden	1964	744	Public Promenade Area, Old Martyrs' Square	Apr-65			
RJ	Historic garden	1964	748	Flamengo Park	Jul-65			
SC	Historic garden	1965	754	Park in Marechal Deodoro Street, 365	Apr-65			
RJ	Historic garden	1984	1131	Roberto Burle Marx's countryside estate, his museum and bibliographic collection	Aug-03		Aug-03	
PA	Historic garden	1989	1297	Zoo and Botanical Park Museum Emílio Goeldi	Jan-94	Jan-94		
BA	Historic garden	1989	1289	Queimado Park and Fountain		Feb-97		

Table 2 Brazilian Historic Gardens registered in the Books of Listed Heritage

Source: Created by Marianna Gomes Pimentel Cardoso from the List of Protection and Ongoing Processes (1938 - 2015). Data available at: <<http://portal.iphan.gov.br/pagina/detalhes/126>>, under the title "Bens tombados". Accessed in: Feb 2nd, 2016.

The different types of classification of the gardens in the books and the non-uniform treatment of these can be attributed to two main reasons. Firstly, the lack of garden autonomy compared to the architectural and urban heritage, showing a policy that still values the architectural work as a major work, subduing the gardens to a complementation of a built set (as seen in the Athens Charter in 1931). The small number of listed gardens and a lack of appreciation of smaller-scale gardens also reinforce this fact, since there is a predominance of macro-scale gardens, such as parks and orchards.

The other reason is due to the garden's duality: being a living system, linked to the relationships of nature and at the same time a cultural and artistic human expression, inserted in a historical context. The "dual" characteristic of this object complicates its categorization in the current model, in other words, registering the historic garden only in the Archaeological, Ethnographic and Landscape Book, for the garden, as mentioned, touches the historical and artistic dimensions, present in other Books.

As to the recommendations and legislation regarding the concept of cultural landscape, despite the fact international discussions on this theme date back to the 1990s, this issue was addressed in a Brazilian charter, referring to heritage, only in 2007: the *Bagé Charter*, drawn up between September 13th and 18th, during the "Heritage Week – Culture and Memory on the Borderlands", in the city of Bagé (RS). Also known as the Cultural Landscape Charter, this document aims to defend the cultural landscapes of the Pampas territory and the cultural landscapes on the borders. The 2nd article defines the concept of cultural landscape as:

[...] the natural environment to which the human being printed the marks of his actions and forms of expression, resulting in a sum of all the resulting testimonies of man's interaction with nature and, conversely, of nature with man, subject to spatial and temporal readings. (ICOMOS, 2007, p. 2).

In the same year, between September 19th and 21st, in the *Seminário Serra da Bodoquena/MS – Paisagem Cultural e Geoparque*, The *Serra da Bodoquena Charter*, or The Cultural Landscapes and Geoparks Charter was drawn up. Despite focusing the discussions on the preservation of the national parks – especially the *Serra da Bodoquena* – this document contains a definition of cultural landscapes and the guidelines for their preservation:

[...] Cultural landscapes and geoparks, in the final analysis, are more to do with people than things, since the premises of preservation and conservation meet the fundamental human need of knowledge and belonging to a place and culture. (SERRA DA BODOQUENA CHARTER, 2007).

The issue of cultural landscape in Brazil was once again being discussed after the publication by *Iphan* of the Ordinance 127 of April 30th, 2009 establishing the seal of the Brazilian Cultural Landscape. The document, which makes several

considerations, claims that Brazil is “[...] the author of documents and signatory to international charters that recognize the cultural landscape and its elements as cultural heritage and recommend its protection [...]” (BRASIL, 2009, p. 17) and the Brazilian Cultural Landscape is based on the Constitution of the Federative Republic of Brazil of 1988¹². It also considers that the seal of the Brazilian Cultural Landscape “[...] encourages and values the motivation of human action that creates and expresses the cultural heritage [...]” (BRASIL, 2009, p. 17). The Ordinance 217 also defines what is considered as Brazilian Cultural Landscape (Article 1) and exposes the purpose of establishing its seal (Article 2):

Art. 1. Brazilian Cultural Landscape is a unique part of the national territory, representing the human interaction process with the natural environment, to which life and human science imprinted marks or assigned values. Art. 2. The seal of the Brazilian Cultural Landscape is intended to serve the public interest and contribute to the preservation of the cultural heritage, complementing and integrating the existing instruments for the promotion and protection, in terms envisaged in the Constitution. (BRASIL, 2009, p. 17).

The definition of cultural landscape by this ordinance, however, is not specific, since it does not show what would be the “unique portion of territory” which expresses human interaction with nature. It is noticed that there is an uncertainty regarding the scale, the size of which will be ratified, applying the same principles to both an ecological park as to a small garden, revealing a concept that encompasses the micro-scale to the macro-scale, the determined to the undefined; therefore, not considering the specifics of each case. However, it is certain that the historic gardens are in this category, although the absence of a more specific concept can generate doubts for the establishment of processes and even the management of conservation policies.

Despite discussions on the topic of the cultural landscape all around the world and even inside *Iphan* itself, in October 2010 the Brazilian Historic Gardens Charter, or *Juiz de Fora* Charter, was drawn up establishing definitions, guidelines and criteria for the defense and protection of the Brazilian historical gardens, but not including them in the perspective of the cultural landscape. This document defines historic garden as

[...] the sites and landscapes designed by man, such as botanical gardens, squares, parks, plazas, promenades, boulevards, forest farms, orchards, backyards

¹² The article No 216 defines: “The Brazilian cultural heritage is comprised of goods of material and immaterial nature, taken individually or as a set, bearing reference to the identity, the action, the memory of the different groups that formed the Brazilian society, which include: I – the forms of expression; II – the forms of creating, doing and living; III – the scientific, artistic and technological achievements; IV – the works, objects, documents, buildings and other places for artistic and cultural expression; V – the urban sets and sites of historic, landscape, artistic, archaeological, paleontological, ecological and scientific value.” (BRASIL, 1988).

and private gardens and family tradition gardens. In addition to these, zoos, cloisters, orchards, rural cultivations, cemeteries, parkways of historical centers, green spaces surrounding monuments or historic urban centers, open spaces and open spaces in the middle of the urban network, etc. (BRAZILIAN HISTORIC GARDENS CHARTER/JUIZ DE FORA CHARTER, 2010, p. 1).

After trying to accomplish a definition, the Charter discusses the importance of historic gardens, the authenticity and integrity, the problems and degradation factors, identification, protection, preservation, conservation and maintenance, the general aspects of management, the instruments for financing and promotion and the final provisions. Although addressing different themes, the document focuses on recommendations and guidelines for maintenance and restoration of gardens, similar to “Manual of Interventions on Historic Gardens”, published by *Iphan* in 2005. It is noteworthy that, despite the approval of the Brazilian Historic Gardens Charter being a great benefit to the preservation of the gardens in the country, the failure to include the cultural landscape in the discussion document reveals, in a first analysis, a lack of dialogue within the Institute, since the seal of the Brazilian Cultural Landscape was approved in the year previous to the drafting of the Charter.

4 METHODOLOGIES FOR GARDENS RESTORATION: A COMPARATIVE ANALYSIS

The restoration is currently defined by the Krakow Charter, as “[...] an operation directed to a heritage property, aiming at the conservation of its authenticity and its appropriation by the community”. (CHARTER OF KRACOW, 2000, n.p.). Although this Charter discusses the various types of heritage¹³, the study of restoration practices was always more focused on the recovery of the historical value of buildings.

In the late nineteenth and early twentieth centuries, the theme of restoration developed a diverse and changing concept, and its popularity is based on the different theories proposed by the French Viollet-de-Duc, known as stylistic restoration and later by the Italian Camillo Boito, Gustavo Giovannoni and Cesari Brandi, each with different orientations. It can be observed, on the other hand, that all major methods were thought for architectural monuments.

As a consequence, what existed until then was an adjustment of architectural restoration theories for the garden. This scenario changes due to the increase in the discussions on the historical gardens and the creation of the ICOMOS-IFLA, described earlier, which publishes in 1989 a historic gardens restoration methodology developed by the researcher and landscaper Carmen Añón, a member of a Committee, entitled

¹³ The archaeological heritage, monuments and buildings with historic value, architectural decoration, sculpture and artistic elements, cities, historic villages, landscapes and conservation techniques are mentioned.

El jardín histórico: Notas para una metodología previa al proyecto de recuperación (The Historic Garden: Notes for a Methodology Prior to the Recovery Project).

Berjman (2011) emphasizes the importance of Añón, stating that “Doña Carmen established a methodology of study and restoration of historic gardens that has become a model.” (BERJMAN 2011, p. 33). In her methodological proposal Añón (1989) extends the historic garden definition of the Florence Charter, recognizing especially the documentary value of landscape works. The historic garden is defined as:

[...] a space creation in which architectural elements and natural elements form an inseparable unity, establishing itself as an important historical document, a form of great aesthetic value; undoubtedly, an expression of spiritual characteristics. (AÑÓN, 1989, p. 312).

Añón (1989) also points out the importance of developing a specific methodology for the landscape objects. The model proposed by Añón influences until today the garden restoration methodologies developed around the world, including the Brazilian proposal, published by Iphan in 2005, under the title of *Manual de Intervenções de Jardins Históricos* (Manual for Interventions on Historic Gardens by Carlos Moura Delphim¹⁴). This Manual is the first work published in the country that focuses exclusively on the restoration of gardens.

Reclaiming many aspects proposed by Añón and offering others, Delphim (2005) has a different conception of historical garden, not seeing it as a document, but as a cultural object, constantly changing. To the author, the garden is “[...] a cultural asset that has cultural, socio-economic and environmental factors that, over different phases of evolution, have been changing and acquiring new and dynamic meanings”. (DELPHIM, 2005, p. 17).

From the different conceptualizations of the historic garden of both authors – Añón (1989) exalting the documentary value of the garden and the Delphim (2011), showing it as a cultural object – a comparison of these two works is proposed. The choice of these methods is justified since both are divulged by major institutions of international (ICOMOS) and national (Iphan) preservation. The structure of both methods is illustrated in table 3.

As can be seen in table 3, the method Añón (1989) proposes has four stages in the development of future action: 1) a historical analysis comprising the garden’s description, its historical documentation; 2) the current state, which has the function of showing the physical integrity of the garden; 3) the landscape study, which refers to the landscape project itself, including the built part and the living part (plant species); and finally, 4) the restoration criteria, which are established on the principles that should be considered in a restoration project of a historical garden.

¹⁴ Member of the National Committee for Geological and Paleobiological Sites since 2000. Iphan’s official representative of the National Committee for Water Resources. Member of the Brazilian Representatives in UNESCO’s World Heritage Commission. General Coordinator of material heritage in Iphan’s Material Heritage Inspection Department.

Table 3 Comparison of Intervention Methodologies in Historic Gardens

AÑÓN (1989) - ICOMOS-IFLA	DELPHIM (2005) - IPHAN
1. Historical Analysis	Preservation Actions
1.1 Garden Description	Identification
1.2 Historical Background	Location
1.3 Historical graphic material	Legal data
1.4 Archives	Information on the physical environment
1.5 Restoration plans for the garden's most significant periods	Edaphic survey
2. Current State	Information about the biological environment
2.1 Site Plan	Information on the human environment
2.2 Zoning Plan	Historical research
2.3 Topographical plans of the current state	Bibliographic research
2.3.1 General Topographical Plan	Information from archives
2.3.1 Specific Areas Topographical Plan	Iconographic research
2.4 Plans of larger and smaller architecture	Archaeological research
2.5 Botanical Study	Interviews
2.6 Phytopathological Study	Photographic records
2.7 Edaphological Study	Graphic representation: Physical, biological and Anthropic environments
2.8 Fauna Study	Planning
2.9 Communications Study	Protection
2.10 Infrastructure	Conservation
2.10.1 Water Distribution Network	Restitution
2.10.2 Drainage	Restoration
2.10.3 Lighting	Revitalization
2.10.4 Equipment	Maintenance
2.11 Graphic Documentation	Management
2.12 Study of the facilities and obligations	Use
2.13 Environmental and Sociological Study	Interventions in historic gardens
3. Landscape Study	Circulation
3.1 Zoning	Lighting
3.2 Circulation	Sign system
3.3 Perspectives and points of interest	The garden as an ecosystem
3.4 Vegetation Study	Vegetation
3.5 Art-historical analytical study	Fauna
3.6 Botanical-historical Study	Project Development Guidelines
3.7 Aspects and the legal situation of the garden	Survey
3.8 Study of use and function of the garden	Final project
4. Restoration Criteria	
4.1 General Criteria	
4.2 Specific Criteria	
4.3 Punctual Criteria	
4.4 Garden Function	
4.5 General Considerations	

Source: Marianna Gomes Pimentel Cardoso, on the methodologies proposed by Añón (1989) e Delphim (2005).

Añón (1989) affirms that in the part concerning the analysis and the documentation, the intention is to deeply know the garden through the study of its past and its present, establishing, in this sense, a dual contact – physical and spiritual – with the garden, to try to achieve its profound reason of being, united to a full knowledge of its present state and its possibilities. From the certainty provided by the investigations, it is possible to establish the criteria that will determine the project and the general lines of action, analyzing the conflicting points and seeking the most appropriate solutions.

After establishing the criteria, Añón (1989) includes the complete development of the project, determining the performance of steps and partial and total assumptions. Later, she specifies a maintenance policy to obtain the final image of the garden and complementary actions, suitable for the different cases, seeking to enhance the garden and develop its cultural mission, which is inherently bound to ensure its conservation.

Only by studying each of the proposed parts “[...] can we begin to consider the garden as a ‘whole’ in a time and stylistic unit”. (AÑÓN, 1989, p. 323). It is important to highlight that the author establishes this method as a starting point, allowing for the inclusion of other topics, whenever necessary. The importance of teamwork is also included, because the restoration of the gardens is “[...] always an interdisciplinary project where you need to coordinate various techniques and specialties for a good development”. (AÑÓN, 1989, p. 312).

Another important fact underlined in Añón’s proposal is the establishment of four key ideas throughout the garden restoration: be faithful to the garden’s origin, respect the passage of time, value the contributions and avoid dissonances. In the latter item, all dissonant elements, aesthetic or historically, should be avoided. Facing an aesthetic-historical question, the priority is always the aesthetics in relation to history because in the garden harmony should be found. By placing the aesthetic value first, one realizes that, although Añón exalts the documentary value of the garden, she considers that the garden represents an artwork.

The Brazilian proposal of a restoration methodology refers to the “Manual for Interventions on Historic Gardens”. In this Manual, Delphim (2005) outlines a brief history of the Brazilian gardens and presents excerpts from the Florence Charter – under the title of “The Preservation of Historic Gardens.” Later he introduces an overview of some concepts of restoration theories and conservation. The author, without detailing the theme and without mentioning the main references, defines the meaning of value, integrity and authenticity of the heritage to be preserved.

After this introduction, the author describes the maintenance operations that should be considered in interventions: identification, planning, protection, conservation, restitution, restoration, revitalization, maintenance, administration and use. In “Interventions in Historic Gardens” Delphim (2005) establishes parameters for circulation, lighting and signing inserted in a historic garden. Already in “The Garden as an Ecosystem”

he discusses the integration of vegetation with the fauna and on the specific care of these in a historic garden. Finally, he proposes a “Guide” for development projects, which does not have many new features for architects and designers.

As one can notice in the title of the Manual, the word used is “intervention” instead “restoration”. The use of the term “intervention” is justified by the fact that Delphim (2005) works with various intervention notions such as conservation and preservation. Another important aspect of this work is that the author calls the proposed methodology as “recommendations”, which has a direct impact on how his speech is structured. There is no establishment of “steps”, as in the method of ICOMOS-IFLA, but items to consider in an intervention.

According to Delphim (2005), the Manual for Intervention in Historic Gardens is part of a collection of manuals published by *lphan*. Its goal is to conduct a technical guidance dedicated to the conservation and preservation of historic gardens under federal trusteeship. (DELPHIM, 2005, p. 7). Unlike Añón’s method (1989), which has a more scientific approach discussing and proposing reflections on each topic, Delphim’s (2005) presents a less critical and a more practical approach.

The authors designed their proposals for a different kind of audience. Añón’s is directed to a specialized reader, aware of the issues concerning the garden, adopting a more scientific discourse. On the other hand, Delphim’s speech is given to an audience that has little or no knowledge of this topic, describing the basics and adopting an easy language. Delphim himself says in his Manual:

[...] it is for technicians of IPHAN, state institutions and municipal governments or professionals involved in the preservation, restoration, companies, owners and users of spaces of cultural value that are subjected to any form of protection. (DELPHIM, 2005, p. 7).

Both authors include excerpts that value interdisciplinary work in their texts, acknowledging that the historic garden includes several dimensions. Both authors also recognize that all the proposed issues require constant complementation.

Lastly, it’s clear that Añón’s method (1989) has a more rigorous organization of the points studied and adopted a more structured division compared to Delphim’s (2005) text, which extends its discussions to maintenance, management and accessibility issues. Although Añón’s methodological proposition reveals itself as more elaborate, since the proposed methods targeted different groups and have different objectives, each author has delivered what has been proposed.

5 FINAL CONSIDERATIONS

On the current heritage policy, both in the national and international scene, these discussions and formulations are very recent and are in constant transformation. In Brazil, it is noted that there are different understandings of the dimensions of the

historic garden, resulting in different classifications for the same object.

Concerning their restoration, the complexity of the historic gardens was verified by the methodologies. They demand teams of professionals, technicians from diverse backgrounds for any interventions, and also intensive research, involving both the built part – artistic, architectural – as the living part, the vegetation.

During this study, an interview¹⁵ was conducted with Dr. Jacques Leenhardt, philosopher of the School of High Studies in Social Sciences Paris-France (*École des hautes études en sciences sociales* – EHESS,) and with the author of “In the Gardens of Burle Marx.” When he was asked about his understanding of the treatment of the garden in the field of heritage, he said: “It’s an interesting and difficult question because the garden is a living entity”. He also added that the garden can be studied under the bias of the composition of its layout, of its own dynamic to what is alive and, therefore, in constant transformation, making it possible for aesthetics to adapt to new designs. After a short pause, he concluded the issue honestly and unpretentiously saying: “I think I do not have a defined position. It’s something very new...”

In fact, the impasses in defining and classifying the historical gardens, ranging from its treatment as a monument to a cultural landscape, show the importance of discussing the issue and establishing better criteria for the preservation of such heritage.

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¹⁵ Interview given during the 5th Symposium of Cultural History; Brasília 50 years: Reading and Seeing Subjective and Social Landscapes; Nov 8th 2010, Brasília.

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