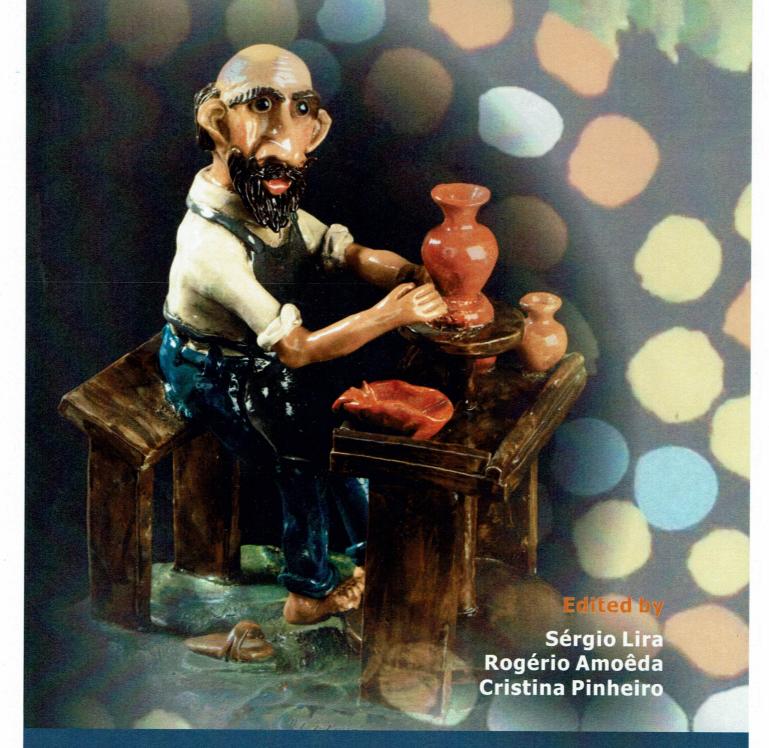
SHARING CULTURES 2017

Proceedings of the 5th International Conference on Intangible Heritage



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Barcelos, Portugal 6-8 September

Edited by

Sérgio Lira Rogério Amoêda Cristina Pinheiro



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Credits of cover image: Museum of Pottery of Barcelos

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ISBN 978-989-8734-24-2 eISBN 978-989-8734-23-5

Published by
Green Lines Instituto para o Desenvolvimento Sustentável
Green Lines Institute for Sustainable Development
Av. Alcaides de Faria, 377 S.12
4750-106 Barcelos, Portugal
mail@greenlines-institute.org
http://greenlines-institute.org

1st edition, September 2017

Published in electronic format.

Print on demand

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Intangible heritage and cultural landscapes: improving an evaluation system

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ABSTRACT: Many cultural landscapes present a high heritage value and should be classified as heritage landscapes. So management tools should be found out and discussed regarding its importance in the context of land management measures for countryside valorization to promote rural development. The heritage value of the landscapes will be calculated by means of a weighted linear combination. This path integrates intangible cultural heritage which is constantly recreated by communities and groups in response to their environment, interacts with nature and history, and provides a sense of identity and continuity. A reflection about the methodology is presented through the comparison of two Portuguese case-studies: the Upper Douro terraced landscape and the Alentejo montado landscape. Both means and represent a different interaction with landscape, connected to communities' practices and uses. The need for a multidisciplinary approach to this heritage assessment leads the authors to view this study primarily as an experimental essay.

1 INTRODUCTION

Our scope with this paper represents a working in progress. The main idea is to introduce intangible heritage criteria to the evaluation of cultural landscape. It will be also a sustainable way to evaluate and monitoring landscape projects itself.

This goal represents a previous working research road map, which start over some years ago, when authors begun to evaluate built structures, archaeological included, and natural heritage sites in real field work connected with roads construction and other projects. From the attempt to find out a value for a structure, authors understood the need to apply this approach to cultural landscapes as an heritage autonomous reality. This path has been produced in the framework of landscape studies and always a doubt emerged: which criteria should be chosen when projects were dealing with heritage landscapes, to attribute a value or monitoring?

Consequently monitoring methodologies and social practices have contributed to develop and conditioning our interpretation of the landscape; therefore, intangible heritage and social cohesion for instance, became a central element to deal with landscape conservation. The comparison of landscapes has been a systematic working practical criterion, in order to test the methodological advances and also to make it clear to the readers.

2 LANDSCAPE VALUE AND INTANGIBLE HERITAGE

In the last decade, the authors have developed and published their thoughts about heritage evaluation, including the cultural landscapes. Our concern has been to evaluate heritage strictus sensum, for several operational purposes, but also to find out monitoring criteria to follow up

field projects, the reason is easy to understand: all over the world, many projects claiming the

heritage development are in reality destroying it.

As it happens with most authors, our evaluation of heritage landscape, for development or monitoring aims, has first concerned built and natural heritage (Barata & de Mascarenhas, 2002; de Mascarenhas, 1995). The issue has been to look at the way how landowners and common rural people interact with environment and consequently shape each landscape. Actually, as emphasized by the Safeguarding of the Intangible Cultural Heritage Convention (UNESCO, 2003), the way how each community deals with land is connected with social practices, expressed in events, oral traditions, local know-how and particularly the manner to view nature and universe; somehow, landscapes often become an identity phenomenon (Rosón & Javier, 2008). That is why, in this framework of landscape evaluation, it is so important to consider and include intangible heritage descriptors. This is an ongoing research where the authors have given special attention a special attention to the analysis of the scarce existing bibliography but also to field evaluation experiments in a context of universal enforcement. Presently, the result can be seen as an approach in the right direction, where the structure of the criteria grid has been intensely discussed (Capel o et al., 2011a; Capel o et al., 2011b).

The ongoing process is of course illustrated by the evaluation criteria and their grid organization but also by the intangible heritage criteria included in it and the respective justification. The option has been to check previous works such as the proposals presented by Mason (Mason, 2002), Avrami (Mason & Avrami, 2002) and Harmon (Harmon, 2004), without forgetting the 2003 UNESCO Convention dedicated to the intangible heritage. Indeed our perspective does not meet them all; some specific criteria have been enhanced and included in the new grid. The intangible heritage criteria are based mainly on four key domains: social practices, local traditional know-how, identity, landscape perception. These four domains are based upon in the referred 2003 Convention (Article 2). From the perspective of local communities but also of society in general, these domains are the most relevant to characterize a landscape as unique but

3 SELECTED HERITAGE LANDSCAPE CASE-STUDIES

also as a heritage landscape.

In order to conduct methodological trials, two contrasting landscapes, presented and characterized by the authors in others papers (Capelo et al., 2011a; Capelo et al., 2011b), have been selected as case-studies:

- the first one, the so-called *Montado*, is a typical south western I berian Peninsula landscape, traditionally related with agro-silvo-pastoral systems where open formations of pure or mixture cork and / or holms oaks (and even other kinds of trees) compose the treelike layer under which a rotation of crops / fallows / pastures takes place. In Portugal, it is mainly located in the province of Alentejo, south of Tagus River, in a geographical context characterized by gentle slopes and poor soils and a Mediterranean-Continental climate with strong annual fluctuations. It is currently protected by national and European law.

This landscape is related to large properties, latifundia on the Portuguese scale. Traditionally, most of the work was done by wage and seasonal workers (a really cheap workforce system) who did not live in the farm but in villages nearby. The social cohesion between communities and landowners was poor and even full of conflicts. Nowadays, this system is submitted to changing pressures connected with tourism, depopulation and economy options, and because of

the low cohesion, the landowner's skills and options prevail.

- the second one is the *Upper Douro vineyard terraced landscape* (NE Portugal), a World Heritage Site classified by UNESCO in 2001. The vineyard terraces were hand-built on the slopes of Douro River and some tributaries. Traditionally they were built with dry stone walls of schist. The maintenance of these walls should be permanent and is the main care for landscape conservation.

This Northern region is quite different from the South. Although subject to the same changing pressures, a great part of the maintenance of vineyard terraces and even rural activities are done with some social agreements. In the region, we can perceive the social cohesion especially in popular festivities and public calebrations: processions, religious or civic festive events.

However, there are conflicts among the regional stakeholders where the perspectives and interests of local and small communities clash often with big wine producers and national or in-

Cultural landscapes of Douro and Alentejo have always been a thematic motif of popular and classical arts, by the way the territory are marked. This is what the Panel of Images 1 intends to

Panel of Images 1 - Cultural landscape and art motives

Douro and Alentejo cultural landscapes by the way they have marked the territory, were always a thematic motif of popular and classical arts. It is intended to represent the first set of images.

Douro Terraces

Alentejo Montado



Figure 1 - "Douro. Chula Rabela" - watercolor by Mário Costa (1902-1975).



Figure 3 - "Santo António" - cork work by Isidoro Verdasco.



station. Cerâmica Aleluia - Aveiro (1937)



Figure 2 - "Panorama" tiles panel. Pinhão railway Figure 4 - "Quercus super; 2H; 45; Carias"- by Manuel Casa Branca (work in progress/detail. Oil on Canvas, 150 x 300 cm, 2011).

In the second block (Panel of Images 2), we try to show the form how really the same cultural landscapes have become, keeping however, their asset values. In Douro, are perceived traditional terraced areas, where the vine-related work is all done manually, while in the new vineyards, the terraces intend to organize themselves for the use of machinery. In Alentejo, in the 50s, the montado was an open field, but carefully farming, with a well-structured vegetation and the domain of black pig that was pastured; today, the pig-raising became limited, due to African swine

fever, and as a result of European agricultural policies, the fields started to be surrounded, showing evidence of abandonment in certain places. The livestock types such as sheep or cattle became more diverse being many of them exogenous. Some of these exotic cattle breeds have an impact on the Quercus trees roots due to the weight of each specimen (Pinto-Correia & Mascarenhas, 1999).

Panel of Images 2 - Cultural landscape and heritage values

Regarding the Douro landscapes, this panel shows how they have been changing over time while keeping their heritage values: the traditional vineyards on terraces where the work is done manually and more recent vineyards with terraces organized for the use of machinery. As to the Alentejo region, the images show the montado in the 50's, an open field with scattered trees, a dry agriculture (cereal/fellow rotation system) and black pigs feeding on acoms, and the today montado, derived from European agricultural policies, with fields often enclosed and sometimes various animal species.

Douro Terraces

Alentejo Montado

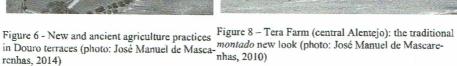




Figure 5 - Douro near Foz Coa (photo: José Manuel de Mascarenhas, 2015).

Figure 7 - A common middle twentieth century montado landscape (photo: António Mexia de Almeida, 50s)







4 INTANGIBLE HERITAGE CRITERIA

Coming back to the package of intangible heritage criteria which are considered within landscapes (Table 1), they can be gathered in four main groups as referred before: the first one concerns the way how populations organize their interests, and even their day-by-day life, around the field work and how they achieve to take out their support from land. As land and life support the work social organization, the linkage between community insiders plays an important role and cohesion acquires specific characteristics. In this domain, the following criteria are considered: civic importance, social value and engagement of local people. Somehow, all of them define commitments and behaviours for citizens

Table 1. Explanation of criteria.

Criteria	Description				
Built heritage	Architectonic and archaeological richness.				
Natural biotic heritage	Vegetal and animal richness.				
Nasural abiotic heritage	Palaconthological, geological and geomorphological richness.				
Rarisy	Concerning the heritage landscape type.				
Antiquity	Of the coherent spatial structures of the heritage landscape.				
Scientific potential	Concerning archaeological and/or historical and/or geographical research.				
Recreation potential (*, group 4)	Offered by the heritage landscape concerning the amusement usufruet.				
Pedagogic potential	Offered by the heritage landscape concerning the educational activity.				
Thistoric record	Realized landscape research quality and documental production.				
Conservation/Protection statute	Existing classification statute.				
Identity importance (*, group 3)	Capacity to stimulate or maintain group identity and other social relations.				
Spiritual or religious importance (*. group 3)	Relation with the beliefs or practices of a religious group.				
Historic importance	Relation of the landscape with significant historic events.				
Artistic significance (*, group 4)	Capacity of the landscape to stimulate the senses (artwork and music production, etc.)				
Civic importance (*, group 1)	Landscape shared-space quality (social gatherings use as rituals and festivities).				
Social value (*, group 1)	Landscape place attachment quality (social groups feelings affiliation, sense of place)				
Political value	Landscape quality to enforce national / regional culture.				
Engagement of local people (*, group 1)	In landscape management processes.				
Legal provisions	Appropriateness of Laws to landscape preservation and development.				
Therapeutic value	Of the landscape components.				
Coherence degree	Of the structures related to certain(s) epoch(s).				
Conservation degree	Of the spatial structures of the heritage landscape (identification marks).				
Aesthetical quality (*, group 4)	Of the heritage landscape when observed from terrestrial sites.				
Montanentality (*, group 4)	Grandiosity of the heritage landscape when observed from terrestrial sites.				
Range	Surface occupied by the heritage landscape.				
Craft - or work - related value (*, group 2)	Related with methods used to design and built the landscape, and processes of making.				
Public interest	Number of the heritage landscape visitors (estimation).				

(*) Intangible heritage criteria (IHC) IHC Groups: 1 – Social practices; 2 - Local traditional know-how; 3 - Identity factor; 4 - Landscape perception

The second group of intangible heritage criteria regards local traditional know-how. The framework where each community lives, the challenges that must be overcome and the more or less importance of the usual connections draw a picture of technical know-how level, creativity and innovation environment; this is pointed out by article 2, number 5 of 2003 UNESCO Convention and it is also where fits the table 1 criterion called "craft-or work-related value". In the same Table 1, two more criteria can be read: "identity importance" and "spiritual or religious importance"; here is the third group of criteria: the identity factor. This one deals with the structure of memory that organizes the cohesion of each community, no matter if expressed by an ideological speech or religious events or any other way. They are the core of the sense of belonging, a feeling that creates the profile of a group.

The last group, called "Landscape perception", deals with different issues: how visitors and people coming from outside see and feel landscape; how to take advantage of landscape ("Recreation potential" for example); how landscape can inspire for performing arts or cultural activities ("artistic significance" or "aesthetical quality"); how to look at a scenery quality, which is often much more subjective, and the way to input, or not, a sense of landscape grandiosity ("monumentality"). Of course the weights considered (Table 1) come out from the authors' long

experience and field work.

These intangible heritage criteria included in landscape evaluation allow debating the following matter: landscape does not mean only natural and built heritage but also an intangible domain, a discussion still in an ongoing process. Approaches can be quite different. Harmon (Harmon, 2004), for instance, organizes part of his presentation around what he calls "peace values" stressing the importance of landscape as an intercultural space, where civic engagement is better perceived; in the other hand he stresses also the tourism attractiveness of each landscape. This example shows how even the glossary is not yet stabilized; this author points out the importance of a quite interesting element viewed from outside, he calls it the "protective impulse". Here the motivation of safeguarding "special places" full of intangible values became a real movement concerning the perception of the landscape regarded from our urban civilization.

5 EVALUATION OF THE LANDSCAPE HERITAGE VALUE THROUGH SCIENTIFIC CRITERIA

The need to evaluate cultural landscapes in terms of heritage is considered by the European Landscape Convention "recognizing that, in a community and personal context, the most ordinary-looking landscape can be filled with values" (Fowler, 2006). Between these values, the heritage ones must be estimated according to specific hierarchical methods.

The establishment of such methods for landscape is desirable for land planning purposes since the priority order ranking of the landscapes heritage value can be very useful. This is especially important for landscapes conservation purposes in a context of scanty budgets. In fact, to set priorities can be a useful tool to help decision makers as, for example, to establish monitoring priorities.

Since several criteria can be used to estimate the landscape heritage values, the authors have proceeded to a selection of criteria and proposed for each of them a weighting coefficient in accordance with its relative importance (Table 2). This is indeed a very delicate matter due to the subjectivity and contingency of most of the judgments (Mason, 2002). Then the criteria and related weighting coefficients should be selected following a broad expert debate combined with the theoretical context (Capelo et al., 2011a and b). More precisely, the value of each coefficient should be established on an experimental basis and through successive brainstorming tables. In this respect, a simple and practical strategy to select the weighting coefficients is presented in this paper below. Thus, simple semi-quantitative methods can be used, as the linear combination function, a methodology developed by the authors since the Eighties, mainly in the framework of environmental impact studies (Mascarenhas et al. 1989; Mascarenhas 1995; Barata & Mascarenhas 2002; Capelo et al., 2011a and b).

To test these methodological issues, the landscapes described above were used as case-studies (Table 2).

Five classes of criteria evaluation (High; Medium-High; Medium; Medium-Low and Low) were considered and the value of each indicator was estimated for the two landscapes. Using a general scale of values (convenience scale), a numeric value was assigned to each class, allowing the linear function application and the Global Indicator value (Y) estimation: allowing the linear function application and the Global Indicator value (Y) estimation:

$$Y = \sum_{i=1}^{n} a_i \cdot X_i$$
 (1)

where n - number of criteria; a_i - criterion i weighting coefficient; and X_i - value concerning criterion i.

Table 2. Heritage valuation of the landscapes study-cases.

	Weighting	Nº Evaluation	Evaluation (Xi)	Evaluation (Xi)	Montado	Douro
Criteria	Coef (ai)	Classes (Xi)	Montado	Douro	ai*Xi	ai*Xi
Built heritage	16	5	ML	MH	192	448
Natural biotic heritage	16	5	MH	L	448	64
Natural abiotic heritage	16	5	L	L	64	64
Rarity	6	4	MH	MH	150	150
Antiquity	6	5	M	ML	120	72
Scientific potential	16	3	Н	L	534	107
Recreation potential (*)	1	3	H	H	33	33
Pedagogic potential	3	3	H	Н	100	100
Historic record	3	3	Н	Н	100	100
Conservation/Protection statute	6	2	Н	Н	180	180
Identity importance (*)	16	3	M	Н	320	534
Spiritual or religious importance (*)	6	2	L	L	60	60
Historic importance	6	2	Н	Н	180	180
Artistic significance (*)	3	4	Н	Н	105	105
Civic importance (*)	3	2	H	Н	90	90
Social value (*)	16	3	H	Н	534	534
Political value	1	3	н	Н	33	33
Engagement of local people (*)	6	2	L	Н	60	180
Legal provisions	6	3	M	M	120	120
Therapeutic value	1	3	H	L	33	7
Coherence degree	16	3	M	Н	320	320
Conservation degree	6	4	MH	ML	150	90
Aesthetical quality (*)	3	3	M	Н	60	100
Monumentality (*)	1	2	L	Н	10	30
Range	1	4	H	ML	35	15
Craft - or work - related value (*)	6	3	н	Н	200	200
Public interest	1	3	M	Н	20	33
Heritage Value (%):					60	54

^(*) Intangible heritage criterion

A relatively accurate and practical strategy, based on our experimental work developed in recent decades, was applied for the selection of the weighting coefficients (Capelo et al., 2011 b):

- 1) The coefficients are related with the criteria importance;
- 2) Four is a convenient number for the weighting coefficient levels;
- 3) General rule: The half of the sum of the values of each level should be higher than the sum of the values of the immediately below level, i.e.:

$$\frac{\sum \text{[Weighting Coef]}_{\text{level } j}}{2} > \sum \text{[Weighting Coef]}_{\text{level } j-1}$$

4) The final decision on the weighting coefficients should be taken by a set of experts.

After the conversion of Σ a, X_i to the 0-100 scale, the Global Indicator Value for each land-scape could be estimated.

6 RESULTS, DISCUSSION AND CONCLUSION

The heritage values obtained for the *montado* landscape and the Upper Douro terraced landscape are very close, despite very contrasting results regarding some criteria as the *Natural*

Abiotic Heritage, Scientific Potential, Engagement of Local People, Therapeutic Value and Monumentality (Table 2).

For both landscapes, the global heritage values set around 55%, which is rather relevant. Also, this estimation is regarded as deeper than the previous ones (Capelo et al., 2011a, Capelo et al., 2011b), on the one hand because more evaluation criteria were applied have been extended (especially the ones of intangible nature), and on the other hand because for the first time, four weighting classes were used. The heritage values found are slightly lower than the ones calculated in previous tests (Capelo et al., 2011a; Capelo et al., 2011b), which is not surprising as the global heritage value tends generally to decrease when the number of evaluation criteria increases.

This integrative methodology which is being developed is just one within a large panorama of other possibilities as, for instance, the conceptual model of Janet Stephenson based on a "linkage between contemporary theory on landscape, space and time with the range of ways in which insiders and disciplines express what is important to them about landscapes" (Stephenson, 2008). The same linkage is found in the methodology proposed by the authors, through the collection of criteria and their mathematical integration, easy to understand and to apply by non specialized persons, although it is convenient to turn to experts regarding the estimation of some thematic aspects.

Finally, it is important to assess / appraise globally the question of the link between the intangible heritage and the landscapes. Experts from different areas have been approaching this problem. In our case, the first concern was to estimate the value of the built heritage structures, a stand due to our intervention in several environmental impact assessment projects; then, for the same reasons, our studies were extended to the need of evaluating the heritage value of the landscapes, required by an increasing number of land planning actions, with a variety of purposes. Over the last few years, the authors have been members of a UNESCO Chair, dedicated to the intangible heritage and related to more and more projects for developing this kind of heritage, which led them to give a special attention to it as a value of the landscape itself.

Of course, not everyone has arrived to the intangible heritage in the same way. Several authors were concerned by the legal issues in applying the 2003 UNESCO Convention (Lixinski, 2011; Lenzerini, 2011), others, namely with a background in economy (Dümcke & Gnedovsky, 2013), were more interested in the practical aspects of the problem, that is in estimating the advantages which could be obtained from the exploitation of the intangible resources.

In a word, it is worth observing that this recent process has not yet allowed establishing an analysis structure accepted by all when the intangible heritage is to be identified. The work of Janet Stephenson (Stephenson, 2008) above mentioned is relevant, but debates less about the practical problems of intervention and more about the need to create analysis models. So, the variety of perspectives is presently very important, and the process ongoing.

It's easy to understand that such a work needs the cooperation of expertise coming from quite different areas. It's impossible to deal with this kind of information with a unique scientific profile. This, the real domain of cooperation and multidisciplinary field and interpretation work. Anthropologists, landscape and heritage experts, biologists, historians, geographers and many more have a large cooperation platform here. According the criteria we have point out in this paper and if landscapes were built up in such a complex way, analysis became also complex to evaluate each one of them. This is the case of the authors of the paper.

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ACKNOWLEDGEMENTS

This work was financed by FEDER funds, under the COMPETE2020 and the Portugal2020 partnership. agreements and by national funds FCT/MEC - Foundation for Science and Technology, under the CI-DEHUS-UID/HIS/00057/2013 (POCI-01-0145-FEDER-007702) project. The authors thank also:

- . the Cerâmica Aleluia that have made available the tiles panels photographs of the Pinhão railway sta-
- . Dr. Manuel Casa Branca for authorizing the publication of the oil on canvas Quercus suber; 2H; 45; Carias; 2011 (work in progress/detail);
- . Mr. Luís Mexia de Almeida that have allowed visiting Tera farm and authorized the publication of the Figure 7.