

The Brazilian Fortress of São José da Ponta Grossa

The Challenges of Restoring and Providing Accessibility

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Abstract

Located on the northern part of Santa Catarina Island, this fortress formed one of the strategic vertices of a defensive triangle with the Fortresses of *Santa Cruz de Anbatomirim* and *Santo Antônio de Ratones*. Conceived in the 18th century by Brigadier José da Silva Paes, the first governor of the Captaincy of Santa Catarina (1739–1749), it defended Portuguese dominions in South America against Spanish threats. By the late 19th century, the fort had deteriorated into ruin, receiving restoration efforts only from the mid-20th century onwards. Officially listed as national heritage in 1938, it was among the earliest sites protected by the newly founded IPHAN (National Institute of Historical and Artistic Heritage). This recognition was due to its historical, architectural and archaeological significance, even though it was partially ruined at the time. The structure, built from stone, sand, shells, and lime, exemplifies the robust defensive architecture of its era. Currently, the site is managed by the Federal University of Santa Catarina for cultural and educational purposes. A recent restoration project, completed in 2022, aimed to provide use to all buildings and ensure universal accessibility. A particularly complex undertaking due to the fort's hilltop location, its three-tiered terracing, and the enclosing defensive walls. The intervention prioritised minimal, reversible, and sustainable interventions, ensuring that contemporary additions harmonised with the original construction while accommodating modern usage requirements. The restoration sparked debate, mainly over the decision to maintain the varied external finishes, with some surfaces left plastered and others exposed in their original state, as found. The project, carried out by IPHAN, restored the complex as more than an open-air museum, featuring exhibition areas, space for traditional lace-makers, a cafeteria, and public facilities. The project revitalised the fortress as a dynamic cultural hub, striking a balance between conservation and contemporary use.

Keywords: Heritage Restoration, Fortress Reuse, Accessibility.

Introduction

Constructed in the 18th century alongside two other fortifications (*Santa Cruz de Anbatomirim* and *Santo Antônio de Ratones*) to form a defensive triangle for the north of Santa Catarina Island, the Fortaleza de São José da Ponta Grossa aimed to defend the Portuguese colonies in southern Brazil. It served as a strategic base for maintaining Portuguese dominion over the disputed *Colônia del Sacramento*. In 1777, the Santa Catarina island (present-day city of Florianópolis) was, in fact, captured by the Spaniards and was restored to the Portuguese approximately a year later, following the Treaty of San Ildefonso. By the mid-19th century,

reports already indicated signs of the structure's ruination (Souza, 1885, 123). With a built area of approximately 1,200 m², the fortification was constructed on three distinct terrain levels. At the highest level are the Commander's House, a two-storey building adjacent to the Gunpowder Storage, and the Chapel, dedicated to Saint Joseph, the patron saint of the site. The Chapel is the only building that still maintains its original function. The intermediate terrace houses the second line of cannon batteries, as well as the Troop Barracks building, a structure joined to the Flour House (provisions depot) and the Troop Kitchen. On the third and lowest terrace are the remains of the old Palamenta House and two sentry watchtowers over the respective stone-carved basins, projecting from the corners of the walls, in addition to the first cannon battery. The fortification was constructed in stone with lime mortar and shells. Although the whole structure originally featured covering, after its ruin, most of this plaster was lost. As a result, its current walls are predominantly made of exposed stone, although there are also sections that are plastered or constructed with solid bricks. The openings are made of wood and glass. The site has been used as an open-air museum since the Federal University of Santa Catarina (UFSC) began administering it in the 1990s, albeit with virtually no infrastructure. Despite being abandoned and in ruins at the time, it was listed as a national heritage site by IPHAN (National Institute of Historical and Artistic Heritage) in 1938. Efforts were made to restore this property towards the end of the 20th century. In the 2010s, substantial measures were implemented, culminating in a major intervention in the 2020s. This final intervention will be examined in greater depth in this study, as it aims to redevelop the entire area to revitalise it, enhance existing functions, and introduce new, dynamic uses, enabling the space to be rediscovered by the community and utilised more regularly.

History of Conservation and Intervention Guidelines

Since the listing in 1938, the fortress was already in need of restoration, adaptation, and utilisation. In the 1970s, a first attempt was made to reclaim the space, beginning with the clearing of vegetation. Since it had been abandoned for years and was overgrown with vegetation. Nonetheless, it was not until the early 1990s that the building underwent its first major restoration. Since its original defensive function became obsolete at the end of the 19th century, the site was reconfigured for museum purposes and placed under the custody of UFSC. After this initial restoration, conservation measures were limited in the subsequent period. As a result, decades later, the assets again required restoration measures, in addition to the need for more active use.

In 2014, projects were commissioned for the comprehensive restoration and revitalisation of the entire area. These projects were comprehensive, covering not only the preservation of the buildings, as in the initial restoration, but also including all the necessary initiatives to give the site a new, dynamic, improved, and attractive function to promote asset valorisation. Therefore, the projects involved new interventions to incorporate essential services, along with all supporting works for electrical installations, lighting design, plumbing, drainage, and more, as well as accessibility, landscape revaluation, faunal surveys, exhibition planning, indicative signage, and archaeological monitoring. The aim was to transform the site into more than an open-air museum, but rather a well-equipped, accessible, appealing space with high-quality exhibitions and essential amenities. In the 2020s, when the projects were completed, the site underwent its most extensive intervention to date. This study focuses on

this intervention, which required the establishment of precise restoration and conservation guidelines aligned with internationally recognised heritage charters and conservation principles and entails a proper use of each space.

During both the project elaboration and the works, numerous idea exchanges occurred between IPHAN staff and the representatives of the hired teams to discuss and define procedures, following contemporary restoration theories and international charters. The project aims were to improve the contemporary use of heritage, achieve valorisation, and enhance the attraction exerted by the good. A key point addressed was the promotion of accessibility, an extremely challenging endeavour for a listed property, and even more so for a fortification designed to be inaccessible (Fig. 1)¹.



Fig. 1. Fortress of São José da Ponta Grossa, Florianópolis, Brazil. (UFSC Fortresses Collection, 1999)

The restoration concepts adopted are outlined in the project report (*memorial de projeto*): reversibility of additions, minimal intervention, conservation of original materials (maintaining authenticity), distinguishability, and the use of traditional techniques wherever possible. Reversibility was chosen as the principal characteristic for all additions, ensuring minimal intervention on existing structures while providing new utility to the place without compromising its original visual identity (Prospectiva 2019, 42-43). Consequently, the assumed solution privileged maintaining the state in which the property was found, restoring the existing structures and coatings as they were, even if this resulted in a diversity of finishes. To make this possible, a complete architectural survey with a point cloud was performed, showing the building's layers and mapping overlapping layers.

Some scholars advocated restoring the plasterwork on all buildings, painting it white, to protect the structure in an aggressive maritime environment and ensure greater durability. Then, a digital simulation was developed, showing a plastered fortress painted white,

which was shared among stakeholders, creating a sense of strangeness and a feeling of not belonging, considering that, since the early 20th century, the property has remained predominantly finished in exposed stone. The image of a white fortress only exists in very old photos, not in people's memories. And heritage, above all, is a social construction involving a range of values, meanings and understanding about an asset, as defended by Smith (2006, 11-13). Furthermore, the concept of returning to a previous stage of the good has already been overcome.

«The meaning of the word 'restoration' in the field of conservation has shifted from its common definition of returning something to a previous or original state. Today, restoration is associated with actions that respect works in the condition in which they have come down to us, with all their layers and transformations, while keeping both the present and the future in view»² (Kühl 2016, 1).

Muñoz-Viñas adds that restoration should be done for the users, not for the experts:

«Conservation is performed for those people for whom the objects are meaningful, and it is because of them that so many delicate operations are performed, so many efforts are taken, or so many resources are employed in that complex set of operations we call conservation. Their interests (their needs, their preferences and their priorities) should thus be considered as the most important factor when it comes to decision-making, regardless of their training. Their authority derives not from their level of education, but rather from their being directly affected by the actions that others perform upon objects that are meaningful to them» (Muñoz-Viñas 2011, 170). Another considered option was to leave the entire Fortress in exposed stone masonry. Ultimately, the adopted solution was to maintain the existing layers, consolidating and restoring them, thus neither erasing the marks of time nor the characteristics still present in the building. This resulted in buildings with parts constructed in exposed stone masonry, parts in exposed brick, and parts with masonry featuring rendering (Fig. 2). It was a distinct solution from the usual, yet grounded in preserving the historical characteristics of the property. Moreover, the project team criticised the fact that the property had a use that was almost solely contemplative. Thus, as a project guideline, it was decided to insert new, fully accessible uses, such as a cafeteria and toilets to serve the public visiting the space, considering potential events that might occur there. In addition to qualifying some space for the practice of *rendeiras'* knowledge, an intangible heritage of the place, and the commercialisation of their products, the *rendas de bilro* (bobbin lace), alongside enhancing the site with a contemporary expographic project. (Prospectiva 2019, 41). All new insertions followed the principles of reversibility, distinguishability and minimal intervention.

Key Interventions and Major Challenges

In inserting new uses, the latest interventions aimed to be perceptible without standing out excessively, simultaneously neither damaging nor blending in with the existing buildings. The new cafeteria, for instance, was located inside the old troop barracks and was entirely assembled using an autonomous structure painted white to differentiate it, which was overlaid on the original building's walls and floor. This structure houses water and electrical piping, all of which were easily demountable and removable. The new volume containing public toilets was implanted at the side of the same building without touching, blending with, or overlapping it, and is completely reversible and distinguishable (Fig. 2).



Fig. 2. Distinctive troop-barrack plasterwork; at left, the toilet's new light-brown volume at the Fortress. (Liliane Nizzola, 2023)

The same approach was used to install the covering at the main entrance, where several LED luminaires at different heights were employed to mimic the shape of the previously existing archway covering, evoking its memory. At the top, a metallic structure creates a flat and permeable roof, finished with expanded clay (Fig. 3). Although these solutions were very suitable and distinctive, they were not the greatest challenge. The biggest challenge was making the site accessible and ensuring it could be used inclusively. Fortifications are designed to be impenetrable and, therefore, not attacked, which makes them difficult to adapt. This is an added hurdle in transforming a site meant to stay isolated into something that is accessible, integrated with the local community, and used daily. Before the intervention, the site's main entrance was not universally accessible and still is not. To address this, an alternative route was created that provides access to the property without causing damage, while taking advantage of the natural slopes of the terrain. Prior to this route, a car park was introduced, from which visitors can proceed towards one of the two entrances to the fortification. As described by the accessibility project authors, from the main square, the visitor will find two alternatives to access the fortress: to the right, via the path that skirts the wall, and to the left, via the centenary trail. The first presents, as recommended by the IPHAN technical team, an elevator tower for access to the upper terrace and a complex of ramps and stairs slightly elevated above the ground, constructed in a steel structure with a floor made of *cumaru* timber (Studio Barra, 2018, p. 3). It was targeted at allowing access to the intermediate and lower terraces through openings to be made in the fortress wall (Fig. 4). Each building has independent access ramps, also in a metallic structure and timber planks. The aim was to use materials and colours that would simultaneously distinguish themselves from the building without standing out excessively. Thus, natural materials and earthy tones were used for the ramps, the elevator, and the new building. Universal accessibility, combined with reversibility and minimal intervention on the property, served as the guiding principle for the accessibility proposal. Ensuring accessibility was the most challenging issue to resolve and, perhaps, the most significant achievement of the project.



Fig. 3. New cover created at the main entrance of the Fortress. (Liliane Nizzola, 2023)



Fig. 4. The ramps and lift providing access to the Fortress. (Liliane Nizzola, 2023)

Towards heritage valorisation and its inclusive use

Societies must decide how to give meaning to their inherited heritage and adapt it to contemporary needs. Reconciling contemporary uses with the conservation of listed properties is always a challenge. This project, therefore, sought not only to implement new functions but also to promote social activation through use and accessibility.

Considering the significant number of *rendeiras* (lace makers) residing in the vicinity of the Fortress, their inclusion through the provision of a dedicated space for the production and commercialisation of their handicrafts constitutes an effective strategy for engaging a key segment of the local community. This approach is particularly relevant given the cultural importance of *rendas de bilro* (bobbin lace) and the intrinsic relationship between this form of intangible cultural heritage and the tangible heritage represented by the site.

Furthermore, the capacity to host events supported by adequate reception infrastructure, made possible through the incorporation of essential facilities such as sanitary amenities and a cafeteria, has enhanced the appropriation and comprehensive appreciation of the heritage, especially by the local community. This has enabled the organisation of a wide range of activities, including celebrations, musical and university events, concerts, lectures, weddings, and photographic sessions, among others.

The new project has revitalised the site, introducing an active and dynamic dimension that fosters community engagement and substantiates the distinction between preservation and appreciation. While preservation ensures the safeguarding of the site, appreciation transforms this former military space into an environment that extends well beyond the concept of an open-air museum. Rather than serving solely as a place for understanding the past and observing a fortification, it has become a living space where contemporary social and cultural life unfolds.

As noted, preservation alone does not ensure the continued use or long-term sustainability of a heritage asset. Valorisation, on the other hand, could be more effective in this arena, as articulated in contemporary heritage management theory, extends beyond the safeguarding of material structures to encompass the activation of social, cultural, and economic values. In this sense, it provides a more effective framework for reinforcing the relevance, use, and sustainability of heritage sites over time.

This distinction is also formally embedded in some national legislative frameworks. In the Italian Constitution, both concepts appear, *tutela* (safeguarding) and *valorizzazione* (valorisation), in Article 117. In addition, the *Codice dei beni culturali e del paesaggio* (Legislative Decree of 22 January 2004) defines *tutela* in Article 3 as consisting of actions to ensure the identification, protection, and conservation of heritage for public enjoyment. It also introduces the concept of *valorizzazione* in its sixth article. This statute stipulates that valorisation must be compatible with the protection of cultural assets and actively encourages its implementation by private agents as well as public bodies. The concept's significance is underscored by its appearance sixty-six times throughout the text of the code.

By contrast, the Brazilian Constitution refer only to heritage safeguarding. And the foundational Brazilian protection legislation (Decree-Law No. 25/1937) does not incorporate the concept of cultural heritage valorisation, focusing instead on the core tenets of protection and preservation. The same occurs in the *Portaria* IPHAN No. 375, of 19 September 2018, which established the material cultural heritage policy of the IPHAN and defines just heritage protection, what should happen through instruments such as listing, registration, valuation, and export bans.

What is more, in the Brazilian heritage field, it is frequently assumed that preservation, interpreted in its broadest sense, inherently encompasses valorisation. The interpretation is summarised in the following view:

«The word preservation is used here in its broadest sense, which includes not only various forms of legal and physical protection of cultural heritage (listing, expropriation, etc., etc., etc.), but also conservation, restoration, rehabilitation, etc.), as well as identification (research, documentation, analysis) and valorisation (mainly through use and guarantees of social enjoyment)³» (Meneses et al., 2006, 35).

However, valorisation is a key mechanism for achieving enduring preservation. Italy formally incorporated this principle into its legislative framework decades ago, providing a useful reference for Brazil. The preservation of heritage, whilst fundamental, does not in itself ensure the continued use or long-term sustainability of a cultural asset. Valorisation, by contrast, is the process which effectively enables this outcome. One can conclude that preservation and valorisation constitute distinct, though complementary, dimensions of heritage management.

Although Brazilian law lacks explicit guidance, the project described herein has pursued the valorisation approach. It operates within a paradigm wherein the asset enhancement is understood as a process that fosters society engagement with cultural heritage, improving appropriation, reinforcing its associated identity, and promoting its economic and social function alongside its contemporary significance and use.

Notes

1. This author was the manager of the projects (2014) and works (2020) contracted by IPHAN, monitoring them from 2014 until the end of 2021. Much of the information provided here is based on the day-to-day monitoring of the projects and restoration works.

2. Free translation.

3. Free translation.

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