



# POLICY RECOMMENDATIONS FOR TOURISM TO BE A TOOL FOR INCLUSIVE AND SUSTAINABLE TERRITORIAL PROJECTS IN MARGINAL AREAS

April 2024

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## INTRODUCTION

While the harmful effects of over-tourism are recognised and are the subject of redoubled vigilance, the virtues of a well-managed tourism strategy in contributing to the livelihood of a region are now recognised, especially when it takes account of cultural heritage. Sustainable cultural tourism can be defined as *'the integrated management of cultural heritage and tourism activities in conjunction with the local community, creating social, environmental and economic benefits for all stakeholders in order to achieve tangible and intangible cultural heritage conservation and sustainable tourism development'* (European Union 2019, p. 8).

In this policy brief, we explore **another dimension of integration** than the one defined above, namely **the integration of tourism activity with the other socio-economic activities in the area, focusing on two needs: on the one hand to strengthen social cohesion, and on the other hand to contribute to the preservation of living conditions** at a time when the effects of climate change – considered here not only as the global warming but also including all the aspects of the entrance to the Anthropocene – are increasing from year to year and are forcing a thorough review of the relationship between humans and their living environment. In doing so, the approach developed considers the **urgency of 'landing'**, as formulated by Bruno Latour (2018). Because of the integrated approach to tourism developed here, the recommendations are aimed at a wide range of stakeholders.

- Some of them concern **stakeholders locally involved**, whether local authorities and other local public organisations or socio-economic stakeholders in all their diversity.
- **At the intermediate level** (regional and national), we are targeting the public and private organisations that define and implement the public policies concerned (tourism, culture, biodiversity, agriculture and rural development, etc), as well as training bodies.
- **At the European level**, the note is aimed at decision-makers of policies to support territories, the economy and technological development.

While the action research developed by INCULTUM has focused primarily on rural and marginal areas, many of the recommendations are relevant to all types of areas, including those already heavily, or even overly heavily, involved in tourism.

The recommendations presented in this policy brief should be read in conjunction with those presented in INCULTUM's first Policy Brief (Coppin *et al.* 2022).

### The political context: the ecological emergency

Started in the context of the COVID-19 pandemic, INCULTUM has adjusted its ambitions to take account of the new situation, which is reflected in the **increasingly harmful effects of the climate crisis**, and which makes it an absolute priority to adapt to this situation, to preserve the habitability of the planet and each of our living environments through a resolutely ecological attitude: reducing greenhouse gas emissions, saving biotic and abiotic resources that are being depleted, restoring and adapting living environments to the new climatic conditions. This attitude should also, indirectly, help to mitigate the conflicts caused by the increasing scarcity of resources and the deterioration of living conditions on a global scale.

**After growing exponentially in the second half of the 20th century, tourism must radically reinvent itself in order to reduce its ecological footprint, promote intercultural dialogue, contribute to the well-being and raise awareness of the vital issues of the Anthropocene.** The need for this reinvention is gaining increasing support, reflected in a new form of demand that has exploded since the start of the pandemic and is reflected in the growing popularity of local tourism, which is both green and serious-minded.

At European level, public policies such as the Green Deal measures are incorporating these new requirements in an increasingly systematic and precise way, by implementing the sustainable development objectives adopted by the United Nations in 2015.

### Targeted areas and communities

INCULTUM has focused on rural areas that have become **marginalised from economic activity over the course of the 20<sup>th</sup> century**, as evidenced especially by a significant fall in their population, which continues in some cases at a sustained rate at the beginning of the 21<sup>st</sup> century.

This marginalisation is correlated with a mountainous or insular geography, isolating these areas from inter-regional communication routes and the accelerated technical revolution in agriculture since the middle of the 20th century. Today, **the result of these shared geographical and historical conditions is a socio-economic situation that has many points in common**: low population density, an economy that is not very dynamic, particularly in the services sector, and, conversely, landscapes that have been preserved in the sense that they have escaped the trivialisation associated elsewhere with the economic development of the 20<sup>th</sup> century (standardised housing and farming practices, omnipresent road infrastructure, etc). The fact that the technical revolution in agriculture has not been completed in these areas has also resulted, to varying degrees, in a form of resilience linked to the preservation of the population's strong attachment to the place where they live and their traditional know-how.

The areas in question are also marginal from the point of view of tourist appeal, in the sense that they do not have an emblematic point of attraction (monument, imposing landscape) which, conversely, has spared them the after-effects of tourism over-exploitation.

### The key idea: considering heritage and landscape as a territorial common

The key idea behind INCULTUM is that **the heritage of a territory, considered as the set of reasons for attachment shared by its inhabitants, can become a real common** in the sense in which it has been understood since the work of Elinor Ostrom (1990), i.e. **a resource** managed collectively **by a group** (the community) by means of **rules**.

In the case of a resource embedded in a territory, we speak of **a territorial common** and a territorial heritage community, these concepts fitting in those of *cultural heritage* and *heritage community* within the meaning of the Faro Convention (Convention 2005).

In our view, one key to the success of a local project is **to work on the scale of an area that generates a strong attachment shared by its inhabitants**. By attachment, we mean an emotional factor that translates into a feeling of loss if the reason for attachment deteriorates or disappears.

Taken together, **the shared reasons for attachment can also be considered as the constituent elements of a landscape**, as defined by the European Landscape Convention: "an area, **as perceived by people**, whose character is the result of the action and interaction of natural and/or human factors" (Convention 2000).

From an operational point of view, the aim is to implement **the landscape approach**, which we define as follows, drawing on the work of the French *Paysages de l'Après-Pétrole* collective: a collective process in which everyone's opinion is taken into account, in which the specific nature of the area is the starting point, the ecological substratum and the historical continuum the foundation, and which is capable of devising complex projects in which attachment to places feeds their capacity for sustainable development.

**The landscape approach is effective because it embraces the different physical components of an area, as well as the way it is inhabited and the sensitive experience of its inhabitants. In this way, it mobilises people and enables a holistic approach to the issues facing an area.**

In the spirit of the Faro Convention, living in a landscape that inspires attachment is also the right of every individual, all the more so as attachment to one's living environment is recognised as an essential factor in personal well-being (Council of Europe 2006).

This landscape-based approach is in line with that advocated by the Italian territorialist school, for whom **the challenge is to relearn how to inhabit places by drawing on their specific characteristics**, as advocated by the proponents of bioregionalism in the 1970s, or in other words **to reterritorialize territorial management policies** that, since the mid-20<sup>th</sup> century, have seen territories as little more than an undifferentiated substrate designed to accommodate the developments of modernity (Magnaghi 2010).

#### **The scenarios tested by the ten INCULTUM pilots (#)**

Each pilot project highlights heritage motifs that could serve as a basis for making the area concerned attractive to tourists. In most cases, these motifs are physically marked in space; they are also more or less closely associated with traditional skills or practices that are now being undermined by modernity, or even threatened by their disappearance of human memory.

It is no coincidence that most of these **motifs take the form of networks**, whether local, transhumance or transregional. These networks of routes for people, animals or water were assets used and managed collectively by rural communities, usually according to unwritten rules but were the result of usage. In this respect, they were real commons, the reactivation of which is conducive to the development of collective projects, as well as being ideal itineraries for exploring the area on foot or by bike. The pilots concerned are therefore placing the development of tourism within these networks at the heart of their action.

For pilots whose heritage theme is not a network (mining heritage, for example), the design of discovery itineraries nevertheless remains central to the projects, since **it is the organisation and staging of visitor movements that are considered crucial for the development of tourism in the areas**, according to a strategy quite different from that of "hot spots", which consists of keeping tourists in an emblematic place as long as possible in order to increase their consumption.

#### **The sustainable tourism wheel, a modelling tool**

**The ambition of INCULTUM is to transform the concept of tourism from a consumer product into a tool for social and territorial cohesion. To do so, INCULTUM subscribes to the quintuple helix model to describe desirable innovation at a time of socio-ecological transition, with a view to foster "the formation of a win-win situation between ecology, knowledge and innovation, creating synergies between economy, society, and democracy" (Carayannis et al. 2012).** This model envisages five sub-systems that need to be considered in a concerted manner to ensure the future of a socio-ecosystem: the political system, the education system, the economic system, civil society and the natural resources. The way to articulate the sustainable evolution of the five systems is through the circulation of knowledge, seen from an interdisciplinary perspective, where knowledge brought to a sub-system can stimulate that sub-system to produce and inject new knowledge into the system.

This model articulates three approaches: (1) a mapping of the stakeholders in the system under consideration, (2) the stimulation of knowledge exchange between stakeholders and (3) the iterative nature of the system, based on the permanent circulation of knowledge from one sub-system to another.

INCULTUM has drawn on this model to design a **sustainable tourism wheel** (Fig. 1). This wheel meets the iterative requirement expressed in the helix models of innovation: one turn of the wheel strengthens the involvement, skills and contribution of the stakeholders, which, in a virtuous process, means that the next turn can be approached with more favourable initial conditions.

**Each turn of the wheel involves a logical sequence of four stages, each of which responds to a specific strategic objective:**

- stage 1: reveal the common ground and strengthen the community.
- stage 2: organise the management of the common ground and further develop the community.
- stage 3: organise the tourism offer.
- stage 4: market the tourism offer.

Each stage can itself be divided into two operational sub-objectives. The pilot projects were committed to testing actions that contribute to these objectives. These actions are listed at the periphery of the wheel in the logical order in which they are to be implemented, together with the tools and skills that underpin them. These actions have a contextual character, and it is rather through their concerted and coordinated mobilisation that an innovative approach to the management of a tourist destination is expressed.

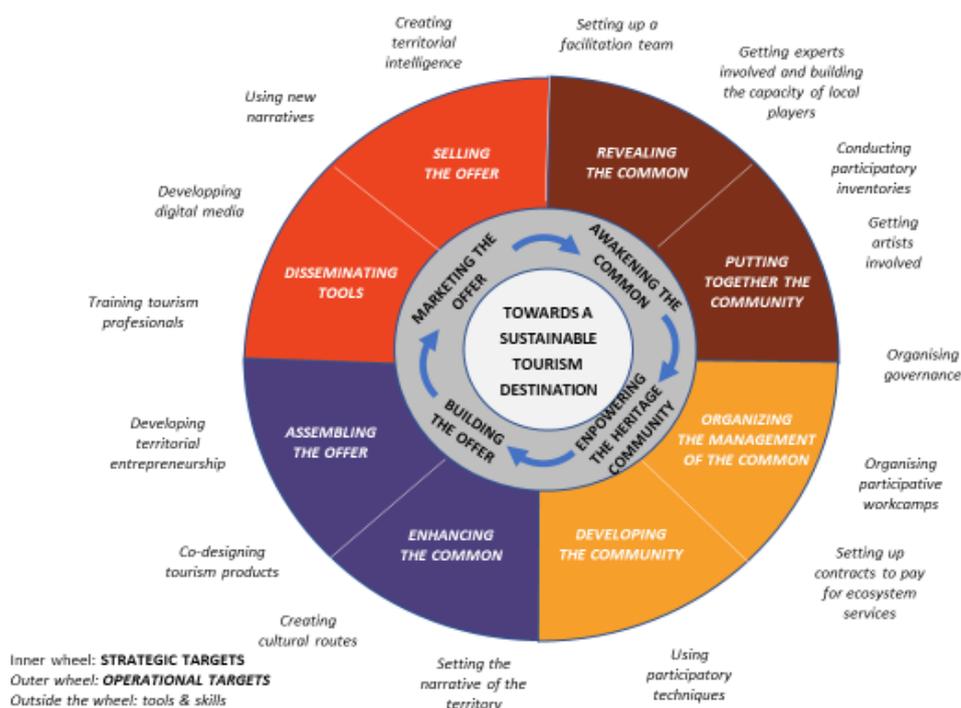


Fig. 1: The INCULTUM sustainable tourism innovation wheel (Coppin & Guichard 2024).

**One key challenge is** to mobilise the expertise needed to drive the process over the long term. This is particularly critical in the sparsely populated areas studied by INCULTUM because they do not produce the resources needed to finance themselves (See in particular Recommendations 1.3; 1.4; 10.2; 10.3).

## POLICY IMPLICATIONS AND RECOMMENDATIONS

The recommendations that follow are set out in the logical order of their implementation during a tour of the sustainable tourism wheel. They are based on an analysis of the avenues of innovation explored by INCULTUM (Coppin, Guichard 2024) and scale of audience reference is also included.

<b>LOC</b>	Stakeholders in the project area: local authorities and other local public organisations, as well as a wide range of socio-economic stakeholders existing in the territory.
<b>NAT</b>	Stakeholders at intermediate level (regional and national): public and private organisations that define and implement the public policies concerned, as well as training bodies.

<b>EUR</b>	Stakeholders at European level: decision-makers in policies to support the regions and their economies, the sustainable economy, the environment, research and technological development.
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These recommendations clarify and expand on certain aspects of the recommendations already made by INCULTUM (INCULTUM first **Policy brief on sustainable tourism** 2022 = Coppin *et al.* 2022; Lisbon conference 2022 - Policy Recommendations by Horizon2020 Sustainable Cultural Tourism Projects = Lisbon conference 2022). They take into account those set out in various recent policy documents and emphasise the subjects that seem to us to be priorities by concentrating on the issues related to INCULTUM's key idea, which is to use heritage and landscape as levers for integrated territorial projects that include a tourism component.

Key guidance documents consulted include: EESCC 2018; EENCA 2018; European Union 2019; Ruritage 2021; UNTWO 2016.

## **Stage 1: reveal the common ground and strengthen the community**

### ***Defining the perimeter of the common and setting up a project management team***

INCULTUM's experience has shown that the project management team plays a fundamental role at every stage of the process: emergence, management, and structuring of heritage communities. This means that a project manager needs to be put in place on a long-term basis, with a range of specific, high-level skills: a cross-disciplinary understanding of the issues facing the area, the role of referee, the ability to analyse complex situations and mobilise the expertise needed to overcome stumbling blocks, the power of persuasion both with regard to the local community and the external bodies on which the success of the approach depends, starting with the administration in its role as guarantor of compliance with the law and guardian of public funding, and last but not least, empathy with the area and its stakeholders.

The crucial issue is therefore to ensure that the management team has the financial capacity to do this on a long-term basis, even though the outlying rural areas concerned do not have sufficient resources to do so. Different approaches therefore need to be combined at the three levels of public intervention to deal with this difficulty. Added to this is the creation of wealth managed in a cooperative spirit according to the model of territorial entrepreneurship, a subject addressed in point 10 below.

Defining the scope of action is also essential, as it is the key to building a solid heritage community of sufficient size to be able to support the initiative, raise the necessary funding and act as a credible interlocutor with the authorities and financial backers.

- *Recommendations:*

1.1	<b>LOC</b>	Decomartmentalise the management of the tourism activity and optimise paid human resources by <b>mobilising project managers with a cross-disciplinary understanding of local issues</b> and by pooling needs between adjacent micro-territories.
1.2	<b>NAT</b>	<b>Develop appropriate training courses</b> for integrated territorial project managers.
1.3	<b>EUR</b>	In policies to support regional development, priority should be given to the <b>sustainable establishment of skills</b> in the regions rather than time-limited expertise services.
1.4	<b>EUR &amp; NAT</b>	Introduce <b>staggered funding arrangements that allow support for local projects</b> to be reduced in stages, allowing time for the organisation to become self-financing.

- *Inspiring experience: The Grands Sites de France network*

*The Grands Sites de France policy was born of the French government's concern, expressed in the late 1970s, to combat the harmful effects of over-tourism on the country's most emblematic*

protected natural and heritage sites. Since 2003, the Grand Site de France label has been awarded by the ministry responsible for landscape policy. The aim of this label, which is renewed every six years, is to encourage local authorities to take responsibility for the sustainable management of their most emblematic sites, going well beyond tourism issues alone. One of the distinctive features of this policy is that it is not prescriptive: applicants are free to define the geographical perimeter of the designated area, to mobilise stakeholders and to organise governance. In this sense, the Grand Site de France approach is a genuine laboratory for innovation in the management of rural areas. Some fifty territories, which welcome a total of more than 30 million visitors a year, are involved in the approach; they are federated within an independent body, the Réseau des Grands Sites de France, which over the years has become a think tank for public policies based on the landscape approach. It shares its experience through an international training centre ([www.grandsitedefrance.com/en/](http://www.grandsitedefrance.com/en/)).

### **Mobilising experts and building the capacity of local players**

When it comes to setting up holistic regional projects, of which tourism is only one component, it is essential to mobilise **multi-disciplinary expertise** over the long term and to create the conditions for strengthening expertise that is firmly rooted in the region.

- *Recommendations:*

2.1	<b>LOC</b>	Create favourable conditions for <b>hosting scientists and students</b> (by taking simple measures such as offering accommodation facilities in local municipalities). At a higher level of ambition, set up project areas as <b>laboratories for territorial experimentation</b> , able to host teams of scientists over the long term for research-action projects that capitalise on their results over the years, making these areas showcases for good practice and privileged spaces for consultation, able to attract public support over the long term.
2.2	<b>LOC</b>	Set up <b>action-training systems</b> that give learners an active role, enabling them to participate in developing questions and methods adapted to their local context, in the spirit of Citizen Science. Identifying <b>resource people</b> in the local ecosystem and relying on their ability to pass on knowledge, with the development of their expertise being a key factor for success.
2.3	<b>NAT</b>	Encourage <b>closer links between university campuses and the surrounding areas</b> . <b>Network territories</b> involved in territorial innovation schemes based on the landscape and heritage approach.
2.4	<b>EUR</b>	Make the <b>mobilisation of participatory mechanisms</b> in the spirit of Citizen Science a requirement for projects receiving support under the Territorial Support scheme and encourage the mobilisation of the Humanities and Social Sciences in projects.

### **Conducting participatory inventories**

**Participatory heritage inventories** are the key to mobilising and connecting people who care about their common heritage.

- *Recommendations:*

3.1	<b>LOC</b>	Include <b>participatory inventories</b> in the calendar of cultural activities and mobilise a competent heritage coordinator and the expertise available in the local community and the scientific world.
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3.2	<b>NAT</b>	Mobilise <b>regional and national heritage inventory services</b> to support communities. Encourage the development of <b>free and opensource digital tools for collecting and sharing heritage elements</b> .
3.3	<b>EUR</b>	Use calls for projects relating to digital uses as a lever to develop tools for collecting and sharing heritage elements that meet the criteria of open science, <b>by promoting free, opensource, collaborative and sustainable solutions that meet the criteria of the digital commons (see also recommendation 12.3)</b> .

- *Inspiring experience: Conducting low-tech participatory inventories*

*In Ireland (#9), one of the goals of Historic Graves was to be low-tech, using accessible (tape, markers, compact cameras with GPS and now mobile phones) or free-to-use technologies (Drupal content management software) to identify the burial grounds and share their location. That was a key factor in building the heritage community. The web platform is a way to expand the territorial link and extend the heritage asset to reach people worldwide, who can feel to be part of the community without actually being in Ireland and without travelling (<https://zenodo.org/records/11066156>).*

### **Mobilising participative approaches and involving cultural and creative players (including artists)**

In a rural context, where the population is sociologically very fragmented, **activating/restoring social links is an essential task** if an inclusive territorial project is to succeed. With this in mind, **artistic mediation is a relevant tool** for establishing dialogue, renewing how local people view their environment and helping to create a shared "narrative" of the local project.

- *Recommendations:*

4.1	<b>LOC</b>	Organise <b>artists' residencies</b> and <b>events involving artists</b> with a view to revealing the reasons for attachment to the heritage.
4.2	<b>NAT</b>	Encourage local players (local authorities, cultural operators, schools) <b>to involve artists</b> in revealing the reasons for attachment to heritage.
4.3	<b>EUR</b>	Make <b>the involvement of artists and cultural players</b> a requirement for projects receiving support under the regional support scheme.

- *Inspiring experience: The use of participatory approaches*

*At Bibracte (#6) and San Pellegrino in Alpe (#5), artistic residencies have been organised in collaboration with the heritage community to create links between local people, gather their perceptions of the evolution of the area's landscapes and collect local stories. At San Pellegrino, these residency programs resulted in the development of a theatrical production which tells the story of the artefacts displayed in the rooms of the ethnographic museum at the pilot site. It also delves into the life of the museum's founder and explores the origins of the idea to establish a museum dedicated to local culture, employing a narrative style; at Bibracte, to the publication of a collection of illustrated booklets, which are a poetic and sensitive way of strengthening the attachment of local people to the area, attracting new visitors and stimulating dialogue and training opportunities for local players.*

**Stage 2: organise the management of the common ground and further develop the community**

#### **Organising governance**

**To ensure the sustainability of a project, a system of governance must be put in place and spelt out, including each stakeholder.** The governance plan is the expression of the rules that the heritage community adopts. Putting it in place is a long-term and largely empirical process. It is

in fact necessary to create a shared vision, not only of what constitutes the common heritage, but also of the legitimate ways in which it is used. As well as the consequences of the actions of some on the uses of others, and the definition of the people authorised to claim access to these uses. And as it is not enough to establish rules "once and for all", but to bring them to life as successive generations and new visitors or residents enter the area, it is important to establish permanent forums for dialogue to ensure that these standards evolve and, above all, that the desire of the members of the community to work together is maintained.

- *Recommendations:*

5.1	<b>LOC</b>	Use participatory approaches to form a structure where actors, through <b>bottom-up processes</b> , become involved and included in the project so as to organise a clear governance structure for the integrated territorial project.
5.2	<b>NAT</b>	Ask regional project leaders, particularly local authorities, and active local communities <b>to spell out the stakeholders involved and the governance adopted</b> , which should complement (or even overcome) the division of public action into competences distributed between public players.
5.3	<b>EUR</b>	Require the promoters of territorial development projects financed by the European Union to provide <b>a list of stakeholders identified</b> when the application is submitted, allow an emerging process where stakeholders can be identified as the project evolves and <b>a governance plan validated by the stakeholders</b> at the end of the project.

- *Inspiring experience: the stakeholders of INCULTUM pilots*

The *INCULTUM Stakeholders map* (deliverable D7.1) presents the preliminary results of stakeholders mapping activity. The map is a "living" document and has been updated during the entire life of the project.

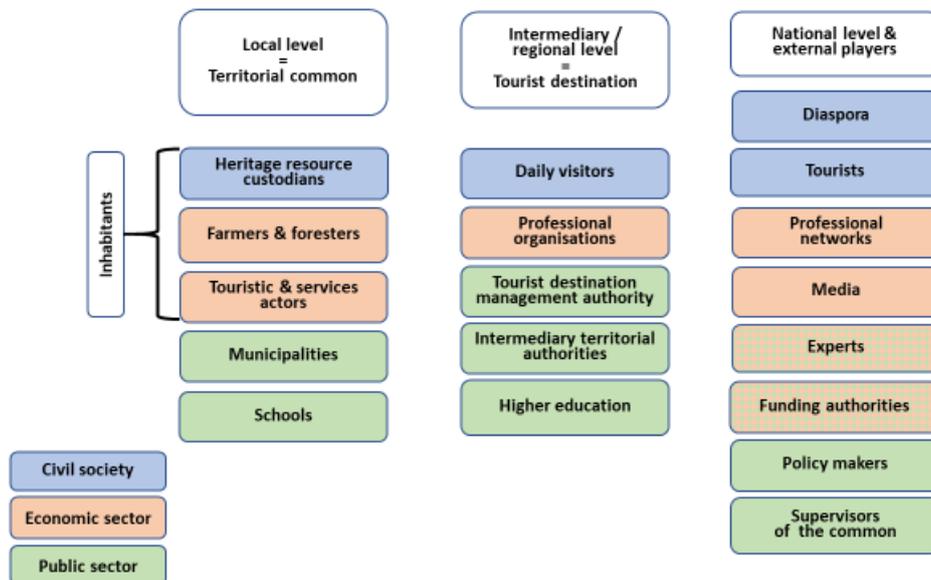


Fig. 2: Typology of the stakeholders identified by INCULTUM (Coppin, Guichard 2024).

### Organising a long-term cultural offering

To involve local residents over time, it is important to anchor the local project in history and over time, in particular through annual events as well as participative heritage maintenance projects or long-term educational initiatives.

- *Recommendations:*

6.1	<b>LOC</b>	Organise regular <b>participatory activities</b> involving local residents and trainees recruited from outside the area. The activities can both emerge locally as well as follow national strategies.
6.2	<b>LOC</b>	Mobilise schools by <b>involving pupils in the collective project</b> : heritage collection days, care and maintenance of heritage features, etc.
6.3	<b>NAT</b>	Facilitate the organisation of volunteer work camps, by supporting organisations that can <b>provide technical and administrative support</b> to local authorities and stakeholders.
6.4	<b>EUR</b>	Create a scheme to <b>help schools to make a commitment to their local heritage</b> , along the lines of the UNESCO Associated Schools Network or by creating a competition to reward inspiring initiatives.

- *Inspiring experience: Organising participative workshops and camps*

*Annual events and rituals such as participatory heritage care and maintenance activities (Bibracte #6, Granada Altiplano #1, Aaos valley #7) or long-term educational initiatives in schools to raise the awareness of different generations (Central Slovakia #3) are useful activities to anchor the local project.*

### **Recognising the role of local players who maintain heritage features**

The upkeep of heritage and landscape is most often carried out by local people for whom it is an integral part of their job, especially farmers. Recognition of their skills and the results of their work, through material support or symbolically, is an important incentive for these participants. This maintenance work can be integrated into a broader definition of ecosystem services, considering that, **by maintaining the traditional components of the inhabited landscape and the associated know-how, we are contributing to the preservation of natural resources and biodiversity.**

- *Recommendations:*

7.1	<b>LOC</b>	Formally recognise <b>the role and expertise of local players involved in maintaining heritage and landscape features</b> . Provide them with in-kind support through formal or informal agreements.
7.2	<b>NAT</b>	Give priority to <b>mobilising local stakeholders, in return for payment</b> , to maintain the rural landscape and heritage, in the same way as ecosystem services.
7.3	<b>EUR</b>	Include the upkeep of the landscape and rural heritage in the actions eligible for <b>agri-environmental and climate measures</b> (AECMs), which form the basis of the second pillar of the Common Agricultural Policy.

- *Inspiring experience: Agreements between local authorities and communities to manage irrigation networks*

*In the Granada Altiplano (#1), traditional irrigation networks are maintained by irrigation channel users grouped together in associations. **Agreements signed** between these associations and the municipalities concerned provide official recognition of the social utility of canal maintenance and of the services provided in terms of water for irrigation and drinking. These agreements are welcomed by the communities, even though they do not provide for payment in cash, but only support in kind, such as the loan of equipment or the provision of labour. The determining factor is symbolic: through such agreements, the communities gain recognition of the value of their work by the local authority and the inhabitants it represents.*

### Stage 3: organise the tourism offer

#### *Telling the story of the region*

Storytelling is a classic – and effective – tool in tourism marketing, when it is used to inspire people to discover a destination by highlighting the uniqueness and "authenticity" of its heritage and landscapes, or the quality of the welcome offered by its inhabitants. INCULTUM has taken a different approach to the subject, emphasising the importance to involve the residents in forming the storytelling through bottom-up and participatory approaches. The target audience for the stories is first and foremost the area's inhabitants, with the aim of sharing with them a positive vision of their region, based on themes and values linked to the management of the community and the way in which the area is inhabited, past and present.

**It is only when such stories are shared within the community that it becomes legitimate to share them with visitors.** It is a way of resonating with the area, but also of **renewing collective representations and imaginations.** By conveying to visitors their attachment to their territory, **heritage communities invite them to consider the relevance of local lore and historically sustainable skills/lifestyles.** They raise visitors' awareness as "temporary residents", of the threats posed by global warming, and inspire them to act to care for and protect heritage resources. "*Understanding the changing nature of heritage can help mitigate the general fear of change and loss of rights that sometimes arise from conflicting local-global narratives.*" (Lisbon Conference 2022).

- *Recommendations:*

8.1	<b>LOC</b>	Gather and promote <b>the views of local residents and cultural actors</b> , particularly those directly involved in maintaining the rural heritage and landscape through their work or their role in the local community.
8.2	<b>NAT</b>	Foster <b>the mobilisation of ethnologists and, more broadly, scientific skills</b> (historians, archaeologists, etc.) to co-create stories about the area to promote it.
8.3	<b>EUR</b>	Ensure the quality of the methods used <b>to build local stories</b> (participative approach, mobilisation of ad hoc expertise) in the areas supported under the tourism development programme.

- *Inspiring experience: Stories collected from heritage communities' farmers form the basis of the story of the area*

*In Campina de Faro (#2), the stories collected (<https://zenodo.org/records/10836640>) from former farmers who are considered to be the **guardians of the area's memory** form the basis of the story map for the new itineraries, which evoke the natural and cultural history of the coastal plain of the Algarve, the use of the old irrigation system, the traditions of solidarity, frugality and adaptation of the farming community.*

*In the Vjosa valley (#8), local meetings bringing together the Vlachs, members of the community, researchers, and local stakeholders aiming at rediscovering the historical narrative of the past enabled to establish familiarization with the Vlach culture and create a local synergy and a sense of solidarity.*

#### **Creating discovery itineraries**

The creation of discovery itineraries in the area, giving priority to soft mobility (walking, cycling), is **an effective way of bringing stakeholders together**, thanks to the diversity of people and organisations involved: local councils, tourism stakeholders, users of the paths in all their diversity (farmers, foresters, hunters, sports enthusiasts, walkers, neorurals, etc.). In this way, the tourism project can be used as a lever to design, maintain and develop new discovery routes, thereby strengthening the heritage community, provided that the approach is carried out in partnership.

- *Recommendations:*

9.1	<b>LOC</b>	Set up a <b>working group dedicated to the discovery of itineraries</b> on offer and build/adjust the offer in a concerted manner.
9.3	<b>NAT</b>	Foster Macro-regions and tourism operators <b>to develop "soft" discovery offers.</b>
9.4	<b>EUR</b>	Study the feasibility of an indicator <b>for measuring the ecological footprint</b> of packaged tourism products.

- *Inspiring experience: Design of discovery itineraries*

*In Central Slovakia (#3) and Sicilian Inland (#4) (<https://zenodo.org/records/10975152>), the design of discovery itineraries to visit the mining heritage sites or along a dismissed railway is at the heart of the project, because it is the organisation and, one might say, the staging of visitor movements that are considered crucial for the development of tourism, according to a strategy that is very different from that of 'hot spots', which consists of keeping tourists as long as possible in an emblematic place in order to increase their consumption. In the Archipelago landscape of Sweden (#10) participatory approaches have been used to design family, historical, and natural heritage itineraries. In the Aaos / Vjosa valley (#7 & 8), the reactivation of a transborder pastoral route formerly used by the Vlach community assisted in mending the two regions' fractured cultural unity and developed an innovative cultural tourism product (<https://zenodo.org/records/10944659>) (<https://zenodo.org/records/10925245>)*

### **Developing the collaborative economy and territorial entrepreneurship**

**The concept of the commons enriches the economic analysis of cultural heritage provided that:**

*"an integrated approach is developed to define the role of heritage in sustainable development, based on three key concepts that combine and interact:*

- *cultural capital - heritage is an asset that produces other goods and services, and it follows that the cultural values it embodies are placed on the same level as the economic values it can generate;*
- *the cultural district, which emphasises the entrepreneurial, organisational and territorial dimension of the production of goods and services linked to heritage assets;*
- *the cultural commons, which opens the door to the consideration of local communities and questions the governance of the various dimensions of heritage as a shared resource". (Bertacchini 2021)*

- **The collaborative economy** is an ideal way of bringing this approach to fruition. It brings together economic activities based on the sharing or pooling of goods, knowledge, services or spaces, and on use rather than possession. It is based on networks or communities of users and aims to pool resources, both tangible and intangible. It is based on horizontal exchanges and generally relies on digital platforms as intermediaries between users (For more information " Participatory Models and Approaches in Sustainable Cultural Tourism". By Kamila Borseková and Katarína Vitálišová (Univerzita Mateja Bela v Banskej Bystrica. In "Visiting the Margins: Innovative Cultural Tourism in European Peripheries", Eds. Borowiecki, Fresa, Civantos. In press).

These initiatives maintain control and autonomy over the management of the commons, and the benefits accrue directly and in a circular fashion to the heritage communities, generating positive impacts. They involve a participatory approach, giving the **heritage community** a leading role.

*"The various theories of the commons have contributed in particular to the emergence of the collaborative economy by formalising the notion of peer-to-peer exchange and community projects, and also by renewing the approach to governance within collective projects... by drawing inspiration from the principles of social utility, democratic governance and controlled profitability of the social economy, [the collaborative economy] is an important lever for transforming society, particularly in terms of the ecological transition and the development of social ties and territorial dynamics." (Avisé 2020)*

**Territorial entrepreneurship**, understood as "an entrepreneurial movement that reinvents new, more collective ways of doing business, with the aim of generating responses in favour of a more rooted, sustainable and inclusive economic development" (Baudet 2017, p. 72), is a relevant form

of collaborative economy for our subject. It can concern a vast field of intervention: safeguarding traditional activities, maintaining the rural socio-economic fabric, adding value to local products, developing new activities, etc. It is an alternative to public action and private entrepreneurial projects. It can take the form of a traditional business, or a legal form derived from the social economy.

Tourism can be seen as an area-based entrepreneurship scheme, providing a genuine lever for **sustainable economic development**. The aim is to inject **the added value of the collective entrepreneurial project into the local area to fuel circular and social economic flows**.

In some of the rural areas considered by INCULTUM, **farmers and local producers are key players in such a scheme**.

An important aspect of innovation is **the hybridisation of economic sectors**, which today suffer from having been specialised since the middle of the 20th century as part of the establishment of the Common Agricultural Policy, with the result that they are increasingly vulnerable to the vagaries of the market and the climate. The priority is to enable farmers (and foresters), who are the "gardeners of the countryside", to enjoy a decent standard of living over the long term. To achieve this, the services and visitor reception sector offers a whole range of agritourism possibilities: food production to be sold in a short circuit on the local market, reception on the farm, and development of a guiding or concierge activity.

- *Recommendations:*

10.1	<b>LOC</b>	Facilitate <b>the involvement of players in the primary and secondary sectors of the economy in the field of services</b> : farm reception, short-line marketing, concierge services, guidance, etc. Mobilise the engineering resources needed to <b>set up and support local entrepreneurial support businesses</b> .
10.2	<b>NAT</b>	Promote the hybridisation of professions, esp. by <b>encouraging sectoral professional organisations to develop concerted actions</b> .
10.3	<b>EUR</b>	Encourage <b>the hybridisation of sectors in the rural world</b> by identifying it as a fully-fledged component of the EU's common agricultural policy. This involves, for example: - extending the <b>Farm to Fork strategy</b> to services and tourism, - develop <b>income support</b> for farmers who diversify into services, - proactively promote the hybridisation of professions as one of the priority objectives of the <b>EAFRD and the LEADER and EIP-AGRI programmes</b> .

- *Inspiring experience: Discovery routes as a catalyst for local entrepreneurship*

*The new cultural discovery itineraries are initiatives that bring the local economy together. The pilots have modelled an integrated approach to the tourism economy, using the concept of "tourism as a tool" to encourage the development of local entrepreneurship and create a local dynamic with a positive social and environmental impact through cooperation between stakeholders.*

#### **Stage 4: Market the tourism offer**

##### ***Training tourism professionals***

Considering shared heritage as **an area for local development, integrating tourism, agriculture, crafts, science and education, means building the skills of those involved in the ecological and social transition and in rural development policies**. This means providing appropriate initial and continuing training.

This is particularly important for mediators and guides in direct contact with the public, who play an important role in raising visitor awareness of the principles of sustainable tourism, heritage preservation, the environment and biodiversity. Their training, including the acquisition of expertise in the specific characteristics of the areas in which they work, is therefore a key factor in the creation of new tourism offers for the pilots.

- *Recommendations:*

11.1	<b>LOC</b>	Encourage the region's economic players to train as tourist hosts and organise a tourist offer that allows them to be paid.
11.2	<b>NAT</b>	<b>Strengthen the training of tourism and mediation professionals</b> in subjects related to sustainable tourism, by encouraging schemes tailored to local players, in particular apprenticeship.
11.3	<b>EUR</b>	<b>Develop continuing training in</b> the tourist reception and service professions, based on the resolution adopted by the Council of the European Union on 29 November 2021 on a new European agenda in the field of adult education and training, particularly with regard to skills relating to the ecological and digital transitions.

- *Inspiring experience: A course on Social Branding for Cultural and Sustainable Tourism*

The online training course **Marketing and social branding for cultural and sustainable tourism destinations** (<https://zenodo.org/records/11002700>) is provided online by the University of Pisa to the partners and other users of the INCULTUM Training Portal. The goal of this course is to provide the participants with the essentials of marketing logic applied to a cultural and sustainable destination, together with the importance of involving the locals in place representation and branding. The course highlights the strategic tools for branding processes, from conceptualisation to branding communication and local community involvement. A double perspective is adopted: the theoretical one to introduce concepts and models, and the practitioners' perspective to provide tools and case studies.

### **Developing digital services**

Digital tools and services are now essential to the development of a form of smart tourism adapted to peripheral areas, while respecting the requirements of sustainability and inclusiveness to which INCULTUM refers.

The tools specifically required for itinerary forms of tourism in outlying areas include systems for evaluating and monitoring visitor flows and, above all, tools to help people get around, making it easier to find and access local resources and services, including through storytelling. In this respect, the INCULTUM experiments have identified a damaging lack of participatory digital mapping tools for heritage commons and resource enhancement, particularly as regards the sharing of walking routes, which is subject to a highly fragmented supply. **There is therefore a great interest in developing tools that fully meet the criteria of the new digital commons**, not only to better share the range of tourist itineraries on offer, but also to list and manage them by mobilising the community of users, whose role could be to assess the relevance of the proposed itineraries. The business model for such tools is that of Software as a Service (SaaS) platforms with cooperative support.

- *Recommendations:*

12.1	<b>LOC</b>	Systematically favour the adoption of free and <b>open software solutions</b> that allow content to be shared and circulated freely.
12.2	<b>EUR</b>	<b>Encourage tourism regulatory bodies</b> to develop free and open shared digital tools.
12.3	<b>EUR</b>	<b>Launch one or more calls</b> for projects under the Digital Europe programme to develop one or more software solutions dedicated to cultural tourism and managed cooperatively by their users.

- *Inspiring experience: Cooperative initiatives to manage cultural and tourist services*

By way of example, here are two initiatives whose philosophy can be applied to the field of rural cultural tourism.

APIDAE enables local authorities to retain control of their tourist data (points of interest, restaurants and accommodation, itineraries, events, offers, etc.), enrich it and distribute it. Service providers (web agencies, service platforms, software publishers, etc.), partners of the regions via their destination management organisations, use the platform to build comprehensive, high-performance information systems. Developed within a regional destination management agency, APIDAE is now an independent cooperative that manages France's largest tourism database. <https://apidae-tourisme.com/>

OMEKA S provides heritage professionals (notably libraries and museums) with tools for cataloguing and publishing cultural objects from collections and virtual exhibitions, and even to collect information from the public, which are now used by thousands of institutions worldwide. OMEKA is operated by a non-profit organisation under US law. <https://omeka.org/>

### Creating territorial intelligence

The use of **strategic intelligence tools** is essential for getting to know visitors, analysing their behaviour and understanding the impact of tourism on heritage resources and avoid negative impacts. What's more, the shared construction of an objective and informed diagnosis combining quantification and perception of tourism makes it possible to create territorial intelligence, particularly in the tourism economy sector.

In a development model for territorial projects where the creation of value is dissociated from the use of common resources, where economic models are based on positive impacts and not on volume and quantity, and where players rely on cooperation rather than competition, **sharing this knowledge with stakeholders guarantees the sustainability of the territorial project.**

Something pilots have learned from INCULTUM is that **the scale of the collected data relating to tourism activity should be deeper to understand how tourism operates at the local scale.**

- *Recommendations:*

13.1	<b>LOC</b>	Implement systems of data collection for <b>monitoring tourism activity</b> and the perception of tourism by local stakeholders.
13.2	<b>EUR</b>	Refine, systematise and harmonise the systems for monitoring tourism activity and <b>the perception of tourism</b> , from both a quantitative and qualitative point of view, esp. to enable more accurate <b>monitoring of trends in tourism activity</b> at national level and better benchmarking of regional performance at local level.  Encourage Member States <b>to harmonise their tourism</b> observatories and <b>enrich the catalogue of data</b> aggregated at European level (via EUROSTAT) with refined qualitative data, in order to better monitor tourist practices, the services offered in the regions, the perception of tourism in the regions, and the ecological footprint of tourism.

- *Inspiring experiences: Observing tourist behaviour in the field and on-line*

Bibracte (#5) used a system designed to create a form of **territorial tourism intelligence**. Through a local tourism observatory, the aim is to overcome preconceived ideas and objectify knowledge of tourist activity by means of in-depth surveys produced and analysed with visitors, residents, economic players, and local decision-makers. Repeating the survey over the years makes it possible to monitor changes in the behaviour of both visitors and local stakeholders, and to redirect the area's tourism strategy.

The Swedish pilot (#10) (<https://zenodo.org/records/10951395>) developed a method for understanding visitors and their spatio-temporal behaviour by combining GPS loggers and questionnaires providing information on visitors, with the use of with mobile phone data to geolocate visitors' positions. Netnography completes this method by examining visitor discourse on social media. This method provides decision-makers, residents, and other stakeholders in a

*geographic area with concrete data in real time on visitor behaviour and their perception of the place.*

*The Greek pilot (#7) developed a bottom-up methodology aimed at increasing the collective intelligence of local stakeholders to help them build a database and undertake specific actions for cultural tourism. Using technologies such as the Integrated Development Planning Support System (IDPSS) and Business Intelligence (BI) systems, maps were created to analyse, summarise and visualise the cultural reality of the region (<https://zenodo.org/records/10947219>). This has led to the creation of a digital platform which presents local culture and enable stakeholders to offer online cultural products and incorporates an interactive dashboard for combining resources and proposing evidence-based development actions and policies, serving both as a decision-making tool and an interactive tourist guide.*

## **Concluding comment**

**INCULTUM has identified two levers for tourism to become a tool for social cohesion:**

- **to encourage as far as possible a commons-based approach**, at all levels of public action, to manage the resources needed to preserve our living environment and the well-being of our fellow citizens; this concerns both "traditional" commons, such as water resources or the quality of a living environment, and "new commons", such as data and services using digital technologies;
- **to recognise the virtues of the landscape (including the human-made features/ infrastructures such as paths, canals, hedges, etc.) as an object of attachment** and of the landscape approach as a means of taking a holistic view of the issues facing a given area, in order to "reterritorialize" public policies, i.e. adapt them to the specific characteristics of local situations, with a view to preserving and enhancing these specific characteristics.

On a different note, **low-density marginal areas are major producers of ecosystem services**, provided that their resources are well managed, which could lead them to receive sustainable remuneration from the community for their upkeep, through a form of contract with the local heritage community.

### **Project's Summary**

Tourism is more than travelling and consumption; it has great potential when it comes to culture, nature, knowledge, and personal experiences. Travelling is a way to learn and improve oneself, to enrich one's vision and improve mutual understanding. The INCULTUM project deals with the challenges and opportunities of cultural tourism with the aim of furthering sustainable social, cultural, and economic development. It will explore the full potential of marginal and peripheral areas when managed by local communities and stakeholders. Innovative participatory approaches are adopted, transforming locals into protagonists, able to reduce negative impacts, learning from and improving good practices to be replicated and translated into strategies and policies.

### **15 partners**

An interdisciplinary group of partners including academia, municipalities and SMEs will effectively deploy knowledge and participate in the various project's activities.

### **10 local pilots**

INCULTUM aims to demonstrate the high potential of the marginal and peripheral places, cultural heritage and resources when managed by local communities and stakeholders.

### **Data analysis**

INCULTUM gathers quantitative and qualitative data on cultural tourism to produce innovative data analysis and new statistics on this phenomenon.

### **Participative methodology**

INCULTUM findings are oriented to foster positive impacts of cultural tourism by using a participatory approach involving local population and stakeholders as communities of practices.

### **Synergies**

INCULTUM fosters intercultural understanding through the implementation of bottom-up strategies that can have positive effects on both locals and tourists.

## PROJECT IDENTITY

<b>PROJECT NAME</b>	INCULTUM Visiting the margins: INnovative CULTural ToUrisM in European peripheries
<b>COORDINATOR</b>	José M <sup>a</sup> Martín Civantos University of Granada MEMOLab. Laboratorio de Arqueología Biocultural civantos@go.ugr.es civantos@go.ugr.es
<b>CONSORTIUM</b>	University of Granada, Spain (Project Coordinator) Matej Bel University, Slovakia Copenhagen Business School, Denmark Promoter S.r.l., Italy (Network Coordinator) SDU – University of Southern Denmark, Denmark University of Pisa, Italy Uppsala University, Sweden G.A.L Elimos, Italy Eachtra Archaeological Projects, Ireland Bibracte, France The High Mountains cooperative, Greece Centre for the Research and Promotion of Historical Archaeological Albanian Landscapes, Albania University of Algarve, Portugal Provincial Tourism Board of Granada, Spain Municipality of Permet, Albani
<b>FUNDING SCHEME</b>	INCULTUM project 2021-2024 is financed by the H2020 programme of the European Union under Grant Agreement n. 101004552 through the H2020 Framework Programme for Research and Innovation (2014-2020), Societal Challenge 6 – Europe in a changing world: inclusive, innovative and reflective societies". TRANSFORMATIONS 04 2019 2020: Innovative approaches to urban and regional development through cultural tourism.
<b>DURATION</b>	May 2021 – April (36 months)
<b>BUDGET</b>	EU contribution: € 3,487,411.25
<b>WEBSITE</b>	<a href="https://incultum.eu/">https://incultum.eu/</a>
<b>FOR MORE INFORMATION</b>	Contact person: Antonella Fresa, <a href="mailto:fresa@promoter.it">fresa@promoter.it</a>

### FURTHER READING

These publications are available on the Zenodo INCULTUM Community

- **Policy outputs:** this report includes a policy brief and two think papers (Think paper 1 Cultural and sustainable tourism, a territorial development tool for Europe's rural areas <https://zenodo.org/records/11067831>; Think paper 2 Heritage communities at the heart of rural heritage development projects <https://zenodo.org/records/11067855>). The document is focused on participatory models and sustainable cultural tourism and on synergies among participatory models, innovative tools and policies, and it will be supported by demonstrative cases (mainly WP5 cases) and connected with impact (WP7) and Structural Investment Funds policies: Policy brief on sustainable tourism.

- **First Policy brief on sustainable tourism concept**, marginal areas and marginal heritage, methodologies and innovative approaches to achieve positive social, economic, cultural and environmental impacts (<https://zenodo.org/records/10908650>).
- **Report from the Brussels policy workshop and round table** containing the main findings and outcomes regarding the major drivers and barriers that account for the success or failure of participatory models. Report Concludes relevant policy recommendations or measures to be considered by preparing an evaluation framework for participatory models (<https://zenodo.org/records/8016010>).
- **Guidelines on the use of European Structural and Investment Funds**: this deliverable provides hints and instructions for the re-use of the experiences that have been gathered in the pilots, as well as other resources related to critical review of the effectiveness of regional development policies and instruments (<https://zenodo.org/records/10843423>).
- **Participatory governance and models in culture and cultural tourism**, Kamila Borseková, Katarína Vitálišová, Alexandra Bitušíková, Belianum, Publishing house of Matej Bel University in Banská Bystrica, 2023. This book has been developed within the framework of the INCULTUM project (<https://zenodo.org/records/10950510>).
- **Marketing and social branding for cultural and sustainable tourism destinations**, online training course provided by the University of Pisa on INCULTUM Training portal (<https://zenodo.org/records/11002700>).
- **INCULTUM book** - published as Open Access, this publication explores the context of change, the innovation potential and the role of cultural tourism in European social, cultural and economic development, with a specific address to policy makers, programme owners and CH managers. This book is still in edition process.

#### INCULTUM PILOT CASES ([HTTPS://INCULTUM.EU/PILOTS/](https://incultum.eu/pilots/))

1. **DESERT LANDSCAPES AND OASIS: ALTIPLANO DE GRANADA**
2. **AGRARIAN COASTAL PLAIN: CAMPINA DE FARO**
3. **MINING TREASURES OF CENTRAL SLOVAKIA: BANSKA BYSTRICA AND CENTRAL SLOVAKIA**
4. **SICILIAN INLAND: MONTI DI TRAPANI**
5. **TUSCAN-EMILIAN APENNINES: GARFAGNANA**
6. **BIBRACTE-MORVAN: ANCIENT PATHS INTO THE FUTURE: REGIONAL PARK OF MORVAN**
7. **AOOS, THE SHARED RIVER: AOOS/VJOSA VALLEY**
8. **VJOSA, THE SHARED RIVER: VJOSA/AOOS VALLEY**
9. **HISTORIC GRAVES: IRELAND**
10. **ESCAPE INTO THE ARCHIPELAGO LANDSCAPE: BALTIC OCEAN AND THE GREAT LAKES OF SWEDEN**

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