Preserving and valuing historic gardens: an analysis of projects under the Portugal 2020 investment framework (2014-2020)

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Abstract - Gardens are delicate and vulnerable assets. They are also cultural, artistic, and historical documents of great relevance that must be preserved and valued. Various funding programmes have sought directly or indirectly to help comply with this principle. The aim of this study is to analyse the conservation and enhancement interventions carried out in Portuguese historic gardens between 2014 and 2020, under the Portugal 2020 Community Support Framework. This is a funding programme for projects in various thematic areas. The public database containing all approved applications was therefore analysed. Twentyfour projects involving 20 historic gardens were identified. This is a relatively small number of projects considering how many historic gardens there are in Portugal. Most of the approved projects are located throughout the North and Centre regions, and the interventions mainly focused on the physical rehabilitation of the spaces and their elements. Some suggestions are presented to enable these funds to be more widely used in Portuguese historic gardens.

I. INTRODUCTION

Gardens are as old as the relationship between humans and Nature. They have always been the embodiment of this relationship, transcending time and societies. They are therefore cultural, artistic and historical documents with a relevant role in strengthening cultural memory and collective identity [1,2]. However, besides being one of the richest expressions of cultural heritage and landscape, they are also one of the most delicate and vulnerable [3]. As such, conservation, maintenance and enhancement are fundamental to their preservation and continuation. In certain geographical contexts these aspects are fully considered and addressed in specifically defined legislation, policies and programmes. This is not the case in Portugal.

Portugal has plenty of gardens – from the more than 1000 inventoried by Aurora Carapinha to the approximately 800 listed in the Inventory of Gardens and

Landscapes in Portugal or in the Inventory of Historic Gardens [4]. These inventories cover a diverse heritage of historic gardens that are considered original and unique due to their characteristic cultural traits resulting from particular territorial, historical, cultural, political, religious, economic and social circumstances [4-6]. In the Portuguese context, the historic gardens issue has been undervalued and has not received specific concern or attention at the legislative and administrative levels. The lack of an integrated policy to safeguard and enhance historic gardens, as happens in the United Kingdom or France, for example, has resulted in the loss or impairment of their artistic and historic character, and to the disappearance of many gardens.

This situation has meant that interventions in some Portuguese historic gardens have been undertaken within more general programmes, notably within the European financial framework. The last one, set for the period 2014-2020, that is, Portugal 2020, has funded more than 96,000 projects on a wide range of thematic areas, including those for historic gardens.

The present reflection looks at the financial support, the geographic distribution, the nature of the interventions, and the specific actions carried out in Portuguese historic gardens within Portugal 2020.

This involved analysing the public database containing all approved applications (as of March 2023, when it was last updated). The initial research applied the reference words "garden", "park" and "farm" which led to a list of just over 180 projects. Subsequently, each of these was analysed and only those that were related to interventions in historic gardens were selected. The references used were the inventories of historic gardens of the Portuguese Association of Historic Gardens [7] and the Inventory of Gardens and Landscapes in Portugal [8].

This work could broaden knowledge about the preservation and valorisation actions that have taken place in Portuguese historic gardens in recent years, and be useful for assessing the future demand in these spaces. Furthermore, it might serve to reinforce the discussion

about the obvious need to define a national strategy to safeguard and enhance them, and support public policies capable of elevating this heritage to an expressive level.

II. PRESERVATION AND ENHANCEMENT OF HISTORIC GARDENS

The process of recognizing historic gardens as heritage has been slow, because they were sidelined and treated casually for a long period. It is in the context of the need to know about and safeguard this heritage, following the damage and loss that often occurred, that the gardens have experienced changes and opportunities, particularly since the late 1960s. A specific section for gardens was created by the International Federation of Landscape Architects (IFLA), the International Committee of Gardens and Historic Sites (a sub-division of ICOMOS-IFLA) was founded, and the Florence Charter was adopted in the early 1980s. This last document formalised historic gardens as heritage by giving them the status of monument, a "living monument", as well as guidelines for their preservation [9,10]. Several other documents on cultural heritage were produced containing guidelines that can be adapted to the preservation of historic gardens [4].

Leisure and tourism are among the functions of gardens, as set out in the Florence Charter. It clarifies that gardens were originally designed to be used and enjoyed, and therefore sees this purpose as contributing to their preservation and enhancement, with due care being required when using them [3]. Indeed, gardens are living monuments that are perishable over time, but above all this depends on their use, so opening them to the public for a more touristic use is a delicate operation which, if not properly planned, involves risks [11]. The restoration and maintenance of historic gardens are fundamental conditions for their adaptation to tourism [12].

This is the context in which strategies, policies, programmes, and initiatives have been developed and implemented over time, both to safeguard and preserve the physical integrity of the spaces and to value, enhance and optimise this resource. There are several cases in the world and particularly in Europe [4,10]. "Gardens are an essential element of European cultural heritage" [13], but there is neither a common garden policy in Europe nor specific funding lines. There is indeed a patchwork of policies that multiply and differ from country to country. The "HEREIN in garden" network, part of the HEREIN programme created by the Council of Europe, has done a vital job of collecting and sharing information on national policies about the protection of historic gardens. Broadly speaking, these essentially focus on legislation, inventory and events [13].

Portugal uses the inventory and classification – figures found in the Law on Portuguese Cultural Heritage – to learn about, preserve, and value this heritage, although there are a number of associated constraints [4,14]. In addition, events, garden and flower festivals organised by

the gardens or local authorities, and the seal of quality provided by the Portuguese Association of Historic Gardens (private), are other actions that promote and enhance these spaces [10].

However, although the absence of specific structured funding for the recovery and maintenance of the historic gardens is acknowledged [15], some initiatives do stand out.

One such initiative is the Programme for the Rehabilitation of Historic Gardens in Portugal. It was launched at the end of the 1980s as a joint initiative of the Portuguese Institute for Cultural Heritage and the Portuguese Association of Landscape Architects [16]. Other actions include the interventions carried out in twelve historic gardens under the European programme of EEA Grants, under the theme Conservation of European Cultural Heritage, between 2007 and 2010. programme focused on restoring gardens' hydraulic systems, walls and trails, in an investment of over 1 million euros [6,10]. It also supported the development of historic gardens as tourist attractions by devising and implementing garden circuits in Portugal [10]. In the field of garden enhancement and promotion, it is also worth mentioning the VALORIZAR Programme from Turismo de Portugal. This funded the Portuguese Association of Historic Gardens in 2017 to carry out an inventory of historic gardens in order to design a series of Tourist Routes of Historic Gardens for the interior of Portugal [4].

Over time the historic gardens have been the target of interventions funded under various Community support frameworks, notably in the later one, Portugal 2020, as specified below.

III. PORTUGAL 2020 COMMUNITY FRAMEWORK

Portugal 2020 is the Partnership Agreement adopted by the Portuguese Government and the European Commission to embrace the programmes with EU funding. It ran from 2014 to 2020. Backed by a financial package of EUR 25 billion, the programming and implementation of Portugal 2020 is organised into four domains: i) Competitiveness and Internationalisation; ii) Social Inclusion and Employment; iii) Human Capital; and iv) Sustainability and Resource Use Efficiency. Portugal 2020 operates through 16 Operational Programmes, including the regional operational programmes. Each regional programme is organised around 10 priority areas, framed within thematic domains, within which specific objectives and types of action are defined [17].

There is no specific area dedicated to historic gardens. Most historic garden projects analysed in this study are within the following priority areas: 4 – Environmental Quality, from the North Region Operational Programme (NROP) [18], 7 – Affirming the Sustainability of the Territories, from the Centre Region Operational Programme (CROP) [19], and 5 – Protecting the environment and promoting resource efficiency, from the

Madeira Region Operational Programme [20]. The aim was to promote the conservation and enhancement of cultural and natural heritage as well as the environmental, urban, and landscape quality of the regions. Priority area 5 – Urban System (NROP) and 9 – Strengthening the Urban Network (CROP) sought to foster a more sustainable urban mobility and improve the environmental, urbanistic and landscape quality of urban centres, and to encourage social inclusion in deprived urban territories, through physical, economic, and social regeneration actions [18,19]. Priority area 7 – Energy Efficiency and Mobility, from the Alentejo Region Operational Programme, included support for the transition to a low carbon economy in the various sectors [21]. Finally, priority area 3 – Competitiveness of regional companies, from the Azores Operational Programme, aimed to establish regional companies and their products in the regional market [22].

IV. SUPPORT FOR HISTORIC GARDENS IN PORTUGAL 2020: THE RESULTS

Within the framework of Portugal 2020, 24 projects were registered involving 20 Portuguese historic gardens, spread across the North, Centre, Alentejo, Azores, and Madeira regions. The total eligible investment was EUR 22.5 million, of which EUR 17.7 million covered the total approved incentive, entirely from the European Regional Development Fund [23].

With respect to territorial distribution, the North region received 42% of the approved projects, followed by the Centre region with 25% (Figure 1). This distribution is not unrelated to the geographical distribution of the historic gardens, taking into account the information provided in the existing inventories [4]. Nevertheless, the surprise is the total absence of projects in the Lisbon area, the region where most of the Portuguese historic gardens are located. Regarding investment, the Centre region saw the highest investment, just over EUR 8 million, followed by the Azores, where interventions reached a total eligible expenditure of almost EUR 5 million. The projects developed in the historic gardens of the Centre region absorbed 36% of the total registered expenditure and almost 40% of all the funds approved for the projects under analysis. It was also found that the average funding per project in this region was higher than in the other regions (Figure 1).

It should also be noted that most financial projects were proposed by municipalities (79%), thus almost all of the involved gardens are public property. The rest were proposed by a Foundation, two public institutions and two private companies [23].

Depending on their nature, the projects under analysis are covered by the various priority areas of each regional operational programme, as shown in Table 1 [23].

Emphasis is on the areas of environment, resources efficiency, and urban system. In the North and Centre regions, more than half the projects fall under areas 5 –

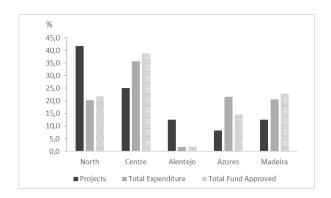


Fig. 1. Projects, total investment, and total incentive per region [23]

Urban system and 9 – Strengthening the urban network, respectively. The thematic objective "Preserving and protecting the environment and promoting energy efficiency", and the investment priority "Adopting measures to improve the urban environment, revitalising cities, restoring and decontaminating abandoned industrial areas, including redevelopment areas, reducing air pollution and promoting noise reduction measures" predominate in all regions.

Table 1. Priority areas and thematic objectives that underpin the interventions in historic gardens

	•	•
Region	Priority areas of the Operational Programme	Thematic objective
North	4 - Environmental quality	6 - Preserving and protecting the environment and promoting energy efficiency
	5 - Urban System	
Centre	7 - Affirming the territories' sustainability	
	9 - Strengthening the urban network	
Alentejo	7 - Energy efficiency and mobility	4 - Supporting the transition to a low-carbon economy in all sectors
	8 - Environment and sustainability	6 - Preserving and protecting the environment and promoting energy efficiency
Azores	3 - Competitiveness of Regional Enterprises	3 - Strengthening the competitiveness of small and medium-sized enterprises
	6 - Environment and resource efficiency	6 - Preserving and protecting the environment and promoting energy efficiency
Madeira	5 - Protecting the environment and promoting resource efficiency	6 - Preserving and protecting the environment and promoting energy efficiency

Around 75% of the projects were covered by the intervention area "Protection, development and promotion of cultural and heritage public assets". The others were in the fields of cycle and pedestrian paths (no. 1), renovation of public infrastructure for energy efficiency, demonstration projects and support measures (no. 2),

development and promotion of the tourism potential of natural areas (no. 1), generic productive investment in small and medium enterprises (no. 2).

The available information for each project indicates that interventions have been carried out, or are still ongoing, at the level of physical space and visitor reception and visiting conditions, in a balance between conservation and preservation of the spaces as well as being able to access and appreciate them. Actions include: regenerating and enhancing the floral heritage through preservation interventions and/or replacing and planting trees, shrubs and other plants; rehabilitating buildings, playgrounds, walls, gates, paths, irrigation systems, lakes, bandstands; constructing paths, rides, and trails; installing new leisure areas, new attractions and new facilities such as toilets and visitor support services; restoring or installing urban furniture such as benches, litter bins, drinking fountains and signs; reinforcing or installing more energy-efficient lighting. Actions were taken in only two gardens to inventory the existing species and set up information points for visitors. In just one garden the intervention was associated with promoting natural values to attract visitors, and the provision of information and raising awareness about nature protection and conservation [23].

Seven of the intervened historic gardens received investment and financing that exceeded one million euros: in the North region the Quinta do Castelo in Santa Maria da Feira (EUR 1.8 million total investment); in the Centre region the Manuel Braga Park in Coimbra (EUR 3.9 million), the green park on the hillside of Leiria Castle (EUR 1.8 million) and the Alta Vila Park in Águeda (EUR 1.2 million); in the Autonomous Region of the Azores the Terra Nostra Park (EUR 2.9 million) and the large urban rehabilitation project including the Duque da Terceira Garden (EUR 1.9 million); and in the Autonomous Region of Madeira the Quinta do Monte/Gardens of the Emperor (EUR 3.8 million) [23].

The interventions carried out in the Manuel Braga Park in Coimbra (public garden) (Figure 2) and in the Terra Nostra Park in the Azores (private garden) (Figure 3) are specified because of the financial outlay. In the case of the Manuel Braga Park, the intervention aimed at improving the state of conservation of the park and the seating areas, and stabilising the retaining walls on the banks of the Mondego River along the entire length of the park. Specifically, the landscape received a makeover by replacing plant species; the riverbank walls were stabilised; some buildings were demolished, and a new kiosk and public toilets built; the bandstand was renovated; a sound and light system and a removable stage were installed; the paths were repaved; the rainwater drainage system was improved; street furniture was added (benches, litter bins, signs, etc.); new public and scenic lighting have been installed to improve safety [24]. The intervention in the park's arboreal heritage involved the preservation and replacement of plant species in accordance with a phytosanitary study carried out to assess the condition of the trees [25]. Around 30 specimens have been removed and more than five dozen planted, such as *platanus*, *tilia*, *liriodendron tulipifera* [26].

Unlike the Manuel Braga Park, where the plant component was very important, in the case of Terra Nostra Park, the intervention has mainly focused on upgrading the park organization, structures and facilities. The Park House was remodelled and turned into a villa – the Botania Hall, and the whole park entrance area is being reorganised; the conversion of changing rooms, canteen and workshop room, the acquisition of signage and visitor support equipment, and the installation of a new shop and night lighting in the park are still part of the project [23].



Fig. 2. Manuel Braga Park (2023)



Fig. 3. Terra Nostra Park – Park House (2023)

The Quinta do Monte project will largely target the restoration of the building that will house the Romanticism Museum, with works also planned in the garden. In Alta Vila Park it is important to draw attention to the work done to incorporate it into the existing urban space, having proceeded to eliminate the barriers that isolated it. Regarding the Leiria Castle Park and the Quinta do Castelo, it is important to highlight the relevance of the

areas for strolling, staying, socialisation, and physical activity. Indeed, the new dynamics and recreational aspects have made the space visitable and accessible to all. The Duque da Terceira Garden will be the target of an enlargement [23].

Although it has not reached one million euros, the ongoing regeneration of the Madeira Botanical Garden is notable for the nature and extent of the interventions carried out to make it more attractive, diversify its offer, and improve its physical space and the conditions for visitors. Here, the intervention in the vegetation took into account not only aesthetics but, and justifiably, assumptions of diversification of biodiversity, too, by supporting and conserving native species and species of scientific interest.

V. DISCUSSION AND CONCLUSION

The fragility of historic gardens means that restoration and maintenance remain at the top of the list of actions crucial for their preservation, valorisation and promotion.

Despite the lack of a policy and structured funding for the restoration and maintenance of Portuguese historic gardens, these actions have been undertaken via other more general funding programmes, such as the more recent European framework Portugal 2020 (2014-2020).

The analysis of projects concerned with historic gardens suggested a number of important conclusions. First of all, the number of historic gardens subjected to intervention under Portugal 2020 is negligible. It amounts to just 2.4% of all the gardens inventoried, for example, by the Association of Historic Gardens (just over 800), and the number of projects analysed does not even represent 1% of the total number of approved projects. This aspect is still curious when there were many more projects involving the construction of new gardens and green spaces - in this context, new build seems to take precedence over preserving what is old and historic, with memory, identity, history. The same happened in the previous Strategic Reference Framework (2007-2013). On the one hand this situation may be symptomatic of the scant importance and interest of this heritage to its owners and/or managers, so it is not an exaggeration to mention that many are not aware of the value – historical, artistic, floristic, cultural – of their properties. Therefore, awareness of the value of this inalienable part of our cultural heritage is a dimension to be worked on, and meetings, workshops, conferences, and training actions could be useful in this process. On the other hand, it might be a consequence of the weaknesses seen in Portuguese historic gardens, particularly the fact that they are privately owned. Most of these private owners are elderly with very limited financial capacity (remember that financing is not 100%), or poor access to information about this type of financing. Furthermore, the application process is demanding in terms of bureaucracy. In this context it is therefore not surprising that almost all the projects were proposed by public organisations which have greater awareness of the value of this type of heritage and more experience and resources when it comes to drafting applications for these programmes. This being so, it will be important to create an organisation (or allocate an existing authority or department, institutional or otherwise) to support and mediate in these processes.

Second, the imbalance in the geographical distribution of projects to a certain extent mirrors the imbalance in the presence of historic gardens in Portugal. However, regarding the interventions, the Centre region and Madeira stand out in comparison. However, the Lisbon area where more than 20% of the gardens inventoried by the Association of Historic Gardens can be found, is not linked to any projects. Tourist activity is increasingly significant in the first two regions and therefore it is not surprising that investment that has been made in the regeneration of public spaces. In the case of Madeira, gardens are one of the biggest tourist attractions and a major brand image of this region, so efforts have been made to upgrade the garden experience. Many of the gardens in the Portuguese capital area have long been real tourist attractions. Others are part of major monuments, some benefiting from international classifications, so over time they have benefited from particular attention, directly or indirectly. For example, the majority of projects financed by EEA Grants were in the Lisbon area.

Third, the great majority of the projects were involved in the areas of environment, resources efficiency, and urban systems. This indicates that gardens and green spaces were appreciated as natural and cultural heritage to be valued and promoted efficiently and sustainably. This was in addition to their role in promoting the environmental, urban, and landscape quality of urban centres and settings. Urbanization and its associated problems are an expanding reality, so the operational programmes are aligned both with the national strategy and also with the European one, which advocate sustainable and inclusive urban space and growth. The projects focused on the physical rehabilitation of the spaces and their intrinsic elements, thus responding to a major weakness of historic gardens, which is the rampant degradation seen in many of these spaces. The degradation affected the plant heritage, the structures and items of equipment equally. The aspects of visitor information and promotion were less considered, even though they are essential for developing the recreational aspect of historic gardens. They are shared heritage that must not only be preserved and restored, but publicized and promoted, too, since they are increasingly popular with national and European publics.

Historic gardens are a differentiating element in Portugal's heritage. The number and diversity of gardens in the country should be more than enough reason for them to secure a prominent place at the legislative and administrative levels, and for a national strategy to be devised for safeguarding and enhancing them. Multiple

actors and interests associated with this heritage should be involved, and they should be supported by public policies capable of contributing to the correct, efficient and innovative management of these spaces. In future, institutions and associations working in the area of heritage in general, and in gardens in particular, should be more proactive in promoting, publicising, and raising awareness of conservation and tourism enhancement projects and programmes, as well as in supporting the formalisation of application processes.

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