

PUBLIC POLICIES FOR THE PRESERVATION OF HISTORICAL HERITAGE IN BRAZIL. THREE CASE STUDIES (1973-2016)

POLÍTICAS PÚBLICAS DE PRESERVAÇÃO DO PATRIMÔNIO HISTÓRICO NO BRASIL. TRÊS ESTUDOS DE CASO (1973-2016)

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ABSTRACT: Each federal government in Brazil has established its own particular sense for the preservation of historical heritage, which have not always been original. The conception adopted by the responsible institutions within the state apparatus has been accompanied by others, defended by its public officers. Bureaucracy, maintaining contact with international debate through books, periodicals, conferences and congresses, has played its part in creating the frequently conflicting programs and their strategies, whether through the implementation of projects related to maintaining the historical memory and cultural diversity, or through the distribution of resources directed towards places and regions across the nation. The present work analyzes the relationship between public policies and territory, based on an examination of three heritage preservation programs implemented by the Brazilian Federal Government between 1973 and 2016: The Integrated Program for the Reconstruction of Historical Cities; the Program for the Preservation of Historic Urban Heritage (*Monumenta*) and the Growth Acceleration Program – Historical Cities.

KEYWORDS: Historical Heritage; Integrated Program for the Reconstruction of Historical Cities; Program for the Preservation of Historic Urban Heritage (*Monumenta*); and the Growth Acceleration Program – Historical Cities.

RESUMO: Cada governo federal no Brasil estabeleceu um sentido de preservação do patrimônio histórico nem sempre original. A concepção adotada pelas instituições responsáveis no interior do aparelho de Estado se fez acompanhar por outras defendidas por parte de seus funcionários. A burocracia, mantendo contato com os debates internacionais por meio de livros, periódicos, conferências e congressos, participou da elaboração, muitas vezes conflitante, dos programas e de suas estratégias, isso mediante a implantação de projetos relativos à manutenção da memória histórica e da diversidade cultural, ou pela distribuição de recursos dirigidos a lugares e regiões do território nacional. O presente trabalho analisa a relação entre políticas públicas e território com base na leitura de três programas de preservação do patrimônio implementados pelo governo federal brasileiro entre 1973 e 2016: o Programa Integrado de Reconstrução das Cidades Históricas; o Programa de Preservação do Patrimônio Histórico Urbano (*Monumenta*) e o Programa de Aceleração do Crescimento – Cidades Históricas.

PALAVRAS-CHAVE: Patrimônio Histórico; Programa Integrado de Reconstrução das Cidades Históricas; Programa Monumenta; Programa de Aceleração do Crescimento – Cidades Históricas.

The contribution of this paper is to analyze the challenges that have been imposed by the urbanization of Brazil and the debate on the role of cities in Brazilian public policies. From amongst the public policies, we have selected that which has focused on the protection of historical heritage. We examine herein three national programs implemented between 1973 and 2016: The Integrated Program for the Reconstruction of Historical Cities; The *Monumenta* Program for the Preservation of Historic Urban Heritage and the Growth Acceleration Program - Historical Cities.

The national policy for the preservation of historical heritage was formalized in 1937, during the first administration of President Getúlio Vargas, with the creation of the National Historical and Artistic Heritage Service (known as SPHAN). At that time, with public administration as the main mechanism of modernization and nationalism as an ideological support, affirmation of the Brazilian identity also relied on the aesthetic values of the “monument city”¹. The city, conceived as heritage, played a part, therefore, in constructing “Brazilianess”. Over three decades, SPHAN, the body responsible for formulating preservation policy, was characterized by the urgency of listing and restoring colonial artistic and architectural assets, conceived as symbolic testimonies of Brazilian roots. Moreover, adhering to modernist proposals for preserving architecturally and culturally representative buildings and artistic objects, it also offered a new perspective to urbanism, the creative practice of a new image, showcase or propaganda instrument that favored a feeling of unity (Fridman, 2013).

However, as from the time of the military dictatorship (1964-1985), important changes occurred in the responsibilities of the accountable body (by this time called The Institute of National Historic and Artistic Heritage, Iphan) as a result of adopting a new perspective that altered the preservation of historical heritage – the recognition of urban historical centers - and of other leading figures in the formulation of preservation programs. It is these changes and their consequences that will be examined below.

THE INTEGRATED PROGRAM FOR THE RECONSTRUCTION OF HISTORICAL CITIES, THE PCH (1973-1979)

Initially, we reviewed two important documents drawn up at international conferences - The Venice Charter for the Conservation and Restoration of Monuments and Sites (1964) and the Norms of Quito (1967). In the first, the concept of historical patrimony was extended so as to include the surroundings of historic sites. By including portions of the territory, the Charter took a stand against the intense process of urbanization that was happening in both developed and developing countries. It is a well-known fact that such a conception was not new and had been referred to since 1931 in the Athens Charter (the so-called Restoration Charter) and in *Vecchie città ed edilizia nuova*, by Gustavo Giovannoni (1873-1947), published in the same year. Giovannoni, involved in drafting the Athens Charter, using the term “urban heritage” for the ancient fabric (now termed “historic center”) and considering it a set of environmental interests, suggested the use of “thinning out” the urban fabric. This, characterized by “microsurgical interventions”, mainly with few demolitions to remove the visual obstacles in order to maintain and protect the life therein, included

¹ For Sant’Anna (2018), this expression, used at least until the 1960s, guiding and designating the protection of monuments and works of art, was not necessarily attuned towards a real city.

measures to preserve artistic aspects as well as those related to lighting, ventilation and sanitation for the group of constructions.

Concerned with enabling the modern city to safeguard the ancient urban fragment, Giovannoni proposed relocating the new city and distributing functions between the two nuclei, whereby integration would take place through the transportation network. He also suggested a master plan (for the city as a whole) linked to regional and territorial plans, which is why he is considered one of the founders of Italian urbanism.² Thus, the Venice Charter owes the basis of its formulation to this theorist.

The “Treaty on the Protection of Immovable Property of Historical Value” originated from a meeting proposed by the Department of Cultural Affairs of the Organization of American States (OAS) in Quito, Ecuador. Known as the Norms of Quito, this treaty recommended the creation of protected zones for monumental districts alongside national development plans. The introduction of two important points should be noted: 1) the tourist attraction of historical sites and 2) the need to link heritage to private interests and the support of public opinion.

It should be further noted that since the end of World War II, European capitalist countries perceived tourism as an economic sector that would provide the means to restore cultural goods. In Latin America during the 1960s, such a guideline, understood by the indebted nations as a way of reducing financial dependence on international agencies, was also the result of the meeting in Quito. Hence, a comparison between the two charters demonstrates that the latter brought about a greater impact on defining the public policies related to heritage, as established by the Brazilian government after the coup of 1964. Instead of a nationalist manner of constructing a modern country, as observed during the Vargas administration, during the military dictatorship, historical buildings assumed a foundational role for overcoming economic and social backwardness. We shall see.

We begin with the Government’s Economic Action Plan (Paeg), the Ten-Year Economic and Social Development Plan and the Strategic Development Program (PED). The objective of Paeg (1964-67) was to curb inflation through controlling wages, reducing public spending, raising taxes, and implementing institutional reforms. With political parties being illegal, improving the country’s image abroad would also serve to widen the possibilities for obtaining loans to help boost the national economy - an apparent “Brazilian” contradiction to the Norms of Quito. In the Ten-year Plan (1967-1976), the theme of preserving the historical heritage was included within the “cultural area”, for which the proposal of a “revolution for education” became the *sine qua non*. The PED (1968-1970) was characterized by the prospect of reducing the negative effects of urbanization.

In view of the proposals outlined within these three plans put forward by the first round of military governments, below we set out the measures implemented regarding historical heritage. First, by identifying tourism as a “national industry” to be fostered with a view to economic development, the government established the National Tourism System, which was responsible for formulating the national tourism policy, and was made up of the Brazilian Tourism Company (Embratur), the National Tourism Council and the Ministry of Foreign Affairs. At the time, the importance given to heritage was derived from the previously consolidated understanding of its value as a consumer commodity, with enormous potential and as an ideological resource (Rodrigues, 2002). According to this judgment, cultural goods as tourist

² For Giovannoni, urban heritage should not be relegated to the role of a museum and should be used for contemporary uses (Meira, 2008). He read the works of Camillo Sitte, Charles Buls and Charles Van Mierlo and participated in the debate on preservation and Italian urbanism during the 1930s (Cabral, 2015), when he developed an interest in fascism.

attractions to cities would produce income both for the region and the country. This link was further encouraged by the Federal Council of Culture (CFC).

The CFC, composed of personalities and intellectuals from across the nation, had four chambers, of which that of Heritage was presided over by Rodrigo Mello Franco, head of Sphan from 1937 to 1967. The basic aim of the council lay in the creation of a National Culture Plan “as one of the vital elements in constructing and maintaining policies for security and development”³ (Calabre, 2006a, p.8). In April 1970, organized by the Ministry of Education and Culture (MEC) and the CFC, the First Governors Meeting took place on Defending the National Historic and Artistic Heritage. At that meeting, the director of the then National Directorate of National Historic and Artistic Heritage (Dphan), recognizing the difficulty of protecting historic sites from the process of urbanization, and most certainly stirred by the Norms of Quito, stated that such protection would depend on investment in the tourism.⁴

The final document of the meeting, entitled the “Brasilia Commitment”, called on the states and municipalities to work together with Dphan in preserving the cultural heritage through the constitution of local norms; the expansion of budgetary resources; the training of skilled labor; the officialization of archives and the creation of regional museums, “(...) with a view to civic education and respect for tradition” (CFC Bulletin, April 1973, p. 13). However, there was no mention of the institutionalization of regional bodies. The recommendations of the “Brasilia Commitment” were upheld by the “Salvador Commitment”, resulting from the Second Governors Meeting, in 1971. There, urban heritage was endorsed as an ambience and included the preservation of historic sites within the instruments of “territorial planning”.

Conversely, in the “Guidelines for a National Culture Policy,” a CFC text published in 1973, cultural heritage was defined as historical traditions and customs; the artistic and literary creations “most representative of the Brazilian creative spirit”; technical and scientific achievements; architectural ensembles and monuments of historical, artistic or religious significance and the “most beautiful or typical landscapes of the country” (CFC Bulletin, Jan.-Mar, 1973, apud Calabre, 2006b, p. 94). We may herein perceive this exaltation, typical of the times, of cultural goods.

Certain observations may be specified: within the CFC, there were two complementary, if not antagonistic, perspectives related to preserving assets of collective memory. The first was related to the part of its associates linked to the international debates established in 1972 - the Convention concerning the Protection of World Cultural and Natural Heritage by Unesco (United Nations Educational, Scientific and Cultural Organization) and the report “The limits to growth” from the Club of Rome regarding the threats to the world’s environment. On the other side there were those who understood that these goods should ideologically express the monumentality of the nation propagated by the slogans “Brazil the Great”, “Brazil Superpower” and “Brazil. Love it or leave it “. This group succumbed to the pressures exerted by the dictatorial government, whose objectives were revealed in the previously mentioned economic plans and in the 1st National Development Plan (PND 1) projected for the period 1972-74. Below, we offer a brief outline of this plan:

PND 1 was oriented towards the country’s economic, social and regional integration through the National Planning Policy, structured in the economic sectors, to which the municipal plans should be submitted. Proviso No. 3 stated that the

³ This and all non-English citations hereafter have been translated by the authors.

⁴ “The association of preservation-tourism was the response encountered by the agencies that defended the cultural heritage against the discourse of those sectors that, under the aegis of economic growth and the expansion of the country’s infrastructure, pressured the federal government to authorize drastic interventions in already preserved architectural ensembles and natural reserves” (Maia, 2012, p. 10).

“Plan should include measures aimed at increasing tourism, both international and domestic tourism chains, providing suitable regions with favorable conditions” (Brazil, 1971, p.73). It should be remembered that in the early 1970s, the most acute phase of political repression, the military dictatorship sought to obtain an alibi in order to silence (unsuccessfully) and gain support from the population. For the disparity between social classes and regions, it suggested that the status of “developing country” be overcome by fighting poverty and hunger in its most fragile region, the Brazilian Northeast. It was within this context that General Garrastazu Médici (1969-1974) made public the Integrated Program for the Reconstruction of Historic Cities (PCH) within the Presidential Secretariat of Planning (Seplan, with ministerial status).

The creation of the PCH was attended by representatives from Embratur, the Ministries of Culture, Industry and Commerce and the Interior, as well as technicians from Iphan. For the authorities, the PCH and cultural policies, by allowing access to cultural goods, hitherto centralized in South-eastern Brazil, would take the place of the absent democracy (Chuva; Lavinás, 2016). According to these authors, the PCH and the Cultural Action Program⁵ were also responsible for promoting the national product abroad. It should be noted that culture was viewed by the state as a matter of national security, and it was therefore used to improve the domestic and international image of the government (Ortiz, 1985).

The aim of the PCH was to defend the monuments considered referential to the so-called sugar cane, leather and cotton cycles in the Northeastern region. Moreover, the patrimonial goods of the open museums, i.e., of the historical cities, when serving as a financial asset, would produce income through tourism.⁶ It may be confirmed that private initiative, as a protagonist in developing tourism, participated in defining the policy on historical monuments, although in the institutional design of the PCH there was a joint venture amongst public agencies in a “national system”, in which the role of Iphan, restructured and modernized, was to approve and monitor the restoration work.⁷ The Program included the Northeast - a “development pole” - with resources from the Federal and State Treasuries and the Inter-American Development Bank (IDB) through the Fund for Integrated Development Programs (FDPI), linked to Seplan.

However, in this first phase of the PCH there was no institutional adjustment nor any of the intended regional integration.⁸ With the choice of the intended municipalities both the political games of interest and the current conditions in the states became apparent. In the First Seminar of Studies on the Northeast: Preservation of the Historic and Artistic Heritage in Salvador, in November 1974, Augusto Silva Telles (Iphan) was critical of the priority given to restoring monuments in historic cities that already possessed tourism infrastructure; protecting pieces of work without including a global view of historic sites; and to the valorization of real estate brought about by the Program and resulting in the expulsion of poor communities from such places (Corrêa, 2012).

In 1975, political pressures led to the states of Minas Gerais, Rio de Janeiro and Espírito Santo being incorporated into the program, which finally reached the entire country: this was the beginning of its second phase. The PCH was attached to Iphan, then transformed into a National Historical and Artistic Heritage (Sphan) linked to the National Pro-Memory Foundation (FNPM) and the National Center for Cultural Reference (CNRC).⁹ Even with the PCH, and having recognized its technical

5 The Cultural Action Program (1973-1974) sought to “sensitize Brazilian public opinion through the promotion of measures to protect and enhance the country’s historical, artistic, archaeological and natural heritage” (the newspaper *Correio da Manhã*, August 10, 1973, p.2).

6 “[...] the local tourism economy financed the preservation of monuments. This proposal was also supported by the states and municipalities granting fiscal incentives to private initiative for ‘restoring and maintaining’ monuments” (Corrêa, 2012, p. 140).

7 The list of works implemented in the 1970s was as follows: Largo do Pelourinho (Salvador, BA), Forte dos Reis Magos (Natal, RN), town houses in São Luís (MA), The José de Alencar (Fortaleza, CE) and Quatro de Setembro Theaters (Teresina, PI), and the transformation of former prisons in Recife (PE), Natal (RN) and Fortaleza (CE) into *Casas de Cultura* to encourage local crafts.

8 Priority was given to impoverished cities which were either receiving flows of tourism or were being established; to those affected by work or activities considered hazardous to cultural goods, and to those in the process of accelerated urban growth (Corrêa, 2015). The states would guarantee infrastructure works, studies and local development plans.

9 The CNRC, responsible for registering the most significant cultural expressions of the country, ultimately expanded the notion of heritage by valorizing the way of life and local cultures; dialogue with communities and recognizing the importance of urban and rural sites, buildings of cultural value (including the most modest) and the environment to which they belonged. These guidelines respond to the Amsterdam Declaration (1975), from which we highlight the following proposition: “

The conservation of the architectural heritage, however, should not merely be a matter for experts. The support of public opinion is essential. The population, on the basis of full and objective information, should take a real part in every stage of the work, from the drawing up of inventories to the preparation of decisions,"(2015, p.4). The theme of Integrated Conservation mentioned in this statement will be observed further on.

10 It was incumbent upon the CNPU, submitted to Seplan, to manage the Metropolitan Regions, to propose guidelines and instruments of the National Policy for Urban Development and to manage the National Fund for Urban Development. In 1979, it was replaced by the National Council for Urban Development (CNDU), an agency within the Ministry of Interior that implemented the Mid-sized Cities Program with a view to promoting a better spatial distribution of the population and productive activities, prioritizing the Northeast, North and Mid-West and the intra-urban dimension.

11 Corrêa (2012, pp. 226-28) drew up a table containing the amounts invested with the percentage received by each state: Rio de Janeiro: 28.04%; Minas Gerais: 17.07%; Bahia: 15.79%; Pernambuco: 14.80%; Maranhão: 5.86%; Sergipe: 5.10%; Paraíba: 3.38%; Rio Grande do Norte: 2.89%; Piauí: 2.47%; Alagoas: 2.11%; Ceará: 1.52% and Espírito Santo: 0.98%. Rio de Janeiro received 14 million cruzeiros per project when the mean value of the Program was around 4 million cruzeiros. In many cases, the states of Rio de Janeiro, Minas Gerais, Bahia and Pernambuco did not offer a 20% counterpart.

legitimacy in restoring Brazilian heritage, Sphan did not exercise a decisive role in submitting to the Commission for the Coordination and Monitoring of the PCH, in which there were representatives from the National Commission of Metropolitan Regions and Urban Politics (CNPU),¹⁰ Seplan, Embratur and Sphan.

In terms of results, between 1973 and 1976, almost all the approved proposals of the PCH were related to the conservation of monuments and buildings; the preservation areas were only considered in two master plans (São Cristóvão and Laranjeiras, both in Sergipe). Thus, the idea of the "monument city" continued to guide policies even with the introduction of predicates, such as the potential for tourism and/or landscape of localities (Sant'Anna, 2018). Until 1979, US\$ 17.3 million were invested - US\$ 9 million in the Northeast (15% in the states of Pernambuco and Bahia) and US \$ 8.3 million in the Southeast (with a higher concentration in the states of Rio de Janeiro and Minas Gerais). The 143 actions in historical monuments, qualification courses, seven urban plans, six refurbishments of public spaces and ten activities of various types absorbed 85% of these values (Corrêa, 2015).¹¹

The resources were channeled unequally, directed towards the regions that were the protagonists, i.e., by including the Southeast, the deconcentration proposal of the PCH was ultimately cancelled. Although it was set up to restore the Northeast from its poverty, the PCH, submitted to the Secretariat of Planning, may have apparently reduced it, but it was unable to overcome local and regional imbalances with the use of assets for economic development. In addition to part of the program's values being directed towards constructing hotels and guest houses in the Northeast, few properties were used for housing and, from the intention of a "national system", resulted in isolated federal, state and municipal preservation systems.

THE MONUMENTA PROGRAM – FOR THE PRESERVATION OF URBAN HISTORIC HERITAGE (1999-2010)

The *Monumenta* Program was introduced during the second mandate of President Fernando Henrique Cardoso (1999-2002). In its first phase, linked to the Ministry of Culture and with technical support from Unesco, it obtained an important contribution in the form of an IDB loan to the Brazilian government. The program was directly associated with the 2000-2003 Pluriannual Plan, based on the social-democratic project known as *Avança Brasil* (Forward Brazil), which was a set of guidelines to "include the excluded". Its goals comprised the promotion of economic growth with job creation; the elimination of hunger; the fight against poverty; the improvement of income distribution; the consolidation of democracy and the promotion of human rights to ensure political stability and sustainable development. These included reducing regional and social inequalities, increasing the quality of public services and economic deconcentration. In order to achieve these objectives, the "privatization program" and the restructuring of the productive sector were to be implemented, accompanied by the strengthening of "the state as a regulator and the engine of development" (Cardoso, 1998, p.4) by extending investments with foreign and domestic capital.

By citing the Unesco Conference on Culture and Development (Stockholm, 1998), establishing the cultural dimension “for full human development” and the restore democratization in the use of urban space, *Avança Brasil* stated that: “Here, there is an inclusion of both the revitalization of central areas and the tendencies to emphasize urban design, such as, broadly speaking, the humanization of cities and the peripheries of large metropolises” (Cardoso, 1998: 122). It is within this direction that the Plan suggested extending the *Monumenta* Program to all the historical centers of the country, linking the preservation of tangible and intangible goods to cultural tourism and introducing changes in urban legislation.

We begin with the National Tourism Policy (1996-2002).¹² Among its several propositions, we note the Tourism Development Program (Prodetur) from the Northeast region. As in its first version,¹³ there was a plan to expand basic infrastructure and public services in places with a potential for tourism. The resources, coming from public-private partnerships, were destined to modernize the hotel network and airports; to offer vocational courses and revitalize the historical heritage of the main cities in the Northeast.¹⁴

With regard to the changes in urban legislation in the “New Urban Policy”, we first review the concept of Integrated Preservation, on which *Monumenta* was based. Among its principles - originally linked to the previously mentioned Italian progressive urbanism and included in the Charter of Bruges (1974) and the Declaration of Amsterdam (1975) - the integration of “traditional historical complexes” into municipal urban plans was included. There was also an emphasis on requalifying public spaces, green and recreation areas and converting monuments (convents, barracks) into equipment for collective use.

However, in the following decade, Integrated Preservation proved to be a way of bringing new vigor to central areas by becoming a “strategy of adding value to the local urban economy and a powerful tool for attracting private supra-regional or international investments” (Zancheti, Lapa, 2012, 21). This change was due to the economic crisis and the renewal schemes of the 1960s and 1970s that demanded large volumes of investment. Other factors should be included, such as the transformations within the financing system for urban development and the role played by national states and large corporations as agents for promoting local progress.

Experienced throughout the Latin American continent, the exercise of defending heritage was transferred to the municipalities, counting on finance from the Funds for the Preservation of Cultural Heritage¹⁵ and on loans from multilateral organisms. In order to grant resources, IDB required the existence of instruments to evaluate economic sustainability and the social effectiveness of projects, as well as the formation of local management institutions (including NGOs and civil society organizations) with administrative practices similar to those of private firms. It is clear that such determinations obliged the formation of independent decision-making structures of local governments. The organization of companies for redeveloping areas and for cultural tourism and forming public-private partnerships between governments and local and national economic actors were also imposed.

Public-private partnerships would expand the mass transport and communications networks and address environmental issues with tax exemption and the provision of subsidies. According to IDB, improving infrastructural bases would allow local governments to compete in the “fiscal war” for investments by global companies.

12 “The generation of employment, income and taxes, as well as the development of the country’s poorest regions, are more than sufficient reasons for the government to intensify its support for tourism. The economic impact of the sector is enormous” (Cardoso 1998: 51).

13 Prodetur I, initiated in 1994, was drawn up by representatives of the Bank for Economic and Social Development (BNDES), the Bank of the Northeast, the Northeastern state governments and IDB.

14 US \$ 670 million was announced, US \$ 400 million from IDB loans and US \$ 270 million from counterparties financed by BNDES.

15 As determined by IDB, the resources of the municipal funds in Brazil would originate from the “preservations” and the municipal budget (Diogo, 2009a).

16 In the opposite direction, the International Seminar on Contemporary Tourism and Humanism (Icomos), held in Brussels in 1976, indicated the negative effects of cultural tourism and suggested adopting the International Convention for the Protection of World Cultural and Natural Heritage (1972) against the destruction of sites of archaeological, aesthetic, ethnological and anthropological interest.

17 Alcântara (MA), Belém (PA), Cachoeira (BA), Congonhas do Campo (MG), Corumbá (MS), Diamantina (MG), Goiás (GO), Icó (CE), Laranjeiras (SE), Lençóis (BA), Manaus (AM), Mariana (MG), Natividade (TO), Oeiras (PI), Olinda (PE), Ouro Preto (MG), Pelotas (RS), Penedo (AL), Porto Alegre (RS), Recife (PE), Rio de Janeiro (RJ), Salvador (BA), São Cristóvão (SE), São Francisco do Sul (SC), São Paulo (SP), Serro (MG) (Castriota et al., 2010). The municipalities were expected to restore national monuments, reclassify public spaces, recover private property and encourage institutional strengthening, training of technicians, economic activities and heritage education.

18 In *Monumenta*, sustainability is “the permanent generation of sufficient revenue to guarantee the financial equilibrium of activities and to keep all real estate in the Project Area” (Zancheti, 2006, p.12). “In this perspective, the more spectacular the patrimony, the better, because the operation would be more likely to be successful from an economic point of view. The exclusion of the population and traditional uses is a consequence and perhaps a condition for this success: the valorization of real estate tends to promote the expulsion of the most popular uses and gentrification; at the same time, the elitization of space requires security, hygiene and asepsis, a situation which, for many, can only be achieved with the exclusion

The leading role of municipalities was therefore a condition for economic and social development.

Promoting economic and social development through equity, rather than signifying anything new, was in fact the discourse of a multilateral agency in favor of decentralized management, in which the municipality would direct the means to maintain these assets over time. One revealing speech is that of Rojas, a specialist in Urban Development on the staff of IDB. In reference to the deterioration of historic centers and the depletion of the old model, he stated that the purpose of the institution was to develop the “business of conservation”. For this reason, it would be down to IDB to “promote a major privatization of the preservation of urban heritage” (Rojas, 2001: 200), with a view to the social efficacy of urban public investment and a reduction of urban poverty.

It was such a foundation of economic and market bases that guided the actions of IDB in the Brazilian *Monumenta*. The bank was responsible for the management culture of the New Urban Policy, i.e., the historical centers as “efficient locations” and the “sale” of historical heritage to cultural tourism became investment opportunities “to optimize urban development policies and anchor [s] for local strategic planning” (Vieira Filho, Guia, 2011).¹⁶

It is in this sense that, for Zancheti (2006), urban development became synonymous with inserting cities into the circuit of the globalized economy and its capacity to attract companies related to cultural tourism, leisure and services. This signifies that planning became a management activity of urban plans formulated by public and private actors - proposals serving “to elevate local productivity and the urban image”, such as those of revitalization, responsible for converting degraded urban sites into “areas of urban entertainment and consumption of culture “. By attributing to the past (historical heritage) the sense of commodity essential for the tourist industry, this treatment has spectacularized sites and refigured image, culture and heritage, thereby provoking gentrification (Harvey, 1992).

Monumenta assumed the (new) notion of Integrated Conservation establishing new uses for real estate and recuperated monuments. Initially, the Program was to include six municipalities, with prioritized interventions in Olinda, Recife, Salvador, Ouro Preto, Rio de Janeiro and São Paulo. However, after 2006, 101 sites and urban settlements were registered under federal protection in 26 cities of 17 states from a “Monument Priority List” prepared by a Committee of Experts appointed by the Ministry of Culture, in accordance with the approval criteria of the abovementioned projects.¹⁷

Bonduki (2012) indicated that the *Monumenta* oscillated between two strategies of preservation. The first was to qualify the historical nuclei (public spaces and monuments) and the activities that attracted visitors to tourism from the middle- and upper-income classes. Generating these revenues, i.e., the “economic sustainability”, would avoid the demand for federal investments.¹⁸ The second focused on being linked with transversal public policies in order to combine resources from government sectors aiming at the feasibility of rehabilitation, the recycling of buildings, future maintenance and the economic impacts on the centers, irrespective of tourism. Along these lines, it was essential for the traditional uses and the poorer social strata to remain.

The agenda of *Monumenta*, defined by the IDB, included the creation of jobs,

training the workforce for restaurants and cultural and tourist agents, the promotion of economic activities and educational events, and funding for recuperating private real estate (Castriota et al., 2010). Agreements were signed between the Ministry of Culture, local councils and states. The projected five-year investment (2000-2005) totaled US\$ 125 million, of which US\$ 62.5 million came from IDB loans,¹⁹ US\$ 30 million from federal government contributions, US\$ 20 million from state counterparts and the municipal preservation funds and US\$ 12.5 million from private companies. Converted into national currency, R\$ 149.3 million were invested throughout the Program.

The first two years of *Monumenta* were marked by conflicts between the institutions involved. In terms of safeguarding the heritage, the design outlined by Iphan, at the request of the Ministry of Culture, was distinct from that designed by IDB. Iphan planned to include just four cities, taking in the revitalization of determined areas and the integration of basic urban services while considering the composition of the environment and landscape. As previously mentioned, IDB emphasized the “sustainable recovery of heritage” by providing “special incentives for the private sector to facilitate their interest” (Gianecchini, 2014, p.10). The agency still required the reduction of administrative, operational and maintenance costs by outsourcing the activities previously carried out by Iphan, thus giving it a secondary role (Castriota et al., 2010).

From January 2003, under the government of President Luiz Inácio Lula da Silva, *Monumenta* was reformulated to restore interaction between the institutions involved and to enact its social foundation. Funding was maintained for the preservation of private real estate, especially those belonging to the low-income population, an instrument that approached the government’s economic goals and social programs. In addition to incorporating Iphan into the Central Management Unit, the links with the Ministries of Culture, Cities, Environment and Tourism aimed to implement the Master Plans, which would include the theme of defending cultural assets. It should be highlighted that workshops were held to train municipal technicians for these undertakings.²⁰

As of 2006, the *Caixa Econômica Federal* (CEF)²¹ – the Federal Savings Bank – began to provide loans for works on the recovery of private real estate, an action, which was conceived by the *Monumenta* program. Funding, with a ceiling of up to twenty years with zero interest, required no age limits and accepted income originating from informal work, in addition to a six-month period of grace to complete the work. According to Hereda (2009), as a financial agent of the operation, in *Monumenta*, the CEF promoted a diversity of uses and maintained residential properties, the affective bonds, the local economy and security, avoiding expulsion processes in the central areas. It was found that the most relevant impact occurred in small cities and amongst the low-income population.²²

An addendum on tourism: with the creation of the Ministry of Tourism by the recently invested President Lula, the National Plan of Tourism: Guidelines, Targets and Programs (PNT) for the period 2003-2007 was presented in April, attributing to the activity the capacity to alleviate regional disparities and to include various social segments (Sancho, 2007). The PNT expanded a number of programs instituted by the previous government, such as Prodetur, which gradually incorporated other localities of the country.²³ Another contribution from the Ministry of Tourism was the publication of leisure itineraries and an inventory of the cities benefited by

of the poorest “(Bonduki, 2012, 364).

19 By 2015, the Union had paid US\$ 48.3 million.

20 We note that the Burra Charter (1980), by innovating the definition of cultural property as a place, area, building or set of buildings of cultural significance and no longer that of “exceptional value”. Similarly, the Washington Charter (1986), reaffirmed the requalification of cities and historic districts connected to economic and social development policies. Both indications were incorporated into the Petropolis Charter (1987), the result of the First Brazilian Seminar on the Preservation and Revitalization of Historical Centers. Let us also remember that from the 1990s the Heritage Charters began to include the natural environment. Efforts were made to recover some of those recommendations that had not always been incorporated into the projects of the Program in its initial phase.

21 With the creation of the Ministry of Cities in 2003, the Rehabilitation Program for Central Urban Areas was implemented, in which the CEF would finance works to convert idle real estate into housing for families with incomes of up to three minimum wages. This Program – with resources from the National General Budget and involving the Ministries of City, Tourism, Culture (Iphan), Planning, Transportation and Social Development, as well as the National Institute of Colonization and Agrarian Reform (INCRA) and BNDES – required the municipality to present an intervention plan. The scope of this Program was limited. In 2006, 892 private properties were selected in the 26 cities of the Program (Castriota et al., 2010), and in October 2008 CEF-financed properties in the country totaled three hundred (Bonduki, 2012).

22 As in Natividade (TO),

Lençóis (BA), Cachoeira (BA), Serro (MG), Diamantina (MG) and Ouro Preto (MG).

23 Prodetur investments were operationalized by the Ministry of Tourism, which technically oriented the state and municipal proposals in partnership with multilateral organizations - IDB and the Andina Development Corporation (CAF).

24 Between 1997 and 2003, BNDES allocated more than 230 million Reais for defending historical heritage. The regional distribution of approved operations was as follows: Northeast (33%), North (2%), Southeast (52%), Central West (3%) and South (10%) (Cardoso; Goldenstein; Mendes, 2009).

25 By 2015, BNDES had provided support for work in at least 170 monuments with a budget of more than 450 million Reais - initially through the Rouanet Law and, from 2010, with its own resources (Suchodolski; Gorgulho, 2016). The Rouanet Law (1991) on cultural investments includes support for tangible and intangible cultural heritage and the regeneration of historic centers.

26 Most striking is Rabello's (2015) assessment, for whom *Monumenta* was a "denial by Iphan", an "institutional aberration", by operating "outside its organizational sphere, but within the influence of the direct and political administration of the Ministry of Culture" and hiring technicians with remuneration two or three times higher than the Iphan employees. According to the author, during the 2000s, part of the technical staff retired or were transferred to the Program, which also justified the hiring of companies to develop intervention schemes.

Monumenta. Although the PNT had received criticism regarding cultural tourism as a lifeline to alleviate inequalities between regions and a mechanism of social inclusion, Sansolo and Cruz (2003) considered that their guidelines were marked by major marketing content. We return to the Program.

Here we would specify two important notes. The first refers to *Monumenta* becoming incorporated into Iphan. The second, in a different direction, concerns the role played by BNDES in preserving historical heritage. For almost ten years (1997-2006), BNDES had sponsored work on historic monuments registered by Iphan.²⁴ However, since 2007, a change had occurred with the creation of a Department of Culture, Entertainment and Tourism within the Bank. This department, with instructions to support investments in historic sites, intended to transform them into the driving force behind local socio-economic development. This discourse was based on "successful projects" in Barcelona and Quito and on the methodological references of the multilateral organizations, such as IDB, the World Bank and Unesco (Suchodolski; Gorgulho, 2016). Therefore, despite a change of emphasis in the direction of *Monumenta*, BNDES persisted, by inscribing the recovered monuments as cultural and tourist assets. Interestingly, the bank attributed to the program an approach, which it described as "development bias", and not just "preservationist".²⁵

In terms of achievements, by the end of the Program, of the 1,500 projects in the 26 cities, 235 had been completed (Bonduki, 2012). These included installing the campuses at the Universidade Federal do Recôncavo da Bahia (UFRB) and the Universidade Federal de Sergipe (UFS) in national buildings protected by Iphan in the cities of Cachoeira and Laranjeiras, respectively. We would highlight, amongst other positive, innovative aspects, the democratic management of cultural heritage, the improvement of housing conditions for the low-income population and the maintaining of traditional activities. On the other hand, from amongst the criticisms of *Monumenta*, it is possible to emphasize the weakening of the public institutions by external consultancies and by the parallel coordinating structures of governmental projects; problems in the technical capacity of Iphan; the fragility of the municipal structures in the preservation of heritage and the symmetry of propositions without taking into account the specificities of each locality (Giannellini, 2014).²⁶

THE GROWTH ACCELERATION PROGRAM – HISTORICAL CITIES (2009-2016)

This program was launched during the second term of President Luiz Inácio Lula da Silva (2007-2010) under the Growth Acceleration Program (PAC), which made part of the recovered State Planning, by means of a plan defined as a "laboratory of institutional experiments and resumption of investments in the structuring sectors of the country" (Brazil, 2007, p.10). The proposal of the Workers' Party (PT) was characterized by undertaking major infrastructure works across the country in three axes, namely logistics, energy and social and urban, "contributing to its accelerated and sustainable development" (ibid., P.1). The objectives were: to increase the pace of economic growth and income, increase the number of jobs and overcome regional imbalances and social inequalities. In order to achieve this, the following instruments, among others, were indicated: an increase in public and private investments in

infrastructure; an improvement of the tax system; fiscal measures; increased credit and protection of the environment.

With the global financial crisis that occurred during Lula's administration, Brazil suffered the reflexes of the collapse of neoliberal formulations, with the aggravation of social and urban problems. Within this context, it was fundamental that government policy, aligned with PT, focused on providing assistance to the poorest population, with emphasis on social and urban infrastructure - education, health, housing, sanitation, transport, culture, sports and leisure., The PAC - Historical Cities (PAC-CH) was inserted within this framework.

Prepared by the Presidential Chief of Staff (Casa Civil) in partnership with the Ministry of Culture/Iphan, the Program involved the Ministries of Tourism and Cities; Petrobras and Eletrobras; state enterprises; BNDES, CEF; the Banco do Nordeste do Brasil (BNB) and the state and municipal governments (Ministry of Culture, 2009). With a view to constructing the National System of Cultural Heritage, the conception of PAC-CH in preserving cultural heritage was linked to both the ambience and the environment as a way of inducing urban rehabilitation. Moreover, it indicated a new idea: to combine the municipal instruments of urban planning with actions of restoration, and not only limited to physical interventions on the historical collections. It is also possible to highlight the models of participatory management, economic stimulus and heritage education in order to expand preservation plans along with long-term projects.

The position of BNDES with regard to the program, which was different from that assumed during *Monumenta*, was to "position cultural heritage as an inducing and structuring axis, with the aim of contributing to the organization and planning of urban growth" (Suchodolski, Gorgulho, 16). An appraisal, as undertaken by Tanaka et al. (2011), possibly revealed elements in the PAC-CH similar to those linked to the Integrated Program for the Reconstruction of Historical Cities. As previously stated, the discourse of the PCH brought the theme of urban development dependent on economic development linked, in turn, to tourist activities. However, during the period of the PAC, the National Tourism Plan (2003-2007), called Tourist Brazil, brought a different perspective. By recognizing that "important tourist destinations in Brazil are located in the poorest regions" (Brazil, 2003, p.4), it asserted that domestic tourism needed to be strengthened through its consumption by all Brazilian citizens. It also provided incentives to small and medium-sized enterprises via credit, so that this activity became, in effect, "a factor towards the construction of citizenship and social integration" (ibid., 8).

While recognizing the scope of PAC-CH, Castriota et al. (2010) related points in common with *Monumenta*, such as the perspective of dynamizing productive activities (including tourism), using the category Integrated Preservation and the links between the spheres of governments. As we shall observe below, the Integrated Preservation was to overlap the Action Plan.

The Action Plan for the Historic Cities is defined as an instrument of territorial planning aimed at "facing full on the structural issues of cities" (Iphan, 2009, p.11), such as the preservation of cultural heritage (its central axis), social development and economic dynamics. In this document, the historic cities correspond to "municipalities with urban sites and urban settlements that are either registered or are in the process of being registered at a federal level, and municipalities with places that are protected or

in the process of being protected by the Brazilian Cultural Heritage” (ibid., P.11). This would be a pertinent point to introduce the viewpoint defended by Carrión, in which the definition of a historical center is an act of urban politics. “The condition of center is defined by a double ambience - the urban (space) and the historical (time) -, and for a policy on historical centers to be considered integral, it must contemplate the circle and the circumference” (2000, p.11). It should be noted that what is currently designated as historical center, in the past was the entire city with its heterogeneous reality. But, to return to the Action Plan.

Drawn up by the states and municipalities under the coordination of Iphan’s regional superintendence for a period of four years (2009-2012), the objectives and intersectoral activities of public policies were included in the Action Plan. In the case of cities that already had a Master Plan that addressed defending heritage, the Action Plan would be incorporated and/or adapted into it. Its territorial scope would be defined by the “urban area of heritage interest” established by the preservation sites, by their surroundings and by their area of influence, i.e., it could therefore go beyond the municipality and reach a regional scale. In relation to the management of the Plan, a consensus pact was foreseen integrating different levels of government, the private sector and organized civil society. Additionally, for the effective participation of the community, it was recommended that a municipal forum or a public hearing should be held. After its approval, the Agreements for the Preservation of Cultural Heritage would be signed between Iphan, through its state superintendence, and the municipalities.

In mid-2009, a Public Call to draw up Action Plans was sent out to 188 municipalities with sites or urban ensembles protected or in the process of being protected by Iphan.²⁷ A total of 173 locations were surveyed in 140 cities in 22 Brazilian states and US\$ 8 billion were budgeted for 4,386 actions to restore monuments and public real estate; funding to restore private property; urban renewal (urban furniture, signs, adaptation of road plans, lighting, earthing electrical wiring, preservation and implementation of parks and green areas); promoting local productive chains and promoting cultural heritage (Iphan, 2014, p.7).

If the Action Plans of each place met with their approval, the contributions from PAC-CH also expounded the political geography designed by the social actors involved, i.e., the criterion regarding the qualification of a team in a municipality ultimately determined the attraction of resources, thereby revealing one of the existing conflicts within the Program. An example of this would be: in Minas Gerais, in the South-eastern region, proposals from 19 city/town halls gained approval. The distribution of resources however, was that the state capital, Belo Horizonte, received R\$ 82.9 million and Serro, a town that has been protected ever since the 1930s, only received R\$ 2.5 million (Castriota et al., 2010, p. 109).

In two years (2009 and 2010), investments reached R \$ 133.1 million (Tanaka et al., 2011). According to Iphan’s presidency, funding was only released in 2013 (apud Leal, 2017) when a Public Call for selection was restricted to 44 cities. The PAC 2-CH, implemented during the presidency of Dilma Rousseff (2011-2016), was established as a call for localities with protected assets or that demonstrated an urgent need to safeguard their heritage.²⁸ Committed to local development and using the same discourse as the first phase of the Program, the strategy to defend cultural heritage was linked “to other public policies, especially those of a social and economic

27 In addition to holding Training Workshops, in August, the booklet *Action Plan for historical cities, cultural heritage and social development. Building the National System of Cultural Heritage* was published.

28 Sites recognized as World Heritage and/or with large collections; including landmarks in the process of occupying national territory; or with cultural diversity, railway complexes and fortification systems.

nature, such as education, health, tourism and to the generation of jobs and economic opportunities “(Iphan, 2013, page 2).

In August 2013, the Program Management Committee (CGPAC-CH) announced the selection of 423 (or 425, according to other sources) projects in those 44 municipalities in 20 Brazilian states with projected investments of R\$1.6 billion²⁹ for restoration work on monuments (especially churches and religious assets); protected public spaces (squares, wide belts and forecourts); the preparation of booklets, technical manuals and divulgation; training technicians and implementing specialization courses in tourism.³⁰ According to the list of localities contemplated, 14 were state capitals; nine owned assets recognized as Cultural Heritage and nine would host the 2014 FIFA World Cup.³¹ Added to this was the link between PAC 2-CH to the National Tourism Plan (2013-2016), highlighted as one of the main pillars for the preparation of the host cities of sports mega-events as a national and world tourist destination, the works for which received 85% of the resources coming from the Federal Government (Popular Committee, 2013). Furthermore, the BNDES ProCopa Tourism Program also provided subsidized loans (with low, long-term interest) to expand and modernize the hotel facilities within these municipalities.

It is a challenge to assess the PAC CH, a program which, even after Dilma Rousseff's impeachment in 2016, was not formally interrupted by then-Vice-President Michel Temer. As of March 2018, more than half of the work had either not yet begun or was still incomplete. A small part of the pre-selected interventions was waiting to be contracted. Sant'Anna describes this panorama as follows (2017, p.150):

This new program, launched in 2009, with the aim of improving the previous programs, overcoming their fragilities and increasing their conquests, ultimately became a program of works to restore great monuments and requalify public spaces, which greatly diminished its capacity to reverse the situations of abandonment and deterioration of areas located in more complex urban contexts.

IN CONCLUSION

As a result of examining the PCH, *Monumenta* and PAC - Historic Cities, federal programs adopted in Brazil over four decades, we have indicated the different views on the part of its formulators with regard to defending historical and cultural memory. We have verified that, according to the social context, the projects have ultimately revealed the embedded interests in what was intended to be preserved or not.

Certain similarities between the PCH and *Monumenta* may suggest that there existed some continuity between them, although both were designed based on governmental agendas that were presented under different national and international conjunctures. One common point would be the transversality that such programs have assumed, encompassing actions and technical teams both in and outside the governmental sphere in several areas, such as economic planning, the preservation of cultural heritage, urban development, management, tourism and the environment. One other important point, both in the PCH and *Monumenta*, consisted in harnessing the preservation of monuments and historic sites to cultural tourism.

In the PCH, defined during the military dictatorship, symbols of the past were indicated as being economic and ideological resources aimed at consumption. Even

²⁹ Of the total, R\$ 431.94 million were already planned for work in 115 cultural facilities; R\$ 279.22 million for 88 historic churches; R\$ 160.44 million for 24 railway heritages; R\$ 134.40 million for 39 museums; R\$ 60.54 million for 9 forts and fortresses, R\$ 44.69 million for 11 educational institutions and a line of credit of R\$ 300 million for private properties (later found unfeasible).

³⁰ Marechal Deodoro (AL); Penedo (AL); Manaus (AM); Itaparica (BA); Maragogipe (BA); Salvador (BA); Santo Amaro (BA); Aracati (CE); Fortaleza (CE); Sobral (CE); Goiânia (GO); Goiás (GO); São Luís (MA); Belo Horizonte (MG); Sabará (MG); Congonhas (MG); Diamantina (MG); Mariana (MG); Ouro Preto (MG); Serro (MG); São João del-Rei (MG); Cuiabá (MT); Corumbá (MS); Belém (PA); João Pessoa (PB); Antonina (PR); Fernando de Noronha (PE); Olinda (PE); Recife (PE); Parnaíba (PI); Natal (RN); Jaguarão (RS); Pelotas (RS); Porto Alegre (RS); São Miguel das Missões (RS); Rio de Janeiro (RJ); Vassouras (RJ); Florianópolis (SC); Laguna (SC); Iguape (SP); Santo André (SP); São Luiz do Paraitinga (SP); Aracaju (SE) and São Cristóvão (SE).

³¹ The list does not include Brasília, Curitiba and São Paulo, which would also have stadiums built for the competition.

overcoming the unequal income distribution faced by the Northeast region became sufficient justification for leveraging cultural tourism. This discourse was based on the joint action of various agencies, attracting investments and recognizing cultural diversity as a democratic means to national integration, thereby reducing the leading role taken by the Brazilian Southeast. However, requalification, with new uses for town houses, theaters, private properties and prisons (transformed into Casas de Cultura), through federal and IDB contributions, substantiated the expulsion of part of the poor community from the requalified areas.

The democratic climate would set a new course for the policy of Brazilian historical heritage. Recovering the use of the urban space by the whole population, made explicit by the citizens' 1988 Constitution, was announced as one of the objectives of *Monumenta*. Despite the decentralization measures, revitalizing the central areas was subordinated by recommencing the real estate value of buildings through local funds and multilateral organizations, especially the IDB. The latter, by formulating the public agenda, imposed changes in urban legislation and municipal management institutions; the organization of independent decision-making structures of local governments; public-private partnerships and the organization of enterprises for the preservation of historical goods, which were the basis of the "New Urban Policy" and the "business of preservation business". Within this context, the distribution of large investments directed at cultural goods was insufficient to undo the old power ties and the social segregation of the territory. A major turning point occurred in the second phase of the Program, after *Monumenta* was incorporated into Iphan, the projects of which were aimed at recovering historic properties used or belonging to the low-income population through long-term loans from CEF.

The inauguration of a new program focusing on historic cities would reaffirm the role of the municipality and the need for the community to deal with heritage as a social issue. The concept of PAC - Historic Cities, the largest investment program in the country, included defending cultural heritage, the ambience and the environment to induce urban rehabilitation and thereby indicated a new idea: to combine the instruments of urban planning to actions of preservation and restoration, and not be limited to physical interventions on historic sites. Supported by the definition of an "urban area of heritage interest", including the monument, its surroundings and its area of influence, the Action Plan become the main instrument of territorial policy. Funding the Program by companies and BNDES, CEF and BNB - all public banks - reveals an autonomous perspective within the country. However, the PAC - Historic Cities also determined that strategies should be linked to development initiatives within the tourism sector, especially those linked to major events. Nevertheless, we recognize that reforms were carried out and spaces were created for the expression and representativeness of previously marginalized social segments.

If, over these more than forty years, attempts were made to seek to link the interests of the funding agencies with those of the representative groups of Brazilian cultural diversity, we are currently witnessing the dismantling of ministries and institutions (and not only those related to heritage), the weakening of genuine local initiatives and the policy to preserve the country's memory.

We hope for better days to come.

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