

Impact of European Cultural Routes on SMEs' innovation and competitiveness

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Executive summary

The study on the impact of European Cultural Routes on SMEs' innovation and competitiveness was jointly launched by the European Commission (EC) and the Council of Europe (Council) in September 2010. Its objectives were to provide insights into the effects produced by the transnational Cultural Routes – such as those certified by the Council of Europe – on SMEs' performance, innovation capacity, and network and cluster development; to examine the potential of Cultural Routes for promoting sustainable and quality tourism in Europe; and to analyse to what extent Cultural Routes networks can benefit SMEs, especially in rural areas and less-known destinations.

The main expected outcomes from the study were to:

- identify key actors currently involved in Cultural Routes;
- understand the benefits and disadvantages of their environments (especially in the context of the current economic conditions);
- estimate the potential of Cultural Routes, their needs and concerns on the way to sustainable development; and
- to establish links with different levels of authority – local, national and European – financial and governmental institutions, tourist organisations, and other bodies that would encourage future development of the Routes.

Methodology

The study included two main components:

- case studies of five Cultural Routes – the Hansa, the Legacy of al-Andalus, the Via Francigena, the Olive Tree and the Transromanica;
- an analysis of several transversal issues relevant to all 29 Council-certified Cultural Routes and to the environments in which they are operating.

The issues included: cultural tourism trends in Europe; Cultural Routes' management and governance structures; SMEs' innovation and competitiveness; branding and marketing of the Cultural Routes; characteristics of the Cultural Routes networks; the degree to which quality sustainable tourism criteria are implemented within the Cultural Routes; the role of ICT in the marketing and promotion of Cultural Routes; and the Cultural Routes programme in the context of relevant initiatives at European and international levels.

Interviews with international organisations, such as UNESCO and the Organization of Ibero-American States were also conducted by the Council of Europe. Enquiries were made about the current state of development and future implementation strategies of the related cultural projects run by these organisations in eastern Europe, Asia, North Africa and the Caribbean.

Part I

Analysing the impact of the European Cultural Routes

Main findings

The Cultural Routes of the Council of Europe are in line with the key trends of cultural tourism development in Europe today. They have achieved a noteworthy impact and progress within the last two decades, and shown enormous potential for SME generation, clustering, networking (intercultural dialogue), and promoting the image of the Council of Europe and Europe generally.

The Cultural Routes encourage widespread community participation in cultural activities raising awareness of a common cultural heritage. Established on cultural and social principles, the Cultural Routes represent a resource for innovation, creativity, small business creation, and cultural tourism products and services development.

The promotion of cultural tourism is a logical next step in developing Cultural Routes since this type of tourism builds on the uniqueness and authenticity of remote destinations, local knowledge, skills, heritage and traditions. Cultural Routes networks benefit SMEs by providing markets for SMEs' products and contribute to tourism revenue generation in remote destinations. A number of innovative practices were recorded within the SMEs and various routes, with the organisational, product and service forms of innovation being the most noticeable.

At the same time, the economic and social impacts of the Routes vary greatly since they differ not only in their thematic focus but also in their network and management structures, development approaches, geographical dimensions, target groups, capacities, and quality standards as regards products and services.

According to the study, the most urgent issues that Cultural Routes need to address include the development of better:

- transnational connectivity of the Cultural Routes network;
- co-ordination at European level of the development and promotional strategies of the Cultural Routes;
- brand image and marketing strategies;
- quality and sustainable tourism standards development/implementation;
- human and financial resources of the Routes;
- expertise in the management of the networks;
- exchange of good practices; and
- network management and performance evaluation tools.

Taking these issues into account, the study suggests creating a cohesive SMEs involvement strategy for the Cultural Routes, and establishing strong partnerships with different authorities and stakeholders – financial, educational and governmental institutions, tourism organisations, market agents, etc., at the international, European, national and local levels – in order to produce a more stable long-term impact and to ensure increased economic and cultural benefits from Cultural Route activities. The Council of Europe's capacity-building role is regarded as crucial in the development of this strategy.

A number of the Cultural Routes have already started to co-operate with various public and private sector actors locally, regionally and/or transnationally with a view to providing better services and supporting tourism development actions. These attempts can be further reinforced by the input of adequate human and financial resources, by the development of the common Cultural Route brand, while pursuing uniqueness in the design of Cultural Routes' tourism products and services.

Transnational networks and accessibility to different levels of funding – European, national, regional and local – are viewed by the study as the foundation for the Cultural Routes’ success at their early stage of development. While some networking is taking place between Cultural Route partners, there is a clear lack of support mechanisms – capacity-building and funding, in particular – to encourage more face-to-face partner interactions and meetings. Without this vital “connection” each partner concentrates his/her activities on their own part of a Cultural Route, thereby hindering network expansion. The evolving trends and market niches in cultural tourism offer different opportunities to the Cultural Routes for closer interactions. These opportunities should be used to establish more stable connections and stronger regional and transnational networks.

Summary of recommendations

The study concluded that in order to ensure that the potential of the Council’s Cultural Routes programme for sustainable and inclusive growth and the promotion of economic, social and territorial cohesion in Europe is fully realised, and in view of exploiting this potential for cultural tourism, it is important to develop a strategy at European level.

In order to help Cultural Routes to address the existing challenges, to collaborate more effectively transnationally, and to realise their potential as a basis for cultural tourism development, focused action is recommended in five main areas:

1. Capacity-building.
2. Network governance.
3. Performance evaluation.
4. Brand image and marketing.
5. Co-operation with the main stakeholders.

Furthermore, the following priority actions are suggested within these five activity areas: a more comprehensive understanding of the value of tourism for culture, for Cultural Route projects and destinations needs to be developed; the role of local communities in promoting sustainable cultural tourism development should be addressed; and various aspects of sustainable tourism – demographic, cultural and economic trends, entrepreneurial approaches, business models, marketing strategies, public-private partnerships, etc. – have to be taken into consideration while building capacity. It is highly recommended that clear and democratic network governance models are applied, and professionally trained staff in Cultural Routes governance and management are engaged to ensure effective network functioning.

Within the framework of capacity-building, performance evaluation, branding and marketing the following actions are proposed:

- develop mechanisms for setting up Cultural Routes activities and performance evaluation in the short/long term;
- carry out concurrent evaluation of the European Institute of Cultural Routes and all Council-certified Cultural Routes;
- design quality and sustainable tourism development criteria throughout the Cultural Routes in close consultation with their local stakeholders and taking into account specific geographical, environmental, political, social, cultural and economic characteristics of Cultural Route destinations;
- rebrand the Cultural Routes programme by developing a single consumer brand;

- develop a long-term marketing strategy identifying overall marketing goals and objectives, the target market, consumer preferences, communications channels, as well as key performance indicators; and
- undertake co-ordinated action for further development of educational, cultural and tourism management models, expertise, R&D, training and capacity-building programmes associated with the Cultural Routes in order to co-operate closely on local capacity-building and to promote the Cultural Routes as a quintessence of European values, traditions, heritage and cultures.

The Cultural Routes of the Council of Europe offer significant potential for collaboration at all levels – European, national, regional and local. The current study suggests that the programme should build on this potential as well as on the expertise, know-how and reputation gained to develop common strategies and establish strong partnerships with different stakeholders and authorities.

It is strongly recommended to develop a new coherent road map for co-operation between the Council of Europe Cultural Routes, other European routes created with European Union funds, with related UNESCO initiatives, especially those associated with the Council’s Cultural Routes, and other significant European and international projects in order to establish a competitive and effective joint strategy for the promotion of “European Cultural Routes”¹ globally.

Through a number of individual scientific inquiries, interactions, interviews and observations, this study describes the Council’s Cultural Routes, identifying the main actors involved, recognising their interests, concerns, and evaluating the existing benefits and disadvantages of the Routes in relation to their sustainability. More comprehensive conclusions and recommendations of the study are provided in the main body of this report.

1. In this way, the existing practice of unco-ordinated promotion of similar initiatives (for example, UNESCO routes and the Cultural Routes of the Council of Europe by VisitEurope.com (ETC)) could be avoided.

1. Introduction

1.1 Study goals and concepts definitions

The study on the impact of European Cultural Routes on SMEs' innovation and competitiveness pursued three main goals:

- to provide insights on the effects produced by the Council's Cultural Routes programme on SMEs' performance, network and cluster development;
- to examine the potential of the Cultural Routes for promoting sustainable and quality tourism in Europe, strengthening European identity, disseminating the richness of European cultures and favouring intercultural dialogue and mutual understanding;²
- to analyse to what extent Cultural Routes networks can benefit SMEs, especially in less-known destinations, where the local culture and heritage are the main resource for development, and how SMEs' involvement can create a solid basis for promoting Europe as "the world's No. 1 tourist destination".

1.2 Methodological approach

In order to examine the existing and potential benefits of the European Cultural Routes for SMEs – especially in less-known destinations – for their innovation, competitiveness, and clustering,³ and to analyse if and how these SMEs' clusters can create a solid basis for promoting Europe as "the world's No. 1 tourist destination" this study required a rigorous scientifically based methodological approach.

The co-ordinating team of the study (Council of Europe) worked closely with the main study stakeholders, a group of independent experts, and Cultural Routes co-ordinators to design an appropriate analytical framework. At the outset, the study management team (Council of Europe) set up an advisory group with key partners, including representatives from the European Commission (DG Enterprise and Industry, DG Education and Culture), the European Travel Commission, and the European Institute of Cultural Routes (EICR). Considering the complexity and novelty of the field, a consultative group of experts was invited from academia and practice to ensure the input of a range of disciplines, professional backgrounds, and partner organisations, and to guarantee a sound methodology.

Key methodological steps of the study:

- identification of experts (five selected from a list of 25) (November 2010);
- Cultural Routes survey (December 2010);
- creation of a Cultural Routes analytical grid (January 2011);
- case studies of five selected Cultural Routes (February-March 2011);
- intermediary study results (March 2011);

2. The Council [of the European Union] Conclusions of 10 May 2010 on the contribution of culture to local and regional development (Official Journal 2010/C 135/05).

3. Clusters are defined as "geographical concentrations of interconnected companies, specialized suppliers, service providers, firms in related industries and associated institutions (e.g., universities, standards, agencies, trade associations) in a particular field that compete but also co-operate" (Porter 2000).

- transversal themes and issues analysis (April-May 2011);
- final study results (June 2011).

The study included two main phases that followed a survey of 29 Cultural Routes certified by the Council of Europe (see Chapter 2 for information on certification). This exercise was important not only in terms of current qualitative and quantitative data and information gathering for the selection of case studies but also as a way to assess the overall development potential of the Cultural Routes programme. Established in 1987, the Cultural Routes programme of the Council of Europe comprises 29 certified Routes with many more in the making. It covers 70 countries on four continents.

The methodology of Phase I was based on the case studies of five representative Cultural Routes – the Hansa, the Legacy of al-Andalus, the Via Francigena, the Olive Tree and the Transromanica.

A Cultural Routes' classification grid was created based on the information obtained from the Council of Europe survey and targeted research, and included the following categories:

- Cultural Route focus and geographical area;
- type of managing organisation (legal entity);
- number of SMEs and NPOs involved;
- new products/posts created;
- sources of financing;
- Cultural Route network connectivity;
- spatial accumulation;
- existing marketing tools;
- target audience.

The Cultural Route case studies were selected in close consultation with the study's group of experts.

Each of these studies followed the individual methodological approach most appropriate to its particular circumstances, designed by the expert working on the study. The goal was to capture in depth as much data as possible from the locations within the Cultural Route networks. Generally, the methodology of the case studies included the following elements:

- a literature review of documents concerning the Route;
- desk research: review of the related material and information available online including Cultural Routes' web pages and open source information;
- meetings and interviews with the key stakeholders of the Route, which provided a useful overview of the management, key activities and future plans;
- a survey of Cultural Route locations/members of the network;
- data analysis and presentation.

Phase I was completed in March 2011. Its main conclusions and recommendations were presented at the "Innovation and competitiveness within the European Cultural Routes projects: analysis, opinions and perspectives" workshop in Luxembourg on 28 and 29 March 2011.

Phase II of the study focused on the transversal issues relevant to all 29 Council-certified Cultural Routes and to the environments in which they are operating. In particular, these issues included:

- cultural tourism trends in Europe;
- Cultural Routes' management and governance structures;
- SMEs' innovation and competitiveness;
- branding and marketing of the Cultural Routes;
- characteristics of the Cultural Routes networks;
- the role of ICT in Cultural Routes marketing and promotion;
- the Council's Cultural Routes programme in the context of relevant initiatives at European and international levels.

A few interviews were conducted by the Council of Europe with international organisations, such as UNESCO and the Organization of Ibero-American States inquiring about the current state of development and future implementation strategies of the related cultural initiatives co-ordinated by these organisations in eastern Europe, North Africa, Asia and the Caribbean. Phase II was completed by the end of May 2011, resulting in seven expert reports.

The current report represents the final product of the study and combines the inputs from 12 separate independent experts' analyses and the historical outline of the Cultural Routes programme by the European Institute of Cultural Routes (EICR).

The report is organised as follows:

Chapter 2 offers an historical outline of the development of the Council of Europe Cultural Routes programme.

Chapter 3 of the report explains the current value of tourism for the economy in general and provides an overview of current cultural tourism trends in Europe.

Chapter 4 analyses the Cultural Routes networks from the point of view of their governance models, legal bases, structures and connectivity. Existing sources of funding for the Cultural Routes at the local, national and European levels are reviewed. This chapter also suggests some creative approaches to generating additional income for the Routes.

Chapter 5 is dedicated to an analysis of the identified innovative and cluster formation behaviour/practices within the Cultural Routes and SMEs involved in Cultural Routes' activities. It also examines the ways in which the Cultural Routes could stimulate innovative behaviour, tourism SMEs' competitiveness and cluster development within their networks. Particular attention in this chapter is devoted to the Cultural Routes and SMEs' performance evaluation as a condition for further successful development. Relevant performance assessment measures and instruments are suggested for implementation and use.

Chapter 6 looks at the opportunity for promoting the value of cultural tourism within the Cultural Routes context. It offers some practical advice on Cultural Routes' branding and marketing. Suggestions regarding the development of quality and sustainability criteria for the Cultural Routes are also provided.

General conclusions and recommendations of the study follow Chapter 6.

The case studies of five Cultural Routes – the Hansa, the Legacy of al-Andalus, the Olive Tree, Via Francigena and the Transromanica – as well as a review of the related European and international initiatives are presented in Part II of the report.

2. Cultural Routes of the Council of Europe

The Cultural Routes programme of the Council of Europe was set up between 1984 and 1987 following a resolution of the Parliamentary Assembly of the Council of Europe. The programme was adopted in 1987 and later implemented by the Council for Cultural Co-operation; its political visibility was ensured by a declaration made at Santiago de Compostela in October 1987 at a meeting attended by the ministers for culture of the member states of the Council of Europe.

The programme has gone through different phases in terms of its governance, methodology as regards setting up Routes, methods of financing, and the involvement in joint programmes of other international organisations, as well as its rules governing certification.

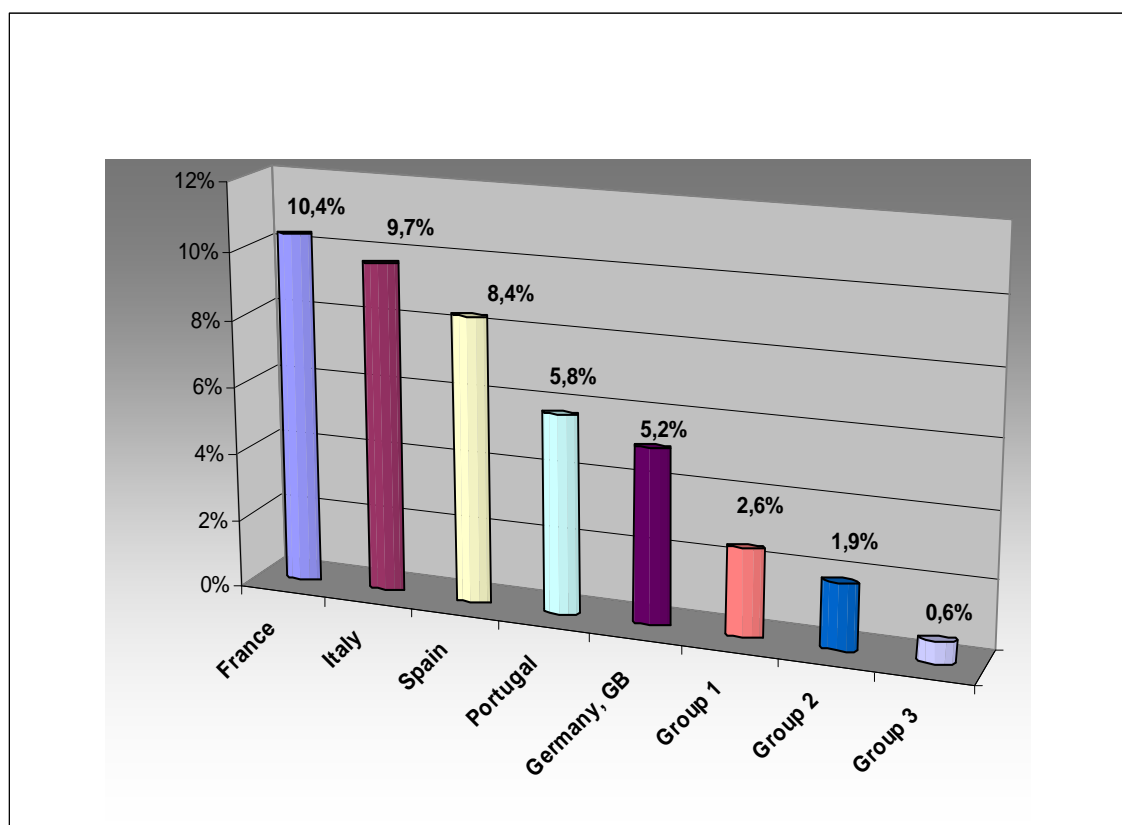
It should be noted that the development of the programme can be divided into three main periods:

- an experimental phase during 10 years without written rules, during which the methodology was based on practical experimentation;
- a developmental phase of 14 years founded on rules adopted by the Committee of Ministers, the practical, scientific and technical ramifications of which were entrusted to the EICR, which was welcomed by the Grand Duchy of Luxembourg. All the documentation relating to the programme since its inception has been compiled at the premises of the EICR.

Since the resolution of the Committee of Ministers on 8 December 2010, a third phase has been inaugurated with the creation of an Enlarged Partial Agreement, the seat of which is based at the European Institute of Cultural Routes.

As previously indicated, the Cultural Routes programme of the Council of Europe comprises 29 certified Routes that cover 70 countries. Statistical analysis of the Cultural Routes traversing these countries demonstrates visually the density of the Cultural Routes networks. Graph 1 below illustrates the percentage share of the Routes network by country. France (10.4%) heads the list followed by Italy (9.7%), Spain (8.4%), Portugal (5.8%), Germany (5.2%) and Great Britain (5.2%). The rest of the countries each comprise 2.6% or smaller percentages. These nations form three large groups, which represent the unexploited development potential of the Council's Cultural Routes programme.

Figure [REBI]1. Cultural Routes – Share per country, 2011



Group 1: Belgium, Czech Republic, Greece, Norway, Poland, Sweden and Switzerland.

Group 2: Algeria, Austria, Croatia, Cyprus, Lebanon, Morocco, Netherlands, Slovenia and Tunisia.

Group 3: Albania, Argentina, Armenia, Azerbaijan, Belarus, Bulgaria, Denmark, Estonia, Jordan, Lithuania, Malta, Romania, Russian Federation, Serbia, Slovakia, Syria, Turkey and Ukraine.

2.1 History of the programme

As early as the 1960s, searching for a way to make the fundamental principles of the European Cultural Convention clear and visible to all Europeans, the Council of Europe assembled a group of experts to reflect upon the measures to be taken to “improve the collective awareness of Europe’s foremost cultural sites and their incorporation into leisure culture”.⁴ They favoured the idea of discovery through travel: “The working party considered that it would be advisable to place a greater importance on cultural journeys, which are one of the best uses of leisure time. Such journeys should consist of not only a visualisation or illustration of basic education acquired at school, but also a human experience and an opportunity to develop personal sensibilities”.⁵

4. “L’Europe continue” report, Strasbourg, 13 and 14 October 1964. Quoted in “European Cultural Routes”, Council for Cultural Co-operation, Council of Europe. Secretariat memorandum prepared by the Directorate of Education, Culture and Sport, 1992.

5. Ibid.

But it was only in the 1980s that the Cultural Routes programme of the Council of Europe was officially launched with an inaugural Route based on the roads along which large numbers of pilgrims from all parts of Europe travelled to one of the foremost pilgrimage sites of the Middle Ages: the cathedral of Santiago de Compostela and the tomb of the apostle James. As stated in the declaration adopted in the Spanish city on 23 October 1987, the aim was to base the initiative on well-reasoned concepts: “The meaning of man in society, ideas of liberty and justice, and trust in progress are the principles which historically have forged the different cultures which make up the European identity. This cultural identity is, today as yesterday, the result of the existence of a European space laden with collective memory and traversed by roads which overcome distances, borders and a lack of understanding.”

Furthermore, the declaration envisaged the immediate expansion of the initiative: “This route, highly symbolic in the process of the construction of Europe, will serve as a reference point and an example for future initiatives”. In addressing the spirit of a modern pilgrimage, the declaration invited Europeans – particularly the young – to “travel these routes to build a society founded on tolerance, liberty, solidarity and respect for others”. In this way, the routes leading to Rome, and from Rome to Jerusalem, the Michaelic pilgrimages and the pilgrimages dedicated to St Olav in northern Europe have progressively been added to the first route to create the most faithful and coherent image possible of the great land routes which have structured the towns and villages of Europe.

This informed the inclusion of the great axes along which travelled Roman armies, pilgrims and students as well as migrant populations escaping persecution or conflict, or seeking employment in industrialised regions. No less important are Europeans’ maritime journeys, from the Mediterranean to the Black Sea, the Atlantic and the Baltic Sea. It is through the journeys of the Vikings, Phoenicians and the Hansa merchants that we can understand the scale of these cultural exchanges.

Considering the recent evolution in cultural practices related to tourism and leisure, the far-sighted and visionary nature of the initiative inaugurated by the Council of Europe more than 20 years ago is striking. In choosing to promote the Cultural Routes programme, the Council of Europe very clearly gave it a civic purpose. That purpose was to “render more visible, further develop and make tangible the common cultural identity of Europeans”,⁶ that is, to raise awareness of, and give a definite form to, one of the fundamental pillars of the European Cultural Convention, which is to encourage with the nationals of each signatory country “the study of the languages, history and civilisation of other signatory countries”.⁷

This personal experience can occur during visits to heritage sites presented within the context of an interpretation and mediation of European history and culture by rediscovering the legends which travelled Europe with the pilgrims, sharing the music composed in the Middle Ages in an exchange between the Arab and European worlds, or walking together along the Routes in the different regions, exploring the landscape and conversing with people from other countries and other cultures. The Council of Europe also emphasised the importance of memory when it proposed that the Routes should be created around “a certain number of strong points, sites with a particular place in history and representative of the European cultural identity”.⁸

6. Ibid.

7. European Cultural Convention, open for signature in Paris on 19 December 1954.

8. See footnote 4.

Lastly, it can be said that the programme constitutes a practical response to one of the aims of the Convention for the Protection of the Architectural Heritage of Europe relating to education and training, particularly that of young Europeans: “to this end, to promote policies for disseminating information and fostering increased awareness, especially by the use of modern communication and promotion techniques, aimed in particular:

- a at awakening or increasing public interest, as from school-age, in the protection of the heritage, the quality of the built environment and architecture;
- b at demonstrating the unity of the cultural heritage and the links that exist between architecture, the arts, popular traditions and ways of life at European, national and regional levels alike.”⁹

The Council of Europe also saw the Routes as “offering citizens new possibilities for fulfilment in their non-work time”,¹⁰ and as responding to new necessities in the cultural management of European regions while safeguarding and developing European cultural heritage as a factor in the improvement of the living environment and as a source of social, economic and cultural development.

From the Convention of Granada (1985) to that of Faro (Council of Europe Framework Convention on the Value of Cultural Heritage for Society, 2005) and the European Landscape Convention opened for signature in 2000 in Florence, the Cultural Routes programme has consistently incorporated diverse demands corresponding both to the evolution of the social context of heritage and to its expansion into the cultural landscape, permitting a practical understanding of the regions covered by the selected themes.

A Cultural Route as recognised by the Council of Europe primarily constitutes a larger European theme, which enables us to better understand the history and memory of Europe in a continental continuation extending from the Atlantic to the Southern Caucasus and from the Baltic to the Mediterranean. A Cultural Route’s primary aim is to set in action joint initiatives of interest to academics, heritage mediators, teachers and students as well as elected representatives, agents of regional development projects, and politicians, who together form European networks.

A Cultural Route also constitutes a new category of “cultural good” which creates an interaction between a monument in need of protection and development, and the cultural and regional context to which it must be linked for it to be fully appreciated. This new form of discovery is above all an intellectual operation which is essential to understanding the significance, history and value of a heritage site in a particular culture and society. It has also led to the expansion of the definition of a “cultural good”, from the category “material” to the category “immaterial”. This enables one to understand that monuments and traditions, the fine arts and popular arts, landscapes and traditional products together make up the numerous languages of one community. The European Landscape Convention added a new element to this general approach by introducing the bases of responsibility as shared between owners and users, and consequently between locals and inhabitants, on the one hand, and visitors and tourists, on the other.

In putting this programme into action and in considering this shared responsibility, the concept of a network responsible for a theme or a Route has gradually increased in importance. The three versions of the rules give a clear definition of the typologies of

9. Convention of Granada, 1985.

10. See footnote 4.

networks (one for each theme): either association (non-profit organisations) or federations of associations. The management of these networks has to be truly European and they have to take and implement their decisions in a clearly democratic way. More than that, the rules, which initially proposed the introduction of approved networks responsible for the management of each Route, have now made the accreditation of a network a major and obligatory condition of obtaining certification.

A programme with geopolitical resonances

A large proportion of the European public – not to mention visitors from other continents – struggles to interpret a monument, a site or a route in its geopolitical context. Yet, the fate of the great empires and the territorial evolution of the great religions and their confrontations have left Europe marked by lines of defence in the form of material fortifications as well as cultural fractures whose resurgence we have seen in the conflicts following the break-up of the former Yugoslavia and the end of the Soviet Empire. Explaining the past without fearing to confront its complexity allows a better understanding of the major stakes of the construction of Europe, which since the last world war has been based on a lengthy process of dialogue and reconciliation. It is not for nothing that the first Cultural Route in the Iberian Peninsula had a secondary aim of re-establishing physical links between the democracies created at the end of the Second World War, the founding countries of the Council of Europe, and the two countries belonging to the Iberian Peninsula who abolished dictatorship and adopted new democratic constitutions only in the mid-1970s. The Cultural Routes also served to restore links between western Europe, and central and eastern Europe after 1989 and contributed to the reconciliation in South-Eastern Europe when in 2005 in Varna, Bulgaria, the heads of state of 10 Balkan countries adopted a resolution on the creation of “cultural corridors”¹¹ based on cultural heritage, which reads: “The protection, presentation and interpretation of material and immaterial cultural heritage should strengthen mutual understanding and respect for the heritage of others”.¹²

The Council of Europe can call upon its many different conventions in its condemnation of all forms of intolerance and discrimination, including anti-Semitism and Islamophobia, but it can also call upon the spirit of dialogue and openness of the Routes, which seek to combat prejudices in concrete terms.

This is the case, for example, in the development and interpretation of the heritage to be found along the Routes of the Legacy of al-Andalus and along the European Route of Jewish Heritage. The Council of Europe also wishes to help build unified societies by combating exclusion. A clear example of this is the route based on the heritage of migrations which is founded on the possibility given to migrants of rediscovering a sense of pride at what they transported and contributed from one country to another, sometimes from one continent to another.

11. The conference of Varna is largely based on the works of Professor Todor Kretev and his team in the Faculty of Architecture, Sofia. The first presentation of various projects of Cultural Routes in South-East Europe was held in September 2000, during a conference in Sofia in the context of the campaign of the Council of Europe “Europe, a Common Heritage”. From 2000 onwards, Professor Kretev prepared a framework for “cultural corridors” in South-East Europe that was proposed to the conference of heads of state held in May 2005 in Varna. The definition of “cultural corridors” comes from a book by Professor Razvan Theodorescu (1974). See: www.seecorridors.eu.

12. Varna Declaration, 21 May 2005. Regional Forum on Cultural Corridors of South-East Europe: Common Past and Shared Heritage – A Key for Future Partnership.

After 20 years of experience, the Cultural Routes programme continues to promote and render more visible these common values and principles rooted in the cultural, religious and humanist heritage of Europe, a heritage at once divided and enriched by its diversity.

2.2 Cultural Routes programme today

The economic dimension of the Cultural Routes has never been one of their major aspects. At the same time, tourism and sustainable development are clearly specified as part of the criteria for certification. Since the first rules, it has been clear that collaborative projects are to be set up between all the countries of the Council of Europe, all geographical and social entities, as well as between majorities and minorities. In 2007 this was expanded to include the idea of “seeking partnerships with public and private organisations in the area of tourism with the aim of developing tourist products and tools targeting all potential audiences”.¹³

The aim of the study on the impact of European Cultural Routes on SMEs’ innovation and competitiveness was to assess whether or not the Routes have achieved part of these objectives by linking them in practical terms to the most important sector of tourism in general: small and medium enterprises.

Insofar as the study carried out by the Council of Europe and the European Commission examines one of the economic aspects of the Cultural Routes – their impact on the competitiveness and innovation of small and medium enterprises – it seems equally important to note, even briefly, that the themes of certain Cultural Routes lend themselves better to pursuing this issue over the historical long term as they require an understanding of the crafts, and industrial and trade relations having influenced the economic and capitalist structure of Europe today; and some of these routes require an understanding of the relations having played a role in the oldest forms of the “tourist economy”.

The ways of pilgrimage

From its beginnings, the concept of hospitable networks (the Order of Cluny, the Knights of Malta or St John) has led to the development of a network of small businesses, initially religious, which federated agricultural and medical “clusters” to feed and care for pilgrims. Today, with the renaissance of pilgrimages, this spirit of hospitality and welcome has spawned resting points, hostels and semi-tourist accommodation facilities, which contribute to the local development of the villages and rural spaces traversed, creating an entire “social economy” linked to a social, supportive and ethical tourism.

Maritime and trade routes

The Phoenicians’ routes, starting in the Mediterranean and stretching as far as the Isles of Scilly (United Kingdom), enable one to analyse the evolution of the concept of trading posts, and of the establishment of platforms for exchanges with local populations.

13. See Appendix 2.

It is equally clear that the towns of the Hansa are the first example of the creation of an economic network founded on mutual insurance and risk-sharing. The towns, particularly Bruges, also had links to the Medici Bank and the great central European markets.

The Via Regia is also one of the oldest commercial exchange corridors in Europe. The Route enables one to interpret the geography and nature of these exchanges and the creation of small and medium businesses from the age of pedlars to transportation via articulated lorries on the new east-west motorways built since the last world war.

The Cultural Routes of industrial heritage

The Iron Route in the Pyrenees, primarily designed to present and interpret a network of small historic crafts enterprises which employed a cross-border seasonal workforce, and the European Iron Trail in Central Europe, showcasing the great industries of the region, are at the heart of the concept of evolution in the economic forms of work in Europe; not forgetting that they are also examples of a recent form of economic innovation: the reconversion of an industrial activity into a heritage activity.

Landscapes and civilisations

The Routes of the Olive Tree and the Iter Vitis Route are particularly relevant models for studying the economy and management of landscape as well as the economic structure of small agricultural businesses before the development of the food-processing industries.

The European Route of Historical Thermal Towns

This Route is particularly suited to studying the evolution of the tourism economy, from spa treatments to the development of well-being tourism linked to the rediscovery of one of the great historic heritages of tourism.

3. Cultural tourism trends in Europe: a context for the development of Cultural Routes

Over the past 20 years, tourism has become one of the most dynamic elements of the global economy. Tourism accounted for over 9% of global GDP and almost 3% of employment in 2009 (UNWTO 2011). In Europe, income from tourism represents 5% of GDP and comprises 5.2% of the total workforce (communication of the European Commission to the European Parliament, June 2010). International tourism has grown by an average of 4-5% a year over the past decade, outstripping most other major economic sectors. Even though global tourism was severely hit by the economic crisis, falling by 4% in 2009, there was a strong recovery in 2010, with growth of 6.9% in international tourism arrivals, according to the UNWTO. Worldwide, the number of international arrivals reached a record 935 million in 2010. The UNWTO forecasts growth of around 4-5% in 2011. However, most of the growth is due to emerging economies (the BRIC countries), and Europe is likely to experience lower growth rates, predicted to be between 2% and 4% in 2011.

In recent years, therefore, attention has shifted from the purely quantitative growth of tourism demand, towards qualitative change in the nature of that demand. The following sections consider, first, the main drivers of tourism growth and development, and then look in more detail at the consequences of change for the nature of tourism production and consumption.

Macro trends in tourism

In general, the development of tourism in recent decades has been heavily influenced by the development of society as a whole. The rise of the industrial society and growth of prosperity turned tourism into a mass leisure activity, while, at the same time, individualism and postmodernism have contributed to the creation of an increasingly fragmented and diverse field of tourism supply and demand. According to the OECD (2010), the current growth of tourism is largely a result of increasing globalisation, which has strengthened a number of key drivers in international tourism:

- rising incomes;
- new and cheaper means of transport;
- intensive use of ICT.

These changes are bound up with the development of a global network society.

The network society

One of the basic changes that is taking place across social, economic, cultural and political realms is the growth of the network society (Castells 1996). The implications of the increasing importance of networks and the rise of the networked organisation and the networked individual are profound. In the realm of tourism, this is leading to a number of interlinked changes that will have important implications in the future:

Increased networking between producers

In an increasingly competitive marketplace suppliers need to move quickly and to seize every opportunity for competitive advantage. Increasingly, this can be done through co-operation and partnership – the search for collaborative advantage. The IPK trend study (2009) points to “the importance of co-operation – public-private partnerships, but also partnerships between different sectors of the industry (such as airlines, hospitality groups, tour operators, niche market associations, etc.) and, increasingly important, technology specialists able to help in developing new media marketing campaigns”.

Increasingly networked consumers

Social networks and other forms of networking are becoming vital in our leisure and our work. The importance of groups and individuals is increasingly assessed by their linkages and membership of different networks. Networks assess their importance by their membership. The very importance of networking means that the boundaries between work and leisure are becoming more vague – we use our social networks to make friends with those who are useful to our careers and can provide contacts and knowledge for our work. The networks we belong to therefore have an increasingly important influence on our decision making in a wide range of fields.

Changing value chains

Traditional vertical distribution chains are giving way to a more complex value chain involving a wide range of different suppliers from within and beyond the travel sector. Travel is no longer dependent on the infrastructure of the old economy – airline seats, hotel beds and travel agent’s shelves. We are entering a new, flexible, networked economy in which ICT, local culture and society, education, etc., become part of the tourism value chain. In fact, the inter-relationships between travel, other economic sectors and society as a whole have become so integrated that we might conceive of a “value network” rather than the old value chain.

Figure 2. Traditional tourism value chain [REB2]

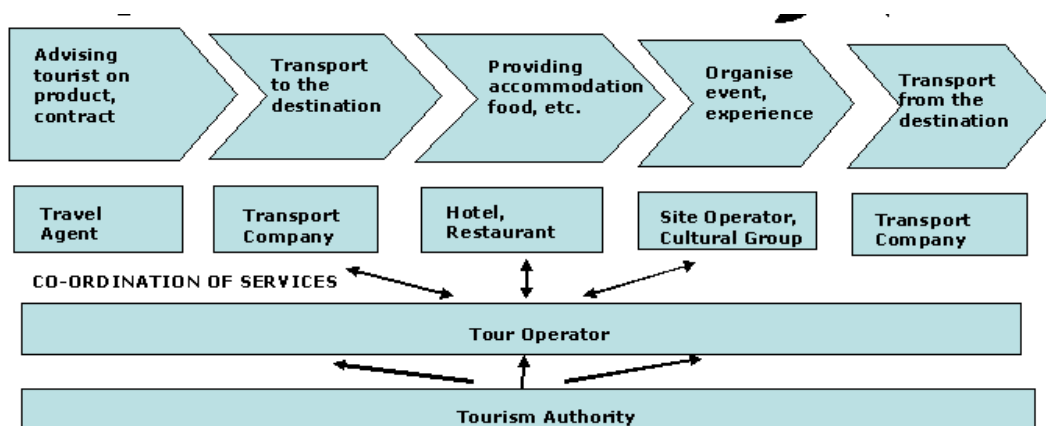
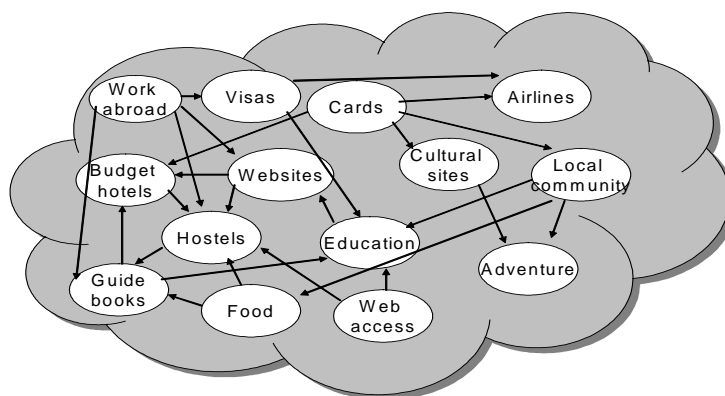


Figure 3. New value network



In the new tourism value network, the destination, rather than being a simple supplier of inputs to the tourism value chain, becomes an integral part of the value creation process in tourism. The narratives and images attached to the destination become an important determinant of the value of places to the consumer and therefore their decision making in terms of destinations and willingness to pay.

The general conclusion that can be drawn from the development of tourism and other areas of social and economic intercourse in recent decades is that the advent of the network society has brought profound changes to the relationship between production and consumption. We can therefore contrast the overarching themes of the former industrial era with the driving concerns of the network society.

Table 1. Contrasting concerns of the industrial society and those of the network society

Industrial society	Network society
Market transactions	Relationships
Mass production	Customisation, individualisation
Economic capital	Social capital
Innovation	Creativity
Competitive advantage	Collaborative advantage
Branding	Authenticity
Information	Knowledge
Unskilled consumption	Skilled consumption

In order to ascertain what effect these macro trends are having we must first develop an overview of the way in which these forces are driving the development of tourism.

The major drivers of tourism

The *Future of leisure travel – Trend study* (Gottlieb Duttweiler Institute 2006) identified a number of key drivers for the development of global tourism, which can be grouped into social, technological, economic, ecological and political drivers.

1. Social drivers:
 - ageing society: in 2020, the elderly will be in the majority in western Europe. Children and young people will be in short supply;
 - individualisation. Growing demand for individual holidays. Falling demand for package tours;

- new family structures. More and more singles. Ever fewer families with children;
- health consciousness grows. Destinations with potential health hazards will come under pressure. Areas with contaminated water and beaches, polluted air, ugly buildings, a risk of infection, etc., will be avoided;
- value orientation increases resulting in a new competition of values. Ecological, ethic and social values become ever more important;
- decline of the middle class in western Europe;
- leisure time declines. Western Europe must work longer again. Raising the pension age retards the growth of senior travel.

2. Technological drivers:

- availability of information. The spread and performance of information and communication technology continue to increase; and booking information will become even simpler;
- transport: more, faster and cheaper long distance;
- new search and mapping services. Geo-tagging revolutionises maps;
- tracking services make it possible to mark travellers and to locate them at any time;
- extreme engineering: opening up new destinations closed to tourists, for example, underwater hotels and space;
- environmental-control technology will become more important.

3. Economic drivers:

- greater competitive pressure. Tourists expect more for less money;
- booming Asia. Wealth and power shift towards the east;
- polarisation of demand for cheap and luxury offers. Growing pressure on the middle;
- daily rock-bottom prices are normal and expected. The downward price spiral will revolve faster and faster and the margins will shrink;
- end of industrial working in western Europe;
- growing vulnerability of financial markets.

4. Ecological drivers:

- unspoilt nature will become scarcer and, therefore, more valuable;
- climatic change. Regional climatic advantages shift;
- end of the oil reserves;
- traffic jams will become chronic, the consequential effects increase and make travelling an even greater torture;
- ozone hole: the sun is dangerous. “Sun? Just say no!”

5. Political drivers:

- political uncertainties increase and prevent or restrict travel;
- growth of terrorism. Security measures, visa regulations and entry controls will become even stricter and make travel more complicated;
- declining trust in politics;
- disintegration of shared values. Clash of cultures. Intercultural conflicts spread and intensify. Thus, travelling will become more dangerous again.

3.1 Cultural tourism: major drivers and niches

The tourism segment that most directly relates to the Cultural Routes is cultural tourism. Cultural tourism essentially involves visits to cultural attractions and events by culturally motivated people. Taking the World Tourism Organization definition of tourism as its basis, the ATLAS (Association for Tourism and Leisure Education) definition of cultural tourism is:

The movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs

There is some evidence to show that cultural tourism is an increasingly important segment of the total tourism market. For example, figures from the World Tourism Organization indicate that the proportion of international trips accounted for by cultural tourists grew from 37% in 1995 to 40% in 2004. Although this seems a small increase, the large growth in global tourism volumes means that by 2009 there were around 375 million international cultural trips. Cultural tourism is also seen as a desirable market by many countries and regions because it is generally high-spending tourism, usually undertaken by highly educated individuals who stimulate cultural activity in the destination. Local residents also seem to appreciate the potential benefits of cultural tourism as it is a form of quality tourism. When asked what forms of tourism they would like to see developed in future, over 90% of Barcelona residents indicated that they would prefer to develop cultural tourism. They also saw benefits from cultural tourism, such as increased local incomes and support for local cultural institutions (Richards 2006). The OECD report on culture and tourism (2009) indicated that the main drivers for developing culture and tourism policies are:

- valorising and preserving heritage;
- economic development and employment;
- physical and economic regeneration;
- strengthening and/or diversifying tourism;
- retaining population;
- developing cultural understanding.

The growth of cultural tourism demand has also stimulated the development of many new cultural attractions and cultural tourism marketing strategies, as different countries and regions compete for a share of this lucrative market. For example, it is estimated that the number of museums in Spain has increased by 100% over the past 20 years. Barcelona, one of the leading city break destinations in Europe in recent years, has targeted cultural tourism as a major growth area, and saw attendance at cultural attractions rise from 4 million a year in 1994 to 13.2 million in 2005 as a result. Tourists now account for 71% of all visitor admissions at cultural attractions in the city. In order to succeed in this market, therefore, regions not only need to have a good supply of cultural attractions and events, but they also need to be able to meet stiff international competition through effective marketing. This in turn requires a clear understanding of the structure and needs of the cultural tourism market, as well as developing cultural products that can satisfy market demand.

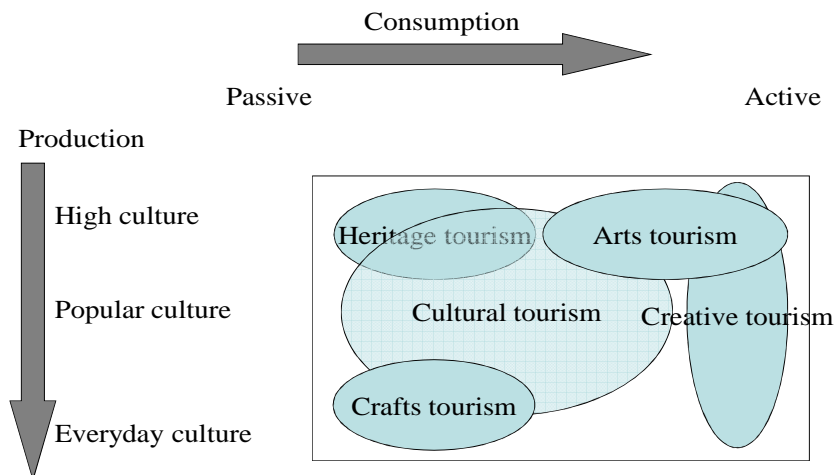
The main quantitative trends identified by ATLAS that are relevant for this analysis are:

- increased number of “cultural holidays”;
- rising education, income and status levels in the market;

- more use of the Internet for information gathering and booking;
- more visits to cultural events and festivals, driven by increased supply and a desire for co-presence.

At the same time, ATLAS research has also identified a number of qualitative changes in demand which are also important to consider. In general terms, there seems to have been a general shift towards new areas of culture, particularly popular and intangible forms of culture. There is also more evidence of “omnivorous” patterns of cultural consumption, as people combine both “high” and “popular” cultural forms in their leisure time.

Figure 4.



Popular culture is therefore emerging as an important market for cultural tourism alongside the more traditional high culture and historic attractions. For example, tourism associated with the Beatles is estimated to account for 600 000 visits to Liverpool a year, with these visitors spending some £20 million in the local economy.

Arts and creative activities are also becoming more visible in the cultural tourism market. Major arts exhibitions are now an important source of tourist flows in many cities, and the organisation of “blockbuster exhibitions” has become an important part of the cultural tourism strategies of many museums. The performing arts are also becoming more orientated towards tourist audiences, as music and theatre performances are used to draw residents and visitors to new performing arts venues, and programming is increasingly geared to tourist tastes (such as the growth in musicals in major cultural tourism destinations such as London).

Creativity is also becoming linked to cultural tourism, as people utilise their increasingly scarce leisure time to develop their own skills and experience local culture at the same time. There has been a veritable explosion of courses in areas such as languages, gastronomy, art and photography in recent years, driven not only by high demand for creative skills, but also by a growing number of creative producers who have started to service this market (see below).

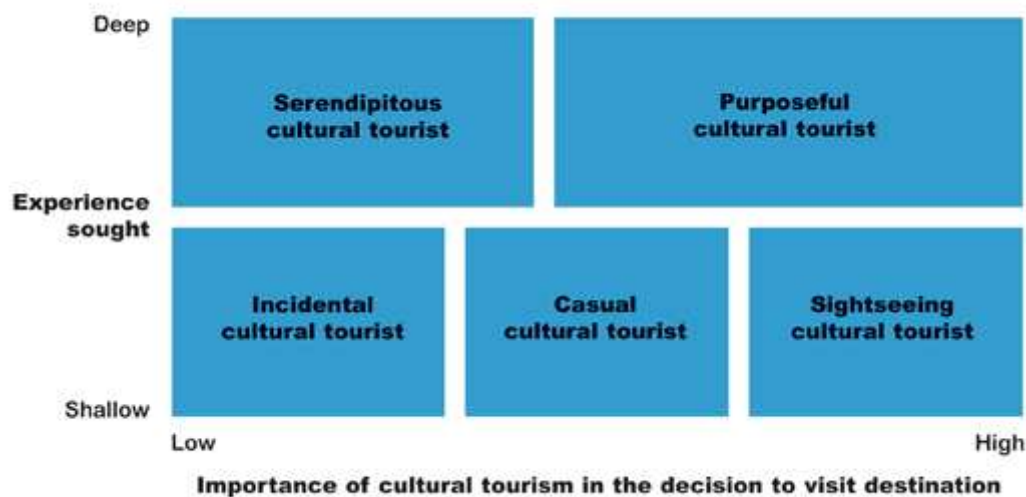
The main qualitative trends might therefore be summarised as:

- growing interest in popular culture, or the “everyday culture” of the destination;
- growing role for the arts in cultural tourism;

- increased linkage between tourism and creativity, and the growth of “creative tourism”;
- growing omnivorousness of cultural consumption.

Within the cultural tourism market, a number of different demand segments can be identified. In broad terms, the main segments tend to relate to people who have either a general interest in culture, and who see culture as just one aspect of the destination, and those with a specific interest in culture, for whom culture is the main reason for travelling to the destination. Paschinger (2007) combines the ATLAS distinction between “specific” and “general” cultural tourism with the work of McKercher and Du Cros (2002) to explain the cultural tourism market:

Figure 5. Importance of cultural tourism in the decision to visit destination



The purposeful cultural tourist, comparable to the “specific” cultural tourist introduced by Richards (1996, p. 34), is entirely motivated by culture in visiting a certain destination or cultural attraction, and engages in a deep experience.

The sightseeing cultural tourist is chiefly motivated for cultural reasons, too; however, this experience remains more shallow.

The serendipitous cultural tourist does not plan to travel for cultural motives, but after participating still ends up having a deep cultural experience.

The casual cultural tourist offers only a weak motive for visiting a certain cultural attraction or destination and, as a result, this experience remains shallow.

Finally, the incidental cultural tourist does not travel for cultural tourism reasons at all, and when they find themselves engaged in some sort of cultural activities, those typically remain shallow.

The implication is that not all attractions can appeal to all cultural tourists, and that many visitors will have only a tangential interest in the specific cultural offering. This is important in marketing terms, since it means that attractions need to think about the

specific and general appeal that they may have for tourists and have to develop appropriate product-market combinations. This principle is clearly evident in the Transromanica Route, for example, where research for the CrossCulTour project has indicated a clearly identifiable segment of visitors with a specific motivation to visit Romanesque sites (see Transromanica case study).

Trends in European cultural tourism

Europe is a key cultural tourism destination, with a large number of major cultural sites and a strong flow of culturally motivated international and domestic visitors. It is estimated that cultural tourism accounts for around 40% of all European tourism (including general and specific cultural tourists). In the last couple of years cultural trips in Europe declined as a result of the economic crisis, but appear to have been less hard hit than some other tourism sectors. Data from IPK (2009), for example, indicate a 5% drop in city trips (usually closely related to cultural tourism), compared with a 20% drop in touring holidays and rural tourism, and a 15% fall in mountain recreation in 2009.

One of the reasons for the resilience of cultural tourism is the fact that the range of cultural motives for travel is broad and rapidly increasing as a result of postmodern fragmentation. In place of a 'mass market' for cultural tourism, one can identify a growing range of cultural tourism niches related to specific facets of culture that appeal to tourists or which are being developed by destinations.

Among the most important of these new market niches are:

- creative tourism;
- educational tourism;
- gastronomic tourism;
- religious tourism;
- spiritual and holistic tourism;
- wellness and spa tourism;
- cultural volunteer tourism;
- roots of migrant tourism.

Creative tourism

Richards and Wilson (2006) have suggested that in some cases cultural tourism is developing into "creative tourism", which is defined as:

Tourism which offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences which are characteristic of the holiday destination where they are undertaken.

In the field of creative tourism the emphasis shifts from tangible to intangible culture, and the basic experience consists of an exchange of knowledge and skills between host and guest. This produces a more locally driven, equitable and arguably more "authentic" form of cultural tourism. The development of creative tourism is evident in rural areas (where creativity is needed to combat a lack of economic alternatives) and in cities, which are viewed as the engines of the creative economy. Rural creative tourism is being developed in many rural areas of the UK, Scandinavia and France. In major cities such as Barcelona, Paris and Rome, creative tourism is now being

developed as an alternative to “mass” cultural tourism (www.creativetourismnetwork.org).

Educational tourism

Travelling to learn a language is an increasingly important market in many countries, particularly those that can offer one of the major global languages. It is estimated that there is a potential global market of 375 million people wanting to travel to learn languages, although the actual earnings of language schools were a mere €15 billion in 2008 according to the trade association ALTO. Very often language courses are combined with cultural activities, offering the possibility to package language and local culture.

Gastronomic tourism

In recent years, a growing emphasis has been placed on tourism experiences and attractions related to food. Food tourism – as an example of gastronomic tourism – is defined by Hall and Mitchell (2001) as “visitation to primary and secondary food producers, food festivals, restaurants and specific locations for which food tasting and/or experiencing the attributes of specialist food production regions are the primary motivating factor for travel”.

Religious tourism

There has been a significant growth in religious tourism in recent years, particularly with a resurgence of pilgrimage to important shrines and a growth in more general spiritual tourism (see below). It is estimated that there are over 250 million pilgrims undertaking tourism trips each year. A study by ATLAS indicated that about 50% of visitors to sites along the Camino de Santiago had a religious motive. This figure is much lower for lesser known shrines in Northern Portugal, where the main motive is meeting local people (Richards and Fernandes 2007). The religious motive often means that pilgrims travel along specific routes to visit a number of shrines or even to complete lengthy itineraries. Increasingly, purely religious motives are becoming mixed with more secular forms of religious tourism, which often centre around specific religious sites.

Spiritual and holistic tourism

The journey within is also an area of cultural tourism growth, as tourists seek to develop their own spirituality or discover the spirituality of others. This is also linked to holistic approaches to wellness. Spiritual tourism was identified by the UNWTO as one of the fastest growing travel segments in 2007. However, pinning down this segment is difficult, as it spans a wide range of motivations, from more traditional religious tourism through alternative medicine to tree-hugging.

Wellness and spa tourism

There has been a revival of interest in spa destinations in Europe as a result of the general trend towards wellness travel. A new generation of visitors is discovering traditional spa destinations, but is now demanding more luxury and add-on experiences. The global market for wellness travel is estimated to be around €30

billion. This is particularly relevant to specific Cultural Routes which link spa and other wellness destinations.

Cultural volunteer tourism

Volunteer tourism has been another major growth market in recent years, again often fuelled by a desire to get to know other cultures. Tourism Research and Marketing estimated that there are up to 600 000 volunteer placements offered worldwide each year. This segment of tourists is particularly significant because of the long length of stay in the destination. Many volunteer tourism projects are also based on the conservation or restoration of heritage. The Cultural Routes have a strong potential link to volunteer tourism through heritage and through the desire to have intensive experiences with local people.

Migrant tourism

“Migrant” tourism is broadly linked to migration flows. As people move to other countries and settle there, they tend to travel back to their own country, and/or are visited by friends and relatives from their home country. This type of tourism therefore becomes a very physical manifestation of the history of migration to and within Europe. This type of tourism is expanding in line with global migration and as the income levels of migratory groups and their home populations rise.

In the UK, for example, the volume of migrant tourism grew from less than 4 million visits by international tourists in 1990 to almost 10 million in 2008. For UK residents, 20% of all international trips are now represented by this type of tourism. In Poland, 17% of inbound tourists were roots of migrant visitors in 2010, and 25% of Polish outbound trips were for the same purpose.

In many areas there are specific marketing programmes that are aimed at markets, often related to people tracing their roots in the home country. This is a fairly large market for tourism to European countries such as the UK and Ireland, and potentially it could be actively developed in many different areas. This particular market is of particular relevance to Cultural Routes because these often trace essentially migratory routes or links between different population groups. A number of projects have been developed linking Cultural Routes to migrant tourism (for example, the Routes to the Roots project, originally funded by the EU: www.routes.de).

Towards a new tourism?

Longer term changes in tourism are strongly influenced by general social and economic trends. The review of the tourism literature clearly identifies a number of these, such as the shift towards more individualised production and consumption, the desire for experiences and the shift towards electronic distribution and booking. Most of these trends can be related directly to features of the contemporary network society (Castells 1996).

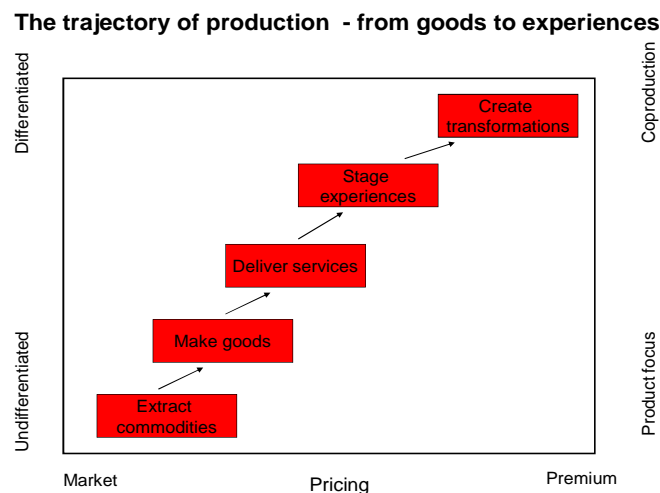
Scitovsky (1976) noted the transition from unskilled to skilled forms of consumption. As society develops so material wealth increases, basic needs (food, shelter) are easily met and people begin to acquire an increasing range of goods. Over time, the satisfaction and distinction that can be derived from possession of goods diminishes, since they tend to provide repetitive experiences. The emphasis therefore shifts to

skilled forms of consumption, such as cultural activities, where increased consumption leads to skill development and therefore enhanced enjoyment. The growth of skilled consumption is also often linked to a rising demand for “authenticity” among more discerning consumers (Zukin 2009).

A similar progression is foreseen in the production of culture by Pine and Gilmore (1999), in their vision of the Experience Economy. They argue that the basis of value production has shifted from extraction of raw materials to production of goods and then services, each producing increasing added value. However, services can be easily copied, and intensifying competition leads suppliers to develop complete experiences as an added value compared with services. In the experience economy, they argue, producers no longer charge for goods or services, but for the experiences. This is the basic business model of Disney or Starbucks, who extract premium prices through theming and other elements of staging and narrative.

This trend is clearly observable in tourism, where services are being enhanced through the development of scripts and performances, such as the development of themed attractions, cultural itineraries and staged events. Specific attractions now market themselves as experiences, such as the Court Room Experience in Bodmin, Cornwall, the Rotterdam Port Experience and Sport Experience Heerenveen in the Netherlands. The explosion of experiences in tourism has also arguably led to a form of “serial reproduction”, in which destinations around the world are busy developing similar experiences (Richards and Wilson, 2006). As a result, Pine and Gilmore have suggested that the next phase of value creation will be in the area of “transformations”, or experiences which actually change the person having the experience.

Figure 5.



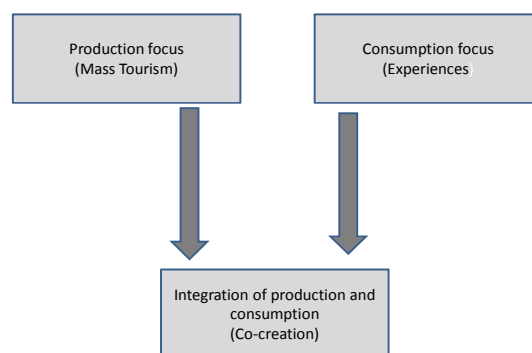
A similar progression is captured in the work of Rolf Jensen (2001) on the dream society. He suggests that modern society has inverted Maslow's hierarchy of needs so that self-actualisation is now the greatest need. The desire to develop the self through dreams and imagination has produced a shift from need-driven information to story-driven imagination. Storytelling will become one of the major drivers of the dream economy in the future. Stories engage people and add value to experiences – this is the basic business model used by Hollywood for generations, and it is now extending to other areas of the economy. Cars are no longer a means of transport, they are a

story about their owners. People purchase cars to say something about themselves as individuals, as part of their own life narrative.

In the same vein, value creation in tourism is increasingly about the stories and narratives that tourism carries, creates and facilitates. In order to stand out in the contemporary marketplace, destinations need to have a clear narrative about who they are. For tourists, Paris is not just a city, but also a dream of romance. Selling dreams has long been a preoccupation of the tourism industry, but the difference now is that those dreams are not necessarily pre-packaged, but co-created with the tourist. Because the tourists are in search of their own dreams, they are far more knowledgeable than the producers – so the producers have to work with the tourists to make their dreams a reality. Dreams are also far more complex than hotel beds or restaurants or amusement arcades. They require the collaboration of a large number of different producers, co-ordinated by what Jensen would call “dream makers” – the new cultural intermediaries for the 21st century.

Looking at these macro trends in the economy as a whole and in tourism in particular, we can begin to identify how the basic nature of tourism has shifted.

Figure 6.



There has been a shift from a purely production focus (mass tourism) and a primarily consumption focus (experiences) to the integration of production and consumption (co-creation). In a system of co-creation, the links between actors and organisations become vital, as these facilitate the co-creation process. These linkages depend not just on the form of information flows, but also on the content of the information. Although changes in the form of communication, such as the advent of the Internet, smartphones and social media, have revolutionised the way we communicate and the way we travel. The information also has to be shaped to provide the specific content that people want, such as the storytelling that makes a particular place attractive to travel to, or information on the specific benefits that are being sought from the destination. This means a shift from the simple provision of information and services towards the creative co-creation of experiences, narratives and dreams.

In the field of cultural tourism we can see a similar shift away from static museums and monuments towards more interactive and intangible experiences and the creative development of narrative. For example, Frey (2009) outlines how cultural tourism and

creativity are becoming integrated. He sees cultural tourism not as a passive activity, but as a means of creating places:

The cultural capital and creative resources of places are a resource for cultural tourists [who] are considered cultural pioneers who [can] re-evaluate “doubtful” places and have a decisive influence on them (revitalisation).

Cultural tourists can therefore help to forge new creative or trusting spaces and play an active role in place-making. Certain groups of cultural tourists, particularly creative tourists, can read and understand the “languages of creative places”, the “spatial complexity of structural, social, economic and cognitive factors [that] are seen as a specific local identity”.

Because of these creative skills, cultural tourists seek out the local and the defining elements of the atmosphere of places. This enables them not only to see or experience a place, but to live and dwell in the culture itself.

Frey argues that the “resource of place” has four dimensions:

- the physical-material constitution of the place and the consequent possible forms of utilisation;
- a cultural symbolism of the place which uses and thus contributes to creating an identity. This atmosphere of local identity marks the “habitus of the place”;
- the neighbourhood environment of the place, which by its utilisation and activation structures the socio-spatial habitat of the place; and
- infrastructural features and the connection of the quarter to city structures.

The amalgamation of these different narratives effectively constitutes the “genus loci” of a place. Successful places are arguably those that manage to co-ordinate all of these cultural-creative resources to make themselves more attractive as places to live, work, enjoy leisure and invest in, thereby increasing the quality of life. In the network society, the vital function that enables places to achieve this is the ability to link different networks into “regimes” that can manage the internal (space of places) and external (space of flows) resources effectively.

In line with general network theory, Frey argues that successful creative places are those that can generate “weak ties”, which enable them to generate bridging social capital (to link to the space of flows and to other communities) and bonding social capital (to link people locally). The essential quality of such places is fluidity, which enables different people to meet, so that “there are unexpected situations, spontaneous actions, as well as heterogeneous and varied lifeworlds and that, in this way, points of view besides usual paths and routines may develop” (Frey 2009).

This process is difficult to manage: Frey (2009) argues that it must be determined which kinds of support for creative processes are suitable for facilitating the self-management of those open structures that “creative people” need for their work and leisure. Thus, apart from focusing on the place as a creativity-developing resource, there must be consideration of the “producers of creativity” and their ability to meet and co-create new knowledge and innovations. In this context, the functions of trust, solidarity and context-bound, implicit knowledge in “creative milieus” are of particular importance. The meetings and moments of co-presence established through networks also create opportunities for risk-taking and surprise, which are vital to the creative process.

Paradoxically, the development of creativity also presupposes the establishment of routine, of sedimented practice which establishes the contours of normality or the everyday. Without these structures, there is no difference, no resistance, and no possibility of action and reaction. Without the box, there is no potential for thinking outside the box. The same applies to cultural tourism as well. Successful cultural tourism experiences are often those which provide a link to the culture of the tourist, as well as a confrontation with the new. Translated into the discourse of the Route, the beaten path is necessary for people to deviate from it, and to recognise that there are new ways to act. In this way, there is a dialectic relationship between the development of established Routes, and the development of new, creative concepts of culture. Only once something becomes “normal” can it be challenged and changed.

De Cauter (2009) argues that the development of modern society produced a rush of sensations and experiences which made the extraordinary “normal” and produced a dulling of the senses which generated a desire for more and more extreme experiences. Modern journeys were therefore often aimed at the different, the exotic. In the past, therefore, the cultural tourist sought culture as something external – the products of other cultures encapsulated in the museums and monuments that represent the “commanding heights” of national and local culture. As cultural tourism has developed, however, many tourists have voraciously consumed these cultural symbols until a certain level of saturation is produced, monument fatigue, “been there, seen it, done it”, which generates a desire for new experiences. Arguably, these new experiences are to be found within, rather than outside the tourist. The Gottlieb Duttweiler Institute (2006) sees a trend “away from adrenalin kick to endorphin kick. Instead of a high and ecstasy, people want meditative tranquillity and spiritual experiences.” Hence the growth of spiritual tourism mentioned above.

We also need our grounding in tourism as an everyday experience in order to be able to appreciate the differences offered by the host culture. This applies to all aspects of the culture, not just the commanding heights. As J. B. Priestly remarked: “A good holiday is one spent among people whose notions of time are vaguer than yours” – in other words it is the practice of everyday life that makes a culture different and attractive to many cultural tourists, not just specific tourist attractions.

Tourism itself has developed in a similar way. In the early days of tourism, travel itself was novel, and only over time did mass travel become an expected, sedimented practice, which participants began to take for granted as part of their everyday world. However, the very fact of travel becoming normal has created new possibilities. The practice of travel equips tourists with skills for travelling, and eventually these skills are used to “travel outside the box” and to create new possibilities for tourism. This is evident in the range of new travel experiences which are now offered via the Internet and depend to a large extent on the consumption skills and trust developed through tourism. Examples include couchsurfing, home swapping and “guided by locals” schemes.

The important point is to see cultural tourism as more than just tourists being attracted by culture. Tourism itself is a creative force. Tourists do not just consume culture, they can also make culture. In some cases this can be negative, as in the commodification of local culture. But in other case, it leads to the creation of new and positive phenomena, including new creative activities and organisations, new insights and new forms of intercultural dialogue. The point is to use the creative potential of tourism to create new possibilities not just for the tourists, but also for local communities. This is a challenge that could be taken up by the Cultural Routes.

3.2 Challenges and created opportunities for Cultural Routes

Cultural tourism is essentially about journeys. Not just because the tourists by definition travel to experience culture, but also because culture itself is a journey – a voyage of discovery and self-realisation. Summarising the trends outlined above, the new cultural tourism can be characterised in terms of:

- co-creation;
- increasing linkages between suppliers and consumers;
- increased contact with the local culture;
- increased emphasis on the everyday and intangible heritage;
- a shift towards events as a means of valorising place;
- creative spaces;
- holistic, spiritual approaches;
- new grounds for authenticity (a move away from authority towards context, originality and user-generated content).

In this new landscape of cultural tourism, the Cultural Routes potentially have a new and important role to play. Cultural Routes can act as spiritual recharging stations, meeting spaces and trusting spaces. The growing range of roles that the Cultural Routes can play is also evident in the work done by the European Institute of Cultural Routes (EICR) for the Congress of Local and Regional Authorities of the Council of Europe, which identifies a range of trends relevant to cultural tourism:

- the increasing importance of showcase exhibitions and of European capitals for culture;
- the increasing importance for visitors of museums of territories and scientific museums, backed on living presentations, that is with people working;
- the increasing importance of industrial heritage sites;
- the increasing importance of military architecture sites;
- the increasing importance of sites of memory;
- the increasing importance of natural and historic parks;
- the increasing importance of celebrations, namely those of prominent local, national or European figures;
- the increasing importance of annual themes co-ordinating a common policy for territories;

The case studies of the Cultural Routes also show that there is collaboration emerging between the Cultural Routes and tourism SMEs to develop cultural tourism. Examples include:

- the development of interactive guides (Transromanica)
- links to new audiences via social media (Transromanica, Hansa Youth);
- new celebrations (for example, Hansa International Festival);
- new heritage merchandise (all Routes);
- joint marketing with hotels and restaurants (all Routes);
- joint promotion with transport providers (Hansa);
- gastronomic tourism (Olive Tree);
- Agritourism/ecotourism (Via Francigena, al-Andalus).

This underlines the fact that there is still relatively limited articulation between the Cultural Routes and newly developing themes in cultural tourism. In particular, the types of tourism activities being created by most of the Routes seem to have little overlap with some of the other main themes of the Council of Europe, such as human rights, democracy, social cohesion and intercultural dialogue.

What is increasingly missing in the contemporary network society is a sense of narrative, which can provide the essential link between people, communities, places, institutions and times. Very often this lacuna can be explained by the fact that the increasing individualism has weakened or broken the previous links which underpinned narrative – the family, the neighbourhood, the tribe, etc. One of the aspects of cultural tourism that makes it particularly relevant for the policy of the Council of Europe is its intercultural dimension, as many different cultures are brought together in the development, consumption and communication of cultural tourism. Cultural tourism has been shown to have the potential to influence attitudes among both the host population and tourists. On the positive side, research by the World Youth Student and Educational Travel Confederation (Richards 2005) indicated that young people travelling abroad for extended periods were primarily interested in having contact with local people and the local culture. The research found that increased contact with the local culture promoted higher levels of interpersonal trust, tolerance and self-confidence.

What is interesting about such intercultural dialogue is that it exposes the double-sided development of narrative. Not only does cultural tourism develop a narrative about the place in which both locals and tourists dwell, but it also develops narratives about the individual tourists who go through and experience interculturality in those places. The narrative of tourism therefore links place and journey, local and global, dwelling and mobility, host and guest.

In the past, narrative was often linked to journeys, often because narratives provided links to people and places only experienced in the imagination. Today, the travel has become more concrete and the narrative has lost its connection with the space of places. Cultural Routes can play an important role in anchoring narrative in the cultural spaces through which they travel, providing:

- raw materials for narrative;
- linkage between narrative and place;
- creative spaces for narrative development and intercultural dialogue.

The Cultural Routes are important not just because of the physical journey, but also because they are in themselves a form of narrative. Routes tell stories about the places they pass through and link, and also about the people who travel them. This is most clearly evident in the case of pilgrimage routes such as the Camino de Santiago, but it should be an essential element of all the Routes. The modern tourist needs to have a story they can relate to and which says something about them as people as well.

Conclusions

This review of tourism trends in Europe points to a number of challenges which need to be met by the Cultural Routes and the Council of Europe in future. In particular, it raises some basic questions about the role of the Cultural Routes as currently constituted with respect to tourism developments and the position of the Council of Europe:

Given the growth of tourism as a major leisure industry in recent decades, is there a role for the Council of Europe in tourism development and promotion?

How can intervention by the Council of Europe in tourism markets be justified with respect to other developments (for example, market failure, development of specific values, etc.)?

If the Council of Europe wishes to develop tourism through the Cultural Routes, what form should this take (“mass” versus “niche” cultural tourism/broad access versus targeted dissemination of knowledge)?

What is the role of the Council of Europe in tourism development and promotion relative to other actors (most relevant in the current context, SMEs, but also European, national, regional and local authorities)?

It is highly recommended that the Council of Europe thinks strategically about these questions and finds a clear position for itself in the broader cultural tourism field, if it is to continue playing a major role in the development of cultural tourism in Europe. In particular, it is important to consider how the values the Council of Europe wishes to promote via the Cultural Routes can best be promoted. Is it sufficient to maintain a general commitment to Council of Europe values in the development and management of the Routes, or is there a need to stimulate a more direct and positive action? If the latter is desirable, then the Council of Europe would need to find ways to stimulate the preferred effects through financial, capacity-building, evaluation, and other instruments.

The case studies underline the fact that the Cultural Routes have limited resources to act outside the temporary and sporadic stimuli provided by EU funds. This suggests a need for more funding, but it also importantly suggests that the Cultural Routes currently lack the non-financial motivational power achieved by programmes such as the European Capital of Culture or the UNESCO World Heritage designation. In a climate of fiscal stress, it is likely that achieving a similar status will be important in gathering the resources necessary to make the Cultural Routes a more valuable tool for realising the broader aims of the Council of Europe.

4. Governance of the Cultural Routes networks

4.1 Network structure and resources

During the past two decades networking has become a key buzzword in the international cultural co-operation arena. In fact, international cultural networks are phenomena that demonstrate the ever-increasing interest amongst cultural operators to be visible on the international stage. The definition of a network is blurred but it is recognised that “networking” has become a convenient and cost-effective mechanism for the exchange of information and experience by cultural practitioners and city leaders. Networking was once a non-formal pursuit but has over the years become a recognised term used synonymously with many forms of governance including forums, leagues, working groups, alliances, councils, committees, foundations, associations, societies, conventions, etc. A formal network may be made up of members, associates, affiliates, partners and/or delegates.

Cultural and artistic networks in particular represent a tremendous pool of creativity, ideas, information and professional practice. European cultural networks are currently playing a vital role in transnational co-operation across diverse sectors and, in doing so, are furthering the European Union’s mission to support cultural co-operation in Europe. In fact, networks are increasingly and widely valued by intergovernmental institutions, as well as national and regional governments and foundations, for their ability to work effectively across borders and deliver a substantial range of benefits and achievements.

“European networks make a vital contribution to transnational co-operation across diverse sectors of arts and heritage fields. A contemporary phenomenon, they represent a flexible and dynamic way of working which brings together professionals across Europe who share common concerns” (Staines 2003). As stated in Chapter 3 of this report, networks represent a flexible and dynamic way of working which bring together professionals who share common concerns across the globe. Transnational cultural networks normally fall within the sphere of human or social networks. Human or social networks are designed to increase communication and mobility of people, ideas and experiences, thereby providing professional development, training and increased employment opportunities: they are also an effective means of representation of a group or alliance at a national or international level. Often, cultural networks grow organically, driven simply by a need to establish links, share information and experience, generate ideas and find partners for collaborative projects and engage in professional development.

This section looks at the Cultural Routes of the Council of Europe to understand how the actors involved are networking. Despite many of the Routes lacking a clear physical network structure, they are a product of the interactions of their members. A study of the individual experiences of each network revealing behaviour patterns of the members and their ways of using the network would be ideal. However, given time limitations for this study, it is only possible to explore network governance themes in relation to the limited knowledge that the five case studies provide as well as the transversal theme grids provided by the EICR. This information does, however,

provide a sample that allows the identification of areas that may need support for informal and formal networking in and amongst Cultural Routes. A network's governance model, the organisation of its activities and fiscal management can vary greatly and depend on many factors. No single model is appropriate for all – however, there are some common “rules” that are normally appropriate to apply if the network aims to determine the highest amount and level of co-operation possible within the network.

This section looks at several areas where these rules apply (legal basis and horizontal structure, the secretariat's role; the use(fullness) of a membership fee, members' charter or by-laws, joint events and initiatives and shared merchandising) with a particular emphasis on how these are applied or not in each of the case studies. The aim is to highlight how these main points might relate to the perception of the network, to the effects of networking and the effects of interaction on the structuring of the network.

In Cultural Routes the theme of the Route is the binding factor and the strength of the theme is a clear motivating factor. However, the theme alone is not enough to constitute a network. The crucial ingredient is connectivity. Connectivity at many levels is the key to networking. Connectivity underpins any web of informal or formal interactions and networking.

Practice examples

Current networking tendencies among partners on given Cultural Routes vary considerably. The Cultural Foundation “Routes of the Olive Tree” has brokered agreements between the Greek and other Mediterranean chambers of industry and commerce, European and Mediterranean universities, European research centres, museums and non-governmental organisations from more than 18 olive-growing countries. However, there are no regular activities that link or bind these institutions. The cultural foundation encourages partners to develop festivals and claim to (in these cases) commit between five and 10 people to support partner events as well as provide exhibitions, books and products – however, given the centralised nature of the foundation it would not be unusual if this were considered as a bilateral rather than a multilateral show of support.

The Transromanica project partners operate independently in each region, although the CrossCulTour (EU-funded) project has provided a financial incentive for four Transromanica partners to develop cross-marketing projects in the form of audio guides, signposting, etc.

The Legacy of al-Andalus Foundation operates unilaterally; however, it has a wide range of local and national partners such as the Andalusian Ministry of Culture and the Ministry of Education and various bodies concerned with regional tourism. In many ways the foundation could be said to operate as a company rather than a network.

Networking between the partners on the Hansa Route is happening bilaterally and multilaterally through a range of initiatives but is most clearly evident on the Hanseatic Day when all partners are invited to take part together in what is a truly collaborative event that provides benefits for all and allows the assembly to meet, to discuss network business and vote.

Governance models for cultural transnational networks

Governance relates to consistent management, cohesive policies, guidance, processes and decision rights for a given area of responsibility. Good governance between a set of partners therefore requires precise and shaped management policies, clear lines of responsibility and commitment. At the stage when a network begins to develop joint

products, a legal structure and constitution become important as does the appointment of an executive committee, the creation of a co-ordinating office and formal membership rules, fees, etc. The most basic elements of a good governance model for a network are the legal basis (statutes and by-laws or models of working), the shared administrative structure (secretariat) and shared commitment (financial or otherwise).

In terms of good network governance, experts seem to agree that a horizontal structure is required, meaning that all partners share or at least rotate responsibility for the network's governance. When many of the Council of Europe's Cultural Routes were first set up, no requirements were made to create a formal governing body and therefore some of the Cultural Routes are still without legal status and/or dominated by a single partner. Legally at least, this has since been rectified in many of the Cultural Routes and, according to the new enlarged partial agreement, Cultural Routes are now required to have a legal base. Most of them have adopted the model of non-profit association or foundation. Others, such as the Santiago de Compostela Route, are more difficult to align in a legal structure; however, one could argue that the connectivity in this Route is solid (namely, networked pilgrim hostels and passport stamp system) and therefore there is no need to impose a legal governance structure.

Where connectivity is low, the governance of a transnational network is fragile. Little communication can lead to misunderstandings and the structure can become very delicate. In this case, the legal base clarifies the mission of the network and leads the way forward for democratic decision-making processes (hopefully with an executive board and an active membership). The governance structure (as has been highlighted) needs to be as horizontal as possible – methods to ensure a horizontal structure include regular rotation of board members and regular meetings of the executive.

Since there is no legal system to create a “European statute” for a non-governmental organisation and, therefore, most legal statutes have to be located in one European country, networks are already at a disadvantage when hoping to create an equitable transnational legal base for their work. However, as most statutes allow for board members from other member states, this should not be the principle issue.

The principle issue is about connectivity in the executive body of the Cultural Routes. It is very difficult to evaluate at a distance the real connectivity in decision-making processes taking place within the current Cultural Routes. More attention should be given to the legal governance structure of Cultural Routes, to ensure that horizontal democratic structures are being formed.

In essence, a network should be designed to establish channels of communication and co-operation between professionals who share common concerns. In order to do this, networks begin to evolve into more complex structures. At the stage whereby a network begins to develop joint products such as publications, conferences, meetings and other collaborative projects, it is normal to create a co-ordinating office.

Although highly diffused and decentralised in their way of working, an established network (with a legal structure) will often require a node or pivotal point which is identifiable as its centre. A small office, the network co-ordination office or secretariat, with a network co-ordinator or secretary general, is often essential to undertake the day-to-day administration, respond to requests from new and existing

members, disseminate information, organise meetings and help facilitate special interest groups or projects within the network.

The Cultural Routes' case studies suggest that in many cases the geographical location of the key decision maker is also the key location of the secretariat. It is unclear if the costs of running the secretariat are shared by the members and how much ownership the dispersed members feel that they have.

The usefulness of a membership fee

A membership fee is a good tool to use to implicate members and create revenue. A membership fee provides a commitment to the project but it is also a contract to get something back. Partners need to be clear about what they get back in return for their membership fee and what they put into the “pot”, be it money and/or time and effort. A membership fee is a good model to follow as this clearly indicates commitment to the cause and suggests (even creates) ownership. Often in networks the stronger partners take up the burden of supporting the weaker partners. A membership fee may therefore help to support weaker partners to attend the network meetings. Sometimes membership fees need to be staggered to take into account differing economic circumstances. Other transnational cultural networks are known to use the UN country scale multiplied by €x to set equitable membership fees.

Practice examples

Transromanica, registered under German law as a voluntary association with 10 members including national and regional public and private bodies from seven countries, collects a membership fee from its members. The membership includes institutions, tourism organisations and regional governmental bodies. The members pay an annual membership fee to the association which is managed by the secretariat member – paid for by the membership fee. In return for the membership fee, the members have permission to use the logo and have their information included on the Transromanica website. This is a very simple system, not expensive but creates an ambience of joint ownership.

Some members contribute financially to the Cultural Foundation “Routes of the Olive Tree” – it is unclear, however, if this is on a sporadic basis and related to specific activities rather than as regular support for the secretariat.

The Via Francigena case study suggests that member cities are expected to pay a fee. Almost a quarter of the 2010 budget is covered by fees. Support is also provided by the Italian Ministry of Culture. It highlights, however, that there are difficulties in involving Swiss and French public authority partners.

According to the initial survey carried out in the context of this study, 14 of the 29 Cultural Routes collect some sort of membership fee or receive funding from a range of city authorities. A further study would be useful to establish how regular membership payments are made and what benefits members receive as a result.

Members' charter or by-laws

Horizontal and equitable governance structuring is a fundamental principal of strong networking. Despite the Resolution CM/Res(2010)52 on the rules for the award of the “Cultural Route of the Council of Europe” certification, stating that the networks should “operate democratically”, in a number of cases the Cultural Routes are dominated by a single member albeit within the framework of an association and are only nominally operating in a democratic fashion.

Building an environment whereby “we are more as a whole” as a philosophy – rather than “I want to keep this for me” – is important. The biggest signal, and possibly the only way, is to ensure shared governance. This is easier said than done, not least because of tight budgets but also limitations on time and not forgetting possessiveness on the part of the founding partners. This also raises the issue that, ideally, Cultural Routes should be constituted by a number of equal partners from the outset.

The dominance of one partner over another is always an issue in networks – it creates an “us and them” scenario. Networks need openness, flexibility and heterogeneity of their members. Some of the best models of networks are those that keep network co-ordination to a minimum (largely volunteer) and spread tasks amongst the partners. Non-institutionalised structures may work well in some cases as can be seen in the Hansa Cultural Route, whereby democratic decisions are taken on who hosts the Hanseatic Day each year. As with anything, the devil is in the detail, an in-depth evaluation of each Cultural Route’s ownership structure in terms of regular meetings, lines of responsibility, budgets, etc., would be an interesting indicator of shared governance. From the five case studies one can already see problems and challenges emerging that impede the implementation of strong, equitable and functional governance models, although it is difficult to say if this is the case of the other networks which have not been studied in detail.

A members’ charter and/or by-laws as a model could be explored for the Cultural Routes. The charter/by-laws could set out partner obligations and thus contribute to a sense of loyalty, not just to the Cultural Route itself, but to the Council of Europe, the EICR and the whole programme. Ideally, a model charter could be devised together with the Cultural Route leaders or co-ordinators through a series of workshops that look at all aspects of governance, networking and cross-marketing. The model could then be adapted to each Cultural Route as appropriate.

It is vital that the group leaders come to an agreement together through guided sessions rather than have a model charter imposed by the Council of Europe or the EICR. The charter/by-laws is a very practical document. It should provide detailed procedures for governance and decision making. Primarily, its aim is to improve connectivity amongst the partners in all areas that could have shared benefits. The by-laws go beyond the legal base (statutes) and consider very practical details such as shared ownership of the website and uploading procedures, or agreements on use and exchange of logos. It may also provide an agreement on shared visibility actions and outline the co-ordinating procedures to create shared brochures or documents, etc. In brief, it would outline the protocol and procedures for developing shared activities.

Joint events and initiatives

Networks depend on face-to-face human contact – connectivity. However sophisticated electronic tools have become, people must actually meet in order to lay the foundations of trust required to develop collaborative projects. The by-laws, constitution or members’ charter should outline the level of commitment in being a partner. Being a partner of a network requires participation and generosity and work. Aside from paying a membership fee, a partner needs to commit to meetings (which includes costs in time and money) and it requires voluntary investment of time. These are real costs borne by the members and their organisations. There are other less tangible efforts required by members, for example the personal mental effort required

to engage in debate in a foreign language; the need to understand the context of your partners and get a grip on someone else's reality; and to plan an exchange with a colleague whose culture has few reference points in common with your own. Trust and continuity of participation are essential to benefit from network participation.

Joint projects create the necessity for networks to evolve. There is a chicken and egg scenario here: one needs to network to build trust, develop an idea and create a project – on the other hand, one needs a shared project to create the necessity to network and meet. A project-based approach to setting up the Cultural Routes might work. Joint programmes are an essential component of networking activities. Face-to-face contact but also co-ordinated initiatives are important to install the significance and importance of the transnational value of the project, in this case a Cultural Route.

The Cultural Routes are an interesting case for, when looking at the activities, one can sense that many are being developed unilaterally. According to the analyses of the Cultural Routes conducted within the framework of this study, there are very few shared innovation projects across national borders. Cultural Routes have few regular shared events or activities that bind their work together and give shape and reason for the international network. Therefore, there is no added value of the Council of Europe label in networking terms for the Cultural Routes.

There are methods to stimulate joined activity, whether this is doing collaborative visits and joint projects, sharing research materials, attending conferences, creating exhibitions, developing workshops or seminars, publications, etc. With very little effort unilateral events can become shared events, like the Hanseatic International Day, which is hosted, shared and rotated between members. It provides the argument for the network to meet and benefits are shared. This does not negate local Hansa Days – it simply creates another layer of shared activity beyond the level of a local festival by creating also an opportunity to network, promote and develop the business of the network. Limited funding opportunities for developing international events or projects is the major factor preventing more joint activities.

In summary, these observations demonstrate that a funding stream should be made available to facilitate more face-to-face contact between the partners and encourage shared working and development of international initiatives. Connectivity is needed.

The statutes should require that the executive committee roles are shared between different international partners. Regular meetings of the executive committee should be a commitment stipulated in the statutes. Regular meetings and reporting between the executive and the secretariat body are essential. Cultural Routes leader workshops should be developed in order to explore the creation of a members' charter and/or by-laws model. All partners should meet at least once a year. Membership could, for example, require attendance at one management meeting a year (this could be combined with an annual shared event). Systems of reporting and regular communication between the partners are necessary.

The partner housing the secretariat ideally should not also hold the post of president.

If necessary, an honorary post for the founding partner could be instigated. The EICR should monitor the development of governance models. At the very least it should receive minutes from the annual Cultural Route partner meetings. Besides, the

Cultural Routes should be encouraged to identify at least one major annual activity that should be rotated amongst the partners (a festival, a walking event, a tasting, etc.). This event should coincide with promotional activities (exhibitions, etc.) from all the partners and create an incentive for the formal assembly to meet, discuss business and vote.

Training is required to support horizontal governance and effective networking. Training may be necessary in the use of Web 2.0 tools would support the partners' ability to communicate cheaply and effectively, using newsletters, blogs, e-mail groups, Facebook accounts, Twitter group, etc. Cultural Routes should consider applying a membership fee to its key partners that would cover core costs related to the secretariat (this would create a sense of shared ownership). It is preferable that any co-ordinating/secretarial post(s)/office is a shared commitment by the partners – either by rotating the secretariat or by sharing the employment costs of the co-ordinating office and staff.

4.2 Fiscal management and funding opportunities

How to govern and sustain networks is always a challenging issue for almost any network. Insufficient possibilities for supporting “the process” needed by networks such as meetings are a problem. All networks suffer from the problem that their ability to operate effectively is hampered by the fact that they lack structural operational support.

Creative approaches to generating income might include a variety of possibilities including:

- sales of goods or services (ticket sales, membership fees);
- support from outside sources, namely foundations, sponsors, donors;
- support from international, national or local governmental programmes;
- financial revenues (bank interest, investments, government bonds and others);
- other revenue from intangible assets such as patents, licenses, trademarks and copyrights.

Current organisational structures

There is no membership fee for joining the Hansa (only for joining the Hansa Route website). All towns cover their own costs for attending meetings or hosting events. A limited amount of private sector support has been attracted and this has covered the cost of modest promotional tools such as pamphlets. The Town Council of Lübeck covers the cost of the central office and a co-ordinator (although this post is not presently filled).

The Legacy of al-Andalus receives almost all its organisational budget from the region of Andalusia with the exception of sporadic funding from European Commission programmes such as INTERREG or Euromed Heritage. However, these projects have all been time limited and the collaboration ended as soon as the money ran out. Some of the EC-funded projects were co-ordinated by partners outside of al-Andalus, which suggests a transnational partnership could be easily established should funding be earmarked for this in the future.

The Cultural Foundation “Routes of the Olive Tree” was founded with the backing and support of the Chamber of Commerce in Messenia. In terms of balance between public/private support, the overall budget of the foundation is:

- 30% (contributions from network members and friends of “Routes of the Olive Tree”);
- 20% (income from publications and the “Routes of the Olive Tree” shop);
- 50% (external grants including grants from the Chamber of Commerce and Industry of Messenia (Peloponnese, Greece), which belongs to the public sector, and other ICC grants from

the Hellenic Ministry of Development and the Peloponnese region and private sponsors, the majority of which are SMEs based in Greece).

The Transromanica network has a membership fee and this covers the basic running costs of the secretariat which is based in Germany. Additional projects have found finance from EU (principally, the European Regional Development Fund) funds. Only some of the partners are able to participate in these as EU funding requires match funding and some of the partners are unable to fulfil this funding criteria. This reduces the ability of the Route to act as a whole.

The Via Francigena is principally supported by fees from participating cities (mostly Italian) and the Italian Ministry of Culture. The EICR highlights the difficulties in agreeing support with local and regional authorities from other countries on the Cultural Route.

Local funding

The Cultural Routes are no doubt accustomed to begging, borrowing, and developing funding avenues with local and regional authorities. As their impact is best felt at the local level, that is where the main funding streams have until now come into play. This of course has its limitations as regional funding is usually restricted to the region in which the respective partner operates and likewise local funding is usually restricted to the town in which the respective partner operates. Support may also be in kind rather than financial.

National funding

National funding is often scarce for cultural projects and even when it is available, it tends to be for projects corresponding to the national territory and not for transnational co-operation or activities. National funding is usually restricted to the country in which the respective partner operates. There might be more funding available for tourism than culture but even that is tending to disappear.

European funding

European Union funding is much sought after by most cultural networks in Europe as it is one of the few sources that support transnational working. However, the case studies highlight that EU calls for projects impose restrictions on partners (match funding, legal procedures, geographical requirements, etc.) and create inequitable situations between partners on the Cultural Route.

European funding is notoriously difficult for cultural projects to get their hands on and relies heavily on partners being able to supply match funding as well as all the legal requirements necessary to tick all the boxes. It is quite normal for only a handful of partners on any given Cultural Route to apply for a project because (a) the practicalities of all partners applying is too cumbersome; (b) the likelihood that all the partners could find match funding is low; and (c) it is extremely difficult in some cases that all papers and legal documents are available as stipulated. There may also be problems because some of the Cultural Route partners do not belong to eligible territories or the match funding is just far beyond the scope of some organisations. The problem is clear, European-driven funding can often make an already inequitable partnership more inequitable. This is no basis for horizontal working, and thus simply opening a dedicated funding stream for Cultural Routes in the EU will not be the solution and may create new problems.

EU-funding programmes can cause friction amongst networks and because of the external drivers or demands (call objectives) it can mean that projects in the end spend a lot of time applying for funding that creates more work for them than resolving funding shortfalls in the desired activities of the network. During the meeting of transnational cultural networks (2008), held in Lisbon, huge criticism was made of donor-driven policies that put pressure on the dynamics of the network.

Corporate sponsorship

Corporate sponsorship may be an area that the Cultural Routes could explore more fully.

Sponsorship is a different concept from that of subsidising or grant-giving. Sponsors always expect benefits in return, for example, increased media coverage; access to potential clients; improved corporate image; tax deductions; sale of goods, etc. Commercial companies may support cultural organisations and projects by giving corporate gifts, services or grants.

Corporate sponsors favour numbers. It is important therefore that the Cultural Routes create mechanisms to monitor visitor numbers and the profile of their visitors. Cultural Routes often attract highly educated people with relatively good incomes who are attractive to certain sponsors. Having a clearly recognised brand and better visibility of the Council of Europe label are also important elements that will reassure corporate sponsors. Sponsors are more willing to support organisations if they already know they have a good reputation. The aim is to find a sponsor that would be engaged with the type of audience that the Cultural Route will attract; for example, Timberland on a walking route, Mozart chocolates on the Mozart Route, etc.

Developing a fund-raising strategy should be a priority for the EICR and where possible the Cultural Routes themselves. The Cultural Routes would benefit from training in developing sponsorship offers such as sponsorship packages for a range of partners. It should be noted that many large sponsors may only provide goods in kind for the Cultural Route. It is up to the Cultural Route to see how to best use this support and convert resources into money. Sponsorship is a mutually beneficial process for both the sponsor and the sponsored organisation.

Foundations and gifts

There are a huge variety of foundations in Europe that are known to donate to cultural/artistic projects. Training and development on brokering relations with foundations is important for the Cultural Routes. When planning to approach foundations, it is important to understand how they function. It is important to plan the process of seeking the right foundation to apply to, as fund-raising is also “fund-spending”: it requires time, money and patience to write applications. One of the problems for the Cultural Routes is that they are operating on a very limited shared capacity (some even without a co-ordinator). Either funding is needed to support this process or the EICR should develop a fund-raising function. A key element in the fund-raising plan is planning charity events whereby individuals or members of the organisation (sometimes anonymously) donate small amounts of money, usually for a specific area of work or a social cause. There has been a notable rise in donor-led gifts

related to immortalising oneself or one's relatives. Many cultural organisations are capitalising on new ways to provide "in loving memory of" trophies like park benches, paintings or sculptures sponsored by, etc.

Crowd-sourcing

Another exciting development for fund-raising in recent years has been that of crowd-sourcing and crowd-funding. Crowd-funding provides a possibility to raise financial contributions from online investors, sponsors or donors to fund for-profit or non-profit initiatives or enterprises. Crowd-funding is an approach to raising capital for new projects and businesses by soliciting contributions from a large number of stakeholders following three types of models:

- donations, philanthropy and sponsorship where there is no expected financial return;
- lending; and
- investment in exchange for equity, profit or revenue sharing.

Crowd-sourcing relies on digital technologies to "sell" a cultural project or initiative. It is too early to tell if this initiative will lose momentum as more and more crowd-funding sites appear but it is clear that this is still a new venture and has a great deal of potential.

Self-financing

Self-financing requires the sale of goods and services. Here we return to the question of merchandising and the possibilities that shared merchandising could have for creating synergies within and through the Cultural Routes, for instance, olive oil from the Olive Tree Route partner in France being sold, for example, by other partners on other Cultural Routes in France. The cross-marketing benefits could be vast although it will take a great deal of leadership and funds invested for this to happen in a serious manner.

Conclusions

It should be noted in conclusion that the Council of Europe needs to consider being more proactive in supporting the project leaders and preferably be able to broker partnerships with funding bodies in order to support the costs of networking, cross-marketing and development of joined projects.

A significant dedicated funding stream is needed to support regular meetings of the Cultural Route leaders and key players. Preferably, the fund should cover costs related to training trainers, support regional events to create awareness, support cross-merchandising opportunities (across Cultural Routes as well as within Cultural Routes) and pay for an overhaul of the ICT infrastructure and branding of the Cultural Routes programme. A funding stream that could cover the activities of the Cultural Routes as a whole is needed to support the Cultural Routes' training, marketing, regular meetings, annual events and use of ICTs. This funding should be sought from as wide a range of funding partners as possible in order for funding requirements not to impede the overall work and objectives of the network.

There is a clear need for two funding streams: one dedicated to each Cultural Route and the other to the overall umbrella activities organised by the EICR.

With regard to the EU calls for projects, the restrictions on partners (match funding, legal and geographical requirements) create inequitable situations among partners on the Route. This, in principle, can be managed if it is not the only funding stream – but, ideally, it should be managed by the EICR. This umbrella fund could cover the costs of training trainers, support regional events to create awareness and support cross-merchandising opportunities (across Routes as well as within the Routes).

5. SMEs' innovation and clustering within the Cultural Routes networks

The impact of the Cultural Routes of the Council of Europe on SMEs' innovation, competitiveness and clustering is the core question of the current study. This chapter is dedicated to an analysis of the identified innovative and cluster formation behaviour/practices within the Cultural Routes and SMEs involved in Cultural Routes' activities. It also examines the ways in which the Council's Cultural Routes could stimulate innovative behaviour, tourism SMEs' competitiveness and cluster development within their networks. Particular attention in this chapter is devoted to the Cultural Routes and SMEs' performance evaluation as a condition for further successful development. Relevant performance assessment measures and instruments are suggested for implementation and use.

5.1 Cultural Routes' impact on SMEs' innovation

It is an established fact that the greatest number of innovations occur in large, privately owned companies. This is also true for the tourism industry, where the most innovative agents are large tour operators and transport operators (airlines, bus companies, shipping lines and other carriers). The reason is that, in most cases, innovations require "upfront and continuous investment of time and resources – human and financial" (Khovanova 2008), which smaller companies and SMEs do not always have at their disposal. Lack of human capital, skills and financial resources limits organisational and marketing capacities of small, local businesses, negatively affecting their product/service development.

As a result, successful innovations are rare in the context of SMEs, especially in peripheral areas. They rather imitate already existing innovations or adapt them to their local contexts. This strategy is not a sign of weakness, as diffusion of innovation is also contributing to wealth creation, productivity growth and technology development (Abreu et al., 2008, 2010). Special capacities also need to be developed to enable this strategy. Yet, they often require smaller and detached – instead of continuous – investments, which are more affordable for SMEs.

Arrow (1962) argued that if innovation is entirely left to the private market, it will soon lead to under-investment. Thus, public sector support aimed at enlarging and improving the resource and production base for innovation (supply side) is important. Public actors can also act as consumers of innovation via public procurement actions (demand side). Along these lines, tourism SMEs in Europe can benefit from the support offered for their capacity-building by state, regional, and local governments, industry clusters, funds, federations, etc. In the case of the SMEs involved in the Cultural Routes, the Council of Europe – as a public institution – could legitimately consider supporting tourism SMEs capacity-building activities and innovations within the Cultural Routes networks in order to make the Routes more sustainable and attractive.

It is important to note that the Cultural Routes are not business organisations, which are usually considered as innovation hubs. The Cultural Routes are rather a means to preserve and showcase European cultural identities. Thus, while the Cultural Routes can provide a good climate for innovation and sustainable development for tourism SMEs and cultural tourism support actors, they should not be subject to over-commercialisation.

Since the Cultural Routes are not business entities, the most widely accepted business definition of innovation as “the process by which an idea or invention is translated into a good or service for which people will pay” would not be appropriate to directly apply to their activity contexts. A more suitable definition for the Cultural Routes case is offered by the public administration literature. It defines innovation within the framework of a public organisation as “an idea, practice, policy (program), structure, method, product or process perceived as new by an individual or other relevant unit of adoption” (Khovanova, 2010). According to this definition, it does not really matter whether an idea, practice, policy or process is objectively new as measured by the time since its first use or discovery. If an idea is perceived as new or different to the adopting unit, it is an innovation.

Towards a typology of innovation

Generally, innovations in private and public organisations can take different forms. The most prevalent forms are the following:

- product/service innovation (or product/service development):
 - the introduction of new products (“artefacts”, games, clothing) and services (experiences, festivals, workshops, educational programmes, visits) to the market. Such innovations can both represent a technological advance or an increase in interactivity or in the information content (or knowledge intensity) of the services provided to the consumer;
 - the emergence of logistics, hospitality, guidance and print- or artificial intelligence-based navigation, and services and tools in support of traveller movements;
 - the configuration of separate products and services into coherent packages and offerings with greater added value for consumers;
- marketing innovation:
 - the development of marketing methods and public relations actions in the form of new or improved product promotions, communication activities and channels (use of social media, specialised journalists or magazines) or delivery or payment mechanisms (for example, using new outlet channels and pay-per-web functions);
- business model innovation:
 - a change in the way a business generates revenue/captures value from products or services; reaping income from new sources – products and services – that customers are willing to pay for (creating a superior “earnings model”; changing the rules of the game);
- design innovation:
 - the restyling/transformation/redesign of existing products and services into more up-to-date items, or with more appealing “packaging”;
- organisational/institutional innovation:
 - the creation or alteration of organisations or co-operative structures, practices and models;

- the joining of forces between separate actors either from the public or private realm, independent of locality (municipality, region) in view of providing better services or support and development actions with regard to destinations or trajectories and/or to the visitors (which can also generate structuring effects in terms of knitting together the (private-public) organisational texture and geographical texture along Cultural Routes, and inducing visitors to visit a larger share of destinations or trajectories).

With regard to the different forms of innovation, it particularly important to look at the extent to which innovations contribute to sustainable and integrated development of geographical areas and organisational textures along the Cultural Routes. In this respect, forms of organisational / institutional innovations that stimulate the cooperation of actors over tourist packages (ideally, trans-nationally and on a substantial geographical scale) are of particular interest. Especially, since they can foster transnational and long-haul networking among tourism SMEs (clustering) and the creation of public-private partnerships (PPP). Furthermore, products and services can be scaled up and offered (as a part of such cooperation stimulating organizational innovations) along the entire Routes or across them.

Innovative behaviour of SMEs and cultural tourism support actors

This section offers an overview of innovative practices identified within various Cultural Routes of the Council of Europe. The following methods and sources were used in the innovative practice identification process:

- review of the available case studies on several Cultural Routes (experts' reports);
- review of additional documents on the Cultural Routes;
- telephone interviews with the representatives of selected Cultural Routes;
- written feedback and mini surveys of the Cultural Routes' representatives;
- desk research.

Creating product awareness and fundamentals for sustainability

In tourism terms, a Cultural Route can be seen as a defined path or route of historical significance that can be presented as a whole with a common thematic denominator. It can be also "a themed route that has a cultural value or an element of cultural heritage as its focus and that assigns a key role to cultural attractions" (Puczko and Ratz 2007). Thus, Cultural Routes' development starts with creating awareness, visibility and recognisability of such Routes.

In this respect and also in order to give the Routes a face and put them on the (mental) map of citizens and tourists, the labelling and certification action of Cultural Routes by the Council of Europe is an appropriate action. It is of particular value to the regions and countries with little tradition in cultural tourism promotion, such as eastern European states (for example, Ukraine or Poland). As reported by the Via Regia Cultural Route, in western Europe, the promotion and development of cultural tourism have been a standing practice for decades, while in eastern Europe this is not yet the case. Hence, the Council of Europe's certification offers indeed a starting point

for development of a cultural tourism strategy. Moreover, in western areas and cities, the Cultural Route they form part of is often just one of the cards they can play for profiling their cultural tourism offer, whereas in the east it may be the only one or the best one available (thanks to the labelling and the fact that there often exists considerable documentation on the Cultural Routes). From this perspective, Council of Europe certification represents an added value.

Transparent governance structures, capacity and network-building along and across the Cultural Routes are no less important. While this statement is well elucidated in the previous chapter of this report, this section highlights the significance of having a deliberate “master plan” that offers comprehensive guidance for long-term Cultural Route operating and marketing strategies that aim to articulate the Route in question by continuously informing the visitor/tourist about what can be “consumed” as a cultural offer.

To implement such a master plan, there is a need for orchestrated effort and for one or more (regional) leaders along the Route to set up and co-ordinate a multi-regional/multinational project aimed at the promotion of the Route in question. Good examples in this regard are presented by the Camino de Santiago and the Hansa Cultural Routes.

Practice example

The Camino de Santiago is a medieval pilgrimage route that culminates in the city of Santiago de Compostela. It has several starting points, including four in France for the French Route, and one in Seville for the Silver Route. In order to comply with tradition, pilgrims are required to walk at least 100 km or to ride at least 200 km by bike or horseback. Along the way, many towns and cities have come to realise the benefits that such a promotion can have. Traditions, architecture, culture and religious history all come together to offer to the traveller a unique experience. The Galician Government’s Xacobeo 93 campaign was a successful and organised effort, as it led to a steady increase in the number of tourists and pilgrims in the following years to about 4 million annually. During the 1999 holy year alone, the follow-up campaign drew over 6 million people.¹⁴

The joint approach to promote and develop the Camino de Santiago by the Government of the Comunidad Autónoma de Galicia and Spain’s National Tourism Agency has been highly effective over the past two decades. At present, competences in Spain regarding tourism affairs lie with the autonomous communities. However, the national TURESPAÑA tourism agency develops promotion campaigns to sustain regional tourism initiatives. It acts in co-ordination with the autonomous communities, as tourism development represents interests that go beyond regional borders and can create substantial spill-over effects to other regions at a national level.

Therefore, through a consolidated communication strategy, a whole new image and experience of the Camino de Santiago has been created. Since Saint James’ Day (the day of “Santiago”, 25 July) has fallen on a Sunday many times during the Route’s existence, the concept of “holy years” has been created to put the Camino de Santiago in the spotlight and to concentrate promotion efforts to capture tourists’ attention. This has worked very well; the awareness of the Route is so strong that during “non holy” years myriads of tourists also travel its length.

The pilgrimage in the holy years (which goes under the name of Xacobeo) is planned well in advance in order to manage the increased tourist flow. Efforts across all the regions involved are made to accommodate the flow of tourists while controlling its impacts. Some examples include the establishment of a network of free hostels for the pilgrims. The Route itself is maintained very well and has an efficient signposting

14. Source: www1.american.edu/ted/spain-tour.htm.

system. The regions involved co-operate with public organisations such as Amigos del Camino to ensure a structured, informative and well-presented experience for the dedicated pilgrim.

In the case of the Camino de Santiago, co-operation occurs not only within regional boundaries inside Spain but also between nations – Germany, France and Spain. Since the pilgrimage has starting points in France, bilateral efforts are made to co-ordinate the entire Route. France and Spain may have different plans for development of their part of the Route. For instance, in Spain the objectives centre around restoring and preserving cultural and historical heritage along the Route. France gives more attention to backpackers' tourism. What is important is to match the two foci in order for both to benefit from the overall interests, experiences and activities that travellers look for along the Route.

A similar case is presented by the Hansa Cultural Route network. Like the Camino de Santiago, it is rooted in reality from the past. It has grown in an organic way rather than through strategic planning and investment.. In a way, the same conclusion could be made about the Transromanica Route.

Practice example

Creation of the modern Hansa Cultural Route goes back to a grass-roots initiative of the city of Zwolle (Netherlands) in 1980. It invited the original Hansa member cities for a Hanseatic Day to be held that year, and the initiative was taken up with enthusiasm by many former Hansa League member cities. The celebration of a Hanseatic Day has rotated over time among the member cities and has become an event for which there is high demand. Membership of the modern-day Hanseatic League has meanwhile grown to an impressive 176 towns or cities from 16 countries; it got an especial boost after the fall of the Iron Curtain. The popularity of the Hanseatic Day celebrations can be illustrated by the fact that its organisation is secured up until 2030, with member cities queuing up to bid for it.

As such, this Cultural Route has managed to revive an identity that seemed to be lost, but is in fact very vivid still today and has easily struck a deep root again among its former members. A representative of the modern Hansa Route itself talks of a “ketchup effect”: at first it was difficult to get things (and people) moving, but the perseverance is now paying off and there is at present a very solid and sustainable basis for continuity. Also, in terms of visibility and recognition of the network, the Hansa Cultural Route is proving to be a success. Not only is there a growing number of former Hansa cities wanting to join in, but also the cultural and business partners in these (trade) cities are adhering in growing numbers to the initiative. Thereby, further agglomeration effects are created, making the Hansa network an ever stronger reality and contributing significantly to the recognition and appeal of it. Evidently, this “formula” of knitting ties between cities and regions along Routes and networks has worked very well to lay an institutional basis for business and cultural sectors to piggy-back upon (and for them to come up with thematic product and service developments). What is also remarkable in the case of the Hansa Route is the common interest of both western and eastern European cities in this network. Very often (it has also been observed in the case of the Via Regia Cultural Route), Cultural Route recognition is more welcomed in the east, since cultural tourism development is new to this area. Thus, sometimes it is easier to promote a Cultural Route among tourist boards and municipal/regional tourism organisations in eastern than in western Europe.

At present, the Hansa Route holds annual meetings where topics of joint interest and planned activities for the future are discussed. It has no official governing body, but has installed its own checks and balances on a collegial basis. As a consequence, it can be argued that the Hansa Cultural Route is self-selling and mature, and that it is ready to take the next step to foster trade and business relationships and provide a fertile commercial and innovation ground for SMEs (“helping them to overcome market and network failures inside the League”).

In addition to resuscitating historical bonds to lay a foundation for organisation and awareness-raising around the Routes, one can observe a variety of other initiatives that the Cultural Routes implement in order to raise their visibility.

Typically, they invest in brochures, magazines, newsletters, flyers, travel guides, posters and article publication; T-shirts and websites design; events and conferences, seminars and workshop organisation; and in the arrangements with tour operators to offer organised trips and universal signposting along the Routes. Some of the Routes have also started to actively use social media and Web 2.0 activities (for example, Via Francigena and Transromanica). There is also a vivid activity in terms of merchandising the names of the Routes. Along many Routes there are examples of food products that carry a Cultural Route etiquette (like: “Vin de Saint Martin”) or hotels and restaurants that offer menus or stays carrying a Cultural Route label (like: “Phoenician Route meals” or “Ruta de Juderias stays”). More insight about Cultural Route marketing is offered in the next chapter of this report.

The value of unifying and special characteristics of the Routes

Having common historical unifying characteristics is highly important for Cultural Route locations in terms of identity, awareness and recognition of the Route. These characteristics help to sustain the Route and its partner network in the long term and in different economic conditions, notably when financial resources and external funds are lacking. It has been observed in the course of this study that the Routes that are based on a genuine bond among the partners are less prone to erosion and loss of vitality. This “liaison” is also likely to extend to the market partners, for example tourism SMEs, as they are willing to collaborate with well-established and recognised Routes. This conclusion was reached within the context of the Via Francigena case study (see Part II of this report).

The fact that a given Route is not path – or corridor – shaped may result in the lack of a sense of community or coherence. In fact, several of the Cultural Routes suffer substantially from “missing links”, that is geographically scattered networks (for example, an archipelago-based shape in Table 1 below), which, in some cases, is a result of uneven development of the Route in different countries. This can prevent visitors from following the entire path of the Route and result in poor SME development in the “missing links” areas. This is, for instance, an issue for the Pyrenean Iron Route, which extends from French and Spanish Catalonia, over Languedoc-Roussillon and Andorra, to the French and Spanish Basque Country and Aquitania. Since the Aquitania part is not yet developed enough and sustained, there are some (spatial) gaps along the Route. One can also conclude that the shape, degree of development and travel conditions of the Cultural Route affect the creation of tourism SMEs. The examples of path-based and archipelago-based Routes are provided in the table below.

Table 1. Spatial characteristics of the Routes

	Path-/corridor-based shape	Archipelago-based shape
Historical roots	Camino de Santiago	Hansa Cultural Route
Recreation	Via Francigena, Via Regia	Transromanica

The role of European funding

Within the territorial cohesion and cultural identity policy frameworks, the Cultural Routes represent a particular interest given their transnational structures and

recognition of cultural values and heritage. It is thus logical that supranational organisations such as the Council of Europe and the European Commission support these initiatives. Yet, the current study suggests that this support should be provided with a greater responsibility for the development of the Cultural Routes themselves.

In addition to the analysis of the role of EU-level funding for the Cultural Routes offered in Chapter 4 above, it is important to emphasise that initiation of development and/or innovation activities at lower levels of government is a prerequisite for such funding. The competence of the European Union in the area of innovation policy, for instance, is to co-ordinate, supplement and support innovative practices. It implies that EU policy action is supplementary to the relevant policy implemented at lower levels. This necessitates a co-ordinated action between different levels of governments – European, national, regional and local. Only through established collaboration between different levels of governments will EU policies be able to:

- better address cross-border aspects of market or network failures;
- benefit from scale economies in policy making and/or implementation;
- bring together the necessary resources (finance, knowledge, etc.) to implement policy action; and
- stimulate international policy learning and diffusion of best practice measures.

Innovation potential for SMEs and Cultural Routes networks

A huge potential for tourism SMEs' innovation is represented by the area of information delivery about the products and services that Cultural Routes are offering. Choosing and implementing “delivery strategies” to address the target audiences of choice in order to attract them to the Routes generally entails answering such questions as:

- What marketing, sales and communication channels should be used?
- What alliances and partnerships should be created in order to reach out to the target audiences?
- Which promotion activities (for example, publicity, events) should be used for awareness-raising purposes?

Today, most of the Cultural Routes and the SMEs involved apply a rather fragmented approach in their product/service information-delivery strategies. There are no established delivery strategies and/or broad-based actions, experiments with new media are small scale (usually focused on separate areas of a Route), mapping of target audiences is marginal, and investigation of their preferences and motivations is rare. While these facts can be regarded as drawbacks in Cultural Routes' product and service marketing, they also indicate an opportunity for tourism SMEs to find innovative low-cost solutions using modern information technology and marketing tools. A list of suggestions on Cultural Routes' products and services marketing using new technologies is provided in Chapter 6 of this report.

Product innovations within the Cultural Routes

Evidently, all the Cultural Routes provide opportunities for SMEs to develop products and services within the framework of tourism activities that the Routes generate. These opportunities can be divided into two types according to a “product–market” combination typology (services are also included in the “product” concept here), as presented below.

On the one hand, local SMEs produce products and services with a Cultural Route label, thus contributing to the promotion of the Routes. These products and services generally involve little adoption (of innovative solutions, practices) and do not require considerable market and/or territorial horizon expansion. On the other hand, some SMEs develop their original products and services based on the unique values and heritage of the Cultural Route they are involved with. According to the definition of innovation used in this report (Khovanova 2008), these products and services are innovative, as they are new to the portfolio of a supplier, that is local SMEs. These products require a higher level of innovation and marketing effort, which local tourism SMEs do not always have at their disposal.

Table 2 below offers a few examples of innovative practices identified within the Cultural Routes.

Table 2. Types of innovations within the Cultural Routes and SMEs

Sales location	Adoption of product innovation	New product development
On-site sales/fixed-place consumption	Vin de Saint Martin, Phoenician Route meals, Ruta de Juderias stays	Virtual reality shows (Pyrenean Iron Route); ecotourism formulas; and archaeological, trekking and cycling tours and other mini-itineraries (short-distance trajectories as in the Transromanica and Phoenician Routes, Via Francigena, Pyrenean Iron Route and the European Route of Historical Thermal Towns) Assembling diversified tourism packages as per the Route of Historical Thermal Towns and the Pyrenean Iron Route offer or to blend industrial patrimony with sculptures, museum visits ¹⁵ and other forms of art and education)
Sales/consumption along the geographical areas of the Routes	Biker tours and tour operator formulas as per Transromanica for China and the United States; assembling existing highlights and hot spots into packages across long-range Cultural Routes, tour operator formulas in relation to the Hansa League and Legacy of al-Andalus	GPS clocks and flash codes for ramblers and monuments, exhibition/cycle-carrying bus , Hansa Business Days, dedicated IT/Web/GIS applications for use along the Cultural Routes as per Via Regia and St Martin Tours (long-distance trajectories or linkages involving carriers, brokerage services and knowledge-intensive mobility services)

Additionally, the European Cluster Observatory reports¹⁶ that agglomerations of creative industries and innovation are typically found in urban and densely populated areas, whereas tourism hot spots are more evenly spread out on the map, including – as a consequence – many peripheral and scarcely endowed areas as regards business. This implies that while tourism – especially cultural – has good potential to develop in remote destinations (based on their unique cultural experience offer), it is not self-

15. In the case of the Pyrenean Iron Route, it can be argued that the elaboration of the Route led to a revitalisation of several pedagogical centres into the Route-based cultural tourism chain. For example, the Museum of Ripoll (Catalonia, Spain), to which didactic visits are organised, and a former school for metal working in the Basque Country (Spain), where interactive scenographies in relation to metallurgy are presented. These are clear examples of how the Cultural Routes valorise European cultural values and heritage.

16. Wilson and Orkestra 2010.

evident that innovative activities will follow. As an example from the Transromanica Cultural Route case study demonstrates it is not always the case.

Case study of the Transromanica Cultural Route by G. Richards (2011):¹⁷

There are links with SMEs, mainly in the tourism sector. SMEs are also involved in providing services to the Route there, mainly in terms of publications, merchandising and design.

Many of the contacts are with SMEs involved directly or indirectly with tourism, such as hotels, restaurants and wine producers.

According to the project leaders in Vale do Sousa, many of the SMEs in the region are aware of the Cultural Route, even if they do not participate directly. This includes firms in the major economic sectors in the region, like: furniture making and clothing.

One of the problems in a predominantly rural area such as Vale do Sousa is that there are not many SMEs offering advanced services. So the service providers for the Cultural Route often tend to be based outside the region. An analysis of the SMEs involved in the various publications and merchandising items for the Rota do Romanico, for example, shows that only two SMEs are based locally. The same problem arises for the Transromanica project as a whole. For example, the market research for the CrossCulTour project was undertaken by a firm based in Munich.

And

One of the problems in terms of SME collaboration is the fact that the Vale do Sousa region has relatively few suppliers of advanced and creative services. So tasks such as design and website construction have to be contracted to firms located in Porto (the nearest big city) or even Lisbon. There is some potential to source local products, but these tend to be of relatively low value compared to those contracted from other regions. This is also related to a relatively low number of creative people in the local population.

In spite of these structural drawbacks along many of the Routes, a number of interesting initiatives exist within their networks that are instrumental in generating tourism SMEs' innovation as well as increased visibility for the Cultural Routes:

- the Business Region Hansa project is being prepared to set up trade markets between SMEs from different Hanseatic cities. The idea is that some 25 cities will bring a minimum of two SMEs to explore possibilities for business co-operation and development. This initiative may bring together the critical mass needed for companies to innovate, to raise awareness about the Cultural Route, and to provide complete and higher value services and products to their customers. It may also create greater demand for services provided by tourism SMEs;
- a similar promising initiative in this regard comes from the Transromanica Route, which works to establish specific clusters at key locations along Cultural Routes. This initiative is planned to be implemented with INTERREG funding, if obtained, and to centre on SMEs, entrepreneurship and tourism;
- The Via Regia Cultural Route employs GIS systems to inform its visitors and SMEs about services provided along the Route. This also allows the SMEs to get broader exposure to interested customers and to interact with them directly. This helps to lower the transaction cost for customers and provides a quicker way to the market for SMEs. For the Via Regia co-ordinators this additionally implies lower administrative expenditures;
- the Routes of the Olive Tree have witnessed the organisation of cultural itineraries as requested by chambers of commerce from several parts of Greece. Several of the Route's SMEs participate in external trade, in addition to their

17. For the full Transromanica Cultural Route case study see Part II of this report.

collaboration between different locations along the Route. These itineraries and missions have provided a good basis for strengthening collaboration between the enterprises and establishing a good basis for new joint initiatives.

Conclusions

Based on the review of the Cultural Routes' case studies and the subsequent analyses presented in this chapter, the following observations and recommendations can be made:

Most of tourism and SME-oriented initiatives along the Cultural Routes are primarily place or destination-based rather than Route-based. It is, of course, true that many of the Routes do not have the geographical anatomy of a corridor or a chain, and that this is an obstacle for nurturing tourism and SME activity along the Routes.

It is advisable to promote the Routes as a whole, and not to focus on certain parts. At the same time, emphasising the diversity along the Routes may add to the development of local SMEs' innovative practices based on the uniqueness of the remote destinations.

Several initiatives developed within the Cultural Routes have a rather esoteric character. They fail to reach out to broader interest groups, and are rather locally oriented. It is likely that this is not a conscious choice but this impedes wider marketing and promotion of the Routes.

A further point in this respect is that initiatives like the Olive Tree-biker Tour seem to be under-exploited in terms of their potential to put the itineraries on the map and "expose" them to the visitor. As a result, these itineraries, and activities around them, are confined to niche markets, insiders and locals.

Keeping the Cultural Routes alive is not only about revalorising ancient legacies and having contemporary handicraft activities manufacturing artefacts and souvenirs to commemorate the origin of the Routes. They can equally (or more) gain from modern forms of art and creativity. Thus, the SMEs should further explore new product/service development (innovation) strategies to foster the offer along Cultural Routes.

Clusters are not a local affair. To invigorate the Cultural Routes clustering it may neither be enough to count on local (be it local-for-local or inter-local) initiatives and actors nor on the traditional tourism industry representatives. More ties have to be developed between local and transnational SMEs, tourism operators, carriers, etc.

This would further foster critical mass creation for creative industries and innovation development. For instance, based on the presence of craft industries, quality food production and gastronomy, artists, and cultural and historical activities could foster product and service innovations and create greater added value and sustainable cultural tourism.

Bringing creative, cultural and tourism communities together in, especially, from peripheral areas obviously requires high quality organisation. To invigorate such

networks and keep them running, institutional forums and professional management are essential. It is important to expose traditional tourism actors to cultural and creative sectors to contribute to innovation capacity in cultural tourism and to provide a fertile soil for new innovative tourism ideas through intersections of culture, tourism, creative professions and the use of information technologies.

5.2 Clustering between Cultural Route partners and local SMEs

A cluster is defined as “a geographically proximate group of companies and associated institutions in a particular field, linked by commonalities and complementarities” (Porter 1999). Accordingly, creative clusters are geographical concentrations of SMEs and/or NGOs working in related sectors along the same value chain. The ideal creative cluster encourages collaboration and links between a variety of local actors to enhance one another’s visibility, infrastructure, knowledge, competitiveness and product.

According to De Propis a creative cluster is:

- a place that brings together a community of creative people who share an interest in novelty but not necessarily on the same subject;
- a catalysing place where people, relationships, ideas and talents can spark each other;
- an environment that offers diversity, stimuli and freedom of expression;
- a thick, open and ever-changing network of interpersonal exchanges that nurture individual uniqueness and identity.

The European Commission has commissioned reports and is reportedly developing strategies to support clusters in Europe. The theory is that clusters will be able to kick-start local economies and encourage economic growth.

Developing creative clusters has become an extremely attractive option for local authorities as they reportedly attract a “creative class” – people with knowledge and ideas able to generate SMEs (Florida 2004) and have positive spill-over effects on local communities:

The high levels of innovation in the creative industries reported above supports the idea that, in addition to contributing directly to regional innovation processes through innovative activities in which they engage, they could also do so indirectly, by generating spillovers that benefit the wider economics of the places where they are located (National Endowment for Science, Technology and the Arts (NESTA), UK).

The spillovers relate to knowledge, products and networks. The notion that Cultural Routes generate a novel idea that may act as a spin-off for other creative and non-creative entrepreneurs to launch new initiatives is the inspiration for this study.

Creative clusters and the Cultural Routes

The Cultural Routes clearly provide an interesting value chain based on which clusters could be formed and developed. Indeed the richness and usefulness of the Cultural Routes is most visible at a local level in all of the case studies. This section looks at what could be done to encourage clustering.

It should be noted that a critical mass of stakeholders working in proximity can have important benefits at many levels – socially and commercially. Collaborations need to be nurtured and high levels of informal networking need to be created. A dense web of relations is crucial at many different levels for ideas generation, dissemination and implementation. Once a wide range of partners including local authorities, universities and training institutions, cultural operators, etc., are involved, this stimulates an ecosystem of suppliers of support services to emerge (ranging from production facilities to transport and caterers, etc.).

It is at the local level that the partners are seen to be operating most successfully – building clusters of diverse organisations, institutions and individuals in a non-formal and often haphazard structure. SME development will, however, depend on the Cultural Routes understanding key concepts of networking and cross-marketing. The work that the Cultural Routes would need to undertake consists in encouraging partnerships and promoting sustainable small economies, namely areas that could positively influence SMEs’ development in the future.

Involving SMEs

A dense web of relationships is crucial not only as a source of new knowledge but also as support for the development of value chains, enterprise efficiency and customer satisfaction. Developing relationships with SMEs can have a number of benefits – from offering support services for the user or visitor of the Cultural Route to providing a source of income, ideas and resources for the initiatives within the Cultural Route.

However, none of the case studies conducted within the framework of the current project provided strong evidence of formal networking partnerships with local SMEs. A number of Cultural Route partners are in dialogue with SMEs informally and have brokered relationships with them for marketing or sponsorship purposes. In this regard, some evidence of good practice is offered by the Legacy of al-Andalus. The Cultural Route has trained hoteliers in historical locations of the Route so that they can offer information and pamphlets to the visitors. Some 70% of SMEs surveyed in the Legacy of al-Andalus Route case study also confirmed that they use the brand and logo of the al-Andalus routes in their business activities.

The tendencies in the Cultural Routes’ current networking with SMEs and NGOs are explored below.

<p>Practice examples</p> <p>In the Hansa Cultural Route many local SMEs and larger companies use the Hansa label; however, most of this happens independently of the Cultural Route. The Cultural Route, however, gives local SMEs the opportunity to promote their wares during locally organised Hanseatic Days or medieval festivals or during the annual international Hanseatic Day. There is no formal relationship between the network and SMEs.</p> <p>The Legacy of al-Andalus Foundation does not offer a formal network with local SMEs but it does broker very important friendships and partnerships with SMEs at many different levels either as sponsors or service providers. The Friends of the Legacy of al-Andalus is the closest activity related to networking and anyone can join this initiative, including SMEs that see benefit in being associated with the Route.</p> <p>The Routes of the Olive Tree has a special relationship with producers from olive-growing regions</p>

and as such attracts a number of SMEs to its activities. Having said this, SME involvement in the network is less formal – normally as receptors of the participants on the itinerary or as participants at stands during festivals organised by the network members. The Cultural Foundation “Routes of the Olive Tree” has been involved in some training programmes for SMEs but these have tended to be centred in the local region.

The Transromanica partners independently broker all kinds of agreements with tour operators, hotels and other SMEs such as food and drink companies.

The Via Francigena case study highlights a minimum of 75 SMEs that could be discerned as having a direct connection to the Via Francigena Cultural Route in Switzerland. In the Tuscany region in Italy there are an estimated 25 000 SMEs, with at least 50% of them directly or indirectly related to tourism. However, according to the case study, none of the SMEs are knowingly certified or using any quality or environmental label.

Involving cultural operators

Developing links with cultural and creative operators provides added value to the Cultural Route and thus increases customer satisfaction. Cultural NGOs are a great source of volunteers, energy, commitment, ideas, knowledge and innovation. With the exception of the Cultural Foundation “Routes of the Olive Tree”, very little evidence emerged during the case studies to acknowledge relationships with cultural operators. Despite the limitations seen in the case studies it is clear that the Cultural Routes have been active in brokering relationships at many different levels.

The Legacy of al-Andalus Foundation is undoubtedly a good example of an organisation that has established many and varied local agreements with SMEs, regional partners and tour operators. There is no doubt that the Hansa Cultural Route brokers partnerships at a local level. Yet, the questions remain on how strong these partnerships are, to what extent they are linked to the Cultural Route, and to what extent they are part of the participating cities’ strategy.

The case studies demonstrate that the mere existence of a creative agglomeration is not enough for the benefits of SME clustering to emerge. If SME generation becomes a priority in order to attract future funding for the Cultural Routes, significant efforts would need to be made to develop strategies for connectivity with collaborators, business partners and sources of innovation elsewhere.

The development of relations with SMEs should include non-governmental organisations (NGOs) and in particular organisations with creative outputs (performing arts, visual arts and new media). It is often these groups that are the source of new and unexpected ideas, knowledge and energy. Creative NGOs are a powerful resource for local areas seeking to understand and support dynamic clusters.

Most Cultural Route partners have, to some extent, established informal relationships with local SMEs. Yet, in most cases, this could be done better and more extensively or differently. The obstacle is lack of organisational-capacity training, incentives and time. There are some good examples of collaborations with artists or creative organisations. For instance, the Cultural Foundation “Routes of the Olive Tree” engaged with artists and created an art gallery. In general, however, the development of contemporary art forms in collaboration with the Cultural Routes is limited.

Shared merchandising is another area for partners to explore and it may be useful to support innovation in merchandising by working with artists. Artists provide much needed creativity, innovation, and partnerships and this should be explored further.

One might assume that people who enjoy a Cultural Route also enjoy other cultural offers and it might be useful to test if Cultural Route visitors would prefer to buy products individually crafted than “off the peg” souvenirs. Having a good understanding of an area’s true potential is, of course, important and, therefore, the knowledge and full involvement of the local partner is crucial in developing strategies for SME or NGO clustering. Encouraging the right conditions for growth and avoiding waste of resources is reliant on strong guidelines, capacity-building and training.

Building clusters is a difficult task. Yet, there is a possibility for the Cultural Routes to identify the potential for latent clusters development. Creative graduates may be able to help in identifying and encouraging dialogue amongst key players – spreading the word that new opportunities exist is half the battle. Training would help the partners to think about sectors, in which they may work well together. For example, it is common knowledge that historical sites make enchanting backdrops for theatre or musical events, and audiences sense the added value if they learn more about the Cultural Routes at the same time. Encouraging and supporting brainstorming sessions on how to maximise the added value for visitors provides new possibilities for printed materials, caterers, transport, hoteliers, etc. Themed events, as an example, galvanise support around concrete ideas and provide renewed energy.

Involving universities and training institutions

When thinking about developing partnerships with the local community, the Cultural Route partners may also wish to involve training institutions and universities. Universities and further education training institutions have a crucial role to play in supporting regional processes of innovation and creativity. The Cultural Routes case studies, however, show few links between Cultural Route partners and the learning institutions. This may be because despite the fact that universities play an important role in supplying skilled labour, there is very little evidence or acknowledgement that training institutions have a direct link in supporting clustering, innovation and regional development.

However, important developments such as a service-learning educational model may change this situation. Service-learning creates opportunities for professionals to retrain alongside advanced students through shared engagement in a project or problem-solving initiative. The service-learning approach would work particularly well, for example, in raising awareness about the Cultural Route’s importance in the local setting, supporting projects to build synergies amongst SMEs and/or a technology-driven university.

Framing the emergence of a creative cluster within a service-learning environment is a safe and comfortable structure for local entrepreneurs who may be facing innovation challenges. In particular, traditional, long-standing community SMEs can feel threatened by the emergence of new ideas that challenge the way they have worked in the past. Change is always difficult to implement, and the formation of clusters may

challenge traditional ways of working, established relationships between organisations, change design, packaging, sales and distribution methods. Having neutral partners to guide the process of change is important.

Involving local authorities

Local policy makers are normally keen to support the emergence of business clusters. They could be approached to support and develop training models, meeting spaces and dialogue amongst possible stakeholders related to the Cultural Route.

A “one size fits all” approach is not appropriate in today’s society and the typical methods used by local authorities such as encouraging trade fairs amongst all SMEs or developing directories of every local SME are not sufficient. The Cultural Routes should insist on local support to develop a cluster of organisations appropriate to and responding to the needs of the Cultural Routes. A possible way to formalise the link between local SMEs is to develop a “friends of” scheme. It is known that, even when aware of one another, local creative businesses are often keen to protect their own territory, ideas or clients. Encouraging networking, clustering and knowledge sharing is an art and the partners or local authorities need to understand the sensitivities involved.

Programmes (such as NESTA’s Corporate Connect programme, 2010) indicate that neutral bodies acting as a liaison between competing companies usually can provide the gateway to co-operation. Another method is to provide training sessions that bring together professionals from different companies to upgrade their skills. Encouraging public authorities to address these local needs should be easy as it is a clear way to build links between potential collaborators from the business and/or NGO sectors. Given that the Cultural Routes would be providing the value chain to encourage clustering it would be important to also monitor and evaluate the effectiveness of strategies used to encourage clustering. The appropriate evaluation methods that could assist in an assessment of performance of the Cultural Routes and the SMEs involved are suggested in the section that follows.

5.3 Measuring the Cultural Routes' impact and SMEs' performance

Evaluation and impact measurement have become increasingly important in recent years. The demand for “evidenced-based policy” together with a tightening of government spending as a result of the global economic recession means that organisations are increasingly being required to demonstrate the economic impact of their activities as a way of:

- ensuring that resources are allocated and used effectively;
- justifying funding and providing an argument for future funding;
- generating evidence that will help inform the development of future activities.

Where external funding is provided for a project or programme it is now standard practice for recipients to be required to report back on the benefits that have resulted from the financial investment. Economic development projects have long been expected to demonstrate their impact on the local economy through the creation of enhanced skills, employment and business growth. Heritage and culture, in contrast, have traditionally been seen as a means of improving the image of an area and contributing to the quality of life of its residents. Over the last decade or so, however, there has been a growing recognition that heritage, culture and the creative industries may also play an important role in stimulating local economic growth and innovation. The interest of policy makers in the European Cultural Routes stems not only from their ability to revive and foster interest in aspects of common European cultural heritage across state boundaries, but also because of the potential they offer for stimulating tourism, particularly in remoter areas with less prosperous economies. Thus, external funding and support for the Routes is likely to be increasingly contingent on the extent to which they can demonstrate the contribution they make to local economic growth, especially in terms of business and employment.

During the course of the case study research for this report, it became apparent that the Cultural Routes are indeed contributing to local economic development, including SME innovation and competitiveness, in a number of ways. They are contributing to the growth in cultural tourism at particular sites, areas and events, creating new business and employment opportunities through these activities as well as through the production and sale of books, guides and other specialist products. However, whilst a few of the more established Routes are recording visitor numbers and direct sales of tourism products, or like the Hansa Route are beginning to look at the potential economic impact of SME collaborations across the Route's towns, most are not gathering the data needed to measure the economic impact of their activities. As a result it was not possible for us to demonstrate their contribution to SME competitiveness and innovation in anything other than through the provision of examples based on qualitative or anecdotal data.

A short questionnaire sent to 17 of the remaining Routes who were not part of the case study research, and designed to ascertain what impact measurement activities were having, confirmed our suspicions that this not currently happening, although there is some interest in doing so in the future. The need for this is particularly important because most of the destinations involved in the Routes consist of small geographic areas – below the level at which national and regional data on tourism numbers, firms, cluster activity and measures of innovation are generally reported or

captured. Thus, whilst these data sets may provide some very useful background information on regional activity and trends they do not help us measure impact at the level at which the Cultural Routes generally operate. For example, in researching the Hansa Route, the smallest geographic level at which standard data on firms were available was at a level much wider than even the largest towns involved in the Route. Data need to be captured at a much lower level if the impact of Cultural Routes is to be measured – the impact of a festival, or other event, the impact on tourism numbers and spend in specific villages along the Route, or the value of sales from Cultural Route products cannot be obtained from regional data sets. However, our case study research found that even at this local level, data specific to the activities of the Cultural Route were generally not being collected and thus there was little awareness of the value of the economic contribution being made to local economies, and in particular to SME growth and competitiveness. This state of affairs is to some extent understandable since the primary objective of most of the Routes has been the preservation and promotion of a shared cultural heritage. As a recent (2011) paper from the European Institute of Cultural Routes (EICR) on the history of the Cultural Routes notes, the economic dimension of the Cultural Routes has never been made a major criterion and therefore economic development and SME growth has not been a focus of their work. The four Routes that responded to our survey also suggested that lack of resources, technical expertise and different approaches to data collection across the network was an issue.

This chapter therefore sets out to discuss practical ways in which the Cultural Routes can begin to measure the economic value and impact of their activities. The focus here is on economic impact as this is most pertinent to the aims of the overall study. However, it is also acknowledged that other forms of impact are now recognised as being equally important in the cultural sector – in particular, social and environmental impacts. Some tools for measuring these other types of impacts are mentioned briefly here, but the reader is referred to other texts for more detailed coverage of these. Since the Cultural Routes cover a wide range of activities, this chapter draws on research, studies and tool kits in the field of economic development project and programme evaluation, and events and tourism impact studies.

The chapter starts with an analysis of the various activities of Cultural Routes as a prelude to exploring the most appropriate models for measuring impact. It then looks at different types of indicators that can be used to measure impact and the methodologies by which data for these indicators can be collected, as well as key issues that need to be considered. The conclusions and recommendations outline the support that the Cultural Routes will need to enable them to undertake this work effectively.

Activities of the European Cultural Routes

The results of a recent survey of the Cultural Routes conducted by the Council of Europe in 2011 included questions on the Routes' activities. These were analysed to develop a typology of activities. This suggested that the Routes' activities can be grouped into the following broad categories:

(1) Heritage restoration and preservation:

- heritage preservation: restoration activities, historical research, development of museums;

(2) Raising awareness of cultural heritage:

- education activities: workshops, historical and cultural awareness-raising for children, work with schools, summer schools;
- cultural exchanges: youth exchanges, town twinning;
- events and festivals: conferences, exhibitions, literary events, music, theatre and other cultural events, wine fairs;
- development of activities: for example, guided tours, city trails, bike trails;

(3) Marketing and business development:

- marketing and promotion of the Route: through websites, magazines, guidebooks, stands at cultural and tourism fairs and events;
- encouragement of business development and trade: training and support for SMEs;

(4) Commercialisation of cultural attractions and products:

- events: festivals, conferences, exhibitions, literary events, music, theatre and other cultural events, wine fairs;
- development of tourism activities: tours, walking routes, city trails, bike trails, audio tours, guided visits of sites;
- development and sale of tourism products: for example, guidebooks, tours, crafts, souvenirs.

It can be seen from the above that some activities fall into more than one category since they have a number of different objectives. Cultural festivals, for example, may be organised predominantly as a free event designed to stimulate interest and awareness in cultural heritage, but may also attract new visitors to the area who will spend money locally and thus contribute to the local economy.

Clearly some of these activities will generate a direct and immediate income flow – for example, income generated from the sale of guidebooks about the Route should be relatively easy to ascertain. Whilst others – for example, educational activities or cultural exchanges – may have a very limited immediate and/or indirect impact on the economy and be harder to quantify. However, tools do exist for measuring all of these as the following sections aim to demonstrate.

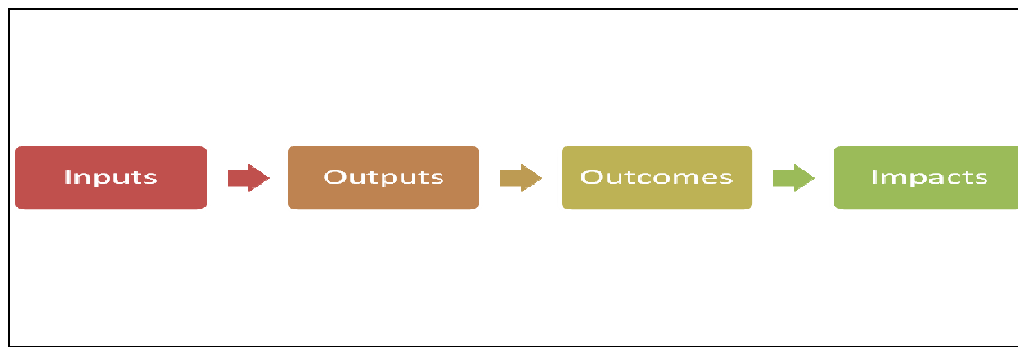
General approaches to the measurement of impact

Inputs, outputs, outcomes and impacts

Most models of impact measurement focus on the input, output, outcomes and impact model. These stages are defined as follows:

- inputs are the investment made in or the resources required to produce a product or develop or undertake an activity;
- outputs are the products or services provided, for example the number of guides produced, number of events held, tours sold, etc;
- outcomes are the immediate changes resulting from an activity – these can be intended or unintended, positive or negative, for example employment, raised profile;
- impacts are the net difference made by an activity, taking into account what would have happened anyway, the contribution of others and the length of time the outcomes last (NEF 2009).

Figure 1. The relationship between inputs and impacts



NEF suggests that organisations should develop an impact map (NEF 2008). This shows the relationship between inputs, outputs and outcomes – sometimes known as the “theory of change” or logic model: it shows how inputs and activities lead to outputs and impact.

The theory of change refers to the story of how your organisation or project makes a difference in the world: that is, how it uses its resources to provide activities that then lead to particular outcomes for individuals, the community and society (NEF, 2008).

An example of an impact map for some of the activities that a Cultural Route might run is shown in Appendix 1 of this report.

Measurement of impact ideally needs to ensure that only those outcomes which can be directly attributed to an activity are counted. Net impacts need to account for:

- deadweight: what would have happened anyway whether an intervention took place or not. For example, external visitors to a cultural event may have decided to visit the town anyhow rather than visiting specifically for the event. Thus, their spending in the town cannot be totally attributed to the cultural event;
- displacement: the extent to which benefits are being displaced from elsewhere. For example, local people might decide to spend money on a cultural event that they might otherwise have spent at a restaurant;
- leakage: some businesses outside the area may benefit from the Route’s activities. For example, a publisher from outside the area is used to print a tourist guide, or an external transport provider (airline, ferry company). This results in the leakage of benefits from the local economy. Local economic development should therefore target local services and suppliers, for example local independent hotels/B&Bs or restaurants, rather than national/international chains in order to minimise economic leakage.

Different types of impact

The simple impact map shown in Figure 2 provides some examples of the range of different impacts that may result from a Cultural Route’s activities. These include cultural, environmental and social impacts as well as economic ones. In the context of events, Getz (2009: 70) argues that, “the social and cultural values of events have been given inadequate attention, so that until recently we have had trouble identifying, letting

alone measuring them. And the environmental impacts of event tourism have until recently been ignored, so that the carbon footprint and energy costs of event tourism have for the most part not been included in impact assessments". This perspective has led to the increasing use of a number of different models and methodologies which take account of a range of different impacts. Key ones which are appropriate to Cultural Routes include:

- the triple bottom line approach. Developed by Elkington (1997), this approach provides a framework for measuring and reporting performance against economic, social and environmental parameters, and a philosophy in which companies, governments and public or voluntary organisations (including events) must comprehensively evaluate their impacts and account for their actions. It captures an expanded spectrum of values and criteria for measuring organisational (and societal) success: economic, ecological and social;
- social impact assessment incorporates the assessment of the environmental, social, economic, cultural, and health implications. The International Association for Impact Measurement have developed a number of tools, checklists, matrices and other training materials to help organisations consider the wide range of societal impacts of an initiative: see www.iaia.org;
- the balanced scorecard is designed to incorporate different stakeholders perspectives (financial, learning and growth, business process and customer perspectives) and looks at the collected mix of outcomes in these areas. This approach was adapted by Shipley et al. (2004) to evaluate the effectiveness of Heritage Lottery Fund projects in the United Kingdom.

For an introduction to the use of these different methods in the evaluation of cultural activities and in particular events see Richards and Palmer (2007) and Getz (2009), and as regards culture and regeneration see Evans (2005).

Approaches to economic impact assessment

In the context of cultural goods, economic impact analysis has been described as seeking “to estimate changes in regional spending, output, income and/or employment associated with tourism policy, events, facilities or destinations” (Tyrrell and Johnston 2006). Approaches used in measuring the tourism and event impacts are summarised in Table 3.

Table 3. Approaches to event impact assessment

Approaches	Goals	Commonly used measures
Break-even or profit/loss	– short-term assessment of financial efficiency or solvency	– measure direct costs and revenues to organisers – determine surplus or deficit (profit or loss)
Return on investment (ROI)	– show the benefits of grants or sponsorship – calculate ROI for investors or owners	– determine the relationship between grants and levels of visitation or economic benefits – use standard ROI accounting practices
Economic impact	– determine the macro economic benefits to the destination area – determine the economic scale of one or more events from the destination perspective	– estimate direct and indirect income and employment benefits – often uses multipliers or econometric models – measure total attendance and expenditure of event consumers, plus organisers’ expenditures
Costs and benefits	– evaluate the costs and benefits from the perspective of the host community and environment – determine the net work value of the event	– compare tangible and intangible costs and benefits short and long term – assess opportunity costs of investments – examine the distribution of impacts – judge the net worth and acceptability of the event(s)

Source: Janeczko, Mules and Ritchie (2002).

Three main techniques are commonly used for measuring economic impact or value in the cultural sector:

- cost–benefit analysis (CBA)/return on investment (ROI) approaches which undertake a straightforward calculation of the benefits or economic return against the cost of delivering the service, activity or event;
- economic modelling approaches involving multipliers which also look at the economic impact on the wider economy using income and job multipliers;
- contingent valuation approaches based on calculating the value of an asset or attraction by asking visitors how much they would be willing to pay to visit.

Cost-benefit analysis/return on investment approaches

A simple return on investment approach looks at the income generated from a product or service against the cost of producing it. So, if a guidebook cost €5 000 to produce and 5 000 copies were sold at €5 each, a profit of €20 000 would be generated, which is four times the original investment.

Cost-benefit analysis takes the calculations a step further by looking at the total benefits (and costs) that will result from an investment – for example, in terms of the number of jobs that will be created. It is used to aid decision making prior to investing in an activity as well as in the subsequent evaluation of the benefits it produces. It provides a fairly straightforward way of measuring the immediate return on an investment. It is also used in value for money (VfM) assessments where there is a need to determine if the amount of money spent on a given initiative, programme or project can be justified by the outcomes actually observed. Cost-benefit analysis requires all benefits as well as costs to be valued in monetary units. This also allows for the comparison of a number of diverse interventions since benefits are measured in the same units. So, for example, the investment in a festival can be shown to produce x number of jobs (for the organisers, performers and local businesses) at a cost of y whilst a similar number of jobs produced as a result of training programme may cost.

In CBA it is necessary to list all the relevant items including spillover effects of the activity such as extra costs and infrastructure amenities; valuing expected benefits and costs and appraising the activity or project by setting-off aggregate benefits against aggregate costs – see Appendix 2.

The cost-benefit analysis/return on investment model has been adapted by those interested in developing a monetary value for the economic impact of a wider range of social, community and cultural activities that have not traditionally been measured in economic terms. Known as the social return on investment (SORI), this approach offers a means of quantifying the social and environmental impacts of an activity and thus “proving” their worth in financial terms. A SROI produces a ratio that is calculated by dividing the net value of social benefits by the value of the investment made to achieve those benefits (the return on investment). The methodology allows for stakeholders to identify what is important and what should be counted, develops a theory of change to explain how the intervention is making a difference, and attaches a monetary value to social and environmental outcomes as well as economic ones as a way of illustrating value. A study undertaken for the Museums, Libraries and Archives Council in the UK in 2007-08 concluded that methodologies looking at return on investment (ROI), and in particular social return on investment (SROI), were best placed to reflect the depth and detail of the value being created by the sector (Jura Consultants 2008; quoted in NEF 2009). For more on this see the UK Cabinet Office (2009), *A guide to social return on investment*.

An example of how the SROI approach could be used by the Cultural Routes is given in Table 4 below. This shows how financial proxies can be used to quantify outcomes where monetary values are not available, thereby enabling all outcomes to be quantified in financial terms. The SROI approach may be particularly useful as a means of developing a value for those aspects of the Cultural Routes’ activities which focus on raising awareness of cultural heritage or offering educational activities or cultural exchanges or events. The process can be time consuming and requires a

discussion amongst the stakeholders to agree key objectives, outcomes and practical methods for measuring them.

Table 4. Example of developing a new youth cultural exchange

Stakeholder	Input	Activities	Outputs	Outcomes
Local children	Time	E.g., camping trip to partner town on Route Biking trip to visit sites en route	X children participate in activities from Y different countries of the Route	(1) Improved language skills (2) Improved social skills
Parents	Cost of trip	Learn about trip Pay for cost	X parents/families involved	(3) Parents show increased interest in travel to partner countries
Volunteer Organisers	Time Skills	Organising trip	2 trips organised	(4) Improved skills and experience leads to greater employability

Outcome	Indicator	Financial proxy	Data collection	Findings and calculation
For children				
(1) Improved language skills	School grades in language subjects	Savings in cost of providing supplementary language lessons	Feedback from schools	E.g., cost of 5 extra lessons for 4 groups saved = $5 \times 4 \times \text{€}100 = \text{€}2\,000$
(2) Improved social skills and behaviour	Children are socialising more Incidents of anti-social behaviour reduced	Savings in cost spent on dealing with anti-social behaviour Extra costs of more social activities	Participants survey	Savings in dealing with anti-social behaviour, e.g., litter, graffiti, etc: $\text{€}5\,000$ Cost of 100 children attending youth club: $30 \times \text{per yr at } \text{€}5 \text{ per session} = \text{€}10\,000$ Net cost = + $\text{€}5\,000$
For parents				
(3) Parents show increased interest in travel to partner countries	Number reporting interest in travel	Amount spent on travel	Parents survey	50 parents spend an average of $\text{€}1\,000$ in partner city = $\text{€}50\,000$ euros
For volunteer organisers				
(4) Improved skills and experience leads to greater employability	Number of job interviews obtained Number gaining employment	Saving in cost of alternative training Income from job Savings in benefit	Organiser interviews	$\text{€}5\,000$ saved in alternative training $\text{€}20\,000$ p.a. income for job – less unemployment benefits of $\text{€}8\,000 = \text{€}12\,000$

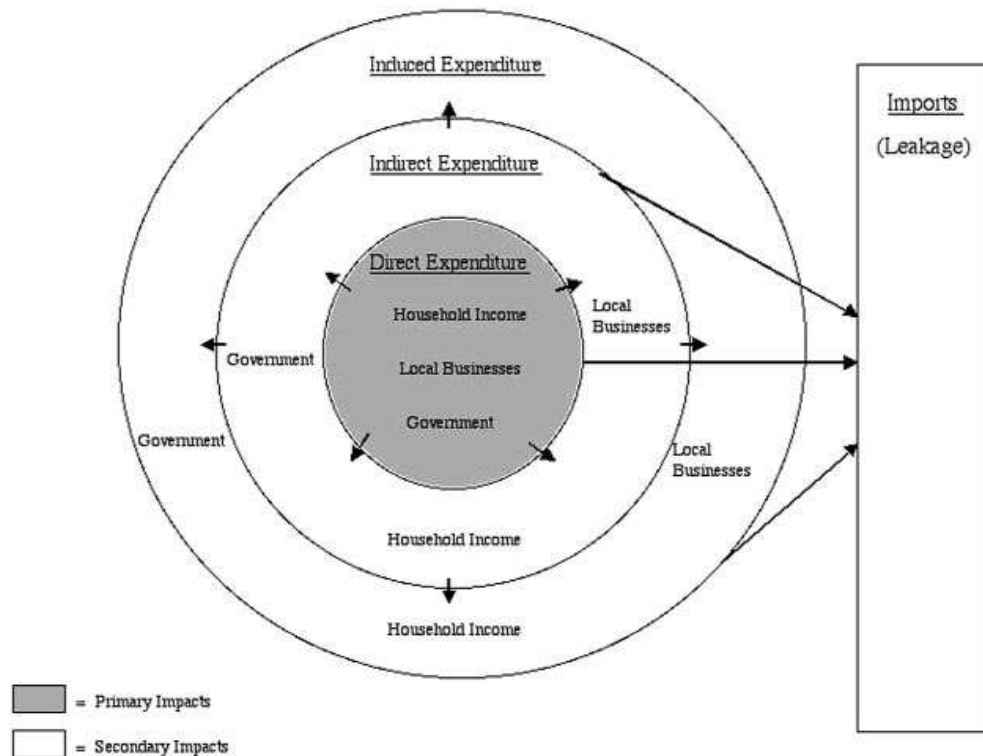
		payments		Total benefits = €17 000
Total benefits across all stakeholders = €2 000 – €5 000 + €50 000 + €17 000 = €64 000				

Economic modelling approaches using multipliers

The most frequently used approach for modelling economic impact within the cultural sector involves multiplier analysis. This approach allows for the wider benefits of increases in visitor or tourist numbers to be measured. The concept is based on the premise that initial expenditure by visitors will permeate through the rest of the economy. During this process, however, a proportion of the original spend is not retained within the local economy, but will “leak” to other areas as supplies may be sourced externally, wages may be paid outside the area and profits and taxes may be remitted elsewhere. “The multiplier is, therefore, the ratio of change between the *original change* in economic activity (in this case, tourism expenditure) and the *ultimate change* in activity that results as the money is spent and re-spent through various sectors of the economy. The value of the multiplier depends on the amount of leakage between each stage of the process, see – Figure 2. The effects on the economy can be estimated at three levels: that of direct effects, indirect effects and induced effects” (Bond 2008). These are described by Bond as follows:

- direct effects: the direct level of impact recognises that the initial change in expenditure will create some income both for the firms that receive the expenditure and for the employees of those firms;
- indirect effects: the indirect level of impact recognises the need of the initial recipient of the expenditure to make purchases of goods and services from other sectors of the economy. Thus, for example, an increase in the demand for hotel accommodation may cause hotels to increase their demand for food and beverages, laundry services, electricity and water. Furthermore, these suppliers will, in turn, need to purchase goods and services from other establishments within the local economy. This process continues until the amount of money being re-spent during each round of activity becomes negligible;
- induced effects: the existence of induced effects is based on the assumption that, as income levels rise throughout the economy due to the indirect effects of the original increase in expenditure, a proportion of the increased income will be re-spent on goods and services within the local economy (Bond 2008: 7). The way money flows through the local and regional economy as a result of an event is illustrated in Figure 3.

Figure 2. How money flows through and leaks from the local economy



These multipliers can be estimated through:

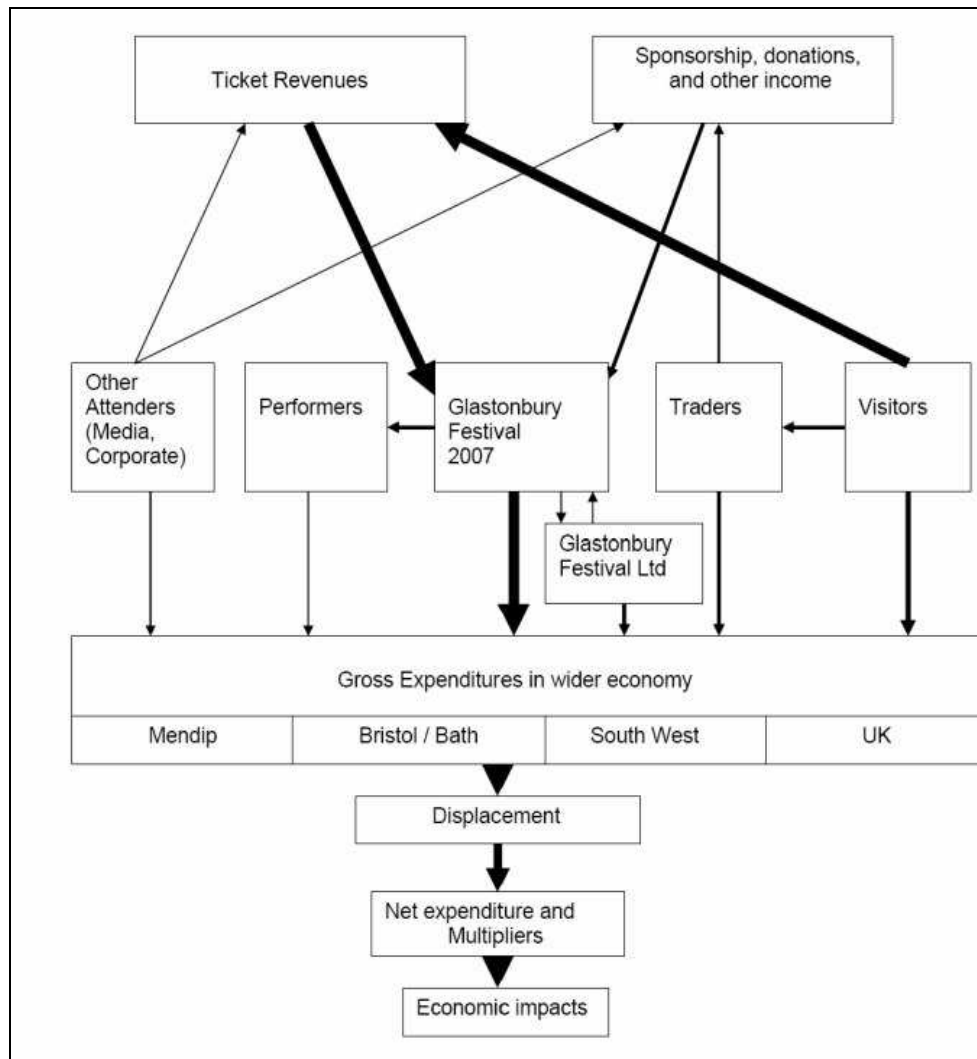
- surveys of businesses and employees designed to understand their supply chains and gain the information needed to calculate the local supply linkage multiplier effects. In addition, estimates can be calculated for the induced effects using data on local consumption patterns in the local economy;
- previous research/evaluations which have assessed the scale of multiplier effects for similar sectors of the economy in similar types of local economies. For example, the Scottish tourism multiplier study (1992) sets out detailed information on the multiplier effects associated with different types of tourism activity;
- economic models: various commercial and academic organisations have developed models of the national economy and of local economies. These can be used to assess the scale of multiplier effects resulting from a particular investment or change in the level of employment;
- input-output tables: these tables provide estimates of supply linkages between sectors and can be used to estimate the supply linkage or indirect multiplier effects.

Many appraisals use a combined or composite multiplier. Thus, for example, if at the regional level the indirect effects multiplier was 1.1 and the induced effects multiplier 1.2, the composite multiplier would be 1.32 (namely, 1.1 x 1.2). Applying the multiplier gives an estimate of the total direct and multiplier effects.

$$\text{Economic impact of tourism} = \text{Number of tourists} \times \text{average spending per visitor} \times \text{multiplier}$$

For example, the Glastonbury Festival impact study used a composite multiplier of 0.25 for on-site visitor spend developing this figure from multiplier figures quoted for similar sectors (restaurants and bars, and other services) in the Scottish tourism multiplier study (1992). Multipliers can also be used to convert estimates of spending or sales to income and employment. Simple ratios can be used to capture how much income or jobs are generated per unit of sales.

Figure 3. Expenditure streams for the Glastonbury Festival



Source: Baker Associates (2007).

In practice the method used by cultural organisations running activities similar to those of the Cultural Routes is to use standard multiplier ratios which have often been developed for different sections of the economy by many national and regional government departments and tourism bodies, and are regularly used for modelling. For example, the Scottish tourism multiplier study (1992) developed multipliers for a wide range of different sectors of the economy. Where these are not available, multipliers are adapted from other similar studies. However, a valid multiplier for one regional economy may not be appropriate in another or in a small local area. In these situations, the best available multipliers will need to be adapted based on local knowledge or more accurate local ones developed by undertaking research into local money flows within the local economy. The

New Economics Foundation (NEF) have developed the concept of Local Multiplier 3 (LM3) as a simple and understandable way of measuring local economic impact. The measuring process starts with (1) a source of income (say total income of an event or social enterprise) and follows how it is (2) spent and then (3) re-spent within a defined geographical area (which is called the “local economy”).

It has also been used as a tool for showing how much of this impact stays within the local economy and how much is lost through “leakages” to other areas. For an example of how LM3 can be used by the Cultural Routes see Table 5 below.

Table 5. An example of LM3 – A local bed and breakfast establishment

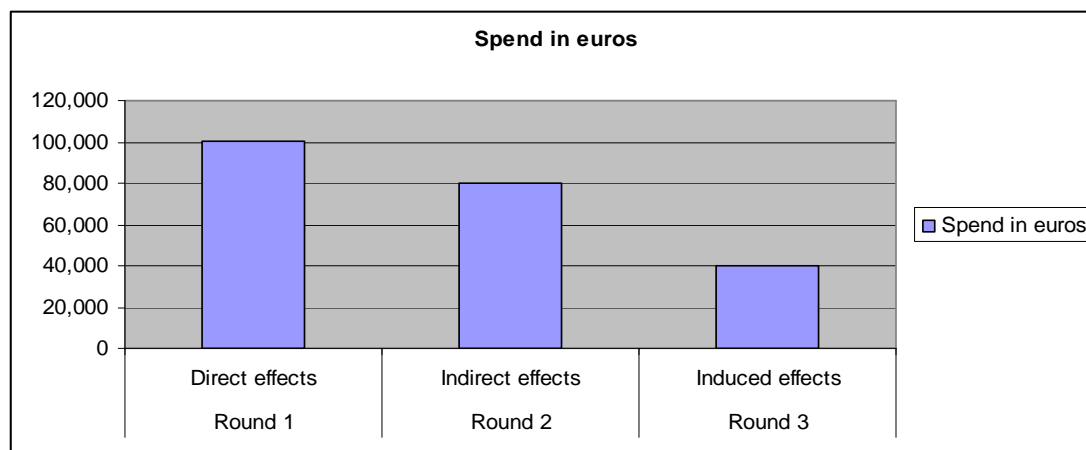
LM3 enables organisations to measure the impact they have on a local economy. In this example we show how much a local bed and breakfast establishment, which is accommodating visitors to the Cultural Route, may be contributing to the local economy. The LM3 goes in three rounds:

Round 1: ask the B&B what its annual income is and what proportion of this can be attributed to tourists visiting the Cultural Route. Let us assume that total income is €200 000 and €100 000 (namely, 50%) is due to Cultural Route tourists.

Round 2: ask the B&B how much of this income is spent locally on local staff, contractors, suppliers, etc. Let us assume total costs are €160 000 euros, so €80 000 relates to the Cultural Route tourists.

Round 3: estimate how much of this local spending is then re-spent by the B&B’s local staff and suppliers in the local area. Let us assume this is €40 000.

Add the money from all three rounds together (€220000), divide by the initial income (€100 000) and you get the answer 2.2. This is the local multiplier score for three rounds – or LM3.



[REB4]Adapted from NEF (2002).

Once the financial impact has been calculated and allowance made for deadweight and leakage, the net impact figure can be converted into the number of jobs by using sectoral employment multipliers, which provide average estimates of the income required to generate a new job in a specific sector. For example, using employment multiplier figures for restaurants and bars and other services, Baker Associates (2007) estimated that the net total impact of the Glastonbury Festivals on the south-west of England regional economy was £45.2 million and that this equated to 1 110 jobs.

Some alternative approaches

The general equilibrium approach

Input-output techniques using multipliers have been criticised for only accounting for the positive impacts of an event on economic activity and ignoring the equally relevant negative impacts (Dwyer, Forsyth and Spurr 2006). For example, a greater demand for labour or resources in one section of the economy will lead to lower use and output in other parts of the economy, and prices will be bid up discouraging production elsewhere. This will lead to an over-estimate of the initial spending and an over-estimate of the final impact on overall activity. The computable general equilibrium approach builds in these negative aspects to the calculations. The arguments for taking these into account are greater for larger events or activities held in major cities where the impact will be felt on the regional economy. At a local level these over-estimations are not likely to be too large and the relative ease of analysis means that multiplier techniques may be appropriate to assess local impacts and are certainly likely to be fine for most of the Cultural Routes.

Contingent valuation

The contingent valuation method (CVM) was developed from environmental economics and is now applied to a range of amenities, as well as attitudinal surveys of public spending (for example, on culture). CVM uses either a “stated” or “revealed” preference method examining people’s behaviour and inferring their “willingness to pay” (WTP) for public (free) or merit (charged for, but subsidised) goods. CVM entails asking a sample of individuals how much they would be “willing to pay” for a particular public good, for example museum or festival. For instance, a survey of visitors to a free Cultural Route event or facility could ask how much they would be willing to pay for the experience or visit. This might be guided by other comparative events or attractions that are charged for. As well as direct price, the travel costs method also captures the cost of travel to a venue as a proxy for “entry price” or “value”. The result calculates a mean monetary value which is then multiplied up (by the number of users, visitors or population) and is used particularly in environmental quality, amenity and historic conservation scenarios in cost-benefit analysis exercises (CBA), in order to put a value on intangible or “non-traded” benefits such as access to a free heritage site. From a meta-analysis (Noonan 2003) over 70 CVM studies were reviewed, mostly in the historic/heritage fields. This method requires primary research surveys to be carried out; however, WTP monetary rates, like pre-calculated multipliers, are used as a proxy in the absence of primary survey data.

Jobs created calculations

It is also possible to show the contribution of a cultural attraction to local employment by calculating the number of jobs it provides, both directly, indirectly and by influences on other sectors of the economy and tourism. Greffe (2004) demonstrates how heritage is a lever for job creation in the French economy by looking at the total number of people employed directly by museums, monuments, libraries and archives and then the number of indirect jobs which are created by work related to conservation and, finally, induced jobs (for example, the arts and craft sector), which use heritage as a source of inspiration for designing new products, and jobs in the tourism sector which are related to heritage. This is another version of the multiplier approach and can be a useful way of demonstrating the value of a heritage attraction

What to measure? Indicators

Having developed a theory of change and identified the types of economic benefits and impacts that are likely to result from an activity, the next task is to identify the indicators that can be used to measure whether and to what degree these outcomes have occurred. A number of practical issues need to be considered including:

- the data must be available;
- the organisation must have the resources required to collect the data;
- The indicators should allow for comparability – in particular, across different points of time and different locations. For example, different locations within the Route may want to compare figures for visitor numbers across a number of years – they clearly need to use the same definition of “visitor” if the data is to be compared;
- the indicator should allow for data to be collected at the appropriate level. If the impact is only likely to be at the local level then local data is required – regional statistics may not be at all appropriate;
- the following indicators are some of the most widely used in studies of cultural tourism:

Visitor numbers

A visitor is defined as “a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited” (UNWTO 2008: 10). This definition is particularly important to note in the case of events which will attract both local and external visitors to the area. Economic impact attributable to an event relates only to new money injected into the study area/economy by visitors from outside the community. Expenditure by those who reside in [the study area] represents only a recycling of money that already exists there

Overnight stays – Bed nights

The additional number of hotel or other accommodation nights booked as a direct or indirect result of the Cultural Route and its activities.

Visitor spend

The amount spent by external visitors in the area on accommodation, food and other goods and activities. Tourism expenditure refers to “the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others” (UNWTO 2008: 35).

Sale of products

The direct sales from items produced by the Cultural Route such as guidebooks, tours, and souvenirs and the sales of such items by other organisations or businesses in the area that can be attributed to the Cultural Route.

Business start-up and growth

Business sales directly attributable to the Cultural Routes.

Reported business growth usually measured as gross value added (GVA) by businesses who have directly or indirectly benefited from the Cultural Route.

The number of new businesses starting up as a result of the Cultural Route.

The level and value of exports that can be attributed to the Cultural Route.

Business support activities

The number of businesses provided with business advice or training.

The number of training or advice hours provided.

Employment

The number of new jobs created or existing jobs saved as a direct or indirect result of the Cultural Route.

Web hits/use of social media

The number of web hits and the extent to which other social media sites (Facebook, Twitter, etc.) created by the Cultural Route attract visitors and comments can be used an indicator of the effectiveness of these marketing strategies and the level of interest in the Route.

Methodologies

A range of methodologies can be used for collecting the data suggested above. The choice of which ones to use will depend on the availability of the data and the resources available to collect it. Methodologies which are most frequently employed are discussed here.

Visitor surveys

Visitor surveys are the most usual way of estimating how much new income has been brought into an area as a result of a new cultural attraction or event. They are particularly important when measuring the economic impact of an event. Frechtling quotes Getz (1994: 444) “Because of the uniqueness of special events, there is generally no viable substitute for visitor surveys. Surveys are required to determine the proportion and number of tourists and their trip motivations, activity and spending patterns”. In the case of events, visitor surveys should also remember to include non-resident producers of the event, non-resident sponsors of the event, non-resident media representatives covering the event, non-resident exhibitors at a trade show and other vendors at the event.

To ensure that the data collected on visitor spend are valid the survey needs to check that the person surveyed is indeed a visitor (using the definition given in the previous section) and that their spend is additional to the area, namely it should be spend which would not have occurred had the venue not been present or the event not taken place.

Surveys should aim to cover a representative sample of visitors taking into account variations across seasons, types of tourists and the different locations visited. Since average visitor spend can vary widely across different types of visitors, a standard practice is to segment the visitor market into different groups (for example, high spending, medium spending, low spending, or by age, mode of transport, etc.) and sample around 50-100 within each category.

Further points to consider are the need for an accurately defined study region, clearly defined spending categories, and a definitive unit of analysis (for example, visitor party per day) (Wilton and Polovitz Nickerson 2006).

The timing of surveys is also important in ensuring that data on visitor spend are accurately recalled by respondents. Frechtling suggests “Surveys should focus on interviewing visitors as they leave the venue, distinguish those who attend the event on a trip for that purpose (avoiding casuals), and ask about spending during the last 24 hrs as immediate recall is more accurate”. Diary methods (completed on-site or mailed back) have also been successfully used. For example, Wilton and Polovitz Nickerson (2006) intercepted visitors at key exit points to the Glacier National Park in Montana, United States, and gave them diaries to record expenditure with prepaid mail-back envelopes. A 39% response rate was achieved.

It may be possible to encourage businesses that benefit from Cultural Route visitors (for example, hotels) to assist in the collection of visitor data, perhaps by having questionnaires in hotel rooms, museums and at other cultural sites important to the Route. Businesses assisting in this way may need to be incentivised by offering them some sort of benefits in return for their co-operation – for example, providing them with analysed data that may assist their business or offering discounts on Cultural Route products that may be of interest to their customers.

Business surveys

A wide range of businesses are likely to benefit from the Cultural Routes’ activities including publishers, photographers, hotels, restaurants, guides, artists, shop managers, tour operators, etc. Business surveys can be used to survey the direct benefits of the Cultural Routes’ activities to local business turnover, growth and employment. They can also be used to help determine the indirect effects by questioning businesses about changes in spending on suppliers and staff wages which can be attributed to the Cultural Routes. Online or telephone surveys may be the most efficient way of collecting this data. The case study developed on the Legacy of al-Andalus Route in this report undertook an online and telephone survey of SMEs involved in sectors related to the Route (accommodation, restaurant, travel agencies, handicraft producers) and asked questions regarding their annual gross turnover and staffing levels and the percentage which could be attributed to the Route.

Traders surveys

Traders surveys can be undertaken with those operating stalls at events. Like the business surveys these can be used to ascertain their business type, expenditure and supply chains, and the turnover generated as a result of the event.

Participant evaluations

Many of the cultural awareness events and cultural exchanges do not have an obvious or immediate economic return, but if it is possible to gather data from participants it may be possible to calculate the likely economic impact of the activity and/or assign a financial proxy to a social benefit using the SROI methodology described above. Where feasible, surveying participants as part of an evaluation of the activity can be used to gather this type of data. Participants need to be asked questions regarding the impact the activity has had on them or their families and how this is likely to change their behaviour in the future, and an appropriate monetary value assigned to this outcome.

Analysis of product sales

Direct sales of products produced by the Cultural Route and its partners should be fairly straightforward to ascertain. However, other businesses may be involved in sales of products such as guidebooks and souvenirs at least some of which can be attributed to the Cultural Route. Information on these will have to be ascertained from business surveys.

Issues and problems

Economic impact measurement should not be an “afterthought” but should be designed into the operation of the event so that appropriate data can be collected and a baseline produced if required.

To measure the impact of the whole Route (that is, all the different nodes), data need to be obtained from each of the local areas involved or failing that a representative sample of areas from which overall impact figures can be extrapolated. The data need to be obtained at each local level involved in the Route and then aggregated to it as a whole. A consistent methodology applied in each area is important here. This may be an issue for some Routes. For example, the Via Regia reported that partners in the Ukraine have “no working information structure in the field of cultural tourism which would have to be the base for any measurements”.

Some economic impacts may not be seen for a long time – this is particularly the case where there is no immediate impact on local businesses – for example, in the case of an educational exchange. In these cases more thought needs to go into developing a plausible theory of change which can offer a reasonable logic for the link between cultural and economic benefits. Examples of beneficiaries who have benefited from past cultural activities and gone on to work in the sector, or improved their educational grades or language skills as a result may provide some evidence of a longer term potential economic impact.

A particular problem is likely to be attributing economic benefits and impacts to the Route in areas where visitors are visiting the Route’s cultural assets as part of a trip involving a range of different tourist attractions. In this situation, it is important to question visitors carefully about their motives for visiting the area and estimate what proportion of spend can be justifiably attributed to the Route’s attractions.

Collecting data from several different sources provides a useful means of checking the reliability of the figures obtained. For example, hotels might provide figures on the number of bed nights and cost of these and visitor surveys can also provide data on accommodation costs. These can be used to cross-check and validate the different data sources, but it is important to avoid the danger of double counting.

Many tourists visit Cultural Routes as part of an organised package tour in which accommodation and possibly meals and visits to cultural attractions are paid to the tour operator in advance. The proportion of the package tour cost which ends up in the local area and the proportion which gets retained by the tour operator or leaks out to other areas will need to be estimated by questioning tour operators and local businesses. Similarly, tourists visit museums because of exhibits related to the Cultural Route as well as other reasons – so an informed judgment (ideally, calculated from a sample of visitor interviews) will have to be made on what proportion of the museum’s visitor numbers can be attributed to the Cultural Route.

Conclusions

This chapter has attempted to give a basic introduction to some of the issues relating to the measurement of economic impacts which may be relevant to the Cultural Routes. Clearly, the Routes are very diverse and it is impossible to prescribe one overarching methodology for them as a whole or even necessarily for one individual Route. As one of our survey respondents pointed out, “It is impossible to create one common tool of measuring impacts that works for all members and activities”. The complexity and diverse offering of the Routes means that a number of different approaches will have to be taken depending on the types of activities involved. This chapter aims to be a starting point for this. The table in Appendix 3 provides a summary matrix of activities and potential approaches and methodologies that could be used. The approach and methodology adopted needs to be fit for purpose and appropriate to the size of the initiative involved. Ideally, the approaches and methodologies suggested here need to be piloted with a sample of Routes to test their applicability and to enable some case studies to be developed of how different approaches work in the context of the Cultural Route structures.

A further issue is the lack of basic data collection by attractions which are part of the Route in some areas. For example, Via Regia reported that, “In the Ukraine there is no working information structure in field of cultural tourism for example, which would have to be the base for any measurements. There is even no common database on existing tourism-relevant facilities.” Whilst in other areas partners in the Route, such as tour operators or cultural attractions, may have their own systems for recording visitor numbers and possibly measuring economic impact, but not necessarily using the same definitions, indicators or methods for recording data. More work clearly needs to be done to promote the use of shared definitions and indicators for collecting data.

Finally, the extent to which the Routes are able to engage in the process of impact measurement depends on the resources and skills available to them.

The four responses to our survey suggested that currently the Routes lacked the resources or technical expertise to do this and felt that the task of collecting data from

such a complex mix of initiatives and partners, operating different measurement systems or none at all, was too daunting. Many of the Routes are still young and are focusing their resources on the development of their products and activities. External resources and support will therefore be required to assist them in evaluating their work and measuring its impact. This support could be provided in a number of ways:

- through the provision of training and resources for staff time to enable the Routes to undertake economic impact assessment themselves;
- establishing a library of tool kits, texts, and past studies on economic impact methods which the Routes could access;
- through the provision of a number of case studies which provide examples of how other Routes have measured their impact;
- by encouraging the Routes to build the costs of evaluation and economic impact measurement into all new funding proposals;
- through the provision of grants or external consultants who could undertake an economic impact assessment for the Route.

6. Increasing attractiveness of the lesser known European destinations via the Council of Europe Cultural Routes programme

6.1 Developing the Council of Europe Cultural Routes brand

The Council of Europe's network of Cultural Routes represents hundreds of attractive destinations that are thematically linked thanks to their shared history, culture and heritage to form 29 unique cultural itineraries through Europe. In the marketing and branding of "Destination Europe", authenticity is the single biggest selling factor that visitors from long-haul markets look for in the destination and it is precisely this authentic experience that is central to the destinations making up Europe's Cultural Routes.

The historical importance of many Cultural Routes is widely known. Indeed, for pilgrim and trading routes, the path itself is often common knowledge owing to the ancestral role they have played in shaping modern-day Europe.

This chapter looks at the opportunity for promoting the value of cultural tourism, particularly by analysing how the 29 Routes are marketing themselves and where there are opportunities for improvement.

In-depth interviews were held with a selection of existing organisations responsible for the governance of the Cultural Routes, with a view to evaluating their existing capacity in marketing the Routes to the tourist consumer.¹⁸ These interviews were held with a view to learning more about how the Council of Europe can support their existing work and where there might be room for improvement in current activities.

Interviews were held with the representatives of the following Routes:

- Phoenicians' Route;
- European Route of Jewish Heritage;
- Hansa Route;
- Route of Saint Olav Ways;
- European Mozart Ways;
- Saint Martin of Tours Route;
- European Route of Historical Thermal Towns.

Conclusions are summarised in the tables below.

Individual Cultural Routes

State of the art in the field of marketing

Each Route had gone some way towards developing an offer for consumers; however, the extent varied greatly, with none of the Routes producing complete cross-channel marketing strategies at this stage.

The interviews established that Routes had made progress in the following areas:

18. Interviews carried out by telephone in May 2011.

- websites dedicated to the Cultural Route in local languages;
- social media profile(s);
- annual events unifying the Routes' themes;
- press and PR actions.

In most cases, thematic events were the focal point of their consumer-facing activities, with many concentrating on a specific day in the year on which all suppliers in the network concentrate their promotions and activities.

Dedicated destination/Route websites

All of the Routes interviewed had developed their own websites; however, only in the case of the St Olav Route had the site been developed as a dedicated consumer portal, to allow visitors to discover more about the Route. Other websites contained some information for consumers, but they varied considerably in depth, quality and accessibility of information.

With the exception of the St Olav Route, website visitors are confronted with a mix of information designed for the travelling public and information of a more academic nature, which is intended for corporate and internal communication.

Destination information is generally available on the individual Cultural Route websites. In some cases, however, this is little more than a PDF download, so there is a real need for improvement in this area at Route level. It is evident that there is a challenge beyond aesthetic presentation that demonstrates a greater issue at hand, the tourism product being often poorly defined within the network, with little connectivity between suppliers.

Use of social media

With regard to the use of social media, a few interesting initiatives have been recorded within some of the Routes. A good example is provided by the Transromanica Cultural Route project Walkin 'n Talking, initiated in Modena. A group of Italian girls travelled along the Transromanica Route interviewing local populations and experts and transmitting the information via Facebook, YouTube, and their own blog. This gave some publicity to the Route, and other Transromanica regions have shown an interest in following this example, although insufficient expertise and manpower hold back this initiative.

Most of the Cultural Routes interviewed were using social media, with dedicated profiles set up on Facebook and some also using Twitter. However, it was found that profiles had been set up in a style that could be considered experimental and without a clear differentiation between consumer-oriented communication and internal or corporate communication. It is clear that more support is needed in successfully using these new tools to their full potential.

Budget allocated to promotion and marketing

The funding model for each organisation depends on their set-up, structure, governance and the scope of their activities. It is therefore difficult to find a common

business model or quantify commitment to marketing resources in or between the Routes.

Broadly speaking, none of the Routes interviewed had a firm budget commitment to marketing and worked on a year-by-year basis to secure and allocate funding for promotional activities. This was indeed also a frustration felt by many of the Routes that would like to be more committed in the field of marketing but lack the funds to do so.

Where budget is being regularly committed to activities, the Saint Martin of Tours Route being a good example, it is on an ad hoc basis, responding to opportunities arising rather than proactively implementing strategic long-term planning.

Resource capacity

Resource capacity across all Routes is extremely limited. Most lack any dedicated marketing resources, with membership structures requiring executive staff to multitask in a number of fields.

In all cases, staff working on a day-to-day basis on the development of the Cultural Routes and their activities are doing so on a voluntarily basis as part of their work for other organisations. The work being done by these committed individuals is highly commendable; however, their involvement in this capacity means that their work excels in bringing a strong academic underpinning of the Route theme, for which they are passionate, but they are often under-resourced in other areas where experience is lacking, such as marketing.

Organisation of network and activities

Fragmentation in the supply chain is a huge problem holding back the Cultural Routes from putting together or packaging a strong tourism offer. The nature of the networks, comprising SMEs in many different geographical locations, across different sectors and with different business priorities, means organisation of the network, particularly for marketing activities, is a challenge.

Co-ordination of marketing, and to a certain extent branding, is commonly limited to actions initiated by clusters of local businesses, with specific interests in using or developing the Route's brand where there are clear advantages for the supplier in doing so.

Pan-European marketing activities are therefore often limited to annual events, such as the National Day of Jewish Heritage, whereby all participating members of the Route of Jewish Heritage open their doors to the public. Where cross-border marketing activities are organised, they tend to be isolated and commercially driven, confined to where the demand already exists. This means that where there is not already a demand from the consumer, no resources are being allocated to generate new demand.

Digital presentation of Cultural Routes

Interviewees were highly critical of the EICR's web portal, www.culture-routes.lu, unanimously agreeing that the site was not able to fulfil a consumer-facing role in its current form. There was a distinct lack of clarity about the purpose of the site, with many noting considerable overlap between the institute's website and the Council of Europe's website, in the presentation of Cultural Routes. The key criticisms are related to:

- the purpose of the site and its intended users;
- the quality and style of content, especially texts;
- consistency of information;
- navigability – Many Routes were difficult to find;
- presentation of Routes;
- the lack of consumer orientation.

Many felt that the existing site was “too busy”, containing a lot of good information but poorly presented, mixing both corporate and consumer information together in the same place. There are inconsistencies in the way that each Route is presented, some containing much more information than others and the quality of texts and information was widely regarded as uninspiring.

The critical feedback on the existing digital presentation of the Routes led many to propose the development of a dedicated consumer portal, through which all Routes can be presented to the final consumer on a single site. This proposition was considered by many as an essential “first step” in creating a strong brand for Europe's Cultural Routes and their marketing at European level.

Important markets for promotion

Interviewees were asked whether or not a dedicated consumer portal should be created, and if so, which markets it should focus on. Due to variation in the Cultural Routes' marketing experiences, the responses to these questions varied. Nevertheless, the future promotion of the Cultural Routes could be based on the scenarios presented below:

Near markets focus: development of a central portal, with content and marketing activities designed for European countries where a specific Route passes through. This means that not all Routes would be available in all languages, but only to those markets and languages deemed most important. In this scenario, the Hansa Route, for example, might be presented on a single European portal with languages for the following markets: Belarus, Belgium, Estonia, Finland, France, Germany, Iceland, Latvia, Netherlands, Norway, Poland, Russia, Sweden and the United Kingdom.

Long-haul markets focus: development of a central portal, with site content and promotional activities designed for the North American market and other long-haul markets considered at a later stage. In this scenario, the same Hansa Route might be presented on a single European portal only in English, with its primary target being North America. Users in Europe would therefore either go directly to a dedicated tourism portal for the Hansa Route, in the relevant language, or discover the Route through a central portal for Europe's Cultural Routes, recognising English as the first global lingua franca.

Vertical markets focus: development of a central portal, where content and marketing activities are not targeted to any one geographic market, but to specific vertical markets instead. In this theme-based scenario, content would be available in a limited number of languages, responding more specifically to the interests of vertical markets, such as packaging Routes based on their thematic genres.

Skills development and knowledge exchange

Interviewees strongly emphasised the need for greater knowledge exchange between the Routes. They felt that there could be more done to support tourism product development, education and training, as well as in the field of marketing and the use of digital communications.

Indeed, these disciplines are key areas in which all the Routes struggle to package a strong and consistent supply and where they lack the necessary skills, knowledge, expertise and resources.

Seminars organised by the European Institute of Cultural Routes were seen as valuable, but not always financially accessible and with not enough focus on the above skills areas. It was felt that a better exchange of knowledge in this area allowing Routes to share the work they have been doing with each other would be strongly welcomed. Likewise the use of technology as a means of bridging the communication gap could offer a valuable knowledge-sharing platform.

Product development

Tourism product development was at an early stage in all of the Cultural Routes interviewed. In some cases, much work has been done to create a strong product offering, but progress in this area is challenged by the fragmentation in the supply chain, for example where a Route spans three different countries and there are poor transport links between its different sections. The greatest challenge for all Cultural Routes was in linking different market segments and industry clusters to create a consistent pan-European offer.

The Phoenicians' Route, for instance, is addressing this challenge starting with school tourism, where carefully organised tours are designed to link the different sections of the Route through road or sea passages. Here, a well-developed multinational brand and offer has been established through the Route's network, which is widely adopted by participating SMEs and other stakeholders.

Despite their success, the Phoenicians' Route still faces many difficulties and recognises they are still at an early stage in product development. They face problems caused by vast geographic fragmentation, which make it difficult to effectively and directly communicate a tangible offer to consumers.

Existing capacity

The Routes interviewed believed that there was a strong need for work to be done centrally, in developing a consumer-facing brand and presentation of the Cultural Routes through creating a consumer-facing portal. They also strongly supported the need for marketing the Routes at a European level using digital communications channels. Additionally, they believed that more work could be done to offer practical

support in the use of ICT and marketing through programmes facilitating knowledge sharing and benchmarking.

The work of the institute is widely supported, but members felt that its role and capacity had not been clearly defined. Indeed, none felt that the institute currently has the in-house capacity to develop the above recommendations and, supporting the need for centrally led initiatives, believed that it was important to reinforce marketing resources at a European level. Many also recognised the need for marketing and branding initiatives to be run independently from the political structure governing the Routes.

Table 1. SWOT analysis of branding and marketing

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> – progress already achieved in certification – institutional role in representing European Cultural Routes – support given in Route development – dedicated staff and team resources – focus on supporting SMEs in destination marketing and capacity-building – centrally co-ordinated actions to promote the Cultural Routes globally 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> – brand is confusing and poorly communicated to consumers – website is busy, inconsistent and uninspiring for consumers – lack of dedicated resources for marketing – absence of skills capacity in marketing – limited human and financial resources – poor differentiation between consumer-oriented and industry-oriented action – under-resourced or under-skilled central unit
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> – tourism product development and promotion of Europe’s Cultural Routes – development of a strong consumer brand – demand from travellers for cultural and authentic experiences – use of new technology to inspire visitors and to promote the Cultural Routes in long-haul markets with limited human or financial resources – need for a European organisation bridging network fragmentation – demand from Route co-ordinators for greater centrally led support 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> – multiple brands competing with each other in the same space – building and maintaining reputation as a European “mark of quality” – overlap with other destination marketing organisations (particularly European) – approaching tourism industry with an institutional status – impeding political structures and interventions (for example, political influence in marketing activity)

6.2 Cultural Routes programme branding and marketing

Product development

The brand identity and values of each Route need to be studied sensitively in respect of their vast differences in thematic, historical and geographical values, when coming together as part of a single European brand for cultural tourism.

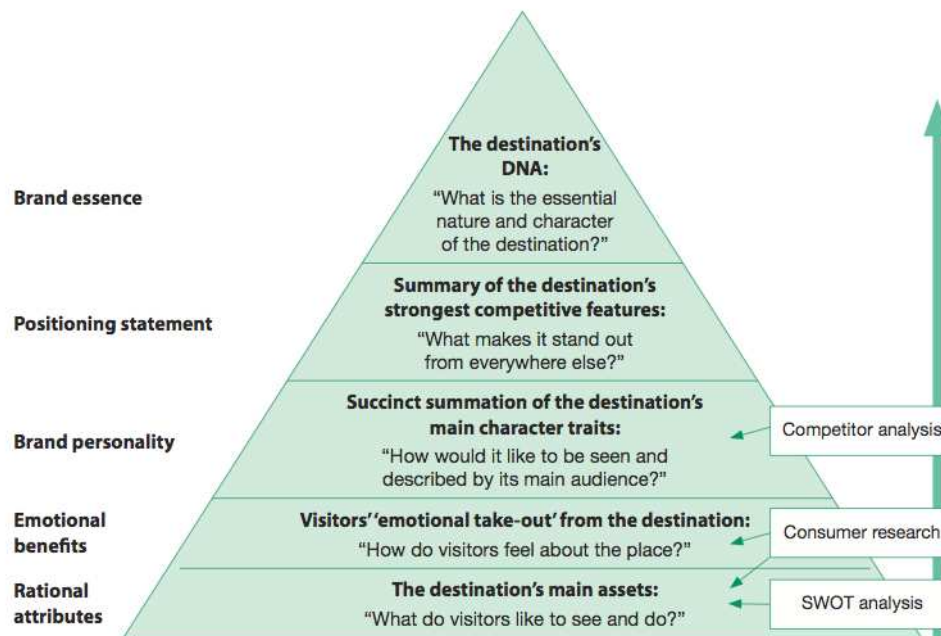
The scope of any consumer brand for the Cultural Routes of the Council of Europe needs to include the following aspects:

- the meaning behind the brand;
- to whom the brand is targeted;
- how the brand will be used.

The EICR’s certification criteria help to give clarity to the consumer in the meaning behind the term “Cultural Route of the Council of Europe” as European Routes or

networks of historical and cultural importance. However, the brand itself is not clear. In creating a brand that depicts the true strengths and the essence of the destination, it is advisable to look at widely adopted brand-building models for destinations like a five-stage pyramid shown below.

Figure 1. The five-stage brand pyramid¹⁹



The pyramid combines the attributes, positioning and brand values commonly used in destination branding. The principles used by the Cultural Routes in destination branding would remain the same given the importance of tourism in the promotion of the Routes.

The development of a strong product offer comes from the work of local industry leaders and stakeholders who have a passion to collaborate and promote intercultural dialogue and understanding. Many Routes have made good progress in this field but they lack connectivity, particularly in cross-border product development, transnational governance and collaboration. Strong development at grass-roots level is ultimately the foundation for any promotional action designed to bring visitors to discover European destinations based on a given thematic Route or cultural itinerary. Once a basic offer has been developed, it is important to define a communication plan to promote the Route. This plan could contain simple but important questions to the visitor, for example:

- What is the Route about?
- What can I see and do?
- How do I travel and where can I go?

A well-defined target market is one of the key elements of a marketing strategy. It is thus important to define a target market when designing promotional activities. A good starting point to measuring consumer interest and possible target markets would be consideration of online consumer demand. It is worthwhile conducting further

19. ETC/UNWTO, *Handbook on tourism destination branding*, World Tourism Organization, Madrid, 2009.

research to identify potential source markets and learn more about the characteristics of these markets. Demographics of any given market can be defined by means of:

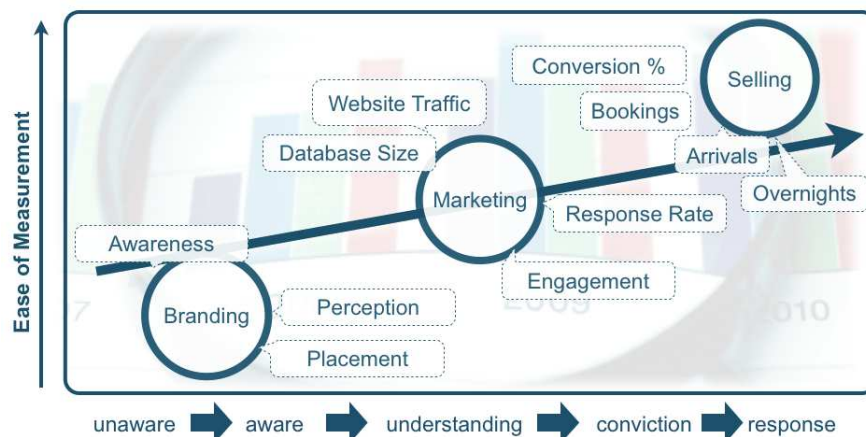
- geographical location;
- age;
- gender;
- ethnicity;
- income and profession;
- level of education;
- type of traveller;
- interests.

Once a target market has been defined, it is important to decide which marketing activities will ensure that the target market knows about the products or services you offer. In other words, at this stage it is important to define your promotion strategy and its goal. For destination marketing the goal is to create awareness and interest in destinations.

Monitoring and evaluating how effective your strategy has been is another key element, although often overlooked. This element not only helps you to see how your strategy is performing but also informs future marketing strategy. The table below illustrates the distribution process and some of the key performance indicators used in measuring success.

Sometimes, it can be challenging for destinations to demonstrate success quickly, as it takes time to build a brand. Perception of a brand's value and awareness are also more difficult to measure.

Figure 2.



Beyond the initial scope in developing and marketing a consumer brand for the Cultural Routes, it is important to examine the value and boundaries of the brand's scope. One should keep in mind the founding values of the Council of Europe on which the Cultural Routes have been established, namely promoting democracy and human rights through intercultural dialogue and understanding. Therefore, the scope of a consumer brand may reach beyond tourism and extend to promoting:

- democracy;
- awareness of cultural heritage;
- Europe's cultural itineraries and destinations;

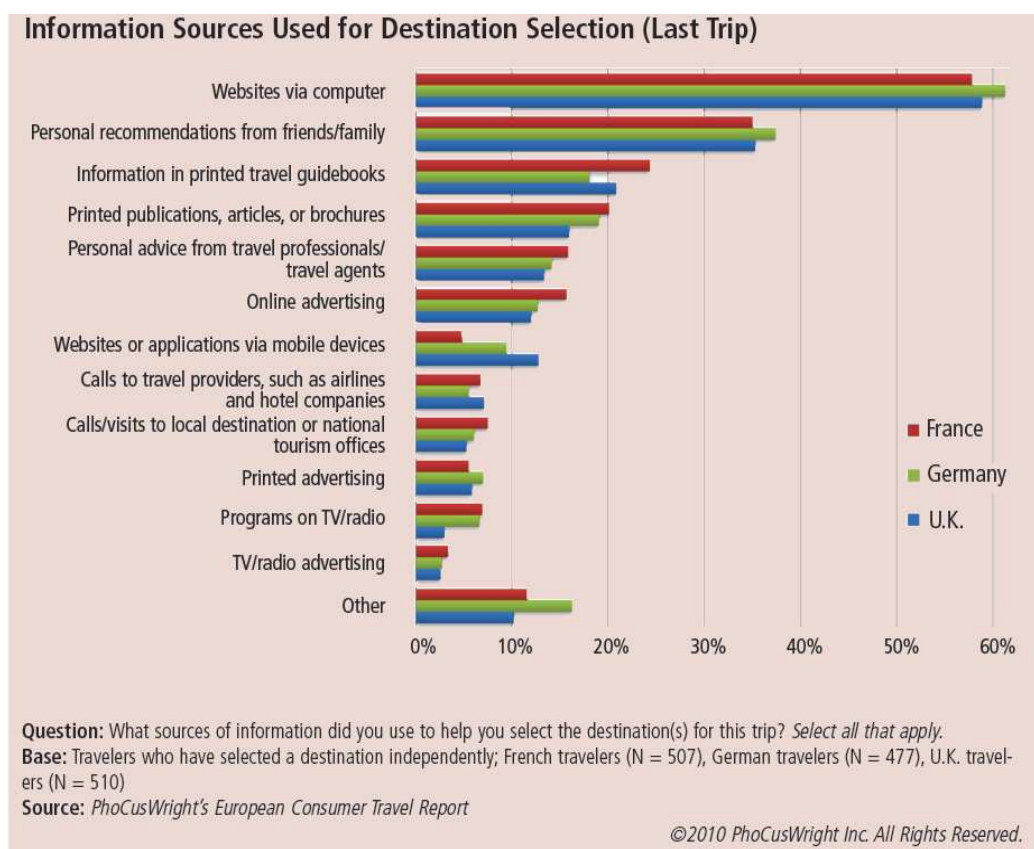
- intercultural dialogue and diversity;
- education and learning.

Dedicated consumer portal

A dedicated consumer website should be central to any communications strategy promoting Europe's Cultural Routes to the end consumer. In today's switched-on world, the research and planning of a trip begins online, and more often than not through a search engine. Protecting and strengthening the brand identity is as much an opportunity as it is a threat, since the first goal of every marketer is to appear first in Google when a relevant search term is entered.

Research commissioned by PhoCusWright²⁰ supports this need to be prominent in the online marketplace. A recent survey asking consumers what sources of information they used to select a trip destination shows that for more than 50% of consumers, research begins on a website.

Figure 3. Information sources used for destination selection (last trip)



A dedicated consumer portal should be inspiring and promote the product and destination(s) to potential visitors who will more than likely begin their research through a website. In order to be successful, the website must be built with the customer in mind and present the destination(s) in a rich and evocative way that will capture the imagination of users. Information needs to be informative, accurate, inspirational and relevant. It must be thorough, though not overwhelming.

20. PhoCusWright, *European consumer travel report*, 2010.

It is important to carefully manage expectations related to the site's purpose, to be clear about what it will and will not deliver. Creating an exciting consumer portal is naturally not enough to attract large visitor volumes. It requires dedicated resources and a promotional strategy supporting it.

Taking the next step of defining the feature requirements for the site can be a lengthy and challenging process that needs to be thought through carefully in order to avoid costly alterations after the launch. A goal-oriented approach is often the best way of scoping the content and functionality requirements of a destination site, asking the question "who is the intended user?" and "what should the site achieve?" Collaboration with stakeholders is paramount at this stage as it is important to define what they want to see the site achieve and how many resources can be committed.

A dedicated destination portal should act as a shop window for Europe's Cultural Routes and be seen as a powerful opportunity to sell the destination(s) and to create an attractive image that will stimulate the user to look for more information. With a good understanding of stakeholders' needs and requirements, the following aspects should be considered from a user perspective to help plan the front-end design of the site:

- look and feel;
- content and information;
- features and functionality;
- hierarchy of information;
- usability.

Important aspects, which will ultimately define how the site is built and what technology is required, must also be thought about from a technical perspective, including:

- content publishing: user created, content aggregation, database look-up, CMS, DMS;
- compatibility: platforms, browsers, devices;
- accessibility: available languages, screen resolutions, visually impaired users, etc;
- support and maintenance: wide/bespoke support, licensed/open source;
- data portability: syndication of content to other sites or devices;
- e-commerce: transactional or non-transactional.

The success of a destination portal also depends on what the domain name tells the user at first glance. The current address, "www.cultural-routes.lu", appears to indicate to users that it is a website dedicated to Cultural Routes passing through Luxembourg, while in reality it is the portal of the European Institute of Cultural Routes based in Luxembourg. The lack of consistency with other organisations or destinations in choosing a URL explains why users do not regard the site as "official". Generally speaking, European or international organisations commonly adopt the use of a ".com", ".org" or ".eu" domain, to indicate their global reach, as opposed to a single country domain (".lu" for Luxembourg in this case), indicating only a national reach. Consistency in the use of domain names is highly important for brand awareness of the Routes.

The decision to develop a dedicated destination portal should also not be made without a supporting business model. Successfully running a destination portal requires resources, namely:

- development and programming;
- hosting and maintenance;
- copywriting and translation;
- content licensing;
- marketing.

Multichannel content distribution

The use of technology for content distribution represents an even bigger opportunity than that of a dedicated portal. Whereas traditionally the right approach was to invest heavily in promoting and optimising a single website, the changing nature of how users browse the Internet means destination marketing organisations have also had to adapt the way they reach potential visitors.

Today, users spend the greater portion of their online time in just a handful of sites, or communities, where their friends and family are, the so-called social networks. This means that in order to reach these users, it is important to be visible inside these communities. For this reason, achieving brand visibility in social media is of increasing importance where the rewards of peer recommendation and social brand endorsement offer an unparalleled return on investment compared to other media channels.

Wikipedia

Wikipedia is a free, Internet-based, collaborative, multilingual encyclopaedia project supported by the non-profit Wikimedia Foundation.²¹ When users research specific topics on the Internet, they will inevitably come across a related Wikipedia entry in the top one or two search results, hardly surprising given the site's high search engine ranking. It is somewhat of a surprise, therefore, that the vast majority of the Council of Europe's Cultural Routes do not have Wikipedia entries. Indeed, the entry on Cultural Routes itself is poorly maintained and does not provide thorough or reliable information for visitors.

As an open-source community tool, the Council of Europe has the power to change and update these pages just like any other Internet user. Work can be done in a relatively short time period to improve and extend the visibility of Cultural Routes on Wikipedia in multiple languages. The result will dramatically increase the number of times a Route is shown when relevant search terms are entered, whilst ensuring that the Council of Europe effectively takes ownership of what is written about its activities and work.

External links are important to a site's search engine credibility; links therefore from highly ranked sites are an important part of search engine optimisation strategies. Whilst search engines disregard links from Wikipedia to avoid misuse of the service, it is nonetheless valuable to ensure that Wikipedia entries are set up with relevant links, as the high number of visitors to Wikipedia will naturally want to learn more from official sources.

21. Wikipedia, www.wikipedia.org.

Social media

Social media are increasingly dominating the marketing strategies of destination marketing organisations and are a digital media space that should be considered with at least the same level of importance as the destination's website itself. The "social web" is all about peer recommendation, brand endorsement and building trust and an ongoing dialogue with the customer.

Two social sites dominating the western world are Facebook and Twitter, both used in distinctly different ways to disseminate information and build a strong image of destination brands with their users. Indeed, many of the Cultural Routes themselves, including the EICR, have created their own Facebook profiles, but once again there is lack of consistency in how these are set up and used both between and within the different Routes.

As an advertising medium, Facebook is hugely powerful as it allows targeting of users on the basis of their interests, place of residence, age, sex, education and place of work or study. Given the niche appeal that many of the Routes have, this can be seen as a very powerful tool to apply in promoting the tourism aspects of the Cultural Routes.

The community aspect, however, presents perhaps the biggest advantage for using social media as it offers the possibility to connect both globally and locally, a phenomenon referred to by many as the "glocal" community. This "glocal" opportunity has not yet been fully realised or exploited to its fullest potential, either by the Routes themselves or the institute.

Interaction with potential target audiences via specialised media, blogs, Twitter or Facebook forums is a clever and economic way to market the Routes in a contemporary and effective way and to raise their visibility. It is also an efficient way of crafting the product and service offer along the Routes, as social media tools engage public not only as potential consumers but also as participants in the process of formation of the product/service offer.

Mobile

For destinations, there has been a rapid increase in the need to develop marketing tools and services for mobile devices, as consumer adoption of smartphone and tablet technology gives marketers a new space in which to connect with consumers.

There are two ways in which destinations can tackle the mobile market; first, by grabbing the opportunity to inspire users as they are out and about, following the principle of social media to be wherever the user is. The second is the "on arrival" opportunity, to offer mobile guides and services to visitors ensuring the best destination experience and using mobile communications as an opportunity to promote local events, cultural attractions and businesses, with location-based data telling the visitor what there is to see and do in the local vicinity.

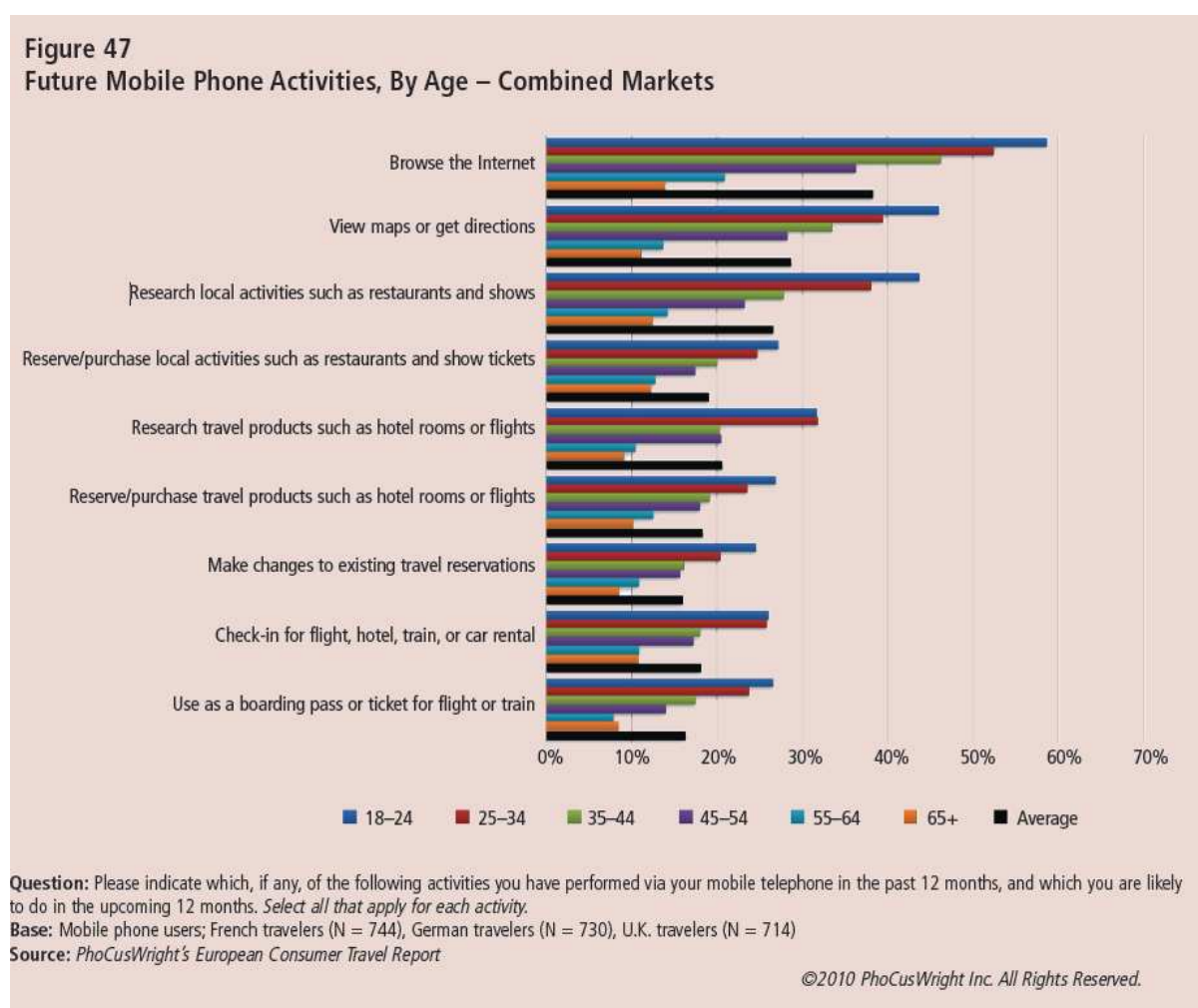
As mobile is a relatively new medium, many National Tourism Organisations (NTOs) are still seeking their way in the mobile marketplace and there is still a certain degree of trial and error when learning more about user behaviour in this field. Many destinations now have their own destination "apps" often developed for multiple platforms. However, there are also many unofficial providers – ranging from the more credible guidebook producers, such as Lonely Planet, to the less credible "app

entrepreneurs”, which often aggregate information from sources like Wikitravel. For this reason, it is important to take ownership of content in this space.

Once again, for the Council’s Cultural Routes, the mobile space represents a great opportunity to offer unique destination guides on particular themes of the Routes. This is something that has not yet been provided by the existing destination marketing organisations or unofficial destination guides. Additionally, for the SMEs involved in Cultural Route activities, location-aware apps could offer a valuable opportunity to promote their services when the visitor is in the area.

PhoCusWright’s 2010 *European consumer travel report*²² demonstrates the importance of mobiles as a communication medium. On average, nearly 50% of mobile phone users have or expect to, in the next 12 months, use their phones to browse the Internet. An average of nearly 30% will be using their phones to research local activities.

Figure 4. Future mobile phone activities, by age – Combined markets



A well-developed mobile destination guide will provide strong support to improve the competitiveness of SMEs and the promotion of local hospitality and heritage, by empowering the visitor to discover destinations as they travel.

There are, however, a number of considerations when entering the mobile market. Firstly, it is important to clearly understand the limitations and difficulties in

22. PhoCusWright, *European consumer travel report*, 2010.

producing a successful mobile application. There are many different mobile operating systems, each requiring their applications to be developed in the respective programming languages. The main systems to be considered are iOS, Android, Windows and Web OS. Variation between devices can also prove challenging and costly, not only in screen resolution but also in maximising use of the phone's features in order to offer the most enjoyable user experience, which is important for the success of a travel application.

The question will inevitably arise, whether to develop for one or multiple platforms and what resources (financial and human) are required to support, develop and maintain both the application and its content. A simple alternative sought by many developers is to create a "web-app", effectively a mobile version of the destination website written in HTML, with some coding to take advantage of the phone's features, such as GPS.

Finally, the biggest consideration for mobile destination marketing is the issue of roaming, and the prohibitive charges incurred when using a phone (particularly for data) when travelling. Many destinations have worked around this by downloading all necessary data within their applications; however, this could present a significant challenge for the Cultural Routes with a potentially large and diverse product database. The issue of roaming costs is of particular importance as the very nature of the Cultural Routes is to create and promote a cross-border multi-country travel experience.

Blogs

Google's Blogger service is one of the most highly ranked sites on the Internet and for good reason. Blogs are sometimes overlooked because of their often comparatively low reach and the lack of professional association that bloggers have; however, for creating awareness and promotion of Cultural Routes they should be seen as a valuable opportunity. Seeking endorsement from influential bloggers can bring a brand or destination to the attention of hundreds of thousands on a global scale.

In seeking the endorsement of influential bloggers, the rich cultural value of Europe's various thematic cultural itineraries can be brought to the attention of potential visitors who already have demonstrated a registered interest in European culture and heritage. Achieving placement in top blogs is a good PR opportunity, albeit exclusively in a digital field, with highly complimentary cross-over from amateur or semi-professional peer endorsement. Endorsement from the right bloggers will not only lead to a credible recommendation and interest being generated to thousands of readers, but strong search rankings owing to the value and relativity of inbound links from bloggers.

Public relations

The Council of Europe's 29 Cultural Routes comprise a fascinating set of pan-European thematic travel itineraries, which – from a public relations (PR) point of view – hold immense value. Traditional press should not be overlooked in light of this chapter, which focuses largely on digital marketing opportunities. The topical value of the Cultural Routes means that there are limitless opportunities for coverage in mainstream media, in particular the travel press.

The very nature of the Routes, tracing cultural heritage or the passages of great trading empires, have broad appeal for a highbrow readership. They offer a perfect mix of elements, which are well suited to generating interesting story-led travel content in broadsheet supplements and television.

Cultural Routes are perfectly suited for one-off special features as well as featured series, owing to the range of themes and the unique way in which they allow visitors to explore Europe through cultural, heritage and authentic experiences. Pitching and securing feature articles in the national press can prove to be the most cost-efficient form of publicity, providing expert endorsement with a large circulation read by highly educated consumers with higher than average disposable income. Furthermore, Web links from national newspapers can be some of the most credible and heavily weighted links on the Internet, bringing large traffic volumes and increasing authority in search results.

Partnerships

Strategic partnerships are an important component for destination marketing, as the right partnership can bring many benefits to help reach the end objective of building a strong brand and promoting the image of the destination. Partnership opportunities can include:

- commercial – revenue-based partnerships through sales or “buy-in” services;
- content – aggregation and syndication of database content;
- marketing – shared cost of marketing activities with partners.

A model often replicated, including by a number of Cultural Routes themselves, is the provision of “opt-in” marketing services for members and the wider industry. Given the cost of running a successful destination portal, it is important to think about partnerships at an early stage, in terms of opportunities to share database content and lessening the burden of marketing costs where mutually beneficial promotional opportunities present themselves. It is equally important to seek a financially sustainable model for the ongoing operational commitment required to run a consumer portal.

Content is also important, and the saying “content is king” is especially relevant for destination websites, both in offering visitors interesting rich material to inspire a trip, as well as accurate planning information for those who have already made the decision to travel. Good content partnerships are essential to ensure regular fresh information is fed into the site, with information such as events, destination information, etc.

Neither the Council of Europe nor the European Institute of Cultural Routes have the capacity to act as fully fledged destination marketing organisations, therefore it is important not to forget the important role of national, regional and city marketing organisations and their value for cross-linking and referencing. In general, destination sites are highly ranked with good visitor numbers; indeed, the online promotion of some Cultural Routes is done largely through the sites of their national tourism organisations.

Commercial services

Many Cultural Routes have demonstrated entrepreneurial leadership in their networks, whether through the enterprising creativity in developing and using a brand to sell and promote products or services, or in the co-ordination of the Route itself. ICT can be used to increase competitiveness and support SMEs, specifically through:

- reservation and booking systems;
- commercial sales platforms;
- access to market.

For many SMEs, the cultural past upon which local produce and handcrafts are based represents the business behind the tourism and the reason for a need to see tourists discovering Europe's cultural heritage. Those who come with an interest in Europe's Cultural Routes seek authenticity, not only in the destination but also in what they take home from the destination. This of course includes enjoying authentic encounters, but for many it is about returning home with material souvenirs, like handcraft or local food and drink specialities, which represent the destination.

The Internet has created new industries that previously did not exist; it has also given small local businesses a global shopfront and an opportunity to sell to customers that they could not previously reach. Whilst not strictly in the field of destination promotion, a commercially driven sister site, open to member SMEs of the Council of Europe's certified Cultural Routes, and based on a consumer brand, may also be welcomed and could complement a consumer portal for Cultural Routes.

An e-commerce site selling products certified "authentic" would support the competitiveness of SMEs and provide a valuable service providing access to a global marketplace. With such a platform, small businesses could sell online as part of a Europe-wide e-commerce platform, featuring only quality and authentic products related to the origins of a given Cultural Route, allowing customers to learn about the origins and producers before buying. Adoption of a dedicated consumer brand might work in the same way that the Fair Trade label has become a globally recognised symbol for products where the consumer can be confident of the producer being paid a fair price for their goods.

Indeed the very nature of a dedicated consumer portal for the Routes themselves is not something that can be overlooked when considering how the Council of Europe can improve competitiveness of SMEs. Many destination marketing organisations support local industry by providing booking platforms, facilitating booking and reservations where SMEs did not previously have access to market, and providing an important channel for new business.

Should a dedicated consumer site be developed, it should take into consideration how technology can be used to support SMEs by providing such services. Depending on the requirements and level of ownership required by stakeholders, such a tool could mean a considerably larger resource investment than the development of a simpler marketing platform.

Marketing capacity

The development of a dedicated consumer portal requires resource commitments, as outlined earlier in this section. Should the Council of Europe decide to go for such a commitment, the overall marketing capacity of the European Institute of Cultural Routes must also be studied carefully.

As we have already seen with the fragmented working approach of many Cultural Routes, there is a strong need to unify and offer support for product development and marketing services, where Routes are often limited due to the lack of dedicated resources. With centrally dedicated resources, the Council of Europe can make real progress in capacity-building programmes aimed at offering practical support through training and skills development in the tourism sector. Additionally, there may also be scope to develop “shell” tools and services that can be re-branded and re-used by members, such as destination portals, mobile apps, campaign tools and general marketing services.

Alongside centrally based activities for those co-ordinating the Routes, programmes could also be developed to help support SMEs understand, get the most out of and stay abreast of new technology.

The role of ICT

Digitisation provides a wide range of possibilities for virtual platforms to support the real network. Having an umbrella portal will be crucial for the branding and development of the Cultural Routes as cross-marketing initiatives.

By integrating and concentrating knowledge about Cultural Routes in one space it will create possibilities for cross-over audiences to emerge. “The long tail” theory comes into being when offers which appeal to niche segments of the tourist market can access a wide variety of information on other similar offers. As visitors to one Cultural Route will likely enjoy the offer of another, it makes perfect sense to concentrate information in one place and would not negate or render useless the individual work of the Cultural Routes to market themselves via their own websites – it would simply create another entry point – a portal.

Training, workshops and exchanges of experience seminars in a range of Web 2.0 initiatives (for example, blogs, Twitter, Facebook, RSS, YouTube, Vimeo, etc.) are highly recommended for the Cultural Routes to maximise their potential with new social media and the Internet. These tools need to be used and integrated into an umbrella platform and all the Cultural Routes should be able to feed into the dynamic website providing a constantly changing and updating ICT platform and entry point.

A top-level audit of the 29 Cultural Routes awarded by the Council of Europe was conducted to take a first look at how ICT is being used throughout the network. The results highlight that there is a significant lack of marketing capacity, with many missed opportunities for free or inexpensive promotion, as shown in the conclusions summarised below.²³

23. Results based on an independent research audit carried out by the author..

Table 2. Use of ICT in the Cultural Routes network

Website	25 Routes	Few of the 29 Routes with websites had developed consumer-oriented sites. Many were not available in English, often limited to the primary language used along the Route.
Facebook	12 Routes Average number of fans: 311	Little more than 30% of the Routes were using Facebook, with few actively using the social network as a marketing tool. Those networks using Facebook more prominently were primarily doing so as an informal means of communication to share ideas and experiences.
Twitter	6 Routes Average number of followers: 33	Half of the 6 Routes using Twitter were using the microblogging tool to promote product and activities directly to consumers, yet with limited success in acquiring followers.
Wikipedia	6 Routes	A number of Routes had subject-related material on Wikipedia owing to the historical importance of the theme, but few had pages dedicated to the modern-day Route/network.
Wikitravel	1 Route	Only the French part of the Santiago de Compostela Pilgrim Routes had its own dedicated page on Wikitravel, containing information related to French locations along the Route. None of the other Routes were found on Wikitravel.

The results are based on searches made in English and are not the result of a member survey. It is important to note that whilst some information may be missing, for example a Facebook page not accounted for, the results reflect what can easily be searched for and found by the end user.

Work has also taken place at a European level to create a unified image for the Cultural Routes, with descriptive information about each Route published on both the EICR and Council of Europe websites. The institute has also set up social media profiles on both Facebook and Twitter to communicate news about the Routes on an ongoing basis. Additionally, a partial entry exists on Wikipedia, which, if fully completed, will further help strengthen the public image of Europe's Cultural Routes.

The main web portal, www.culture-routes.lu, has more than 41 000 pages indexed by Google, a respectable page rank score of 6 out of a possible 10 (7 being a good benchmark) and more than 15 000 backlinks from other sites.

Figuratively speaking, this is a strong site commanding a good level of authority in search engines with many credible sites linking back to it, thus strengthening its own search engine credibility. Visually, however, the site does not meet the expectations of today's consumers and does not present the Routes in a way that is inspirational and evocative, able to offer compelling content that will influence consumer travel decisions.

As already established through interviews with selected Cultural Routes, content is not written for consumers and the navigability and hierarchy of content is also an issue. Google's "reading level" tool supports this feedback, analysing the content of indexed pages by intellectual reading level, with the following findings:²⁴

24. Google search filtered by reading level, www.google.com, as of 18 May 2011.

Figure 5. Results by reading level for site www.culture-routes.lu

Results by reading level for site:<http://www.culture-routes.lu>:



Successful destination marketing websites generally publish content pitched at a basic to intermediate reading level as their role is to answer the question of “why to visit” and “what to do and see”. In this case, however, the high number of pages with an advanced reading level implies that content is written for experts and not the general public.

Germany is one of the world’s leading travel destinations. Their destination portal “germany.travel” is a good benchmark to look at when comparing content reading level. When running the same test on Germany’s website, the results, shown below, indicate that content is pitched at a much lower reading level to focus on answering these early questions of why and how to visit Germany.

Figure 6. Results by reading level for site www.germany.travel

Results by reading level for site:<http://www.germany.travel>:



Search demand

Search is incredibly important; it is the first tool consumers use when researching a trip. Not only is it essential to ensure sites are well optimised to appear in top results for relevant search terms, it is also a valuable tool for monitoring public interest in any given topic.

For the purpose of the study, Google Insights has been used to take a closer look at search trends to examine the level of interest in European culture, against four Route themes where there was sufficient search traffic to draw some conclusions.

The figure below²⁵ shows search trends over a 12-month period for the following five search terms:

Figure 7. Trends for various search terms over a 12-month period

- European culture – 73
- Phoenicians – 46
- Jewish heritage – 36
- Via Francigena – 32
- Via Regia – 15

25. Google Insights, www.google.com/insights/search, global search volume patterns, May 2010-May 2011 for “European culture”, “Phoenicians”, “Jewish heritage”, “Via Francigena” and “Via Regia”.



Figures do not represent actual search volume. They reflect the number of searches that have been made for each term, relative to the total number of searches made on Google over time. Unsurprisingly, the search interest in “European culture” is considerably higher than that of the specific Route themes, yet it demonstrates the scale of interest from users searching for information. The spikes and dips in search activity point to events or news stories which generated significant public interest. In the case of “European culture”, for example, spikes demonstrate public reaction to the naming of the European Capitals of Culture 2011.

Looking closer at the geographical origin of search traffic, it is possible to identify which markets demonstrate the strongest level of interest, as shown below:

Table 3. Geographical origin of search traffic

	European culture	Phoenicians	Jewish heritage	Via Francigena	Via Regia
Netherlands	100	0	0	0	0
United Kingdom	95	28	0	0	0
United States	71	92	83	0	0
Canada	44	45	44	0	0
Germany	0	0	0	0	71

This limited snapshot already offers a sizeable insight into search demand from specific markets. For the top five countries above (based on searches), the Via Francigena is not a topic that any are searching for in significant volumes, whereas both the Phoenicians and Jewish heritage are evidently highly researched by Americans and Canadians. Looking deeper into the two searches, it is possible to get a detailed insight into what users are looking for and which search terms are rising in popularity, as shown below.

Table 4. Trends in search terms

Phoenicians	Top searches	Rising searches
	The Phoenicians	Phoenicia +50%
	Phoenician	Sumerians +50%
	Phoenicians history	What are Phoenicians? +40%
	Ancient Phoenicians	Who are Phoenicians? +40%
	Phoenicians alphabet	
	The Phoenician	

	Phoenicians civilisation	
	Phoenicians people	
	Phoenicia	
	History of Phoenicians	
Jewish heritage	Top Searches	Rising Searches
	Museum Jewish heritage	Jewish heritage month +100%
	Jewish museum	
	Jewish American heritage	
	The Jewish museum	
	Jewish museum NYC	
	Jewish heritage center	
	Jewish heritage month	
	Jewish heritage tours	
	Jewish heritage foundation	
	Jewish heritage night	

In the examples given here, search insights help to analyse the level of public interest in the thematic topics underpinning specific Routes. By scrutinising the most frequently used search terms with greater specificity, one can identify exactly what it is that users are looking for, and more importantly, the opportunity to generate further interest by providing answers.

Social sentiment

The way we use the Internet has changed beyond recognition in recent years thanks to the rise of social networking sites, which put users in control of their browsing experience. Today’s Internet communication is now a two-way conversation; the user is the editor and no longer simply a spectator. Such a dramatic shift in the way we consume media has threatened and even destroyed some forms of traditional media, yet it has created a more even playing field for publishers, in particular for those catering to niche markets.

There are a number of tools that allow marketers to monitor real-time consumer interest in any given subject and analyse the overall sentiment based on the frequency of specific keywords in the conversation. These tools are most commonly used to monitor brand sentiment and can be particularly useful for analysing reaction, especially in crisis management.

For the purpose of this study, the popular Internet resource “Social Mention” has been used to look at consumer interest in cultural tourism and how technology can be used to engage directly with users. To begin with, the search term “European Culture” was entered and results were limited only to microblogs. This helps to give an idea as to the general interest in the subject based on conversations taking place between users.

Table 5. Social Mentions for “European culture” on microblogs²⁶

Strength	20%	This is the likelihood that the topic is being discussed in social media. The strength is calculated by dividing phrase mentions by total possible mentions.
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26. Social Mention, www.socialmention.com, search measurement of microblogs for the term “European culture” based on 371 results, accessed 20 May 2011.

Sentiment	26:1	Sentiment is the ratio of mentions that are generally positive against those that are generally negative.
Passion	17%	Passion is the likelihood that individuals talking about the subject will do so repeatedly.
Reach	88%	Reach is a measure on the range of influence. It is the number of unique authors referencing the subject divided by the total number of mentions.

The results on this broad topic demonstrate a strong and positive interest across social media towards European culture in general. On average, the topic is being discussed every 20 minutes through microblogs alone.

When a similar search was run focusing on a special interest topic relating to one of the Cultural Routes, in this case the Phoenicians' Route, through the term "Phoenicians", a distinctly different set of results came back. They highlight the difference between topics of general interest compared to niche topics where appeal is limited:

- strength: 4%
- sentiment: 4:1
- passion: 23%
- reach: 30%

By interpreting the above results, it is clear that whilst the topic is unsurprisingly less popular and has a smaller reach, the passion demonstrated by the individuals talking about the subject is higher. Sentiment was also less positive, with one in four contributors referring to the term in a broadly negative manner, but this can be attributed to the use of the search term in reference to current-day political events.

More importantly, with the narrowing of keywords, Social Mention and other similar tools can help to accurately identify peer influencers, or sites to target when seeking to promote Routes to niche or vertical markets. In the case of the search term "Phoenicians", there is on average one discussion every three hours related specifically to the term. Factoring in the many other associated keywords and repeating this process across all Routes helps to identify opportunities for stimulating demand in cultural tourism and the marketing of Europe as a destination based on thematic cross-border Cultural Routes.

Media planning

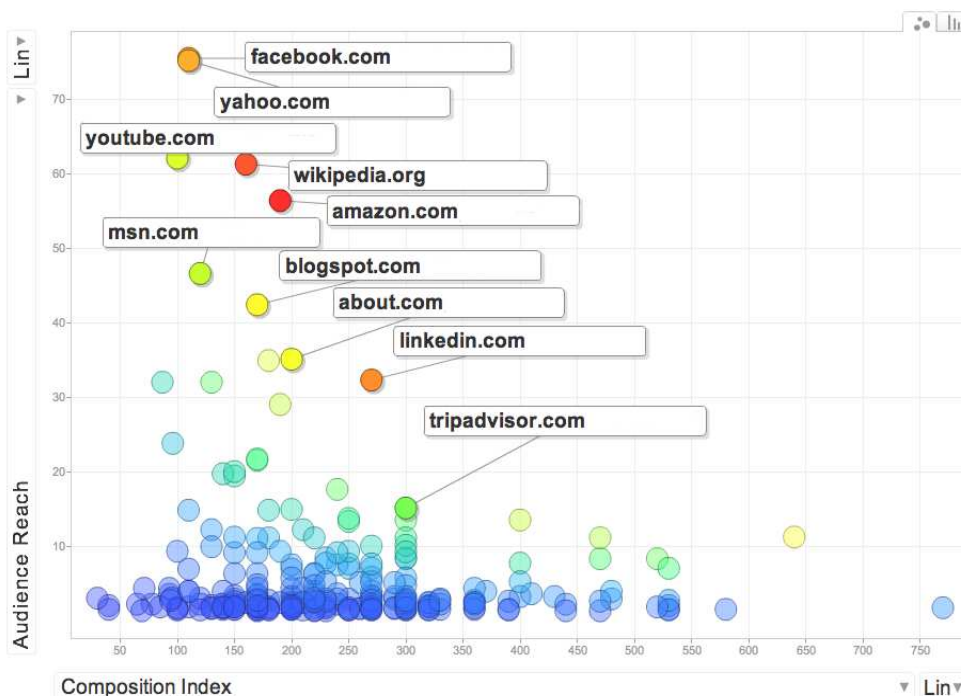
Gaining a deeper understanding of the likely target market for the promotion of Europe's Cultural Routes is key to developing a compelling product offering and planning a persuasive consumer communications campaign.

Using freely available technology, we can quickly identify where existing interest in any given theme might lie and begin to get an idea as to what the target market might look like. With this fundamental starting point, we can look more specifically at what the market is looking for and how passionately they, or influential peers of theirs, discuss the subject within their social communities and get an indication as to the sentiment of feeling.

Digital planning tools can help identify the best sites, from the demographic profiles of users, through which to effectively reach a given target market. The chart below visually depicts, based on what we know from our initial research, the most important

sites in which we can reach the market. Facebook appears as the strongest channel for communicating with a valuable audience profile and achieving a good reach in terms of numbers. Yahoo as a content network is deemed important along with YouTube, particularly powerful for selling authentic destination experiences and Wikipedia, representing good reach and a particularly strong audience profile. The chart demonstrates the importance of user-driven sites, with blogspot's position in particular showing the value of the blogging community.

[REB5]Figure 8. Best match audience reach by geography (eastern US metropolitan), language (English), demographics (above-average income, graduate), online and lifestyle interests (travel, people and society, food and drink)²⁷



The figure above looks specifically at identifying sites that represent the best match, based on appropriateness of audience demographics and reach in terms of numbers. This is just one way of identifying the best media in which to invest resources. To take a different approach, one might also look at focusing on low traffic sites, or a mix, to reach a narrower and more specific demographic representing a closer match to the target market.

Furthermore, geo and socio-targeted advertising services, which are available on most of the sites identified in the chart above, allow marketers to communicate only with users who match a specific given demographic. For the promotion of Cultural Routes, many of which appeal largely to niche markets, the digital landscape represents a valuable and exciting opportunity to package and promote a pan-European thematic tourism product to consumers with a registered interest in the subject.

Council of Europe logo and name

A protocol for the use and avoidance of misuse of the Council's logo is available through the EICR's website and is normally sent to all the main partners.

27. Google, Double Click Ad Planner, <https://www.google.com/adplanner>, accessed 25 May 2011. See Appendix 2 for full list.

Practice examples: current use of the Council of Europe logo

The Cultural Foundation “Routes of the Olive Tree” includes the Council of Europe logo on the website although there is no link and no explanation. The partner websites neither include the logo nor information about the Routes of the Olive Tree on their websites, much less the Council of Europe logo.

The logo or image of the Council of Europe is not used in general merchandising but is included in published materials such as leaflets and book publications.

The Transromanica network have agreed to provide visibility to the Council of Europe label, the title “Major Cultural Route of the Council of Europe” and an explanation they have given is that “This title signalises that the Route enhances the consciousness of common European citizenship and bases on sharing universal values”. The visibility of the Council of Europe labels is ensured on the Transromanica website but not necessarily on the partner websites, even where they refer to the Transromanica project. Each partner produces their own merchandise and thus no mention or use of the Council of Europe logo is evident either in products or publications.

The Via Francigena European Association’s website includes logos of both the EICR and the Council. However, there are a number of websites related to the Via Francigena that carry no such logos and thus create an inconsistent image of the Route and the programme.

Complex Cultural Routes need clear guidelines to establish what is part of the Cultural Route and what might be an independent partner initiative. Events generated unilaterally or even bilaterally or multilaterally can be construed as forming part of the Cultural Route. By-laws or a members’ charter may discern rules, that is correct logo use. It may also be an opportunity to reiterate and establish rules for use of the Council or other umbrella-branding styles.

Value of the Council of Europe label

The added value of the Council needs to be understood as something that not only lends prestige but identifies clearly what the label stands for. Currently the “meaning” of the label is blurred. The EICR have summarised on their website that the Council label denotes that:

The theme must be meaningful in terms of European memory, history and cultural heritage, must refer to at least one of the three large fields suggested by the programme (people, migrations, important movements of civilisation) and must contribute to the diversity of Europe today.

There is a clear overlap with the UNESCO World Heritage label and UNESCO Routes of Dialogue programme.²⁸ The UNESCO World Heritage label very clearly provides “heritage” as the value link. The UNESCO Routes of Dialogue label is less clear and less well known but it calls into question whether there is a need for the CoE to create a Cultural Routes programme based on the same value link as that of UNESCO. It would be important for the Council to identify what the main value link is that it wishes to attach to the Cultural Routes. A quick scan of the current Cultural Routes suggests a very mixed set of values.

Practice examples

The Routes of the Olive Tree draw attention to the greater story of civilisation, peace, humanity and heritage in order to support contemporary elements of production, design and tourism. As a peace symbol, the olive tree has become ever increasingly important. Gastronomically speaking,

28. http://portal.unesco.org/culture/en/ev.php-URL_ID=35022&URL_DO=DO_TOPIC&URL_SECTION=201.html, accessed 28 April 2011.

olives and olive oil are essential ingredients in Mediterranean cuisine. Economically, the olive tree is of major agricultural importance in the Mediterranean region, mainly as a source of olive oil.

The Routes of the Olive Tree is not at present a marketable Route, which cultural tourists could undertake (although plans are under way to develop local regional routes in Messenia). It is actually a different motorcycle itinerary undertaken by motorbike fanatics each year to champion the olive tree story.

Overriding value: olive tree as a symbol of Mediterranean heritage

Characteristic: network

Possibilities: local itineraries (not yet developed), support for local arts, crafts and gastronomical products (developed)

The Transromanica Route supports and fosters Europe's Romanesque cultural heritage. Its aim is to study and preserve Romanesque heritage as well as make this heritage accessible. The Transromanica partnership organises an annual event. The Transromanica Route is not at present a marketable Route that cultural tourists could undertake. It is rather a network of regions with interesting Romanesque heritage sites and individual Routes.

Overriding value: Romanesque architecture as a symbol of Europe's heritage

Characteristic: network

Possibilities: local itineraries (not yet developed), annual festival (developed)

The Legacy of al-Andalus' principal aim is to promote Spanish-Muslim civilisation by means of its art and culture and historical and social relationships with the Arab World, the Mediterranean and Latin America. The current emphasis is on expanding understanding of the historic role of Spain and particularly Andalusia as a bridge. As a wider goal, the foundation claims to contribute towards structuring intercultural co-operation and dialogue in the Mediterranean by means of developing transnational itineraries. In reality this project is regionally focused, funded and owned, and the possibility of it opening up to a wider transnational Cultural Route will depend on its capacity to implement a different governance strategy that creates equitable partnerships and allows the network to dictate future developments.

Overriding value: al-Andalus architecture, culture and customs as a symbol of Europe's heritage

Characteristic: unilateral endeavour (various Routes)

Possibilities: local itineraries (developed), museum (developed), cultural events (not yet developed)

The Hansa Route promotes a medieval network of merchants that controlled trade and markets in the Baltic Sea area. The revival of the Hansa is an act to revive the spirit and ideas of Hansa as a unifying element in the quest to develop economic, cultural, social and governmental unification in Europe.

Overriding value: Hansa symbolism of trade routes in the Baltic region of Europe

Characteristic: network

Possibilities: annual festival (developed)

The Via Francigena aims to highlight this ancient pilgrim Route and enhance historic paths by integrating them into a network of existing hiking trails.

Overriding value: pilgrim Route

Characteristic: route

Possibilities: passport system (not yet developed)

It is advisable that the Council determines the guiding principles that bind all the Cultural Routes and re-brands the programme. The above examples signal the challenge, given that established Cultural Routes are so different in aims, approaches, organisation, binding principles and symbolic importance. There may also be a need to re-evaluate which Cultural Routes should continue their programme participation, and which may need to be excluded.

Role of the EICR

The EICR has had and will have a pivotal role in developing the Cultural Route programme in the future. The Cultural Routes need many more opportunities to meet with their peers and network, they need to grow and become “learning organisations”. This can only happen with the support and guidance of the EICR.

Creating an environment in which the EICR could play a more proactive role in supporting the Cultural Routes would be ideal. Changing mindsets, however, is one of the greatest difficulties and therefore there would need to be an incentive (possibly monetary) for partners to invest time in coming together. It will be crucial that in those first meetings the Cultural Routes have a real sense that they can be greater if they work together.

Cultural Route leadership days

The greatest challenge is to promote transnational networking. Limited networking is taking place at present between partners on the Cultural Routes. There is clearly a lack of support mechanisms (training and funding) to encourage more face-to-face partner meetings. Without this vital contact it is normal that each partner concentrates his/her activity on their own part of the Cultural Route. In order to increase the notion that Cultural Routes have complementary offers that may appeal to similar audiences, it would be essential to develop a dialogue and understanding between the Cultural Routes.

One possible way would be to encourage Cultural Route leadership days. Cultural Route leadership days might be an opportunity for Cultural Route partners to meet, share experiences, learn from each other (develop new skills) and network. The annual Cultural Routes Advisory Forum foreseen in the statute of the newly established Enlarged Partial Agreement on Cultural Routes (EPA) will partly play this role (www.coe.int/routes). Most Cultural Routes are currently operating well at a regional level in terms of networking but without funding incentives it is difficult to see how the partners could operate beyond their current capacity.

The EICR has made important steps to create a marketing brand with icons for each Cultural Route using a similar style and shape. The visibility and usage of this branding by the Cultural Routes, however, is very low and in many cases non-existent. The EICR needs significant financing and expertise in order for it to be able to be more proactive in creating opportunities for cross-marketing across Cultural Routes as well as within Cultural Routes. Workshops on strengthening the visibility of the Council, and how and when to use the logos would be an important first step.

The EICR could also be proactive about supporting the development of other cross-marketing materials, namely catalogues and calendars. Shared development and sale of merchandise is complicated if ownership issues are not resolved and there is no clear transparency and shared gain.

Loyalty programmes

The EICR may wish to explore loyalty programme options. Loyalty programmes are quite common amongst cultural organisations. A range of loyalty initiatives should be

explored for both the Cultural Route partner and visitors to the Cultural Routes. If for example all Cultural Routes identified one major event each year, the EICR could produce a calendar with these events – information about the Cultural Routes and other useful data that could be distributed amongst all the Cultural Route partners. A passport to events organised by the Cultural Route partners could also be considered. For the Cultural Routes, the EICR could explore more effective use and development of the EICR logo and brand.

Conclusions

The Council should re-brand the Cultural Routes programme. It is recommended that the re-branding avoids heritage sites (UNESCO has coveted that) and is accompanied by an evaluation of the current Cultural Routes to see if they satisfy the new criteria.

The Council should seize the opportunity that the Cultural Routes have thus far an underdeveloped merchandise offer. It would be advisable to produce merchandise under the new branding of the Council and distribute it to all the partners of all the Routes. Partners could buy the merchandise at cost price and sell at an agreed profit in order to generate a certain amount of self-funding. The option could be given for the partners to create their own merchandise using the new brand/logo and to offer these goods to other Cultural Routes or partners.

Training, workshops and exchanges of experience seminars in a range of Web 2.0 initiatives (for example, ^[REB6]blogs, Twitter, Facebook, RSS, YouTube, Vimeo, etc.) are highly recommended for the Cultural Routes to maximise their potential with new social media and the Internet. These tools need to be used and integrated into an umbrella platform and all the Cultural Routes should be able to feed into the dynamic website providing a constantly changing and updating ICT platform and entry point.

The EICR should insist on regular reporting and monitor Cultural Routes to identify “weak links” in the networks that could be supported by targeted initiatives. The EICR should consider implementing a “friends of the Cultural Routes” system for the overall Cultural Routes programme. This may appeal to universities, research institutes and corporate sponsors.

The EICR could facilitate and support the visibility of these annual international events by producing a calendar of activities and promoting these activities on its website and through partner portals such as Visit Europe. The different Cultural Routes could be encouraged to also promote these events (particularly if a physical calendar were printed and distributed). The events should be encouraged to have a touristic value and, thus, the EICR could also instigate passport systems whereby tourists could gather stamps at each major Cultural Route annual event.

6.3 Establishing sustainability standards

Results that were obtained in previous research for the study on the impact of European Cultural Routes on SMEs' innovation and competitiveness proved the varied nature of the Routes in terms of length of existence, management structures, development approaches, geographical scope, subject matter, target groups, capabilities, standards in product and service quality together with many more factors. The absence of general quality standards and criteria for European Cultural Routes and/or sustainable tourism to develop with the Routes has been pointed out as one possible reason why, more than 20 years after the Cultural Routes programme was launched by the Council of Europe, the brand "Council of Europe Cultural Route" is still weak and thus the 29 Cultural Routes do not form a coherent picture.

In order to gain an impression of Cultural Routes' activities concerning the development and implementation of quality standards, the Cultural Routes were surveyed by directly contacting the Cultural Routes' operators. The information gathered from the survey partners exposed that differences do not only exist among the Cultural Routes but also between the different countries and even regions or single partners belonging to one Cultural Route. This finding makes it very challenging to reach an agreement about one common position for further development or growth within the programme.

Some of the Cultural Routes are already in the process of implementing quality standards and criteria but these are still isolated projects, and the whole European Cultural Routes programme fails to benefit from them. These individual standards are probably not known beyond the regional or national borders of the particular Cultural Route. The consensus among Cultural Routes operators is that a general set of standards must start at a minimum level to allow access for regions or single businesses that are less developed in tourism, and ultimately the criteria should not lead to a consolidation or synchronisation of the Cultural Routes. Instead they should function as an orientation for further development of country- or Cultural Route specific standards that meet certain basic standards valid for all Cultural Routes. This report gives an overview of existing certification programmes and quality standards for sustainable tourism, and aims to estimate the meaningfulness and practicability of quality sustainable tourism criteria for European Cultural Routes.

Sustainable development

According to the Brundtland Report, officially entitled "Our common future", published by the World Commission on Environment and Development WCED in 1987, sustainable development is a process that "ensures to meet the needs of the present without compromising the ability of future generations to meet their own needs". This definition implies the limits imposed by the present state of technology and social organisation on environmental resources. It also speaks to the limited capacity of the biosphere to absorb the effects of human activities. Therefore, sustainable development is not a fixed state of harmony but rather a process of change with the major objective to satisfy human needs and aspirations while protecting natural environment and creating structures that ensure economic development of the society. The five basic principles of sustainable development, according to the Brundtland Report, are:

- holistic planning and strategy;
- preserving essential ecological processes;
- protection of human heritage and biodiversity;
- intergenerational equity;
- balanced fairness and opportunities between nations.

Sustainable development was declared an international goal by the UN Conference on Environment and Development (1992). According to Chapter 40.6 of Agenda 21, “countries at the national level and international governmental and non-governmental organizations at the international level should develop the concept of indicators of sustainable development in order to identify such indicators. In order to promote the use of these indicators in satellite accounts, and eventually in national accounts, the development of indicators needs to be pursued by the Statistical Office of the United Nations Secretariat, as it draws upon evolving experience in this regard.” In this regard, the webpage of the Division for Sustainable Development at the UN Department of Economic and Social Affairs offers a list of related documents.

Sustainable tourism

According to the World Tourism Organization (UNWTO), sustainable tourism development guidelines and management practices are “applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments”. In addition the UNWTO states:

Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability. Thus, sustainable tourism should:

1. Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
2. Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
3. Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary. Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them (UNWTO).

Quality sustainable tourism standards for European Cultural Routes

It has been recognised that sustainable tourism certification programmes can bring benefits to different stakeholders and interest groups in many ways. According to the UNWTO (2003), benefits to society, environment, governments, private companies and consumers are particularly noticeable. These programmes can also contribute to the assurance of product and service quality.

While the Council of Europe Resolution CM/Res(2010)53 establishing an Enlarged Partial Agreement on Cultural Routes²⁹ implies “development of a sustainable tourist offer based on the Cultural Routes, and capacity-building for Cultural Routes operators in the field of heritage and culture, as well as standards of professional practice in the field of tourism”, the methodology and/or clear strategy on how to develop and apply these standards has not been yet identified. It would be thus advisable to design specific criteria for quality sustainable tourism development along the Cultural Route locations. At this point, it is particularly important to remember that these criteria must be flexible enough to address specific needs of individual Routes. A few suggestions on how the criteria for sustainable performance of Cultural Routes and the SMEs involved could be developed are presented below.

Developing sustainability standards and indicators

Criteria for progress assessment in sustainable tourism development are usually established based on the stakeholders’ experiences in tourism. As underlined by the UNWTO (2003), certification systems need to fit the individual geographical, political, socio-economic and sectoral characteristics of each participant. Any already existing criteria can only serve as an orientation and can be adapted to the conditions prevailing in each country or destination. According to Williams and Waldron (2002), any process for developing sustainability indicators should contain at least some of the following five stages:

1. Assessing the priority issues and collecting relevant information to build up a database to work with.
2. Selecting suitable indicators to measure sustainability. Selection decisions are based on the affordability of the data, and their availability and perceived relevance.
3. Identifying fields where data is still missing and developing appropriate methods for information gathering (public/focus groups meetings, key informant interviews, environmental audits).
4. Analysing information and reporting the findings. Their significance has to be made clear to the stakeholders so that they can link them with their own performance.
5. Feedback from customers. Proper feedback can affect the way products are designed, produced, packaged, marketed and promoted for the guests’ satisfaction.

The UNWTO is additionally extolling this approach by suggesting the following steps in initiating certification systems:³⁰

- consideration of national certifications schemes as an integral part of sustainable tourism development strategies;
- identification of key stakeholders and target groups interested in certifications schemes;
- development of the scheme through multi-stakeholder consultation;
- in-depth research on the conditions and feasibility of a certification system;

29. See <http://conventions.coe.int/Treaty/EN/PartialAgr/Html/CulturalRoutes201053.htm>.

30. See Recommendations to governments for supporting and/or establishing national certification systems for sustainable tourism, at http://turismo-sostenible.rds.hn/documet/OMT_certification-gov-recomm.pdf.

- provision of financial and technical support for research, development and operational costs;
- assurance of transparency throughout the process;
- communication of benefits and also costs to the private sector;
- development of incentives to motivate and encourage tourism companies to participate in certification programmes;
- consideration of factors that hinder and affect sustainable development;
- consideration of equitable access to certification, especially by SMEs as they can have more difficulties in meeting the costs and requirements;
- introduction of pilot projects for testing and demonstrating the success of a scheme;
- preparation of the market for certification.

Existing certificate programmes and quality standards schemes

Initiatives on sustainable tourism development are abundant. They vary from transnational, European and regional research institutions and networks to business alliances, partnerships, scientific committees, groups and online platforms for best practice exchange. Only a few examples include the European Research Network on Sustainable Tourism (ERNEST), Network of European Regions Committed to the Issue of Sustainable Tourism (NECSTouR), Sustainability South West (United Kingdom), the Greenbox (Ireland), and DestiNet – a sustainable tourism information and communications portal, which is jointly administrated by the European Environment Agency (EEA), ECOTRANS (a European network of experts and organisations in the tourism sector), the United Nations Environment Programme (UNEP), and the World Tourism Organization (UNWTO).

This variety of actors in the field of sustainable tourism enables the existence of hundreds of certification programmes, quality standards and schemes. The Green Tourism Business Scheme (United Kingdom), the Heritage Environmental Rating Programme (South Africa), Tourisme Responsable (France), the Steinbock Label (Switzerland), Nature's Best (Sweden), and the EU flower are the most cited. This fact is not surprising, as consumer demand for certified products and services is growing. Recent research indicates that a consumer who is offered a choice between a certified and a non-certified business or product tends to choose the certified one (Ra and Ties, 2008). Therefore, it is important for tourism providers to develop proper quality standards in order to survive market competition. A few examples of what approaches could be used in such quality standards development for the Council-certified Cultural Routes and their involved tourism SMEs are provided below.

Global sustainable tourism criteria

Today, criteria for sustainable tourism are accredited and valid internationally. Their main indicators and measuring instruments for measuring progress are listed in table 6 below. [REB7]

Table 6. Main indicators and measuring instruments of sustainable tourism criteria

Indicator	Specific measuring instruments
Site protection	Category of site protection according to the IUCN index ³¹
Pressure	Frequency of tourists (visitor numbers)
Intensity of use	Intensity of use in peak period (people/area)
Social impact	Ration tourists/inhabitants (average and peak period)
Development control	Existence of a procedure to study the environment or of true controls as regards planning and density of use
Waste management	Percentage of waste water treated
Planning process	Existence of a systematic plan for the area/of the tourist destination
Fragile ecosystems	Monitoring of (rare or threatened) species and habitats
Consumer satisfaction	Degree of satisfaction of the visitors (according to a questionnaire)
Satisfaction of inhabitants Quality of life	Degree of satisfaction of the inhabitants (according to a questionnaire), barometer among the locals
Contribution of tourism to the local economy	Proportion of the global economic activity due solely to tourism, actual revenues from the added value of tourism
Carrying capacity	Composite measuring instrument warning about the state of key factors influencing the capacity of the site to handle various levels of tourism
Site disturbance	Composite measuring instrument of impact levels on the site
Interest	Composite measuring instrument of characteristics of the site which make it attractive for tourism and which can change over time
Customer satisfaction	Survey score

Source: Ceron and Dubois (2003).

In 2008, the Rainforest Alliance (RA), the United Nations Environment Programme (UNEP), the United Nations Foundation (UNF), and the United Nations World Tourism Organization (UNWTO) collectively launched the Global Sustainable Tourism Criteria (GSTC),³² which is a set of 37 voluntary standards. They are recommended for use in tourism businesses in order “to protect and sustain the world’s natural and cultural resources while ensuring that tourism meets its potential as a tool for poverty alleviation”.³³ The GSTC pursues four main objectives, namely, to:

1. demonstrate effective sustainable management;
2. maximise social and economic benefits to the local community, and minimise negative impacts;
3. maximise benefits to cultural heritage and minimise negative impacts; and
4. maximise benefits to the environment and minimise negative impacts.

31. International Union for Conservation of Nature, www.iucn.org.

32. See the Global Sustainable Tourism Criteria at <http://new.gstccouncil.org/resource-center/gstc-criteria> for more details.

33. The Partnership for Global Sustainable Tourism Criteria, www.sustainabletourismcriteria.org.

Each objective is supported by a group of specific measures. For example, in order to maximise benefits to cultural heritage and minimise negative impacts, the company should follow established guidelines or a code of behaviour for visits to culturally or historically sensitive sites, in order to minimise visitor impact and maximise enjoyment; historical and archaeological artefacts should not be sold, traded, or displayed, except as permitted by law; the business should contribute to the protection of local historical, archaeological, culturally and spiritually important properties and sites, and should not impede access to them by local residents; and the business should use the elements of local art, architecture, or cultural heritage in its operations, design, decoration, food or shops, while respecting the intellectual property rights of local communities.

European Ecotourism Labelling Standard

In 2010, the European Ecotourism Labelling Standard (EETLS)³⁴ was developed as a modification of the GSTC with special regard to tourism in Europe. Both the GSTC and the EETLS refer to more than 60 European and international certification schemes and labels and therefore very well reflect the huge variety of existing standards and criteria for sustainable tourism. As the EETLS is developed on the basis of the GSTC, its criteria are very much in line with it. Additionally, they offer some practical advice for SMEs on how to put criteria into action. For instance:

Protection of sites

Criterion

The business contributes to the protection of local historical, archaeological, and culturally and spiritually important properties and sites, and does not impede access to them by local residents.

Rationale

Sites important to the local community that are also tourism attractions should be treated carefully by the ecotourism business whilst being encouraged to develop.

Sub-criteria

1. The business actively contributes to the protection of local historical, archaeological, and culturally and spiritually important properties and sites.
2. The business ensures that under no circumstances should the access of local people to the sites be impeded because of tourism activities.
3. The business encourages locals to visit the sites.

34. See www.ecoroute.eu/destinet/en/eetls.php?id=3 for more details. The EETLS is also available in German, Finnish, Greek, Italian, Romanian and Bulgarian.

How can you do it? Some useful tips

- “adopt” a cultural heritage site: you can actively contribute to the protection of the sites, either by donations or by providing volunteer work for their management;
- you can encourage your clients to donate money to the site authority for the protection of sites;
- co-operate with the competent site authority to find out what more you can do for the protection and sustainable management of the site;
- in your sustainability policy and sustainable management scheme, consider the impact of your activities on the sites and co-operate with the competent site authority to minimise them;
- you can co-operate with local cultural groups and organise joint tours to important sites and activities that inform local people about the value of these sites.

The Indicator System for Sustainable Tourism Destinations³⁵ was developed by the Tourism Sustainability Group³⁶ (EC, DG Enterprise, Tourism Unit) for destination management indicators. This system offers a list of 20 indicators along with measures to quantify these indicators. For example, in order to measure the performance of tourism enterprises (accommodation), it is suggested to measure their average occupancy per year, the percentage participating in co-operative marketing tourism enterprises, etc. (see Table 7):

Table 7. Core indicator

Number and title	Wider topic area	Measures	Ease of collection 0 = impossible 5 = easy
Tourism enterprises performance	Productivity and competitiveness of business	1. Occupancy rate in commercial accommodation per month, yearly average 2. Percentage of tourism enterprises participating in co-operative marketing 3. Average REV PAR (revenue per available room) in destination	2

Source: the Indicator System for Sustainable Tourism Destinations.

In 2007, the Tourism Sustainability Group published a report that included an action framework and implementation mechanisms for allocating responsibilities among the main stakeholders in sustainable tourism development. It targeted public and private organisations at the European, national, regional and local levels, stimulating action between the public and private sectors. Given the transnational character of the Cultural Routes network and involvement of public and private sector organisations in their activities, this report could be considered as a suitable reference in establishing sustainable tourism development criteria for the Cultural Routes.

35. See http://destinet.eu/tools/measurement_instruments/draft_indicators_15th_Nov_t2009.doc for more details.

36. The Tourism Sustainability Group (TSG) was set up by the European Commission in 2004. The group comprises individuals from international bodies, member state governments, regional and local authorities, the tourism industry, professional bodies, environmental organisations, trade unions and research and educational bodies, who have expertise and experience in the sustainability of tourism.

Cultural Routes applicable quality standards

Cultural Routes of Switzerland – a tourism project co-ordinated by ViaStoria – joins together local routes in Switzerland with the goal of making them self-sustainable projects. Although specific quality sustainable tourism criteria have not yet been defined for SMEs, the Cultural Routes of Switzerland established a set of indicators based on which the Routes are selected for participation in the programme. Appendix 4 to this report offers a summary of the approach, different elements of which could be replicated by the Council’s Cultural Routes, where appropriate.

Survey of the European Cultural Routes

In order to gain more consistent information about the implementation of quality and sustainability criteria within the Cultural Routes networks, a related survey was conducted by an independent expert. The 29 Council-certified Cultural Routes were asked to provide their opinion on:

- the necessity of quality standards implementation in order to ensure travel and tourism quality along the Route;
- if they are aware of any quality standards in use, for example quality certification labels or environmental management schemes, for example: quality label, EU flower, corporate social responsibility, etc; and
- the areas that require quality improvement, for example: Cultural Route products, services, infrastructure, environmental management communication and information, marketing and promotion, professional networking, etc.

The survey responses revealed that the Cultural Routes vary greatly in their stages of development, in tourism offer formulation, target groups, customer demand, and thus in their perceptions regarding the necessity of quality sustainable tourism standards development/use. Such differences do not only exist between but also within the Cultural Routes, namely between the countries and regions they are crossing, and the size of economic units (locations) they contain. For instance, the Hansa Route is challenged by the task of developing quality criteria for small and large cities; and the Via Regia confronts a considerable gap in tourism development between such participant countries as Ukraine and Germany, which makes the task of comprehensive quality standard system development particularly difficult.

Although the demand for Cultural Route tourism products is still very basic, the tourism offer along them is very diverse. It includes a variety of SMEs: accommodation, gastronomy, activities, transport, and merchandise; and destination types: networks of cities or regional locations, sets of cultural objects, etc. At the same time, a few of the Cultural Routes use quality standards and criteria (for example, UNESCO, CSR and ISO) or have set up their own standards (for example, the Mozart Ways, or the Hansa Route). The quality standards that are currently used by the Cultural Routes are not systematically reviewed or published by any of the Routes or the body co-ordinating the Cultural Route network at the European level (namely, the EICR or the Council). Consequently, the tasks of (1) quality sustainable tourism standards development; and (2) their systematic adoption, exchange and review should be considered for implementation, primarily by the EICR.

It is also important to ensure that when shared between the Cultural Routes sustainability standards do not result in their “westernisation”. In other words, the standards applicable in western Europe should not be imposed or simply replicated but adjusted to, for example, the economic, social and legislative environments of

eastern European or North African countries. It is also advisable to start implementing sustainability standards with those SMEs that are enthusiastic about Cultural Routes' activities.

Systematic review and exchange of the existing within the Cultural Routes sustainable tourism criteria would also allow to methodologically design a basic set of standards applicable to all Routes in the network. This, in turn, could result in a common benchmark system, against which the progress of the Cultural Routes in quality sustainable tourism implementation could be evaluated. Generally, the basic standards/criteria could include:

- provision of a product that is related to the tourism industry, based on the Cultural Route;
- participation in the overall sustainability strategy of the region/destination and compatible operation with it;
- involvement in a tourism forum/participation in a network related to the regional development process;
- adoption of a feedback system to gather information about clients' demands and visitor expectations;
- development of relevant products and services for visitors and the local community;
- provision of adequate information to visitors;
- regular review of sustainable management in the business' operation;
- provision of the best customer service possible through ongoing staff training.

Conclusions

Implementation of quality sustainable tourism standards along the Cultural Routes is necessary, although the approach and methodologies for accomplishing this task have to be closely discussed with those involved. This is because Cultural Route structures include different sets of local stakeholders, whose interests, needs and priorities vary. It is important to take into account the specific geographical, political and socio-economic characteristics of the Routes and their communities (destinations) while designing quality standards for sustainable tourism development.

Given the variety of existing quality standards and certification systems for sustainable, eco, or responsible tourism for nature-orientated, urban or remote destinations, it is recommended that a systematic approach to quality criteria development for Cultural Routes is taken, whilst referring to the most exhaustive certification schemes and programmes. A few examples of such programmes include the Global Sustainable Tourism Criteria (GSTC), the European Ecotourism Labelling Standard (EETLS), and the Indicator System for Sustainable Tourism Destinations, which was developed by the Tourism Sustainability Group³⁷ (EC, DG Enterprise, Tourism Unit).

Additionally, published in 2004, the UNWTO guidebook on indicators of sustainability for tourism destinations is considered to be the most comprehensive resource for promoting the use of sustainable tourism indicators as essential instruments for policy making, planning and management processes at destinations. It

37. The Tourism Sustainability Group (TSG) was set up by the European Commission in 2004. The Group comprises individuals from international bodies, member state governments, regional and local authorities, the tourism industry, professional bodies, environmental organisations, trade unions and research and educational bodies, who have expertise and experience in the sustainability of tourism.

describes over 40 major sustainability issues, ranging from the management of natural resources (waste, water, energy, etc.), to development control, satisfaction of tourists and host communities, and preservation of cultural heritage. For each issue, indicators and measurement techniques are suggested with practical information sources and examples. The publication also contains a procedure to develop destination-specific indicators, their use in tourism policy and planning processes, as well as applications in different destination types (for example, coastal, urban, ecotourism, small communities). This source may be particularly useful for the Cultural Routes in the process of their sustainable tourism criteria development and implementation.

7. Conclusions and recommendations

7.1 Conclusions

The Cultural Routes are at the heart of cultural tourism development in Europe today. Over the last two decades, they have achieved a noteworthy impact and progress, and shown remarkable potential for SME generation, networking, social cohesion, intercultural dialogue, and for promoting the image of the Council of Europe and Europe generally. The Cultural Routes encourage widespread community participation in cultural activities, raising awareness of a common cultural heritage. Established on cultural and social principles, the Cultural Routes today represent a source of innovation, creativity, small-business creation, and cultural tourism products and services development.

The current study demonstrates that organisational, product and service forms of innovation are the most prevalent areas of change within the Cultural Routes and the SMEs involved. It indicates that all the Cultural Routes provide opportunities for SMEs to develop products and services within the framework of tourism activities that the Routes generate. Some of the local SMEs offer products with a Cultural Route label thus contributing to the promotion of the Route. These activities are seen more as adoptions of innovation [REBS] than innovations themselves. Other SMEs develop original products and services based on the unique values and heritage of the Cultural Route they are involved with. These products and services are regarded as pure innovations, as they are new to the portfolio of a supplier, that is a local SME. Organisational innovations contribute most to sustainable and integrated development of geographical areas and organisational structures along the Cultural Routes, whilst fostering their transnational collaboration.

Increasingly, the Cultural Routes have become a focal point for transnational networking and cluster development. Although clusters have not been identified within the currently existing Cultural Routes, their networks clearly provide a solid ground for future cluster formation. To invigorate clusters (as geographically proximate groups of organisations and institutions working along the same value chain) within the Cultural Routes, this study suggests developing more ties between local and transnational SMEs, tourism operators, carriers, business partners and public institutions. Significant efforts are needed to develop strategies for connecting these actors, which would further foster critical mass creation and innovation development.

The promotion of cultural tourism is a logical next step in developing Cultural Routes, since this type of tourism builds on the uniqueness of remote destinations, local knowledge, skills, heritage and traditions. The study concludes that the Cultural Routes have significant potential for cultural tourism development as well as for the promotion of economic, social and territorial cohesion in Europe. A number of Cultural Route partners are collaborating effectively and are producing remarkable results, particularly at the local level. At the same time, more could be achieved if clear network governance models were applied and a significant effort was made to earmark funding for key skills development, capacity-building, training, networking, and cross-marketing activities. While Cultural Route themes are very clearly defined, they are not sufficient to establish continuous relationships between the partners or to function efficiently as transnational networks. It is thus advised to stimulate more

joint actions and initiatives within Cultural Routes and their transnational partners in order to establish a solid ground for better understanding of common network structures and provide visibility to the Routes.

While Cultural Routes' connection with the tourism sector is evident from the study, the advantages of attracting larger audiences, marketing their products, establishing private and public partnerships (PPPs), and offering products and services throughout the network need to be better articulated. This could be done through providing an opportunity for the Cultural Routes to meet, exchange, debate, decide, and agree together on a common collaborative strategy, and on their individual action plans that would support this common strategy. In this process, some of the Cultural Routes could share their best practices to help the others to overcome difficulties and/or address their needs. It is important that the Council of Europe assumes more responsibility for guiding the Routes in their decisions, whilst encouraging and providing an opportunity for every Route to contribute to the design of the common collaborative strategy of the programme.

The current study also identifies the danger of a missed opportunity. It reports the lack of understanding of the significance of the cultural tourism sector by some of the Cultural Routes and their partners. There is a danger that the Cultural Routes programme will fail to seize the opportunity presented by the potential for cultural tourism development, unless it is given greater attention at both national and European level. This concern becomes even more pressing in the aftermath of the recent economic crisis. The vision of the Europe 2020 strategy is based on policies to create smart, sustainable and inclusive growth and the promotion of economic, social and territorial cohesion. Culture-based activities – such as Cultural Routes projects – are capable of making significant contributions to local economies and the prosperity of Europe in general.

Quality is crucial for the successful functioning of Cultural Routes and the SMEs involved. The Cultural Routes offer an impressive mix of different products and services to their customers. Besides, a rapid growth in cultural and tourism destinations worldwide means that the Cultural Routes today face the challenge of being even more competitive and quality conscious in order to attract more tourists in a global marketplace. Consequently, the implementation of quality and sustainable tourism development standards along the Cultural Routes is highly recommended.

The current study further suggests that the methodologies for sustainable tourism criteria development should be designed in close consultation with the Cultural Routes. Due to the diversity of interests, needs, environments and priorities of the Cultural Routes' stakeholders, consideration of specific geographical, political, social and economic characteristics of Cultural Route locations in the process of developing quality and sustainable tourism standards is essential. This would allow an appropriate tool to be devised to facilitate measuring, monitoring and benchmarking the quality performance of Cultural Routes' destinations, products and services.

Current investment in development of the Cultural Route programme is not commensurate with the Cultural Routes' needs and potential. Limited financial and human resources at all levels negatively affect the programme's performance and scope. In order for the Cultural Routes to work more effectively together as networks, capacity-building and training are highly recommended. These measures would allow Cultural Route leaders and partners to come together and to provide ideas, support and develop skills at many levels, including governance, ICTs, fund-raising and cross-marketing. EU funding was found to be crucial in enabling regional networks – that

is, encouraging regions to join specific cultural projects. National and regional resources play an important role in the development of Cultural Routes tourism.

The aforementioned conclusions draw together the themes that have been analysed in greater detail in the course of this study. In summary, and according to this analysis, the following is a list of the most important issues concerning the Cultural Routes that need to be addressed:

- low transnational connectivity of the Cultural Routes networks;
- lack of co-ordination at European level in the developmental and promotional strategies of the Cultural Routes;
- weak brand image and marketing strategies;
- low degree of quality and sustainable tourism standards development/implementation;
- limited human and financial resources of the Routes;
- lack of expertise in the management of the networks;
- poor exchange of good practices; and
- absence of network management and performance evaluation tools.

The section below provides a set of recommendations on the improvements that could be made, and suggests how the lessons learned from the programme's activities could be carried forward to the next stage of its implementation.

7.2 Recommendations

In order to ensure that the potential of the Council's Cultural Routes programme for sustainable and inclusive growth, and the promotion of economic, social and territorial cohesion in Europe is fully realised, and in view of the opportunities for exploiting this potential presented by cultural tourism, it is important to develop a relevant higher profile strategy at European level.

It is recommended that such a strategy includes the following elements:

- better articulating the added value of the cultural tourism sector in general, related SMEs, and their networks and clusters for economic and social development of Cultural Routes' destinations;
- strengthening the capacity of the Cultural Routes to engage effectively in local and regional development and encouraging a greater professionalism in the area of Cultural Routes networks governance;
- developing the relevant Cultural Routes' improvement strategies – at local, regional and transnational levels – built on partnerships between public authorities, cultural organisations, corporate business, SMEs, and civil society representatives;
- improving communication between and within Cultural Routes networks especially at regional and transnational levels; successful experiences should be further exploited and disseminated;
- identifying and exchanging examples of best practice and innovations between and within Cultural Routes networks;
- developing better evaluation techniques and methodologies and their more extensive application to the Cultural Routes and their co-ordinating bodies;
- addressing the issue of quality and sustainable tourism criteria development for the Cultural Routes.

It is particularly important that the suggested strategy also envisions a set of actions to properly address the key challenges faced by the Cultural Routes today.³⁸ Such consideration is crucial for the full realisation of the Cultural Routes' potential for cultural tourism development, sustainable economic growth and social cohesion in Europe. In order to address the existing Cultural Routes' issues, focused action is recommended in the following five main areas:

1. Capacity-building.
2. Network governance.
3. Performance evaluation.
4. Brand image and marketing.
5. Co-operation with the main stakeholders.

More detailed recommendations concerning the five areas identified for improvement are offered below.

38. A summary of these issues is provided above at the end of the "Conclusions" section.

Capacity-building and governance

In order to improve operational capacity and governance of the Cultural Routes it is highly advisable to:

- develop a more comprehensive understanding of:
 - the value of cultural tourism (and related SMEs) for Cultural Route projects and destinations;
 - the role of local communities in sustainable cultural tourism development;
 - the various aspects of sustainable tourism: demographic, cultural and economic trends, entrepreneurial approaches, business models, marketing strategies, PPPs, etc;
 - the way in which technology could support the development of the Cultural Routes;
- earmark funding for key training, networking, capacity-building, and cross-marketing activities;
- apply clear and democratic network governance models;
- create an appropriate tool to facilitate measuring, monitoring and benchmarking the quality performance of Cultural Routes' destinations, products, and services;
- encourage performance evaluation, benchmarking and best-practice exchange through improved communication between the Routes;
- establish criteria for quality sustainable tourism development within the Cultural Routes networks taking into account the geographical, political, economic and social characteristics of local communities along the Routes;
- engage trained professionals in Cultural Routes governance and management;
- ensure a more proactive role for the EICR in supporting networking and cross-marketing amongst the Cultural Routes as well as in developing a significant funding stream for holding regular meetings of the leaders of each Cultural Route;
- set up expert groups to support knowledge exchange between members of Cultural Routes networks;
- ensure co-ordinated action for further development of educational, cultural and tourism management models, expertise, R&D, training and capacity-building programmes associated with the Cultural Routes in order to co-operate closely on local capacity-building and to promote them as the quintessence of European values, traditions, heritage and cultures.

Evaluation, branding and marketing

Evaluation and impact measurement have become increasingly important in recent years. The demand for evidenced-based policy, together with a tightening of government spending as a result of the global economic recession, means that organisations are increasingly being required to demonstrate the economic impact of their activities. Successful branding and long-term marketing strategies additionally necessitate systematic performance monitoring and evaluation. Regular evaluation of Cultural Routes' performance and impact is thus essential for estimating their progress more accurately. The ability to map social, economic and environmental impact is very important not only for marketing and branding but also for communication with citizens, taxpayers, funding and other stakeholders. In this regard, and further expanding the points presented under the "Capacity-building and governance" section of the current recommendations, the current study suggests to:

- develop mechanisms for Cultural Routes’ activities and performance evaluation in the short and long term;
- evaluate the current Cultural Routes to see if they satisfy the updated criteria;
- conduct a concurrent evaluation of the operational efficiency and performance of the EICR in view of the changing economic conditions and requirements of the Cultural Routes programme;
- re-brand the Cultural Routes programme: develop a single consumer brand and promotion of the Routes and their destinations via a dedicated consumer portal;
- develop a long-term marketing strategy identifying the target markets, consumer preferences, overall marketing objectives, communications channels and key performance indicators;
- put in place capacity-building programmes for both SMEs and Route coordinators to support training and skills development in the field of marketing and ICT, and to provide guidance via geographically and financially accessible seminars, workshops and conferences.

Collaboration with stakeholders

The Cultural Routes of the Council of Europe offer a huge potential for collaboration at all levels – European, national, regional and local. The programme should build on this potential as well as on the expertise, know-how and reputation gained to develop common strategies and establish partnerships with different stakeholders and levels of authority, both in Europe and internationally.

For this reason, the current study suggests:

- to develop a new coherent road map for co-operation between the Council of Europe Cultural Routes, other European Routes created with European Union funds, with related UNESCO initiatives, especially those associated with the Council’s Cultural Routes, and other significant European and international projects in order to establish a competitive and effective joint strategy for the promotion of European Cultural Routes globally;
- given that the Cultural Routes have increasingly become an instrument of cultural diplomacy and sustainable tourism development, the process of expanding their initiatives to include the EU’s overseas territories, neighbour and third countries should be reinforced.

Part II

Cultural Route case studies

The ^[REB9]Hansa Cultural Route

1. Reasons for highlighting this case

The Hansa Cultural Route offers an interesting case study of a large network of cities based on a historic and heritage “brand” rather than a linear route or single “product”. Long established prior to Cultural Route designation, it has evolved and grown as member cities have rediscovered their Hansa “roots”, particularly as barriers between east and west Europe have disappeared. New opportunities for cultural and economic trade and exchange have more recently been recognised using the Hansa brand as a mark of quality and reliability, with important (but still underutilised) symbolic value.

The role of the participating cities’ cultural activities is increasingly being valued as an economic and business development opportunity, although this has not been the prime purpose of this municipal network up until now. As a consequence there is no hard evidence of the direct impact on SMEs or other enterprises, although it is clear, for example, from the Hansa Days/Conventions that the economic impact from these is considerable. There is also evidence that the brand is being used by various firms as a place-making and promotional tool. This report details the activity of the Hansa organisation and the findings of our survey of member cities, together with its initial conclusions and recommendations.

2. Synopsis

The Hansa Route is a modern-day revival of a powerful medieval league of cities, which for 300 years controlled trade and shipping routes in and around the Baltic Sea. The impact of this historic trading network can still be seen in the cultural heritage of the towns and cities that were influenced by the ancient league. The modern-day Hanseatic League includes 176 cities across 16 countries. It provides a good example of a well-organised network which seeks to encourage transnational collaboration and the promotion of the region’s common cultural heritage – past and present – through annual Hansa Days and a range of project activities. These events encourage cultural and small business innovation and development, stimulate tourism, and offer the potential for increased trade, exchange and transnational co-operation.

<i>Participating countries</i>	Belarus, Belgium, England, Estonia, Finland, France, Germany, Iceland, Latvia, Lithuania, Netherlands, Norway, Poland, Russian Federation, Scotland, Sweden
<i>Programme participation period</i>	1991-present 2004: certified as a major Cultural Route (Poland, December 2004)
<i>Sectors covered</i>	Museums and cultural/heritage attractions, tourism and hospitality, food, handicrafts, transport, creative industries (music, dance, traditional costumes)

<i>Activity focus</i>	<ol style="list-style-type: none"> 1. Annual Hansa Day and Convention combines a meeting of all the towns with a major programme of cultural events and a market. 2. Local Hansa Days held in several towns each year to celebrate the Hansa culture and heritage. 3. Youth League – encourages transnational youth projects between Hanseatic towns. 4. Promotion of Hansa tourism through the development of cultural attractions (museums, heritage tours, cultural events), media and travel industry promotion. 5. Business Market Opportunities project to identify trading opportunities between Hanseatic towns. 6. Use of the Hansa brand by a wide range of businesses and cultural attractions, both prior to the revival of the Hanseatic League and as a result of its activities.
<i>Main partners</i>	Local municipalities, a few corporate sponsors, NGOs and SMEs participating in Hansa Days.
<i>Funding sources</i>	Members contribute a small fee (€80 + €30 p.a.) towards the website www.hansa.org . No other funding has been received and each town is responsible for funding its own activities.
<i>Principal impacts</i>	Greater cultural co-operation between member towns and a greater awareness of their common cultural heritage (especially important for former eastern bloc countries). Hansa Days raise the profile of host towns, attract increased visitor numbers, and act as a stimulus for cultural and small business innovation and development.

3. Main findings

3.1 Introduction

The Hansa Route was initially a medieval network of merchants that from 1161 to 1358 held power and control over trade and markets related to the Baltic Sea. In 1356 this network was formalised as a league of Hanseatic cities and for the following 300 years the cities met at least once a year at a Hanseatic Day to discuss topics of

common concern. At its height, the Hansa League consisted of 70 major cities and around 130 smaller cities, and supplied markets in 20 European countries. In some respects it can be seen as a medieval forerunner to the European Union/EEA. The impact of the medieval Hanseatic League diminished from the 16th century onwards as commercial interests shifted towards the Americas, and the last Hanseatic Day from this period was held in 1669.

The origins of the league can be traced to the German city of Lübeck, strategically placed at the western edge of the Baltic at the foot of the Danish peninsula. In the late 12th century, Hamburg and Lübeck had begun to trade together along the “salt road” through Kiel and by 1259 Cologne, Rostock and Wismar had joined the confederation. This date, 750 years ago, is widely regarded as the origin of the Hanseatic League. The origin of the term “Hansa” is disputed, being variously attributed to a trading guild, a tax paid by communities wishing to enter the league, or an armed band formed to protect traders.

By 1400, the league extended as far as Novgorod, Riga and Cracow, now respectively in the Russian Federation, Latvia and Poland. Cracow, in particular, had a large community of German merchants, traders and bankers. In 1356, the league established a parliament, which first met in Lübeck, where representatives of the cities discussed common approaches to such matters as piracy, trading partners and the ambitions of sovereigns. One of the league’s most successful joint enterprises was in shipbuilding: its Baltic cog was tailor-made for the shallow waters of the Baltic coastline, being a flat-bottomed vessel with extensive cargo capacity. The cogs were built mostly in Lübeck and Danzig (Gdansk) and were sold throughout Europe, including in the Mediterranean. In the 14th century, the cog was replaced by a larger version called the Holk (hulk), which could transport as much as 300 tons of freight. The league also produced warships, with successful campaigns being waged with English help against pirates between 1394 and 1420. In the 16th century the largest ship in the world at the time was the Hansa’s *Adler von Lübeck*.

The league set up *Kontors* (foreign trading posts) in Bergen, London, Bruges and Novgorod. One of the most important and extensive *Kontors* was London’s “Steelyard”, established in 1320 on the Thames just west of London Bridge and close to the home of the customs officer Geoffrey Chaucer (*Canterbury Tales*). The Steelyard contained a warehouse, weighbridge, church, offices and several dwellings for German merchants. It was also known as the Hall of the Osterlings to reflect the fact that its residents came from the eastern edge of Europe. This may be the origin of the word “sterling” to describe a sound currency. The traders in the Steelyard also brought with them the word “shilling”, derived from skilling, a unit of currency used in Gotland.

The legacy of the Hanseatic League lives on in the name of the German Bundesliga football team FC Hansa Rostock, Hansabank (Swedbank) and the Lufthansa airline, while the local governments of Lübeck, Hamburg and Bremen still describe their cities as “free and Hanseatic cities”. Many local firms use Hansa within their trading names, including hotels, clubs, ships, and even a board/video game, Hansa Teutonica.

In 1980 the idea of the Hansa was revived and the first modern Hanseatic Day was celebrated in the Dutch city of Zwolle. Membership of the modern-day Hanseatic League has grown rapidly in recent years, particularly since the fall of the Iron Curtain in 1989, and today includes 176 towns or cities from 16 countries. The purpose and goals of the modern-day Hanseatic League are set out in its legal statutes:

The purpose of Die Hanse shall be to act in the spirit of the border-transcending idea of the Hanseatic League and the associated historical experience, in order to revive the spirit and the ideas of the European city/municipality, to promote the self-awareness of the Hanseatic cities, and to develop cooperation between them, with the goal of making a contribution to the economic, cultural, social and governmental unification of Europe, thus strengthening their self-awareness so that they can play their part as a place of living democracy.³⁹

3.2 Management structure of the Hansa

A well-developed management structure has been established and this is clearly set out in its legal statutes, the key aspects of which are summarised here.

Membership of the Hansa is open to any town, city or municipality which belonged to the historic Hanseatic League, was related to it or in which Hanseatic trading posts, storehouses or representative bodies were located for a considerable period of time.

The Hansa includes the following bodies:

- the assembly, which comprises the delegates of the individual member cities. It meets once a year during the Hansa Convention to deal with issues covering the member cities including membership, election of the council, selection of the cities to hold future Hansa Conventions, and discussion of Hansa projects;
- the commission, which comprises one city from each country with active members (apart from Germany which has five). This meets twice a year to prepare the next Hansa Convention, develop proposals to put to the assembly, and supervise project work authorised by the latter;
- the council, which comprises the president and four representatives from different Hanseatic cities in at least three European countries which are elected by the Assembly. The president is always the Mayor of Lübeck. The council prepares the commission and assembly meetings and has the power to take rapid or emergency decisions regarding projects.

The Hansa includes the following institutions:

- a Hansa office in, and funded by, the City of Lübeck. This provides an administrative function (one post, currently vacant), including the updating of the website, www.hansa.org;
- the Hansa Convention is held once a year along with the Hansa Day to discuss the business of the Hansa;
- project groups which oversee specific project proposals;
- a Youth Hansa which has its own statutes and which organises initiatives for young people.

In addition, a Hansa Guild was established in 2004 which is open to individuals who have worked with the Hansa and wish to remain involved, and are proposed by their town or city.

The above outlines the structure of the Hansa's international organisation. Towns hosting the annual Hansa Day are expected to follow a set of guidelines established by the Hansa, however each member city is able to organise their own local Hansa Days and other activities without reference to the formal guidance of the Hansa.

39. Statutes of the Hansa.

The financing of activities is the responsibility of the individual member cities with each covering their own costs for attending meetings and organising events. Thus, towns hosting the annual Hansa Day bear all the related costs, whilst the cost of the Hansa office is met by the City of Lübeck. The only contribution expected of members is a one-off fee of €80 for a link to the organisation's website and €30 per annum towards its running costs.

3.3 Key activities

3.3.1 Annual Hansa Day and Convention (*Hansa Tag*)

The annual Hansa Day combines the formal annual meeting for all the members of the Hansa with a three-day cultural festival designed to promote and celebrate Hansa heritage. This event, now in its 31st year, typically attracts 100 000 visitors. It usually includes a three-day programme of cultural events (concerts, theatre, music and dance), guided walks, exhibitions, lectures and talks, street parades, and a children's programme. It also incorporates a Hansa market where each town can promote its attractions and key business and cultural products, and since 2006 an art show, HANSEartWORKS, and an environmental award. Seminars on commercial themes are also held and these have led to the development of business co-operation projects (see 5.2.6 below). The Hansa Day is seen as a good means of promoting local and international tourism and as a result there is no shortage of towns willing to host it. The host towns have already been agreed until 2030 with one town lobbying to host it in 2037.

3.3.2 Local Hansa Days (*Tag der Internationale Hansa*)

In addition to attending the annual Hansa Day and Convention, member cities are also encouraged to hold their own local Hansa Day as a means of generating and maintaining greater awareness of the Hansa heritage within their own communities. Around 20-30 cities celebrate this event each May. These are smaller festivals usually incorporating city tours, cultural performances and local markets.



The Westfälischer Hansebund (Westfalian Hansa Association: www.hansebund.org) provides a good example of how a network of smaller local towns can work together to organise local and regional events. It incorporates 45 Hanseatic towns from the region (co-ordinated by the German town of Herford) that collectively promote their Hansa activities and rotate the hosting of an annual local Hansa Day for the region. Similar networks operate in some of the other regions including Poland and amongst cities along the Rhine in Germany.

In Novgorod, their Hansa Day in 2009 stimulated a lot of interest in the city from all over the world – an estimated 500 000 attended. Several Hanseatic towns contributed a total of nearly US\$400 000 for the renovation of Novgorod’s St Nicholas Cathedral. Novgorod has also adopted the Hansa brand for the city and recently set up a union of Russian Hansa cities, which will rotate their own regional convention and Hansa Day.

The Hansa heritage is also celebrated by some cities as part of more general cultural event programmes. For example Visby has a Medieval Week (www.medeltidsveckan.se) that embraces the Hansa as well as other aspects of its heritage.



3.3.3 Hansa Youth League

The Hansa Youth League organises projects to encourage intercultural links between the youth and youth organisations of different Hanseatic cities. Recent projects have included sailing trips between Hanseatic towns on the Baltic, special youth festivals, excursions, camps and music festivals, held as part of the annual Hansa Day, see www.hanse.org/en/the_hansa/youthhansa.



3.3.4 Tourism promotion

A tourism working group with representatives from a small number of towns is collaborating on initiatives designed to promote Hansa tourism. Plans include familiarisation trips for journalists and Air Baltic to encourage the promotion of Hansa towns. This is expected to lead to greater press coverage including an article in Air Baltic’s in-flight magazine. Air Baltic is also being encouraged to increase their network of low-cost flights between Hanseatic cities around the Baltic. Information about regional links joining Hansa towns with the Santiago De Compostela Pilgrim Routes and Jacob’s Route has also been collated and promoted. The development of biking routes between different cities has also been proposed.

3.3.5 Museums and heritage promotion

A network of museums brings together representatives from museums in Hansa cities to discuss joint projects around areas of shared heritage. A new Hansa museum is being established in Lübeck to promote the international Hansa heritage. Housed in the town's *Burg Kloster* (old monastery), it will illustrate the history of the Hansa as well as the modern-day activities and will showcase artefacts and exhibitions from towns across the Hanseatic League. Funding has been secured from the German Government (€1 million), the EU (€12 million) and the Possehl Foundation (€15 million).

3.3.6 Key future activities

Business Region Hanse is a major three-year research and development project, starting in April 2011, which is designed to identify market opportunities for key business sectors in participating cities. The plan is to use this research to encourage the development of trade between the cities. The project is being led by the City of Herford in conjunction with the University of Applied Sciences in Munster. The project costs are met by the 24 participating cities, from nine countries, which will each contribute €6 000 over the three-year period, with a total budget of €90 000 (Business Region Hanse 2010).

3.3.7. Financing of activities

There is no membership fee for joining the Hansa (only for joining the website, above). All towns cover their own costs when attending meetings or hosting events such as the Hansa Day. A limited amount of private sector sponsorship has been attracted from organisations with an interest in the promotion of the Hansa, including Air Baltic and the Die Hanse publishing house. Hansa Sails in Rostock and Scandline Ferries have both sponsored promotional leaflets about the Hansa. Cities also usually secure corporate sponsorship for their Hansa Day. For example, Ericsson sponsored the annual Hansa Day when it was held in Visby in 1998 and the local brewery funds Hansa Day activities in Hereford.

3.4 Cultural impacts and transnational co-operation

The hosting of an annual Hansa Day acts as an impetus for the development of new cultural attractions within the host city. For example when Bruges hosted the Hansa Day in 2002, a temporary exhibition was established "Hanse@Medici", accompanied by a publication: "From Hanse merchants to Medici bankers: Bruges, crossroads of European cultures". Similarly Lübeck aims to complete its new Hansa museum in time for its hosting of the Hansa Day in 2014. The Hansa Days also stimulate transnational cultural exchange and innovation as each new host draws on the ideas and activities of previous events in developing new themes, cultural attractions, and events for its own Hansa Day and town.

Hosting local Hansa Days is a way of further raising awareness of a town's Hanseatic heritage and can form part of a wider tourism development strategy. For example, in

2009 King’s Lynn hosted its first local Hansa Day and also published a leaflet promoting a self-guided tour of the town’s Hanseatic streets and attractions.⁴⁰

Since the fall of the Iron Curtain in 1989, the Hansa Day has provided an important opportunity for the revival of east-west visits to Hanseatic towns that had not been possible for many years. This has allowed countries such as Latvia, Lithuania and the Russian Federation to re-establish links with their former European heritage.

Our survey of Hansa city members suggested that the main impact of involvement in Hanseatic Days, whether at home or overseas, has been to raise the profile of the towns and generate a greater awareness of Hansa heritage. The impact on business and international trade has been much less, although it is by no means insignificant for towns hosting an annual Hansa Day (see Table 1 below).

Table 1. The impact of involvement in the Hansa Day

Nature of impact	Hosting an annual Hansa Day (%)	Participating in an annual Hansa Day (%)	Hosting their own local Hansa Day (%)
It has raised the profile of our town/city	76.5	85.2	74.1
It has led to an increase in visitor numbers	47.1	44.4	59.3
It has raised awareness about our Hansa heritage	82.4	72.2	81.5
It has led to a greater number of international links	29.4	48.1	Question not asked
It has had a positive impact on our business sales	35.3	20.4	33.3
It has led to an increased exchange and/or trade with other Hanseatic cities and towns	23.5	22.2	Question not asked

Source: Cities Institute (2011), survey of Hansa towns and cities (N = 63/176).

NB respondents were able to tick all options that applied; hence the total is greater than 100%.

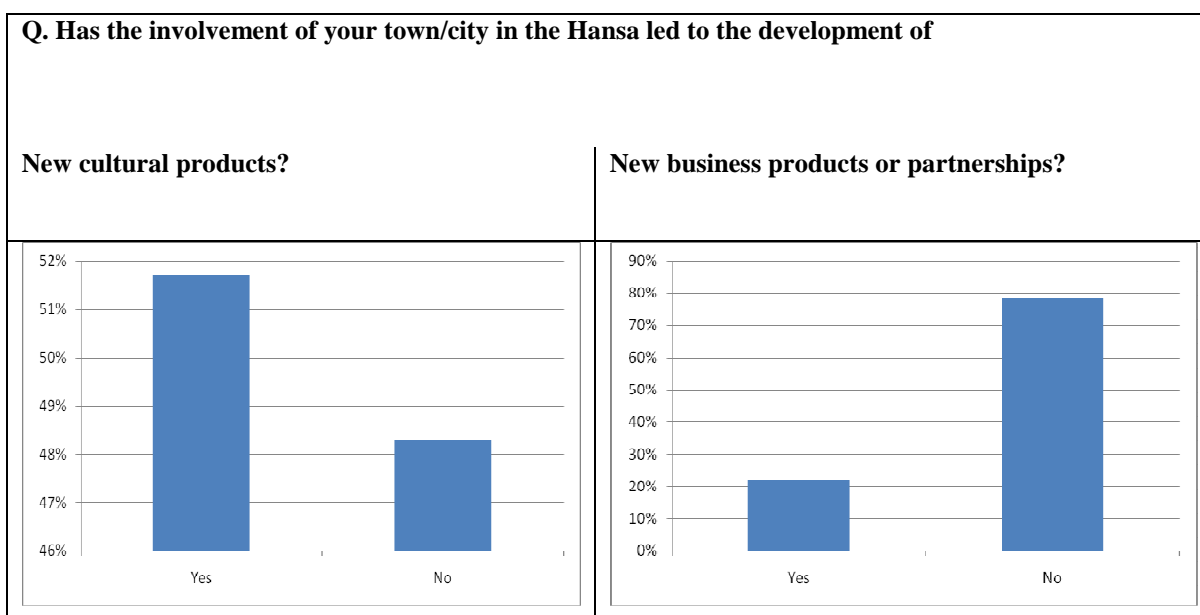
Involvement in the Hansa has stimulated the development of a range of new cultural products. Over 50% of our survey respondents reported that the involvement of their town/city in the Hansa had led to the development of new cultural products featuring the Hansa (see Figure 1 below). These included the development of special maps, literature and guided tours (Herford, Kalkar, and King’s Lynn) and new permanent exhibitions focusing on different aspects of Hansa heritage and culture (for example, “The Hanseatic history of Pritzwalk” in the Stadt-und Brauereimuseum Pritzwalk, “Hansestadt im Fluss”, Kulturpartnerschaft mit Visby/Gotland in Dortmund, Perleberg, and new exhibitions in three museums in King’s Lynn). Whilst the representative from Hafnarfjörður, Iceland, reported that:

A German artist made a stone arch to celebrate our Hanse League and the First Lutheran Church in Iceland – a monument.

40. King’s Lynn and West Norfolk Borough Council (2009).

New members such as Vologda in the Russian Federation, which joined the Hansa in 2010, were planning the organisation of Hansa exhibitions in the future.

Figure 1. Impact of the Hansa on new product development



Source: Cities Institute (2011), survey of Hansa towns and cities.

3.5 Economic impact and impact on small business innovation and competitiveness

Until recently, the emphasis of the Hansa's activities has been primarily on cultural activities designed to promote the Hansa heritage and encourage transnational co-operation between towns in the league. These activities are seen to have had a lesser impact on business development (see Figure 1 above). However, since there has been little attempt to measure the economic impact of the Hansa's activities it is likely that much of this may have gone unrecognised and unquantified. From the data collected in our survey and interviews we have been able to undertake some approximate calculations so as to provide some indication of the value and potential of Hansa Day.

3.5.1 Economic impact of Hansa Days

Our survey and research suggested that the annual Hansa Day attracts between 4 000 and 150 000 visitors over the three-day period. Most visitors are local residents or regional visitors who come for day trips. However, the event also attracts a significant number of international visitors who stay for between three and five nights. Visitors spend money on food, products such as handicrafts, tours, events and cultural attractions. Overnight visitors will also incur additional costs for accommodation and eating out.

Taking the case study of Tartu as an example, we can begin to estimate the short-term direct economic value of the Hansa Day. Tartu hosted the annual Hansa Day in 2005, which attracted around 100 000 visitors. These visitors are estimated to have spent an average of €6.4 per person, thus generating a total income of €64 000 for the stallholders, cafe and restaurant owners, etc. The town's 2 000 hotel rooms were all

full for the three-day period. Taking a conservative average of €50 per night for a double room and perhaps a further €50 spent on meals out per day (per couple) this gives a total additional figure of €600 000 spent by overnight visitors over a three-day period. The Hansa Day festival as a whole could therefore be estimated to have generated a total of €664 000 in income for local businesses. To this figure can be added the cost associated with hiring musicians, actors and entertainers, and all the associated equipment – staging, lighting, etc., which in Tartu was budgeted at €64 000. The value of the Hansa Day to the local economy begins to approach €0.75 million. In the more affluent towns of western Europe or towns where larger visitor numbers have attended, this is likely to be considerably more. The 26th Hansa Day held in Osnabrück, Germany, in 2006, reportedly attracted 150 000 visitors and generated €440 204 in official receipts⁴¹ (which presumably does not include the income generated for local businesses).

3.5.2 The impact of Hansa Days on tourism

The hosting of a Hansa Day is also likely to boost tourism numbers on a longer term basis as a result of the town's increased profile. For smaller towns with fewer competing attractions, a Hansa Day is likely to have a proportionally greater impact on visitor numbers. It can also serve to raise the profile of tourism within a town's economic development strategy. In Herford, for example, the local tourism industry only employs 1 000 people and is not a priority sector as a result. However, since it has been agreed that the town will host the 2013 Hansa Day the development of Hansa-based tourism has risen up the local policy agenda. As Ashworth and Page note (2011: 13): “non-world cities may choose to boost and invest in consumer services such as tourism and leisure to counterbalance the competitive disadvantage of not having highly developed producer services”.

Well-organised Hansa Days can attract a significant amount of media coverage. For example, Osnabrück reported 120 press articles and several TV and radio reports and programmes featuring its annual Hansa Day. For those cities participating in the Hansa Day, the Hansa market also provides an opportunity to promote their city, its tourism attractions and products, although there does not seem to have been any attempt to measure the impact this has had on visitor numbers or spend.

The increased visitor numbers and raised profile resulting from the hosting of a Hansa Day can attract the attention of the travel industry. Following Visby's hosting of the annual Hansa Day in 1998, in which 107 cities and over 2 000 visitors participated, direct flights between Visby and Hamburg commenced.

However, no attempt seems to have been made by the Hansa to measure the longer term impact of hosting or participating in a Hansa Day on tourism numbers. Whilst the change in tourism trends could possibly be measured it is difficult to isolate and attribute the “Hansa effect” without a more detailed visitor and/or business survey.

3.5.3 Impact of the Hansa on business development and innovation

Participation in the Hansa Day and the other activities of the Hansa have stimulated several cities to develop new tourism products which have since become successful businesses. For example, for its Hansa Day in 2005, Tartu developed a joint project with the Emajõe Barge Society, Hanseatic Emajõe Barge 2005, which involved the

41. Although it reportedly cost €790 559 to organise.

restoration of a historic vessel in the style used by the 14th-century Hanseatic League traders. This has since become a regular tourist attraction offering a variety of sailing trips through the Hanseatic waterways of the Emajogi River, local nature reserves and waterways (www.lodi.ee). The Hansa Day also prompted the restoration and development of St Anthony's Guild – a centre designed to promote traditional Estonian art and handicrafts by offering workshops for artists and handicraft businesses. Further plans are now being developed for holding a regular handicraft market.

Involvement in the Hansa has also inspired the development of initiatives to support traditional handicrafts in other Hanseatic cities. In Viljandi, for example, an NGO – the Bonifatius Guild – was founded in 2008 with the goal of introducing medieval traditions and the Hansa heritage. Small businesses have been set up producing medieval clothes and dresses. Here, the local Hanseatic Days, like those of many other towns, will provide an opportunity for handicraft businesses to sell their products, thereby generating new business and employment opportunities. As the Tartu representative explained:

In the Hansa market hundreds of traders will find their way to Tartu – they will sell unique handicrafts made of traditional or natural materials, interesting goods and foods, and introduce medieval handicraft skills. The visitors to the Hansa Market can choose from among the necessary, interesting or just funny hand-made things.

In Tartu the Hansa Day festival in 2005 stimulated the development of a “new” street cafe culture (not witnessed since before the Second World War), which has remained a feature of the town and local lifestyle. This has undoubtedly led to increased revenues for the cafes and restaurants concerned, as well as enhancing the general ambience of the town and thereby providing a more attractive visitor experience.

The revival of traditional food products and/or the development of new Hansa-themed delicacies are another popular activity. Stralsund is currently establishing a Hansa market with food specialties, in its newly restored town hall cellar, which will be held on the local Hansa Day. Other towns mentioned Hansa beer (Herford) and Hansa bread (Riga), whilst Doesburg has developed a new chocolate and mustard sweet – *Mosterdbonbon*.

3.6 The Hansa brand

3.6.1 The strength of the Hansa brand

The Hansa is a well-established brand, which has been in widespread use long before the revival of the Hanseatic League. The history and cultural legacy of the medieval Hanseatic League forms an important part of the Baltic region's history. Schoolchildren, particularly in Germany, learn about the importance of the Hansa from an early age, and the tales of daring sea voyages and encounters between Hanseatic traders and pirates have been popularised in numerous storybooks and films. The Hansa therefore conjures up images of “success, prosperity, rapidity”, and “good, old times” (Riga), ensuring that the brand remains attractive to businesses and tourist offices alike.

In former eastern bloc countries there is less interest in the Hansa heritage and brand as their experience was one of dominance by the Hanseatic merchants: “there is a continuing dialectic about the role of culture, the significance of tourism and the

relationship between these two in central and eastern Europe societies in transformation. Both culture and tourism have been utilised to display a break with the past, to promote particular national identities and to demonstrate a new openness and willingness and eagerness to embrace a wider European identity” (Howard and Allen 2003: 175). Similarly in Gotland (Sweden) residents from the countryside still recall how their local trade was destroyed by the Hansa merchants and the promotion of the Hansa was difficult until attitudes changed as a result of the success of the annual Hansa Day, hosted by Visby in 1998. Nevertheless throughout the Baltic region a wide range of corporate businesses and SMEs, as well as towns and cultural attractions, have been using the Hansa brand as part of their promotional strategy.

Several Hanseatic towns in fact incorporate the term Hansa in the use of their name

(Hansestadt Lübeck, Alte Hansestadt Lemgo) and the evidence suggests that the tendency to do this has increased as the influence of the modern-day Hansa has grown. An example is die Hansestadt Luneburg, which in 2007 adopted the title “Hansestadt” once again. The term “Hansa” is incorporated into the names of restaurants, cafes, hotels, bakeries, wine merchants, travel agencies, discos and a wide range of other businesses. There are Hansa cakes, Hansa hotels, *Hansebrot* (bread), *Hansekaffee* (coffee), Hansa bier and so on.



Hansa-Trunk is a special liquor developed in Alte Hansestadt Lemgo, reportedly as a result of the town’s involvement in the Hansa. Worthy of particular mention is Het Hanze Huis (www.hethanzehuis.nl), which specialises in traditional Hansa food products and has a shop in the two Dutch Hanseatic cities of Zwolle and Groningen. The business describes itself as a modern Hanseatic trading company making direct references to the medieval Hanseatic League and the modern-day network on its website. The Hansa organisation, however, derives no economic benefit from this operation (the Hansa “brand” is not “owned” or copyrighted), but marketing and trading opportunities might also be pursued.

3.6.2 Hansa networks

The Hansa brand and the traditional networks between former Hanseatic towns have also formed the basis for a number of transnational projects which have been developed independently of the modern-day Hansa organisation. Of particular interest is an EU ERDF project, the Hanse Parliament (www.hanse-parlament.eu), which has sought to develop links between chambers of commerce and business support organisations in different cities (some of which are Hanseatic) in order to encourage transnational trading networks of SMEs. A number of EU INTERREG projects have also focused on the development of transnational links between Hanseatic towns,

including Hanse Passage (www.hanse-passage.net), a project designed to foster sustainable economic and social development in the 15 participating partner regions. However, these have been developed and supported through EU programmes without reference to, or linking with, the established Hansa network.

3.7 Hansa tourism

The importance attached to Hansa tourism by Hanseatic towns and cities depends on local circumstances. For some towns tourism is not an important part of the local economy, for others the Hansa heritage (and brand) may be one of many competing attractions, whilst for some it may be their main attraction. Our survey suggested that the Hansa theme was not a top attraction for any of the towns and cities that were members of the Hansa (see Table 2 below). Thus towns and their tourist offices differ in the extent to which they promote their Hansa heritage. Many do not refer to it at all on their website. This is particularly the case for larger towns and those with a range of competing attractions and histories. In such cases there is often an issue regarding competing brands, and decisions have to be made regarding which should have greater prominence.

A number of the Hanseatic towns have also been branded World Heritage sites. For example, Lübeck, Visby and Riga all have World Heritage status and the Hanseatic heritage is either seen as being part of this or not of such importance in comparison. Towns decide which image is likely to attract the most visitors. Smaller towns with limited alternative attractions tend to highlight the importance of their Hansa heritage more than larger towns which may have a range of competing sites and activities to offer visitors. Research and branding exercises conducted by Lübeck’s tourist office, for example, suggested that the close proximity of the Baltic Sea and its shipping, the pleasant surroundings and the town’s buildings, rather than its Hansa heritage, were the key reasons for tourists choosing to visit the town.

Likewise Riga has many “brands” and periods of heritage (Jewish Riga, World Heritage status), but is currently promoting the vibrant nature of the town under the theme of “LIVE Riga”. Similarly, in the larger towns, Hansa festivals have to compete with a range of other festivals or mega-events. Hansa Days have often been combined with European City of Culture events (for example, Bruges, Riga), or celebrations to mark a key anniversary in the town or city’s history (for example, 2 000 years of Neuss) and in such instances the Hansa events can be overshadowed by these higher profile themed festivals.

Table 2. Question: Which of the following most accurately describes the importance of the Hansa brand to your local tourism offering?

Response	Number of respondents (%)
It is our main tourism theme	0 (0%)
It is one of our top five tourism themes	25 (40.3%)
It is an important theme (but not in the top five)	21 (33.9%)
It is not really important to local tourism in our town/city	16 (25.8%)
Total	52 (100%)

Source: Cities Institute (2011), survey of Hansa towns and cities.

The Hanseatic tourism products that are offered tend to cater largely for day trippers and the short-break market. Several cities offer guided or self-guided walking tours around their town's medieval streets (for example, Emmerich am Rhein, Herford, Kalkar, King's Lynn, Riga). The town of Neuss offers wine tasting with its tour ("Neuss, der Wein und die Hanse").

A number of tourist offices and private tour operators offer short trips, particularly by sea to two or three Hanseatic towns. For example, Buxtehude offers a three-day all-inclusive tour visiting Buxtehude and towns along the River Elbe to Hamburg. Via Hansa, a leading inbound tour operator for the region with offices in cities across the Baltic, offers a range of cruises between Baltic ports. Whilst Lübeck, Hamburg and Bremen engage in joint marketing emphasising the ease of travel by car or train between these three key Hanseatic cities.

Despite numerous examples of regional tourism collaborations we found little or no evidence of joint products or joint marketing being developed through international collaborations between members of the Hansa – only private sector tour operators such as Via Hansa appear to offer this.

4. Discussion and conclusions

4.1. Organisational issues

This Cultural Route has achieved a significant impact and progress, particularly in terms of raising the profile of Hansa towns and cities and their common/shared cultural heritage, and in encouraging international collaboration amongst its members. What is particularly remarkable is that it has been able to sustain and indeed expand its activity quite considerably over recent years with minimal external investment, in contrast to many funded projects which cease to operate as soon as external funding ends (for example, ERDF). The tremendous amount of voluntary time which key members of the Hansa Council have devoted to championing the Hansa over a number of years has clearly played a key role in the Hansa's success. Whether this can be sustained without greater investment in central co-ordination and targeted intervention is questionable, however. The website is in urgent need of an overhaul and a contribution of just €30 per annum from members will not cover the cost of this.

We have noted above the issue of competing and diluting brands and the differing values attached to the Hansa brand by different countries. This has implications for the development and promotion of centrally organised Hansa-based tourism products.

A particular observation is that tourism is frequently not seen as the responsibility of local economic development departments or mainstream enterprise and inward investment and, as a result, this activity does not feature in local economic development strategies or intelligence gathering (namely, data). The contribution made by tourism to the local economy may be missed and understated in this situation. This is a fundamental and systematic public and market failure generally in this field. Whilst small businesses form an important part of the tourism system internationally (and in Europe, over 90% of all firms), they remain relatively under-researched. The impact of research on small firms in tourism has therefore been marginal to mainstream studies of small businesses.

As has recently been observed: "an interesting illustration is the manner in which many local authorities do not differentiate between SMEs and other businesses when looking at their absorptive capacity during an event to benefit from its hosting. When

the desired benefits are not reported by the SME sector, policy makers are often unable to explain why they have failed to operate in the same manner as much larger businesses that are networked, promote their products globally and view events as a key strategy to extend the season or to provide a short-term boost to their business” (Thomas, Shaw and Page 2011: 10). This is relevant to the Hansa network that has explicit relationships with large operators (for example, transport) but locally, small firm networks are harder to engage with and identify as beneficiaries.

4.2 Influential models for the future

The Hansa provides some examples of good practice which may be transferable to other Cultural Routes and culture/heritage-based destination marketing programmes:

- the Hansa Day illustrates how festivals can be an excellent means of achieving many of the aims and objectives of the European Cultural Routes programme. They can encourage widespread community participation in cultural activities, and raise awareness of a common cultural heritage. From an economic point of view, they can also provide markets for small business products and contribute to increasing the profile and tourism revenues of a town – particularly, where the tourism offer is limited. Where festivals are organised as a transnational event, as in the case of annual Hansa Days, they can also foster transnational collaboration and innovation. High profile international events such as this also encourage towns to invest in major cultural products;
- the Hansa’s work with Air Baltic (and potentially with ferry operators) could help boost tourism in the region. The evidence from elsewhere (Donzelli 2010) has shown that the arrival of low-cost carriers to an area can have a major impact on local and regional economic development; spreading tourist demand during the year, increasing the rate of international tourism, generating new jobs and improving the income of the area;
- the example of the Westphalian Hansebund demonstrates the value of developing regional groupings of towns within the wider Cultural Route network. These can help promote regional co-operation, raise the profile of the Route and are a far more resource efficient way for smaller towns to get involved in the network;
- the promotion of small clusters of towns, such as Lübeck, Hamburg and Bremen have done, offers tourists manageable “bite-sized tasters” of the network as a whole and is particularly suitable for the growing short-break tourism market;
- the Hansa shop, Het Hanze Huis (www.hethanzehuis.nl), provides an excellent example of how a private sector business has been able to both exploit and promote the heritage of the Hansa.

4.3 Impact assessment of Cultural Route activities

To date, the impact of the Hansa can be seen largely through the increased prominence given to Hanseatic heritage by many towns within the network, and the greater degree of dialogue and collaboration between them. Our research has suggested that the Hansa is also having a positive impact on small business innovation and competitiveness, which can be expected to lead to business and employment growth. However, since this has only recently become a major agenda item for the Hansa, the impact of its cultural activities – in particular the Hansa Day – has not been evaluated. It is therefore very difficult to quantify the value of this activity. By taking

an example of visitor numbers and spend from one town, we have attempted to measure the short-term economic gains from the Hansa Day. However, measuring the longer term impacts of this and the Hansa's other activities is not feasible, and would require more detailed visitor and business surveys. This is now planned in several Hansa cities, and together with the results of a three-year study commissioned in Munster (Business Region Hanse 2010) will provide the first assessment of the economic impact of the network and its participating members' activities.

5. Recommendations

- The central infrastructure of the Hansa needs to be strengthened. As a very minimum the current staff vacancy in the Hansa office needs to be filled, but thought needs to be given to increasing the staffing complement, although it is recognised that this may be difficult in the current economic climate. However, in so doing care needs to be taken to ensure that building the central management structure does not stifle innovation at the regional and local level.
- The website needs to be totally overhauled and links updated and extended. Less than 50% of member cities provide e-mail links and there is not a direct link to e-commerce opportunities. Members need to be consulted regarding the extent to which they are willing to contribute towards the cost of this. Options include private sector sponsorship and/or increased annual subscriptions from members.
- If the central infrastructure and website is developed this would offer scope for providing a single access point for Hansa tourism products – initially linking to other providers (who might also be willing to buy advertising space on the website), and later offering sales of its own products via the site.
- The annual Hansa Day attracts some corporate sponsorship, but as the event has grown there may well be scope for increasing this and also approaching local hotels and restaurants who clearly benefit from the increased trade the event brings.
- Towns will be better able to justify their involvement in the Hansa if its impact on tourism and small business development can be quantified. We suggest that the development of a basic economic impact assessment tool be commissioned which could be used by each town and city hosting a local or international Hansa Day. This should incorporate a brief business and visitor survey designed to measure the economic benefit of the event. Such a tool could be piloted at this year's annual Hansa Day to be held in Kaunas from 19-22 May.
- The Hansa brand is well established and the Hansa could build on the work already developed by many towns in encouraging small businesses to develop new products using the brand and exploiting the potential for offering traditional products (food, handicrafts, etc.). The example of the Het Hanze Huis could be replicated in similar formats in many other areas. Training workshops and business advice could be offered to encourage small business to explore these possibilities. A tie-in with Hansa cultural attractions should be sought wherever possible.
- Whilst there is historical literature on the heritage and architecture of the Hansa towns and cities (for example, Council of Europe 1994) , there is no contemporary travel guide that links and celebrates the network and how visitors might view this as a genuine Route, and over time visit successive Hansa destinations. This may be of interest both to travel guide publishers and sponsors.

- The potential for greater regional co-operation between smaller clusters of towns and tourist attractions should be explored, building on the successful model of the Westphalian Hansebund. Similarly, the potential for tourism collaboration across state boundaries linking clusters of Hanseatic towns in close proximity could be explored.
- There are numerous possibilities for Hanseatic-themed tours, focusing on particular aspects of Hansa heritage – for example, museum tours, churches, cookery workshops and culinary tours, as well as the popular Hansa myths and stories. The proposed bike tours offer an excellent example of a new tourism product that could be developed between networks of Hansa towns within individual regions or across state boundaries.
- Greater co-ordination at EU level on support for projects under the ERDF and other programmes should consider existing regional networks (see 3.5.2), cultural and economic development activities such as the Hansa (and other Routes) to facilitate knowledge exchange, opportunities for collaboration, and to avoid duplication (for example, Baltic region INTERREG).

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7. Sources of additional information

Websites

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www.hansebund.org – website of the Westphalian Hansa Association

www.hanse.org/en/the_hansa/youthhansa – website of Youth Hansa

www.hanse-pasage.net – website of INTERREG 11C project Hanse Passage

www.hanse-parlament.eu – website of the ERDF project

www.hanse-in-europa.de/en/home – Hanse Park, Sierksdorf/Ostsee bie Lübeck

www.viahansa.com

www.hethanzehuis.nl

www.hanse-parlament.eu

www.hm.lv/en – Hanza Maiznica (Hansa Bakery Ltd)

www.hanzasvinagalerija.lv – Hanza Vinu Galerija (wine merchant)

8. Appendices

Appendix 1. Methodology

The Hansa includes a widely dispersed network of 176 towns spread across 16 countries surrounding the Baltic region. The methodology, as planned, was designed to capture as much data as possible from the towns within the network, but also in sufficient depth to allow for the widespread differences between the different states to be understood, and all within the very tight time frame and resources available. It included the following elements:

- A brief literary review of documents concerning the Hansa. Most texts have dealt with the history of the Hansa, few reports cover the work of the modern-day Hanseatic League. Only one brief summary of the Hansa and a booklet highlighting its historical importance and featuring the key towns was available from the European Institute of Cultural Routes. Other material on tourism trends and strategies and Hansa activities was sourced via interviews and Internet searches.
- Meetings and interviews with the key members of the Hansa Council, including the President of the Hansa (the Mayor of Lübeck) and the vice-president (the representative for Visby). These provided a useful overview of the management of the Hansa, its key activities and future plans. The meetings were held in Lübeck where the office of the Hansa is based.
- An online survey of all 176 Hanseatic towns that are members of the Hanseatic League. Over 250 respondents from among these towns and cities were contacted. This survey was designed to capture data on motives for joining the Hansa, the impact of the Hansa Days, the importance of the Hansa brand to business and tourism, and the impact of the league’s activities on small business

development and innovation. (see Appendix 3). The survey was designed to be completed in less than five minutes to encourage a good response rate. A link to the survey together with an e-mail explaining its importance was sent out to all the towns by the Vice-President of the Hansa.

- A total of 63 towns, from 12 states completed the survey (as of 1 April), giving a response rate of 35.8% of all towns. A list of towns that responded is given in Appendix 2 below. Further responses will be incorporated in our final report.
- Five case study towns were selected for more detailed analysis. These included Herford (Germany), Lübeck (Germany), Tartu (Latvia), Veliky Novgorod (Russian Federation) and Visby (Sweden). Telephone communications were also held in Riga, Latvia. More detailed interviews were held with representatives from these towns' economic development and/or tourism officials in person (Lübeck and Visby) or by phone (Herford, Tartu and Riga) and e-mail (Veliky Novgorod). These interviews gathered more data on local tourism trends and strategies, work with SMEs, Hansa activities and their impact on the development of new cultural products and small business innovation and development.
- Internet searches were undertaken to identify Hansa-branded businesses and products within the Baltic regions, and projects which might relate to the work of the Hanseatic League and these were followed up by e-mail to obtain further details. A review of the Hansa's own website (www.hansa.org) and the tourism websites of the case study cities and others was undertaken to identify if and how the Hansa and Hanseatic heritage was portrayed.

Appendix 2. Towns and cities surveyed and interviewed

Belgium

Bruges

United Kingdom

King's Lynn

Estonia

Tartu*

Viljandi

France

La Rochelle

Germany

Ahlen

Alte Hansestadt Lemgo

Anklam

Attendorn

Bockenem

Brakel

Brandenburg

Braunschweig

Brilon

Buxtehude

Dortmund

Emmerich am Rhein

Greifswald

Halle (Saale)

Haltern am See

Hamm

Herford*

Hildesheim

Höxter

Kalkar

Kiel

Lübeck*

Lüneburg

Muehlhausen

Neuenrade

Neuss

Perleberg

Pritzwalk

Quedlinburg

Rheda-Wiedenbrueck

Rheine

Rostock
Rüthen
Salzwedel
Stendal
Stralsund
Tangermünde
Uelzen
Warendorf

Iceland
Hafnarfjörður

Latvia
Cēsis
Kuldīga
Rīga*
Valmiera

Lithuania
Kaunas

Netherlands
Doesburg
Harderwijk
Kamen
Ommen
Zwolle

Poland
Gdansk
Słubice

Russian Federation
Kaliningrad
Veliky Novgorod*
Velikiy Ustyug
Vologda

Sweden
Kalmar
Visby*

* also interviewed

Appendix 3. Online survey questionnaire with quantitative results

Hansa towns and cities survey

A1. What is the name of your town or city

63 (100.0%)

This survey is designed to collect information about the impact of your town or city's involvement in the modern-day Hanseatic League. The study is particularly focusing on the impact the Hanseatic League has had on tourism and business competitiveness and innovation, as well as the potential it offers for the development of this in the future. If you would like a copy of the final report you can add your contact details at the end of the survey.

A2. Why did you decide to join Die Hanse? (please tick all that apply)

55 (91.7%) To network with other Hansa towns

46 (76.7%) To raise the profile of our town or city

38 (63.3%) To emphasise the importance of our common Hansa heritage

42 (70.0%) To seek new market opportunities (for business and tourism) with other Hansa towns

28 (46.7%) To show regional solidarity

Other: please specify

2 (100.0%)

B. The impact of hosting the annual Hansa Day and Hansa Convention (*Der Hansetag*)

The questions in this section all relate to your hosting of the annual Hansa Day/Hansa Convention in your town/city

B1. Has your town/city ever hosted the annual Hansa Day and Convention?(namely, the event for all the Hansa cities and towns)

18 (29.0%) Yes

44 (71.0%) No

B2. In which year did you host the annual Hansa Day ?

17 (100.0%)

B3. How many visitors came to the town for the Hansa Day?

13 (100.0%)

B4. What benefits have resulted from your hosting the Hansa Day? (please tick all that apply)

13 (76.5%) It has raised the profile of our town/city

8 (47.1%) It has led to an increase in visitor numbers

14 (82.4%) It has raised awareness about our common Hansa heritage

5 (29.4%) It has led to a greater number of international links

6 (35.3%) It has had a positive impact on local business sales

4 (23.5%) It has led to increased trade with other Hanseatic cities and towns

Other: please specify

3 (100.0%)

C. The impact of participating in the Hansa Day (*Der Hansetag*) held in another city or town

The questions in this section all relate to your participation in the annual Hansa Day/Convention hosted by another city or town

C1. Has your town/city ever participated in the annual Hansa Day/Convention in other towns or cities? (that is, the event for all the Hansa cities and towns)

58 (93.5%)

Yes

4 (6.5%)

No

C2. What benefits have resulted from your participating in the Hansa Day? (please tick all that apply)

46 (85.2%) It has raised the profile of our town/city

24 (44.4%) It has led to an increase in visitor numbers to our town/city

39 (72.2%) It has raised awareness about our common Hansa heritage

26 (48.1%) It has led to a greater number of international links

11 (20.4%) It has had a positive impact on our business sales

12 (22.2%) It has led to increased exchange and/or trade with other Hanseatic cities and towns

Other: please specify

3 (100.0%)

D. The impact of your own (local) Hansa Day (*Tag der Internationaler Hanse*)

The questions in this section all relate to the Hansa Day/*Tag der Internationaler Hanse* celebrated in your own town/city

D1. Has your town/city ever held its own (local) Hansa Day?

28 (45.2%)

Yes

34 (54.8%)

No

D2. What benefits have resulted from your holding a (local) Hansa Day? (please tick all that apply)

20 (74.1%) It has raised the profile of our town/city

16 (59.3%) It has led to an increase in visitor numbers to our town/city

22 (81.5%) It has raised awareness about our Hansa heritage

9 (33.3%) It has had a positive impact on our business sales

Other: please specify

3 (100.0%)

E. The importance of the Hansa brand to business and tourism

E1. Which of the following most accurately describes the importance of the Hansa brand to your local tourism offering?

0 (0.0%) It is our main tourism theme

25 (40.3%) It is one of our top five tourism themes

21 (33.9%) It is an important theme (but not in the top five)

16 (25.8%) It is not really important to local tourism in our town/city

Other: please specify

3 (100.0%)

E2. Do any businesses or attractions in your town/city use the Hansa brand as part of the branding for their products?
 25 (41.0%) Yes
 36 (59.0%) No

E3. Please can you provide some details of what type of businesses these are and how they have used the Hansa brand
 23 (100.0%)

F. Impact on small business development and innovation

F1. Has the involvement of your town/city in the Hansa League led to the development of new cultural or other products featuring the Hansa? (e.g., museums, exhibitions, cultural events, products, e.g. food, crafts, etc.)
 31 (51.7%) Yes
 29 (48.3%) No

F2. Can you provide some details of this/these new cultural products
 32 (100.0%)

F3. Has the involvement of your town/city in the Hansa League resulted in local businesses developing new products or partnerships?
 13 (21.7%) Yes
 47 (78.3%) No

F4. Can you provide some details of this/these
 10 (100.0%)

G. Additional information

G1. Do you have any of the following information that might help our study and which you could send to us? (please tick all that apply)

10 (47.6%)	Tourism strategies which include a reference to the Hansa
12 (57.1%)	Tourism marketing leaflets which include a reference to the Hansa
8 (38.1%)	Any reports or evaluations of Hansa Days and other Hansa events
9 (42.9%)	Details of any future plans you have for developing the economic potential of the Hansa

Routes of the Legacy of al-Andalus

1. The Legacy of al-Andalus Foundation



Fundación

El legado andalusí

The Legacy of al-Andalus is a foundation created in 1995 by the Government of the Spanish autonomous community of Andalusia (Junta de Andalucía), with special participation from the Andalusian Ministry of Tourism, Commerce and Sport, and the Andalusian Ministry of Culture. The honorary president is HRH King Juan Carlos I and the executive president is José Antonio Griñán Martínez, President of the Government of Andalusia. The Spanish Government also participates in the foundation through its Ministry of Culture, Ministry of Foreign Affairs and Co-operation, and the Spanish Agency of International Co-operation for Development (AECID). Among other institutions, it is supported by the Council of Europe, UNESCO and ALESCO. As regards the foundation's interest in SMEs, the President of the Confederación de Empresarios de Andalucía (the Andalusian Businessmen's Confederation) is listed as a patron.

The objectives set by the Legacy of al-Andalus Foundation are based on the reassessment and dissemination of Spanish-Muslim civilisation by means of its art, culture and historical and social relationships with the Arab world, the Mediterranean region and Latin America. These aims are implemented by actions focused on spreading awareness of the historic role that Spain and Andalusia have played as a cultural bridge between east and west and Latin America, as a result of their shared history, which can contribute to our understanding of other cultures and helps achieve a more human world and one of solidarity. The action in progress to achieve these objectives includes the promotion of cultural and rural tourism, traditional arts and the protection and restoration of our vast heritage of monuments and art. All these aspects can be found in the Routes of the Legacy of al-Andalus. These are historical and traditional routes which have been journeyed upon by historic travellers. These will increase the number of tourist activities available in inland Andalusia.

The foundation's headquarters are located in the al-Andalus Science Pavilion in the Granada Science Park thanks to a co-operation agreement signed in September 2003. Its facilities are an interactive museum of over 70 000 square metres located a few minutes from the historic city centre of Granada. This complex is the most visited museum in Andalusia, with more than 500 000 visitors annually. The al-Andalus Science Pavilion

is a section of this important complex that explains the scientific legacy of al-Andalus. It is also a fantastic site to promote al-Andalus' Cultural Routes and Itineraries.

Reasons for highlighting this case are the importance and relevance of al-Andalus' Cultural Itineraries and Routes as a way of promoting intercultural dialogue. In this sense, the Legacy of al-Andalus Foundation has, since it was created, developed an important programme centred on cultural, educational and sustainable tourism activities. It promotes three transnational Cultural Itineraries, nine Cultural Routes associated with al-Andalus heritage in the Iberian Peninsula and a heritage city tour in Granada.

In this project, the following countries participate: three EU/Council of Europe member countries and 30 non-members from the list of 70 countries involved in the European Cultural Routes programme. It is ranked as number 4 in the study of SMEs/NPOs associated with the European Cultural Routes, with 100 collaborators, after the Phoenicians' Route (867), European Mozart Ways (162) and the Santiago De Compostela Pilgrim Routes in Spain (144) managed by the Consejo Jacobeo (St James' Council).

2. Cultural Itineraries and Routes of the Legacy of al-Andalus

The Legacy of al-Andalus Foundation aims to contribute towards the structuring of intercultural co-operation and dialogue in the Mediterranean by means of the concept of transnational Cultural Itineraries and by the creation and promotion of the Routes of Al-Andalus in the Iberian Peninsula.

The Cultural Itineraries and Routes of al-Andalus are managed by the Legacy of al-Andalus Foundation. The objectives of this organisation are focused on the presentation and dissemination of Hispano-Muslim civilisation through its historical and cultural expressions and the historical and social relations between the Arab world, the Mediterranean area and Latin America. The Tourism Unit is co-ordinating the Cultural Itineraries and the Routes of al-Andalus with the collaboration of the International Activities Unit for the Cultural Itineraries in the Mediterranean and Middle East, and the External Project Unit in the case of the Cultural Itinerary of the Mudejar and the Baroque in Latin America.

In the case of transnational Cultural Itineraries, public and private institutions, universities and NGOs are occasionally involved in the activities organised by the Legacy of al-Andalus Foundation. It is called the Framework of Cultural Itineraries Collaboration programme.

Cultural Itineraries and Routes are one of its major programmes with actions to promote cultural and rural tourism, traditional arts and the protection and restoration of cultural heritage, articulating a supply of cultural and educational tourism and creating cultural corridors between major Andalusian tourist destinations to promote small and medium towns.

This initiative was declared a Cultural Route of the Council of Europe in 1997 and a Great European Cultural Route in 2004 due to "the importance of the Routes of al-Andalus in terms of co-operation, employment for young people, cross-border initiatives and intercultural dialogue".

2.1 Transnational Cultural Routes

The transnational Cultural Routes help to spread this common heritage and history that contribute towards establishing links in joining different countries together. At the moment there are three proposals: the Cultural Itinerary of Almoravids and Almohads, the Cultural Itinerary of the Umayyads and the Cultural Itinerary of the Mudejar and the Baroque (see Table 1).

- The Cultural Itinerary of the Almoravids and Almohads includes the paths followed by these two African dynasties, which, between the 11th and 13th centuries created an empire that stretched from Senegal, Mauritania, Mali, the Maghreb and the Iberian Peninsula to the mouth of the Ebro River. The map of the geographer al-Idrisi in the 12th century traced two paths from Marrakesh, the capital of the Almoravids and Almohad empires. First, the Almoravids Route extends from the Atlas Mountains in Agmat-Urika or Marrakesh, traverses the Tadla, goes to Meknès and Fez to reach the ports of Ceuta, Qsar Seguir and Tangier. From this point the Route continues from Algeciras along the Routes of al-Andalus. This path follows the commercial caravan routes that linked sub-Saharan Africa to the Mediterranean Sea through Sijilmasa.
- The Cultural Itinerary of the Umayyads is the path from the cities of Mecca and Medina followed by Arab civilisation from the Middle East, the Mediterranean and North Africa to reach al-Andalus, culminating in the creation of the Umayyad Caliphate of Cordoba, heir to the Caliphate of Damascus.
- The Cultural Itinerary of the Mudejar and the Baroque traces a path focused on monuments and works that testify to the presence of the Muslim influence in Latin America and the Caribbean through artistic expressions.

The Routes of al-Andalus

The Legacy of al-Andalus Foundation aims to spread and strengthen historical, cultural and rural resources by promoting the Routes of al-Andalus, which run throughout the Iberian Peninsula. This is a tourist-based project with historical unity and cultural content, taking al-Andalus as its common denominator.

The Routes of al-Andalus all finish up in Granada and are based on various Routes that were historically used. They promote the historical heritage and the current cultural and artistic manifestations of all these places. In this sense, there are nine tourist routes (Route of the Caliphate, Route of Washington Irving, Route of Nasrides, Route of the Almoravids and Almohads, Route of the Alpujarras, Route of Ibn al-Khatib, Route of al-Idrisi, Route of al-Mutamid and Route of Münzer) and one heritage city tour in Granada (see Map 1 and Table 2).

3. Principal impact of Cultural Routes of al-Andalus

For the Routes' implementation, various activities have been initiated:

- collaboration agreements with town councils. The brand of the Routes of al-Andalus has significant value. Destinations can gain value from this image and can promote visits to small and medium-sized towns between the main Andalusian tourist cities;

- setting-up of databases: heritage, tourism infrastructure and attractions;
- signposting. The Routes of al-Andalus are properly indicated by a signposting system displaying practical information on the Itineraries.

At present, there are signposts and landmarks all over the different Routes, for example: Route of the Caliphate (189), Route of Washington Irving (186), Route of Nasrides (215) and Route of the Almoravids and Almohads (380);



- the establishment of information points in each town (see Table 2). At the moment there are four Routes with a total number of 113 information points. The Routes of al-Andalus provide a complete network of information points on: the Route of the Caliphate (25), the Route of Washington Irving (26), the Route of Nasrides (32) and the Route of the Almoravids and Almohads (30);
- publication of tourist material: guides, brochures, posters, etc;
- cataloguing of heritage and tourist infrastructure;
- networking with partners and collaborators of the al-Andalus Routes (including SMEs).

Statistics are only available for the educational Routes and the tour groups from the Costa del Sol to Granada managed by TUI, one of Spain's most important tour operators.

Educational Routes – Andalusian Ministry of Education

- School year 2007-08
 - one-day Routes: 5 760 students + 480 teachers
 - five-day Routes: 480 students + 40 teachers
- School year 2008-09
 - one-day Routes: 5 760 students + 480 teachers
 - five-day Routes: 168 students + 14 teachers
- School year 2009-10
 - one-day Routes: 5 760 students + 480 teachers
 - five-day Routes: 168 students + 14 teachers

Routes of al-Andalus – tour groups managed by the tour operator TUI (see Table 3)

- First semester of 2009
5 324 people
- Second semester of 2009
2 569 people
- First semester of 2010
7 157 people

4. Sources of funding

The Legacy of al-Andalus Foundation is a public institution and is financed with public money, except for specific actions for which it obtains some financing from sponsors and donors. For tourist-related activities it receives funding from the Ministry of Tourism of the Government of Andalusia. For cultural activities, the funds come from the Ministry of Culture of the Government of Andalusia.

The Andalusian Ministry of Education also promotes the Routes among students and more than 6 000 participate.

There are other organisations which contribute to the promotion of the Routes of Al-Andalus. It is important to emphasise the role of TURESPAÑA, the Spanish national tourist board.

The European Commission also provides one of the most important sources of funding. In this manner the Legacy of al-Andalus Foundation has taken part in several projects, some of them related to cultural tourism and the development of sustainable tourism (see Table 4).

The project also has private sponsors such as Telefónica, Ferrovial, CajaGranada, CajaSur, Confederación de Empresarios de Andalucía, Fundación Francisco Carvajal and Fundación Lara. Other sponsors have collaborated in specific exhibitions at different times.

It was very important to establish contracts and a joint programme with tour operators. There is an agreement with Turismo Andaluz and the Patronato Provincial de Turismo de Granada to promote tourist packages of the Routes of al-Andalus and the Granada Science Park (which includes the al-Andalus Science Pavilion) in the tourist office networks of Viajes El Corte Inglés and Halcón Viajes.

There is also an agreement between the Legacy of al-Andalus Foundation and the Spanish tour operator TUI España SA, to promote international visits to Malaga and the Costa del Sol from tourists from Germany, France, Belgium, the Netherlands and the Nordic countries. Tourists from the Arab world only come from Lebanon.

As regards SMEs associated with the Routes, an agreement was signed in July 2007 with Otros Caminos, a travel agency specialised in cycling and trekking, for the implementation and preservation of the Route of the Caliphate. It is important to note that this enterprise now has 25% of its clients interested in this Route.

5. Co-ordination with heritage labels

- UNESCO. From 1995, this international organisation has supported the al-Andalus Routes as one of the Routes of Dialogue programme, although it is now considered a former project. This action formed part of the global framework of an Alliance of Civilizations launched by the United Nations. More specifically, it was dealt with within the larger framework of intercultural dialogue, which also encompasses inter-religious dialogue. UNESCO will continue to exercise its influence by highlighting the role that can be played by culture in conflict or post-conflict situations as a vehicle for reconciliation through cultural heritage and as common spaces for exchange via its Routes of Dialogue programme.

In relation to World Heritage sites, there is a co-operation agreement with the Patronato de la Alhambra y el Generalife (Alhambra Trust) signed in July 2005 to organise joint cultural activities that, on the one hand, include the staging of concerts and the joint organisation of musical projects related to the Spanish-Muslim musical legacy and the Arab world. On the other hand, it includes the design and presentation of exhibition topics to fulfil scientific and cultural objectives of common interest, involving the organisation of international conferences and meetings. It also collaborates in specific projects designed for children and groups of adults, promoting the exchange of information, documentation and cultural consultancy amongst specialists in the field of communication, the academic world and other social groups that promote relations between Spain and the Maghreb countries.

During the exhibition “The Splendour of the Cordovan Umayyads”, in 2001, a collaboration agreement with Madinat al-Zahra was signed. In 2006, a similar agreement was concluded with the Real Alcazar of Seville for the exhibition “Ibn Khaldun. The Mediterranean in the fourteenth century”. After these two events, the only activity carried out was the arrangement for free entrance for educational visitors.

With regard to Elche (Valencia) and Aragon, featuring respectively, the Palm area and Mudejar art, both listed as UNESCO World Heritage sites, they are part of the Cultural Route of the Almoravids and Almohads although they have not maintained an active relationship.

- Council of Europe Cultural Routes. In 2005, the European Institute of Cultural Routes created the European Group for Economic Concern (GEIE) "Culture-Routes Europe". The Legacy of al-Andalus Foundation is one of the founding members alongside other organisations such as the Associazione dei Comuni Italiani sulla Via Francigena, Associazione "Rotta dei Fenici" (Phoenicians' Route) and the European Route of Jewish Heritage. The GEIE was created with the aim of establishing a new supply of cultural tourism based on a coherent image of Europe as a tourist destination, but the initiative generated little economic impact at the time.

6. Impact of the Routes of al-Andalus on SMEs

After a prior analysis of the main SMEs involved in the development of the Routes of al-Andalus, an online and telephone survey was carried out of SMEs from different economic sectors.

Most of the enterprises analysed are strongly related to tourism, in the form of accommodation facilities, restaurants, travel agencies or handicraft producers/shops. About 100 SMEs were selected for the study and at the time of writing half of them have responded.

The main results of the survey can be summarised as follows:

- SME geographical location. Some 86% of the analysed SMEs are located in a single province of Andalusia. Only 14% can be found in more than one province of Andalusia. Only one has branches in other Spanish autonomous communities;
- SME staff. The study shows that the number of staff per SME varies widely. The numbers range from one to 40 people. The average is approximately 12 employees. SMEs with more workers are hotel facilities;
- SME annual invoicing. Annual gross turnover of the analysed SMEs differs widely. The range is between €60 000 to €1 500 000. The average is about €400 000. The biggest SMEs are hotels. More than 50% of SMEs surveyed did not answer this question;
- SMEs' connection with the Routes of al-Andalus. All SMEs who responded to the survey stated that their relationship with the Routes of al-Andalus is a sort of collaboration. Within this framework of collaboration, SMEs provide information (brochures, etc.) to customers. Some of them are especially interesting because they are placed in historical buildings related to the al-Andalus Routes, mainly in lodgings and restaurants;
- length of time of collaboration with the al-Andalus Routes. Most of the SMEs interviewed have only recently started collaborating with the Legacy of al-Andalus Foundation. Almost 90% said this collaboration started in 2008 or later, whilst only one SME started collaborating before the year 2000;
- economic benefits of the collaboration with the Routes of al-Andalus. The annual gross turnover directly related to the Routes of al-Andalus is currently considered to be very low. Some of the SMEs surveyed responded that the amount is about 0% of global turnover. This was reported especially by SMEs who had recently been incorporated into al-Andalus Route activities. The Routes have had an economic impact of less than 5% of gross turnover in the case of 80% of the SMEs interviewed. A very small number of groups of SMEs – specialised travel agencies – said that the amount is around 25% of final turnover;
- impact on business activity. About 60% of the SMEs responded that collaboration with the Routes of al-Andalus had improved their business activity, while 40% said that the impact is irrelevant. When considering replies to both the previous question and the present one, it is obvious that an important number of SMEs consider that belonging to the Routes of al-Andalus provides benefits although many of them do not derive economic gain;
- inclusion in tourist packages. When SMEs were asked about their inclusion in tourist packages, approximately 70% of them (hotels and restaurants) said that they are included in these while 30% responded that at the moment they are not

included in any tourist package. Once more, the most recently incorporated SMEs were those not included in tourist tours and packages, as they had just started to collaborate;

- customers profile. Some 93% of SMEs said that their main customers/users are national tourists. Second place is occupied by international tourists (this being the case for 60% of SMEs). Some 13% of the SMEs said that they work with elderly groups (a Spanish programme called Imserso). Finally, only 7% of SMEs receive groups of schoolchildren or students;
- customers interested in the Routes of al-Andalus. When SMEs were asked about their customers' interest in the Routes of al-Andalus, 50% of them did not respond or said that they did not know. The rest of the SMEs said that only between 1% and 10% of their clients are interested in the al-Andalus Routes. It is therefore possible that most of the SMEs do not carry out any studies of their users/public;
- staff training in relationship with the Routes of al-Andalus. Only 15% of the interviewed SMEs said that some of their staff had had specific training with regard to the Routes. The remaining 85% answered that their staff had not received any training related to this. The larger hotels are the SMEs who have provided staff training;
- use of the brand or logo of the Routes of al-Andalus. Most of the SMEs (70%) said that they regularly use the brand or logo of the Routes of al-Andalus in their business activity. The remaining 30% who do not use the brand or logo are the recently incorporated SMEs. The brand includes a reference to the European Cultural Routes promoted by the Council of Europe;
- providing information about other SMEs related to the Routes of al-Andalus. Some 53% of the SMEs stated they provide information to their customers about other SMEs linked to the al-Andalus Routes. However, the remaining 47% did not provide any information to their clients related to this;
- al-Andalus Routes membership and competitive advantage. Most of the surveyed SMEs (90%) consider that their relationship with the Routes of al-Andalus is of competitive advantage to them compared to other SMEs not included in activities associated with the Routes. The remaining 10% considered this an irrelevant factor. Once again, it is important to note that these SMEs are those that have joined the scheme most recently;
- ICT used by the SMEs. All the surveyed SMEs use ICT tools for their business activities. The most frequently used ICT tool is the SME's own website (100%) followed by promotional websites for cities, provinces and regions. About 60% of the SMEs use other Internet tools like blogs and social networks (Facebook, Twitter, etc.). Finally, about 55% of SMEs work with private websites related to travel and leisure (TripAdvisor, etc.).

Comments and suggestions

The main comments made by SMEs included: the need to improve global promotion and marketing systems, to provide more information on other SMEs recommended by the Routes of al-Andalus and to improve co-operation among stakeholders. Other handicaps are related to infrastructure, such as signposting or the maintenance of pathways.

7. Levels of co-operation, partnerships and networking with and between SMEs

Local development is one of the main objectives of the Routes of al-Andalus and the participation of SMEs is essential. In any case, the active role of SMEs is recent. In the publications of three of the most developed Routes (the Route of the Caliphate, the Route of Washington Irving and the Route of the Almoravids and Almohads) there is a list of accommodation, restaurants, and craft and handicrafts shops and workshops in the destinations associated with the Routes.



At present there are hundreds of associates, mainly hotels, restaurants, tourism companies and tourist reception centres involved as partners. They use the brand and the symbol of the Legacy of al-Andalus Foundation, which identifies them as collaborators. A reference to the European Cultural Routes programme is also included.

The two main actions that benefit SMEs are their presence as a collaborating institution on the Routes of al-Andalus website, with a short description and links to the SME website, as well as dedicated theme weekends in towns along the Route. On the last weekend of February 2011, coinciding with the feast day of Andalusia, Archidona (Malaga), a town that is on the Route of Washington Irving, was the guest municipality in charge of providing colourful, festive culture to the al-Andalus Science Pavilion and the Granada Science Park. There were more than 7 000 visitors who came during the three-day exhibition and had the opportunity to experience the rich heritage, and culinary and tourism activities offered by the Municipality of Archidona. These promotional activities are very important for SMEs involved in the Routes.

Another important action was the creation in 2009 of the card "Friends of the Legacy of al-Andalus Foundation", which is free for those interested. This initiative aims to facilitate the participation of the cardholder in the activities organised by the foundation, with the aim of raising awareness of Hispano-Muslim civilisation, its art, its monuments and the historical and social relations with the Arab world and the Maghreb.



It also has the objective of promoting the al-Andalus Routes and the towns associated with them. Cardholders will benefit from a 10% discount in associated Route establishments.

In this sense, agreements with the Federación Provincial de Empresas de Hostelería y Turismo de Granada (Federation of Hotel Management and Tourism Companies of Granada) signed in June 2008 open the way for active collaboration with the SMEs associated with the Routes of al-Andalus in the province, as illustrated by our analysis of the research results from the online and telephone survey.

8. New marketing activities and platforms

Publications (guides, brochures, magazines, etc.) and the Internet are the two most important tools for the promotion of the Cultural Itineraries and Routes of al-Andalus.

Since 2005 there are guides, cycling routes, brochures and promotional videos for the four implemented Routes of al-Andalus: the Route of the Caliphate, the Route of Washington Irving, the Route of Nasrides, and the Route of the Almoravids and Almohads. In September 2005, an agreement was made with Morocco's Ministry of Tourism for the publication of the guide to the Cultural Itinerary of the Almoravids and Almohads published in French and Spanish. The last guide published corresponds to this Route in Portuguese and Spanish.

There are two important travel guidebooks published in Spain about the Routes of al-Andalus. One published by País-Aguilar, *Rutas de El Legado Andalusi*, with a new version in Spanish and old editions in English, French and German. The other is *Andalucía andalusí*, edited by Anaya in its collection Guías TresD, available only in Spanish. In 2005, Conde Nast Traveller published a special monographic issue about the Routes of the Legacy of al-Andalus.

Official websites of the Legacy of al-Andalus Foundation are in the process of being updated. At the moment there are four main websites: the institutional website (www.legadoandalusi.es), the website to promote the thematic al-Andalus Science Pavilion (www.alandalusylaciencia.es), the website to promote the Cultural Itineraries and Routes (www.rutas.legadoandalusi.es), the press website (<http://prensa.legadoandalusi.es>) and the bookshop (www.librerialegadoandalusi.es). All of these websites are in Spanish only. On the website related to Cultural Itineraries and Routes there are interactive maps with links to the SMEs involved in the Route with the status of its collaborators.

Our analysis of the website www.legadoandalusi.es shows that it is ranked at number 2 658 859 in the world according to the three-month Alexa traffic rankings. The website belongs to the education category. Approximately 50% of visits to the website are bounces (one page view only). We estimate that 66.4% of visitors to [legadoandalusi.es](http://www.legadoandalusi.es) come from Spain, where it has attained a traffic ranking of 79 274. The fraction of visits to the website referred by search engines is roughly 36%. The website is linked to 263 sites. Google.es is the main search engine used by Internet searchers. The top queries driving traffic to [legadoandalusi.es](http://www.legadoandalusi.es) from search engines are “legado andalusí” (32.54%), el “legado andalusí” (3.42%), “fundación del legado andalusí” (2.11%). The search queries in relation to Cultural Routes are only associated with “itinerario del barroco” (0.43%), “ruta nazaries”, “ruta de Washington Irving” or “aires de al andalus”. Based on Internet profiles, [legadoandalusi.es](http://www.legadoandalusi.es) is visited more frequently by childless female graduates between the ages of 35 and 44, who browse from home.

The Granada Tourist Board website (www.turgranada.es) offers information on six Routes in English, French, German, Italian and Spanish. They include the Route of the

Caliphate, the Route of Washington Irving, the Route of Nasrides and the Route of the Almoravids and Almohads, the Route of Alpujarras and also the Route of Münzer.

The Andalusia Tourist Board website (www.andalucia.org) gives detailed information about the four main Routes, with interactive maps and links to SMEs involved in the Route.

The TURESPAÑA website (www.spain.info) offers information on the four Routes included in the area of “Great routes” with information in 12 languages: Chinese, Danish, Dutch, English, Finnish, French, German, Italian, Japanese, Korean, Norwegian, Portuguese, Russian and Swedish. The site also includes interactive maps and links to destinations on the Routes and hotel booking.

There is also an important relationship in Andalusia and Spain with the media: newspapers, tourism reviews, radio, TV, etc.

Since 2004 there has also been an agreement with Turismo Andaluz SA, the Official Andalusian Tourism Board. In the collaborative framework with Turismo Andaluz, the Routes of al-Andalus are present at tourism fairs in Spain (FITUR in Madrid, Expovacaciones in Bilbao, SITC in Barcelona, the International Cultural Tourism Trade Fair in Malaga, Tierra Adentro in Jaen, etc.). They are also represented outside both Andalusia and Spain, including on the Andalusian Tourism stand and at heritage fairs (namely, the Cultural Heritage Fair in Paris in collaboration with the European Institute of Cultural Routes). They also feature in familiarisation and press trips, for tour operators and journalists respectively.

There are also other programmes such as Vive Tu Legado (Live Your Legacy) – annual offerings day or weekend visits to various destinations on the Routes of al-Andalus – and Discover the Cities of al-Andalus, which contribute to the development of social tourism (senior tourism, women’s associations, youth organisations, etc.), and Conoce Tu Provincia a Través de las Rutas del Legado Andalusi (Get to Know your Province through the Routes of al-Andalus), promoted by the Diputación de Granada to develop domestic tourism with a supply of tourist offers for weekends. Turismo Andaluz and the Patronato Provincial de Turismo de Granada have signed a collaboration agreement with the Legacy of al-Andalus Foundation, and another with the Granada Science Park and the Museum CajaGranada Memoria de Andalucía for the promotion and commercialisation of these cultural tourist attractions. Through these agreements, the Routes of al-Andalus and the two museums will be sold in packages on the market, respectively, through the tourist office networks of Viajes El Corte Inglés and Halcón Viajes. The agreement with the Legacy of al-Andalus Foundation provides the marketing and promotion



programme for the Routes of the Alpujarras and al-Idrisi in travels throughout the province of Granada. This has been defined for tour packages that include the chosen Route for two days with guided tours, guides, educational workshops, full-board accommodation, bus and the travel insurance. All of the al-Andalus Routes are promoted by the Viajes El Corte Inglés offices in Andalusia.

There are also promotional strategies highlighted through exhibitions on the Cultural Itineraries and Routes, such as at the Universal Exhibitions in Hannover in 2000 and Nagoya in 2005, at the headquarters of international agencies such as UNESCO in Paris in 1998, or in countries linked to Routes like Colombia, Morocco, Mauritania, Mexico and, of course, Spain. The foundation also promoted the carrying out of a travelling exhibition on all the European Cultural Routes, which is still in operation today.

Thematic exhibitions carried out by the Legacy of al-Andalus Foundation (with more than 60 such events) can also contribute to the promotion of Cultural Itineraries and Routes. In this sense, it is important to note that some of them have been organised in Algeria, France, Germany, Japan, Mauritania, Mexico, Morocco, Pakistan and Tunisia. Other activities such as professional meetings and, especially, publications (more than 70 titles) also promote the Routes.

In November 2005 a co-operation agreement was signed with the Paradores. Thanks to this agreement, the Paradores hotels located in Andalusia and integrated into the Routes of the Legacy of al-Andalus will set up information points about these cultural and historical Routes for their customers' use. The agreement includes the creation of a Legacy of al-Andalus Cultural Route of Paradores, the organisation of food conferences on the subject of al-Andalus gastronomy, the joint production of itinerant exhibitions, conferences and concerts, as well as an advertising campaign for the promotion of the Routes of al-Andalus. One of the best joint activities is the edition of a photographic contest named "La Mirada del Viajero" ("Through the Eyes of a Traveller").

9. Frequency of contacts between partners

The main participation forum between partners is the general meeting of the foundation. In relation to the Route of al-Andalus, a collaboration agreement is signed between the Government of Andalusia and the town council of each of the municipalities involved in

the Routes. They actively participate in the thematic weekends organised in the al-Andalus Science Pavilion. There are also other programmes already mentioned such as Live you Legacy, Discover the Cities of al-Andalus, and Get to Know your Province through the Routes of al-Andalus. These initiatives will establish an important network within participating municipalities.

Collaboration with SMEs is recent and will be developed through the programme with partner establishments.

In this sense, the results of the survey indicate that SMEs consider that it is important to improve systems of co-ordination between partners/stakeholders. We should remember that about half of the SMEs do not provide any information on other SMEs to their customers, making it difficult to network. This is probably related to the lack of knowledge about the different SMEs involved in the Routes.

10. Training programmes and SME involvement

As a consequence of the survey's results, it is important to highlight that only 15% of the SMEs have trained staff in relationship to the Routes. It is thus important to improve the training programmes for SMEs. At the moment, only the hotels with a larger number of staff have trained workers. Better knowledge of the al-Andalus Routes will improve the competitiveness of the SMEs involved. It could be more difficult with SMEs employing a small number of workers.

11. Merchandising activities

At this moment merchandising products are limited to posters and publications. There is a Legacy of al-Andalus bookshop at their headquarters in Granada. There is also an online shop: www.librerialegadoandalusi.es.

12. Planned future activities

In June 2010, the Consortium for the Commemoration of the First Millennium of the Foundation of the Kingdom of Granada (1013-2013) signed an agreement with the Legacy of al-Andalus Foundation to provide the operational support needed to develop activities related to this commemoration. It is to serve as an engine to project nationally and internationally the historical and cultural dimension and the cultural heritage of Granada and its former kingdom. It is also a great opportunity for Granada and the other provinces involved in this initiative. One aim is precisely to help promote the conservation of cultural heritage of the Andalusi period and the promotion of the Routes of the al-Andalus closely linked to the history of the Kingdom of Granada.

13. Recommendations

13.1 General recommendations

Transnational Cultural Itineraries are rather academic/governmental and not consumer oriented. It could be interesting to create a network with delegates from each country involved in the Routes. ICT could contribute to create a joint Intranet/Internet and shared area for it. It will also be important to re-establish collaboration with the

UNESCO Routes of Dialogue programme, especially in the Middle East and the Maghreb and in Latin America and the Caribbean, through the Cultural Routes programme. In relation to the Ibero-American cultural space there is now an initiative to create a network of Ibero-American Cultural Routes promoted by the Organization of Ibero-American States and the University of Barcelona/IBERTUR network with the support of the AECID and the Spanish Ministry of Culture, which could be interesting for the Cultural Itinerary of the Mudejar and the Baroque.

In relation to the networks in the Maghreb and the Arab World, it is essential to reinforce the agreement with the Arab League Educational, Cultural and Scientific Organization (ALECSO) and to evaluate possible links and/or networking with the Islamic Educational, Scientific and Cultural Organization (ISESCO).

With regards to the Routes of al-Andalus in Europe, the Legacy of al-Andalus, as an Andalusian public foundation, is mainly focused on the Andalusian region with some extensions to other autonomous communities, such as Extremadura or Murcia, and the southern area of Portugal. It will be interesting to co-ordinate a network with other initiatives associated with al-Andalus heritage in other Spanish territories, such as Aragon, Balearic Islands, Catalonia and the Valencian Community, similar to the Consejo Jacobeo (St James' Council) promoted by the Spanish Ministry of Culture, and with other countries such as the United Kingdom (Gibraltar), Portugal, Italy and Malta, in a similar fashion to the Spanish Jewish Quarters (Red de Juderías) and the European Route of Jewish Heritage or the Prehistoric Rock Art Trail. Like this, there is an agreement with the ONMT, the National Tourism Office of Morocco.

Spain is the third country with the most number of European Cultural Routes (60%), after France (75%) and Italy (70%); it is followed by Portugal and the United Kingdom (40%). To ensure that the Cultural Routes programme's objectives in Spain represent the interests of all stakeholders and partners along the different Cultural Routes, it will be useful to develop a Spanish European Cultural Routes Task Force, comprising selected representatives from the different Routes, public institutions at national, regional and local levels, the private sector, and universities and applied research centres. The role of this task force would be to oversee the development of the Cultural Routes programme and to implement a national action plan. This group of experts would work closely with the Council of Europe and European Union to determine key strategies and actions, endorse and promote campaign activities and share experiences and best practices. A similar model has been developed in Italy, co-ordinated by the Ministry of Culture.

There is also important decision to be taken in relation to the Route of Münzer using the ancient Route between Granada and Almeria, also called the "Camino Real". It is named after the explorer J. Münzer. According to the Legacy of al-Andalus there is no strategy in place for the implementation of this Route, but the Granada Provincial Tourism Board is promoting it on its website.

13.2 Recommendations for SMEs

Despite this not being a new initiative, a large number of SMEs have only recently started collaborating with the Legacy of al-Andalus (2008 or later). It is therefore still too early for a lot of SMEs to have designed business strategies and to have evaluated

results. Nevertheless, most of the companies do see the benefits of their collaboration with the Routes. These benefits are not only economic; they portray a better image of the SMEs, inclusion and visibility in institutional websites, etc.

It is important to conduct a comprehensive brand analysis of the Routes of al-Andalus, identifying key market segments, and the perception and values associated with the added offer given by SMEs involved as partners. The development of a brand tool kit, tailor-made to the needs of SMEs will be needed. The brand could be included through targeted collaborative promotional activities.

It is fundamental to foster community-based development projects, particularly focusing on enhanced cultural heritage management, and to promote employment and job opportunities through the creation of cultural, educational and tourist products and services, and the development of the SME network.

Diversifying the business activities of the SMEs involved in the al-Andalus Routes is also needed because currently all of them are linked to the tourist (mainly hotels and restaurants). It will prove beneficial to open up to other sectors.

The creation of a tourist product club, co-ordinated by the Legacy of al-Andalus Foundation, with destinations and enterprises involved in the Route, especially SMEs, will be a great asset. The idea is to promote joint action, with a specific catalogue to develop educational, cultural and tourism offers related to the Routes of al-Andalus. An active platform will be useful to reinforce this network and to establish a framework for capacity-building focused on destination management that can be implemented across all destinations on the Routes of al-Andalus.

For this reason, it is vital to improve training programmes for SME employees.

Another central factor to consider is that many of the tourists are foreign and therefore more languages must be used on SME-related websites. Currently, most of them are in Spanish.

It is also necessary to start carrying out client profile studies to improve the competitiveness of SMEs.

14. Acknowledgements

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15. Appendices

Map 1. Routes of al-Andalus in Spain and Portugal



Table 1. Transnational Cultural Itineraries of the Legacy of al-Andalus

Denomination	Council of Europe countries involved		Other countries involved		Publications	Other relevant information
	Countries	No.		No.		
Cultural Itinerary of the Almoravids and Almohads	Portugal and Spain	2	Algeria, Mali, Morocco, Mauritania, Senegal and Tunisia	6	Guide (in French and Spanish)	– There is an agreement with the Moroccan National Tourist Board to draw up a cultural itinerary to the Cultural Itinerary of the Almoravids and Almohads (September 2005). – There is also an agreement with Portugal, and a joint guide to this project is published in Portuguese and Spanish. – Gibraltar (United Kingdom) is not involved.
Cultural Itinerary of Umayyads	Italy and Spain	2	Algeria, Cyprus, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Oman, Palestinian Territories, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates and Yemen	16		Sicily is the Italian region included in the Route.
Cultural Itinerary of the Mudejar and the Baroque	Spain	1	Argentina, Bolivarian Republic of Venezuela, Chile, Colombia, Cuba, Dominican Republic, Ecuador, Guatemala, Mexico, Paraguay, Puerto Rico and Uruguay	12	Guide and brochure of the Mudejar in Mexico (in Spanish)	At the moment there is active collaboration with Mexico through CONACULTA

Table 2. Routes of al-Andalus

Denomination	Council of Europe countries involved	Autonomous communities involved	Provinces	Towns and communes involved		Signposts and landmarks	Information points
				No.	List		
Route of the Caliphate (Córdoba-	Spain	Andalusia	Córdoba and Granada	24	Córdoba, Espejo, Castro del Río, Baena, Zuheros, Luque, Fernán Núñez,	189	25

Granada)					Montemayor, Montilla, Aguilar de la Frontera, Lucena, Cabra, Priego de Córdoba, Alcaudete, Castillo de Locubín, Alcalá la Real, Moclín, Colomera, Pinos Puente, Güevéjar, Cogollos Vega, Alfacar, Víznar and Granada		
Route of Washington Irving (Sevilla - Granada)	Spain	Andalusia	Granada and Seville	24	Sevilla, Alcalá de Guadaira, Carmona, Marchena, Écija, Osuna, Estepa, La Roda de Andalucía, Fuente de Piedra, Humilladero, Mollina, Antequera, Archidona, Loja, Huétor Tájar, Moraleda de Zafayona, Alhama de Granada, Montefrío, Íllora, Fuentevaqueros, Chauchina, Santa Fe and Granada	186	26
Route of the Nasrides (Navas de Tolosa-Jaén-Granada)	Spain	Andalusia	Granada and Jaén	28	Navas de Tolosa, La Carolina, Baños de la Encina, Bailén, Mengíbar, Andújar, Arjona, Porcuna, Torredonjimeno, Martos, Torredelcampo, Linares, Úbeda, Baeza, Jódar, Jimena, Mancha Real, Jaén, La Guardia, Cambil, Huelma, Guadahortuna, Píñar, Iznalloz, Deifontes, Albolote, Maracena and Granada	215	32
Route of the Almoravids and Almohads (Tarifa-Granada)	Spain	Andalusia	Cádiz and Granada	22	Algeciras, Tarifa, Castellar de la Frontera, Jimena de la Frontera, Gaucín, Alcalá de los Gazules, Medina Sidonia, Cádiz, Puerto de Santa María, Jerez de la Frontera, Arcos de la Frontera, Grazalema, Zahara de la Sierra, Algodonales, Olvera, Setenil, Ronda, Teba, Campillos, Málaga, Loja and Granada	380	30
Route of Alpujarras (Almería-Granada)	Spain	Andalusia	Almería and Granada	25	Almería, Benahadux, Alhama de Granada, Laujar de Andarax, Ugíjar, Válor, Juviles, Trevélez, Pitres, Capileira, Pamapaneira, Bubión, Cádiar, Torvizcón, Órgiva, Lanjarón, Dúrcal, Otura, Dílar, Gójar, La Zubia, Cájar, Huétor Vega and	-	-

					Granada		
Route of Ibn al-Khatib (Murcia-Granada)	Spain	Andalusia and Murcia	Almería, Murcia and Granada	39	Murcia, Alcantarilla, Librilla, Alhama de Murcia, Totana, Aledo, Lorca, Puerto, Lumbreras, Vélez Rubio, Vélez Blanco, María, Puebla de Don Fadrique, Huéscar, Castril, Galera, Orce, Cúllar, Huércal Overa, Arboleas, Albex, Cantoria, Fines, Olula del Río, Macael, Purchena, Tíjola, Serón, Caniles, Baza, Gor, Guadix, Purullena, Lopera, Diezma, Huétor Santillán and Granada	-	-
Route of al-Idrisi (Algeciras-Granada)	Spain	Andalusia	Cádiz, Málaga and Granada	16	Algeciras, San Roque, Estepona, San Pedro de Alcántara, Marbella, Fuengirola, Málaga, Nerja, Maro, Almuñecar, Salobreña, Motril, Vélez de Benaudalla, Mondújar, Padul and Granada	-	-
Route of al-Mutamid (Lisbon-Granada)	Spain and Portugal	Andalusia	Granada, Huelva and Seville	28	Lisbon, Setúbal, Alcácer do Sal, Lagos, Silves, Albufeira, Faro, Tavira, Vila Real de Santo Antonio, Vendas Novas, Montemor o Novo, Évora, Beja, Mértola, Ayamonte, Lepe, Huelva, Palos de la Frontera, Moguer, Niebla, La Palma del Condado, Sanlúcar la Mayor, Aroche, Cortegana, Almonaster la Real, Aracena, Santiponce and Sevilla From Sevilla to Granada is the same as the Route of Washington Irving	-	-
Route of Münzer (Almería-Granada)	Spain	Andalusia	Almería and Granada	28	Almería, Gádor, Santa Fe de Mondújar, Alhabia, Alsodux, Santa Cruz, Alboloduy, Nacimiento, Doña María, Abla, Fiñana, Huéneja, Dólar, Ferreira, La Calahorra, Aldeire, Alquife, Lanteira, Jérez del Marquesado, Cogollos de Guadix, Alcudia de Guadix, Guadix, Cortes y Graena, La Peza, Quéntar, Dúdar, Cenes de la Vega and Granada	-	-
Granada heritage tour	Spain	Andalusia	Granada	1	Granada	-	

Table 3. Routes of al-Andalus – Touring groups managed by the tour operator TUI Spain from the Costa del Sol to Granada

Origin of tourists	First semester 2009	Second semester 2009	First semester 2010	Total
Australia	12	11	0	23
Austria	429	26	195	650
Belgium	429	704	331	1 464
China	0	7	0	7
Czech Republic	111	77	139	327
France	331	31	1 511	1 873
Germany	3 570	1 605	3 515	8 690
Hungary	0	0	9	9
Ireland	0	0	39	39
Lebanon	0	0	113	113
Netherlands	138	101	915	1 154
Nordic countries	304	307	390	1 001
Total	5 324	2 569	7 157	15 050

Table 4. Projects financed by the European Commission

Name of the project	European Commission programme	Co-ordinator	Project budget (€)	Budget of the Legacy of al-Andalus Foundation	Funds received	Dates	Current situation
Ecotourism	INTERREG IIC East	Teramo province	1 388 030	65 000	48 750	2003-06	Finished and realised
Tela di Aracné	INTERREG IIC Medocc	Toscana region	1 969 300	165 000	123 975	2004-06	Finished and realised
FOMCIC: promotion of co-operation through Cultural Routes	INTERREG IIIA – Spain/Morocco	Legacy of al-Andalus Foundation	374 540	374 540	280 905	2004-06	Finished and realised
ECTN: European Cultural Tourism Network	INTERREG IIC	Wales Tourism Board	547 582	38 239	28 679	2005-06	Finished and realised
SUVOT: Sustainable and Vocational Tourism	INTERREG IIC	Rimini region	998 716	144 856	108 642	2005-07	Finished and realised
QANTARA	Euromed Heritage	Institute of the Arab World	3 668 513	425 167	340 134	2005-08	Finished and realised
Project and equipment of the al-Andalus Science Pavilion	Operative Integrated Programme of Andalusia	Legacy of al-Andalus Foundation	5 164 000	5 164 000	3 873 000	2008	Finished and realised

CITE-TUR: Promotion of the Cultural Itinerary of the Almoravids and Almohads in Spain and Morocco: cultural heritage, traditional commerce and sustainable urbanism	Trans-border Co-operation programme Spain-Morocco	Legacy of al-Andalus Foundation	532 700	333 141	249 856	Under way	Approved and under way
European Network to Improve Women's Employment in Cultural Tourism	Euroemployment	Legacy of al-Andalus Foundation	160 000	160 000	160 000	Under way	Approved and under way
Archaeology and restoration workshop	Aids for the promotion of scientific culture and innovation	Legacy of al-Andalus Foundation	25 000	12 500	12 500	Under way	Approved and under way
Cultural tourism as a tool for integrated development of resources and the cultural heritage between the border of Andalusia and the Algarve – al-Mutamid	Trans-border Co-operation programme Spain - Portugal	Legacy of al-Andalus Foundation	403 886	228 280	171 210	Under way	Approved and under way

Table 5. Promotional tools of the Cultural Itineraries and Routes of al-Andalus

Denomination	Websites				Publications and promotional material
	Legacy of al-Andalus Foundation www.legadoandalusi.es http://rutas.legadoandalusi.es	Granada Regional Tourism Board www.turgranada.es	Andalusian Tourism Board www.andalucia.org	Spanish Tourism Board (TURESPAÑA) www.spain.info	
Cultural Itinerary of Almoravids and Almohads	– Reference to the publications	-	-	-	– Guide for the Maghreb and Iberian Peninsula (in French, Portuguese and Spanish)
Cultural Itinerary	– Reference to the publications	-	-	-	– Guide (in

of the Mudejar and the Baroque					Spanish) – Brochure for the Route of the Mudejar in Mexico (in Spanish)
Route of the Caliphate (Córdoba-Granada)	– Only in Spanish – Interactive maps – Links to SMEs involved in the Route	– English, French, German, Italian and Spanish	– English and Spanish – Interactive maps – Links to SMEs involved in the Route	– Languages (12): Chinese, Danish, Dutch, English, Finnish, French, German, Italian, Japanese Korean, Norwegian, Portuguese, Russian and Swedish – Interactive maps – Links to destinations on the Route – Links to hotels	– Guide (in English, French, German and Spanish) – Guide for the cycling route (English, German and Spanish) – Brochures (in English, French, German and Spanish) – Video (in English, French, German and Spanish)
Route of Washington Irving (Sevilla-Granada)	– Only in Spanish – Interactive maps – Links to SMEs involved in the Route	– English, French, German, Italian and Spanish	– English and Spanish – Interactive maps – Links to SMEs involved in the Route	– Languages (12): Chinese, Danish, Dutch, English, Finnish, French, German, Italian, Japanese Korean, Norwegian, Portuguese, Russian and Swedish – Interactive maps – Links to destinations on the Route – Links to hotels	– Guide (in English, French, German and Spanish) – Guide for the cycling route (English and Spanish) – Brochures (in English, French, German and Spanish) – Video (in English, French, German and Spanish)
Route of Nasrides (Navas de Tolosa-Jaén-Granada)	– Only in Spanish – Interactive maps – Links to SMEs involved in the Route	– English, French, German, Italian and Spanish	– Languages (2): English and Spanish – Interactive maps – Links to SMEs involved in the Route	– Languages (12): Chinese, Danish, Dutch, English, Finnish, French, German, Italian, Japanese Korean, Norwegian, Portuguese, Russian and Swedish – Interactive maps – Links to destinations on the Route – Links to hotels	– Guide (in English, French, German and Spanish) – Guide for the cycling route (English and Spanish) – Brochures (in English, French, German and Spanish) – Video (in English, French, German and Spanish) – Website
Route of the Almoravids and Almohads (Tarifa-Granada)	– Only in Spanish – Interactive maps – Links to SMEs involved in the Route	– English, French, German, Italian and Spanish	-	– Languages (12): Chinese, Danish, Dutch, English, Finnish, French, German, Italian, Japanese Korean, Norwegian, Portuguese, Russian and Swedish	– Guide (in French and Spanish) – Brochures (in French and Spanish) – Website

				<ul style="list-style-type: none"> – Interactive maps – Links to destinations on the Route – Links to hotels 	
Route of Alpujarras	<ul style="list-style-type: none"> – Only in Spanish – Interactive maps – Links to SMEs involved in the Route 	<ul style="list-style-type: none"> – English, French, German, Italian and Spanish 	-		-
Route of Ibn al-Khatib	<ul style="list-style-type: none"> – Only in Spanish – Interactive maps – Links to SMEs involved in the Route 	-	-		-
Route of al-Idrisi	<ul style="list-style-type: none"> – Only in Spanish – Interactive maps – Links to SMEs involved in the Route 	-	-		-
Route of al-Mutamid	<ul style="list-style-type: none"> – Only in Spanish – Interactive maps – Links to SMEs involved in the Route 	-	-		Guide (in Portuguese and Spanish)
Route of Münzer	-	<ul style="list-style-type: none"> – English, French, German, Italian and Spanish 	-	-	There is currently no project for the implementation of this Route
Granada tour	<ul style="list-style-type: none"> – Only in Spanish – Interactive maps – Links to SMEs involved in the Route 	-	-		-

Table 6. Accommodation on the Routes of al-Andalus, according to the Legacy of al-Andalus Foundation guides

Routes	Route of the Caliphate						Route of Washington Irving						Route of the Almoravids and Almohads					
	Towns and provinces	Córdoba city	Córdoba province	Granada city	Granada province	Jaén province	Total	Granada city	Granada province	Sevilla city	Sevilla province	Málaga province	Total	Cádiz city	Cádiz province	Granada city	Granada province	Málaga province
Lodgement	66	112	184	8	31	401	182	41	167	46	33	469	26	277	176	5	112	596
Hotel 5*	1	-	3	-	-	4	3	1	3	1	-	8	-	4	1	-	-	5
Hotel 4*	11	3	24	-	-	38	20	1	26	3	4	54	4	19	19	-	7	49
Hotel 3*	8	4	34	-	1	47	33	6	23	3	5	70	2	27	32	-	15	76
Hotel 2*	13	10	15	-	-	38	12	12	14	7	6	51	2	28	12	-	13	55
Hotel 1*	7	5	6	1	1	20	7	5	11	9	2	34	-	26	7	-	7	40
Hostel 2*	4	3	9	-	1	17	-	-	-	1	-	1	-	-	-	-	-	0
Hostel 1*	12	-	3	1	-	16	-	1	-	-	-	1	-	-	-	-	-	0
Rural hotel	0	1	0	1	1	3	-	-	-	-	-	-	-	1	-	-	1	2
Guest house 2*	2	-	27	-	2	31	36	2	31	3	4	76	5	30	36	-	6	77
Guest house 1*	0	-	52	-	-	52	56	6	53	10	6	131	13	57	58	2	8	138
Guest house	0	11	-	-	1	12	-	1	-	1	1	3	-	-	-	-	-	0
Apartments 3 keys	0	-	4	-	-	4	5	-	3	-	-	8	-	1	4	-	-	5
Apartments 2 keys	0	-	3	-	-	3	6	3	2	-	-	11	-	8	3	-	4	15
Apartments 1 key	1	1	2	-	-	4	2	1	1	-	-	4	-	23	2	-	8	33
Rural apartment	0	2	-	1	-	3	-	-	-	-	-	0	-	-	-	-	-	0
Youth hostel	1	2	0	1	-	4	-	-	-	-	-	0	-	1	-	-	-	1
Camping	1	-	2	-	-	3	2	-	-	1	1	4	-	14	2	-	5	21
Rural houses	5	38	0	1	9	53	-	2	-	7	4	13	-	38	-	3	38	79
VTAR ⁴²	0	32	0	2	15	49	-	-	-	-	-	0	-	-	-	-	-	0

42. *Vivienda turística de alojamiento rural* (rural tourist accommodation).

Table 7. Restaurants on the Routes of al-Andalus, according to the Legacy of al-Andalus Foundation guides

Routes	Route of the Caliphate						Route of Washington Irving						Route of the Almoravids and Almohads			
	Córdoba city	Córdoba province	Granada city	Granada province	Jaén province	Total	Granada city	Granada province	Sevilla city	Sevilla province	Málaga province	Total	Cádiz city	Cádiz province	Granada city	Granada province
Restaurants	124	124	238	9	27	522	217	48	204	62	21	552	74	351	218	5
Restaurant 5 forks	-	-	-	-	-	0	-	1	-	-	-	1	-	-	-	-
Restaurant 4 forks	0	-	1	-	-	1	1	-	-	1	-	2	-	6	1	-
Restaurant 3 forks	2	1	7	-	-	10	3	-	5	-	-	8	3	7	3	-
Restaurant 2 forks	53	21	77	3	6	160	78	18	110	30	13	249	32	115	79	1
Restaurant 1 fork	44	91	152	6	20	313	135	29	89	31	8	292	39	223	135	4
Restaurant Not classified	25	11	1	-	1	38	-	-	-	-	-	0	-	-	-	-

Table 8. Handicrafts on the Routes of al-Andalus, according to the Legacy of al-Andalus Foundation guides

Routes	Route of the Caliphate						Route of Washington Irving						Route of the Almoravids and Almohads				
	Córdoba city	Córdoba province	Granada city	Granada province	Jaén province	Total	Granada city	Granada province	Sevilla city	Sevilla province	Málaga province	Total	Cádiz city	Cádiz province	Granada city	Granada province	Málaga province
Handicrafts	3	245	4	21	50	323	52	62	9	122	35	280	9	72	56	4	45
Associations	3	1	4	-	-	8	-	-	9	-	-	9	-	-	-	-	-
Cosmetics crafts	-	2	-	-	1	3	-	-	-	-	-	0	-	3	-	-	-
Decorative crafts	-	45	-	4	5	54	16	10	-	30	17	73	7	18	26	4	11
Fashion crafts	-	9	-	1	2	12	5	2	-	6	-	13	-	2	4	-	2
Food crafts – Gastronomy	-	130	-	7	42	179	-	36	-	57	18	111	-	23	-	-	7
Functional crafts	-	51	-	9	-	60	25	6	-	17	-	48	-	22	20	-	23
Paper crafts	-	2	-	-	-	2	4	-	-	2	-	6	1	-	4	-	-

Religious crafts	-	1	-	-	-	1	1	-	-	3	-	4	-	1	1	-	-
Textile crafts	-	4	-	-	-	4	1	8	-	7	-	16	1	3	1	-	2

The Routes of the Olive Tree

1. Summary

1.1 Reasons for highlighting this case

The Routes of the Olive Tree is a significant case study because it has at its heart “products from the olive tree” and thus an important opportunity exists to work with, stimulate and create SMEs. The Routes of the Olive Tree is an interesting initiative in that it draws attention to the greater story of civilisation, peace, humanity and heritage in order to support contemporary elements of production, design and tourism.

1.2 Synopsis

Participating countries	Greece, Cyprus, Spain, Portugal, France, Italy, Croatia, Slovenia, Albania, Turkey, Syria, Lebanon, Jordan, Egypt, Libya, Tunisia, Algeria, Morocco
Programme participation period	2005-present
Sectors covered	Heritage, museums, festivals, olive tree products, arts and crafts, philosophy
Activity focus	Rural production and heritage, creative industries, intercultural dialogue, safeguarding of natural landscape
Main partners	Mediterranean chambers of commerce, Costa Navarino, Greek Ministry of Development, Greek Ministry of Culture, Museum of Mediterranean Civilisation (Marseilles), Agropole Olivier (Meknès)
Funding sources	National government via chamber of commerce, private funding, self-funding, EU project funding

Principal impacts

Foundation; olive tree shop (including product development); international network; knowledge bank on sustainable rural economies; training and support for SMEs; intercultural dialogue

2. History of the Route and nature of the organisation

2.1 Introduction to the theme

Historically, the olive tree, which thrives most abundantly in the Mediterranean Basin, has over centuries provided a wide variety of products (including fruit, oil, soap and candles) that have sustained communities living in what would have otherwise been rather arid lands.

Figure 1. Geographical olive distribution (diagrams provided by the International Olive Oil Council)



Philosophically, the olive tree is one of the plants most often cited in literature and legends and is present in the texts of both ancient and contemporary writers and poets. Olive oil has long been considered sacred and olives are mentioned throughout the Bible (both New and Old Testaments) as well as the Koran.

Culturally, the olive tree has become a symbol of peace, wisdom, glory, fertility, power and pureness. Olive branches made wreaths and crowns for winners of the Olympic Games. olive oil and olive candles provide light for shrines and churches. A bride's dowry once required a great number of olive roots.

As a peace symbol, the olive tree has become ever increasingly important. For example in 2003, Moroccan-Algerian borders (closed since 1994) were opened for the Routes of the Olive Tree participants by order of the King of Morocco and the President of the People's Democratic Republic of Algeria. The media of both countries called the travellers "peace terrorists".














Gastronomically speaking, olives and olive oil are essential ingredients in Mediterranean cuisine. Considerable research supports the health-giving benefits of consuming olives, olive leaves and olive oil.

Environmentally, olives trees are now being looked at for use as a renewable energy source. Waste produced from olive plants can be used as an energy source that produces

2.5 times the energy generated by burning the same amount of wood. And, its smoke is said to have no negative impact on the environment. Furthermore, the ash from burnt olive plants is a good fertiliser for gardens and plants.

Economically, the olive tree is of major agricultural importance in the Mediterranean region, mainly as a source of olive oil. The 10 largest producing countries in the world, according to the Food and Agriculture Organization, are all located in the Mediterranean region (with the exception of Argentina, located in South America). Mediterranean countries jointly produce more than 95% of the world's olives and the EU is both the chief consumer and exporter of olive oil in the world.

Table 1. Main oil-producing countries (year 2009 per FAOSTAT)

Main countries of production (Year 2009 per FAOSTAT)				
Rank	Country/Region	Production (in tons)	Cultivated area (in hectares)	Yield (q/Ha)
—	World	18,241,809	9,922,836	18.383
1	 Spain	6,204,700	2,500,000	24.818
2	 Italy	3,600,500	1,159,000	31.065
3	 Greece	2,444,230 (2007)	765,000	31.4
4	 Turkey	1,290,654	727,513	17.740
5	 Syria	885,942	635,691	13.936
6	 Morocco	770,000	550,000	14.000
7	 Tunisia	750,000	2,300,000	3.260
8	 Egypt	500,000	110,000	45.454
9	 Algeria	475,182	288,442	16.474
10	 Portugal	362,600	380,700	9.524
11	 Jordan	189,000	126,000	
12	 Libya	180,000		
13	 Argentina	160,000	52,000	30.769

2.2 Introduction to the Routes of the Olive Tree

Georges Karabatos, President of the Messenia Chamber of Commerce and Industry, recognised that to improve knowledge, share distribution costs, expand markets and open new avenues for the sustainability of small producers it would be essential to develop a cultural network. Building a network amongst competing producers both locally and internationally is a challenge that requires a greater story than economics, packaging and marketing.

Georges Karabatos is quoted as saying “The best packaging of a product is its civilisation and its history”.

The Routes of the Olive Tree are not one Route but rather a network stretching across 18 countries and encompassing many chambers of commerce, museums, festivals, SMEs and other private and third sector organisations. Since its creation in 2002, the Foundation “Routes of the Olive Tree” (hereafter referred to as the “foundation”) has each year organised a specific itinerary devised with the aim of transmitting the idea of sustainable development, intercultural dialogue, rediscovery and recognition of natural heritage linked by the symbolic presence of the olive tree. The aim of these itineraries in the early years was to develop the network membership whereas in the latter years the aim has been to give visibility to the Route in third countries (both northern European countries and as far afield as China).

The olive tree in the context of the itineraries is a symbol of the economic, social and cultural development of Mediterranean communities and a unifying element in the

current quest for solidarity and unity. As Georges Karabatos said, “Once it was trade that promoted culture, now it is the culture that promotes trade”.

2.3 Summary objectives of the Foundation “Routes of the Olive Tree”

The statutes of the foundation lists more than 20 objectives. In summary, the objectives are quoted on the website as being:

to create “interactive synergies” between conservation, tourism and development by:

- favouring dialogue between the regions concerned, between developed areas and those in difficulty, between urban and rural spaces
- encouraging thematic tourism and sustainable development through setting up exemplary initiatives in oil-producing regions
- carrying out an inventory of the material and immaterial heritage of the olive tree, and increasing its value
- contributing to public awareness and educating young people
- leading specialized, multidisciplinary research on the widened theme of the olive tree.

2.4 Management structure of the Routes of the Olive Tree

The Foundation “Routes of the Olive Tree” is principally organised by the Homonymous Cultural Foundation, which has a strong relationship with the Chamber of Commerce in Messenia (Greece). It has also been placed under the aegis of the International Oil-producing Council, the Hellenic ministries of culture, development, tourism and foreign affairs and of the Peloponnesian Region of Athens’ City Council. The Route has a range of international partners with strong collaboration happening through as many as 100 chambers of commerce.

The assembly elects, by secret vote, an executive director from among its members, to serve for 10 years. The executive director to date has been Georges Karabatos, President of the Messenia Chamber of Commerce and Industry, and thus the connection between the foundation and the chamber of commerce is solid. Furthermore, Kalamata (Messenia, Greece) is defined as the permanent base of the foundation and its offices are in close proximity to the Messenia Chamber of Commerce and Industry in the historical centre of the city.

The Foundation “Routes of the Olive Tree” employs two full-time staff members and five or six part-time staff members and has a team of volunteers (four permanent). The foundation also awards temporary contracts to fulfil important roles for the implementation of the annual itineraries. One full-time staff member manages and runs the olive tree shop (which covers its costs) and the foundation is a permanent client of two part-time webmasters (outsourced).

2.5 Summary actions of the Foundation “Routes of the Olive Tree”

The number of events organised directly by the foundation each year varies and in addition to the annual itinerary includes seminars, meetings, workshops, study visits, working meetings, training sessions, etc. In 2009, the foundation organised on behalf of the network more than 30 events. In addition to this, network members of the foundation organised their own local events so the total number of events related to the Route could easily number more than 100 each year.

2.5.1 Annual itinerary

The itineraries of the Routes of the Olive Tree are usually held once a year and consisted originally of a relay race across all the Mediterranean olive-growing countries, with the participation of the "Friends of the Routes of the Olive Tree" (most often recruited through motorcycle clubs). The routes have varied considerably both in countries visited and objectives; however, they tend to be long and have usually aimed to cross a number of countries by motorbike (once by boat). A minibus and a truck for heavy loads are specially designed to follow the course and meet the needs of participants during the trip.

Figure 2. Itineraries 1 and 2 of the Routes of the Olive Tree



The annual itineraries are the cornerstone of the foundation's activities. They have enabled the foundation to develop an inventory of olive tree heritage as well as conduct scientific research on the ground, through the whole Mediterranean Basin, so as to better define the cultural and tourist impact of the olive tree, as tree and landscape, product, popular tradition and symbol.

The course is divided into several stages and includes several town/city destinations. The meeting with the messengers of the olive tree is usually celebrated with events organised in co-operation with local network member organisations. Each itinerary includes various landmarks related to the presence of the olive tree in the region. The stopping posts aim to include heritage, cultural, social, economic, industrial, craft and environmental initiatives. Destinations may include well-known cultural tourism sites or monuments; however, many of the stopping posts include lesser known historical sites such as oil mills, natural landscapes and ancient sites associated with the olive tree. Awareness of environmental protection of olive-growing areas, enhancement and recognition of cultural sites and natural landscapes of olive trees, gastronomy tourism around the products of the olive tree, as well as handicrafts are fundamentals and thus there is an emphasis on regional traditional know-how.

The itineraries are limited in terms of number of participants (between 30 and 50 maximum). Food and accommodation is decided in consultation with network members on the ground. The aim is to adhere to the principles of the sustainable development of local regions, selecting producers and local farmers (for oil mills and olive groves, for example), ways of alternative catering and accommodation (with an emphasis on local offers for small groups: inns, taverns, etc.). The organiser claims to strive to augment tourism in oil-producing regions, whether it is tourism for culture, discovery and appreciation of landscapes, traditional know-how or history.

In general, the financial participation of each participant in an itinerary is set after the call of the foundation to potential sponsors. Once the budget is reassessed on the basis of sponsorship levels and according to the amount that the foundation itself can invest in the trip, the cost of participation is calculated (this has varied considerably). Gasoline and subsidiary transportation taxes (such as motorway tolls) are in principle given free to bikers, as well as some group meals and some accommodation. If there is a participation fee it is usually to cover accommodation and/or meals that cannot be supported by the foundation's budget.

Each annual itinerary has so far been distinct but on average 10 additional full-time temporary employment contracts are provided during the lead-up and implementation of the itinerary (these are additional to the foundation's regular staff). These contracts are for skilled professionals to carry out the logistical and operational aspects of the itinerary, for example: administrative staff (used prior to the Route to organise, research and develop the Route); route manager; equipment manager; events manager; and [REB10]museo-geographer/graphic designer (director of informative material for events along the road: flyers, exhibition panels, etc.); artists (to create gifts and objects related to the Routes for official meetings); driver (truck/bus); press secretary (journalist); doctor; translator; photographer; mechanic; and cook.

In addition, for specific parts of the itinerary, additional staff are employed in order to organise a specific event, to welcome participants, and to guide or assist in certain countries. Mostly, these are qualified people proposed to the foundation by the local network members and paid for from the budget of either the foundation or directly by the local network member.

2.5.2 Training session

Training sessions are regularly organised by the foundation; however, the number varies according to funding possibilities. In 2009, the foundation directly organised two training sessions. The foundation also oversees the provision of training activities in Greek schools and has supported the development of a travelling library to provide Greek schools with books and videos about the olive tree.

The Chamber of Commerce of Messenia, which is a principal network member, also provides a Centre for Education and Training (CET). It undertakes training programmes that are usually co-financed by the central or regional government. The centre helps associations representing different branches of the local economy and prepares courses that each association feels are needed by its members. This year the CET is expected to offer training to 920 people through co-financed programmes alone.

The Chamber of Commerce of Messenia, in collaboration with the foundation, additionally provided open cookery lessons, in a hotel in Kalamata, to help children understand and appreciate their culinary heritage.

2.5.3 Contest

The foundation organises in co-operation with the Greek Consumers Secretariat of the Ministry of Development, the Greek Society of Tasters of Olive Oil Products and the

network of Greek Olive Oil Producing Cities, the Panhellenic Contest of Standardised Extra Virgin Olive Oil and Olive Oil Packaging. The contest, held in Athens, began in 2004 and brings together more than 28 Greek companies and unions to compete.

Other network members also hold competitions; however, it is unclear how involved the foundation is in these events.

The Chamber of Commerce of Messenia is a network member operating in close proximity and therefore they held a competition in collaboration with the foundation to select from older women of Messenia the best recipes using olive oil products. They gathered more than 265 original local recipes, which will soon be presented during a special gastronomy and tourism journalist event. There are 10 prizes for the best recipes and these will be selected by a committee of well-known chefs and gastronomy critics. This is considered as an initiative of the foundation, the chamber and a well-known magazine of Athens (*Athinorama*) and it will be sponsored by the Costa Navarino hotel resort. A longer term aim is to integrate these traditional recipes into the menu of local hotels, restaurants and taverns (through seminars in which these recipes will be taught to kitchen staff). The best recipes will also be published, first, as a manual for catering professionals and, secondly, as a coffee-table edition.

2.5.4 Exhibitions

Many exhibitions have been organised by the foundation. In 2009, the foundation directly organised four exhibitions and tastings. The exhibition/tastings were organised by regular staff members of the foundation. In addition, a graphic artist was provided with a temporary contract to produce the exhibitions.

The foundation, in co-operation with the Musée de Civilisations de l'Europe et de la Méditerranée (Paris) and the European Institute of Cultural Routes (EICR) of the Council of Europe, also produced a travelling exhibition. It was produced for the Cultural Itinerary of the Olive Tree Routes in 2008 and was presented in 10 cities in Central Asia and in Balkan countries. It consisted of 18 large banners presenting the history, symbolism and civilisation of the olive tree and the importance of intercultural dialogue. The exhibition was produced in three languages (Russian, Chinese and English).

2.5.5 Specific missions

The annual agenda of the foundation includes participation in dozens of congresses in several European and Mediterranean countries related to the olive tree, for example: protection of traditions, cultural heritage, natural knowledge in olive-producing regions, sustainable development, thematic tourism etc. In addition, the foundation is often consulted on special activities of the network members. For example, in 2009, four specific missions were undertaken to support members of the network and in 2008-09 network members undertook four heritage rehabilitation projects during which the foundation was consulted.

2.5.6 Knowledge products

During the period 2008-09, the foundation produced more than 23 publications. Many of these have been distributed freely amongst the network and include guides, books, articles, website content and DVDs.

Some of the books produced by the foundation are available for purchase, including: *Ode to the olive tree*, assembled by the Academy of Athens, the Hellenic Folklore Research Centre and the General Secretariat for the Olympic Games (2004); *Le guide des routes de l'olivier*, a book that discusses the olive tree as a symbol (1994); *12 months with the olive tree*, a history of the olive tree, and its financial and social importance for the Greeks and all the Mediterranean people; and *On the Routes of the Olive Tree and the Mediterranean*, selected work of great photographers on the subject of the olive tree (for more information, see Appendix 3).

Short contracts have been provided for photographers, graphic designers and printing houses but there is insufficient information to assess the overall employment value of these initiatives.

2.5.7 Seminars and network meetings

Some four seminars and two network meetings were organised in 2009 but further information about these was unavailable.

2.5.8 Festivals

Each year the foundation collaborates in the organisation of at least one festival. From 2008 until 2011, festivals have taken place in at least eight different countries. In 2009, the foundation supported the organisation of 12 simultaneous festivals throughout Greece.

The following is an example of the type of festival organised: the first Feast of the Olive Road ran from 14 to 19 December 2004 in the heart of Athens (exhibition in the main hall of the metro station "Syntagma"). It comprised several workshops, including "A Thousand and Two Flavours", a tasting workshop; "Draw Me an Olive Tree", an educational workshop for children; "Small Musical Bridges of the Olive Tree", a musical workshop and exhibitions of photography; "Olive Tree, the Favourite Tree of the Greeks"; "Following the Olive Tree"; and "Journey around the Olive Tree in the Mediterranean Through Words and Images". A round table was organised on "The Olive Tree as a Factor of Civilisation and Sustainable Development" and the "National Olive Oil Extra Virgin Competition" was conceived.

Each festival is organised by the foundation in co-operation with the local network member and thus employment is difficult to calculate. Normally, the foundation commits between five and 10 people to support the event, as well as providing exhibitions, books and products.

2.5.9 Olive tree shop

The foundation has been involved in the field of responsible trade through the Routes of the Olive Tree store, located in the heart of Athens, which sells agricultural and traditional craft products selected on the basis of authenticity and quality. The shop is an initiative created by, and now managed by, the Foundation "Routes of the Olive Tree".

The olive tree shop sells olives from Kalamata, extra virgin olive oil, traditional delicatessen products such as stuffed olives, stuffed peppers, pâté, cheese, black olive pâté, green olive pâté), honey, traditional cakes, aromatic plants and herbs, wines and spirits, vinegars, mustards, thyme, oregano, tomato products, basil, sesame cakes, olive

oil soap, cosmetics made with olive oil, art works using the theme of the olive tree or olive, stationary products with an olive tree design, including photo boxes, note blocks, CD cases, folders, telephone books, etc., exclusive series of jewellery created with the olive tree motif, the foundation's publications, T-shirts, good luck olive charms, rosary beads, with an exclusive olive tree design, pottery with the olive tree design, and aprons and cotton bags with the olive tree design.

The olive tree shop employs one full-time shop manager. Two part-time contracts have also been given to two individual artists to design and make goods exclusively for the shop (a jewellery artist and a stationary designer).

The foundation's annual budget sheets suggest that the Routes of the Olive Tree shop is currently covering its costs and in its first year of operations provided a profit

2.6 The legal basis

The organisers of the Cultural Tour "The Routes of the Olive Tree" (1997-2002), the Messenia Chamber of Commerce and Industry, and all the Greek chambers aided by the chambers of production, transformation, trade and services of all Mediterranean countries, cultural institutions, non-governmental organisations and other individuals from the countries of the Mediterranean decided to establish a non-profit and non-governmental organisation to be known as: the Cultural Foundation "Routes of the Olive Tree".

The management board consists of the executive director as president, two vice-presidents, five elected members and 22 *ex officio* members representing the chambers of commerce from the olive-producing Mediterranean countries: Greece, Albania, Slovenia, Croatia, Montenegro, Italy, France, Spain, Portugal, Morocco, Algeria, Tunisia, Libya, Egypt, Jordan, Palestine, Israel, Syria, Lebanon, Cyprus, Turkey and Malta.

In case of absence of representatives, the cultural or commercial attaché of the respective embassy in Greece or his/her representative can participate instead. The Mediterranean committees (through the attachés) promote the objectives of the cultural foundation in their own countries, according to the statute and laws of each respective country. The countries in which Mediterranean committees already operate or have been created include the following:

Table 2. Countries in which Mediterranean committees already operate or have been created include the following

No.	Country	Base city
1	Cyprus	Lemessos
2	Turkey	Smyrna
3	Syria	Aleppo
4	Lebanon	Anfeh
5	Jordan	Amman
6	Egypt	Alexandria
7	Libya	Tobruk
8	Tunisia	Sfax
9	Algeria	Algiers
10	Morocco	Rabat
11	Spain	Jaén
12	Portugal	Moura
13	France	Marseilles
14	Italy	Imperia
15	Slovenia	Kôper
16	Croatia	Dubrovnik
17	Montenegro	Podgoritsa
18	Albania	Tirana
19	Malta	Valletta
20	Israel	Tel Aviv
21	Palestine	Gaza

3. Sources of funding

The Routes of the Olive Tree is an interesting example as it was founded with the backing and support of the Chamber of Commerce in Messenia, which indicates an early realisation that unifying olive tree industries may benefit SMEs across Greece.

The Routes of the Olive Tree programme is supported in Greece by the Ministry of Regional Development and Competitiveness, Ministry of Culture and Tourism, Ministry of Foreign Affairs, and the City of Athens. They permanently support the foundation and are an essential aid to grants, funding and recognition of the Route.

In terms of balance between public/private support, the overall budget of the foundation is:

- 30% from contributions from network members and friends of the Routes of the Olive Tree;
- 20% from income from publications and the Routes of The Olive Tree shop;
- 50% from external grants including grants from the Chamber of Commerce and Industry of Messenia (Peloponnese, Greece), which belongs to the public sector, and other ICC grants from the Hellenic Ministry of Development and the Peloponnese region, and private sponsors, the majority of which are SMEs.

Regarding private sponsors, the list of companies that supported the foundation in pursuing its goals since it was created in 2002 is not exhaustive. It develops according to the Routes

followed and the topics addressed by the foundation. It includes both local and national partners in and beyond Greece, including some multinationals (for example, IKEA and Nivea). Funding from these partnerships do not affect the operation of the foundation itself, but arise as part of events and activities carried out by it (namely, not only for the implementation of the annual cultural itineraries but also for certain specific events, such as exhibitions and conferences).

The help of sponsors can be financial or in kind; for example, during an itinerary: offers for lodging and transport, logistics equipment, provision of food and water, motorbikes and cars, equipment, petrol, etc. are not uncommon.

Some significant sponsors who regularly support the foundation are:

- Baxevanis, www.baxevanismoto.com;
- TEMES, www.temes.gr;
- Costa Navarino, www.costanavarino.com;
- Karelia Foundation, www.baxevanismoto.com.

4. Co-ordination with heritage labels

The Routes of the Olive Tree was elected the 2nd World Cultural Itinerary by UNESCO in 2003.

On the 4 March 2005, the Council of Europe also gave the Routes of the Olive Tree the title “Major Cultural Route of the Council of Europe”. This honorary distinction was awarded following a proposal by the Directorate of International Relations and Organisations of the Hellenic Ministry of Culture.

According to Audrey Guittard (permanent collaborator with the foundation – see Appendix 5) there are few synergies, if any, between the Council of Europe label and the UNESCO label but both are considered to give added value to the foundation’s work.

Some UNESCO World Heritage sites are included in the itineraries if these fit into the Route and the objectives of the itinerary (for example, the archaeological site of Volubilis in Morocco, the Acropolis of Athens or the archaeological site of Delphi).

To date, there has been no formal collaboration with other European Cultural Routes.

The collaboration with the European Institute of Cultural Routes (EICR) of the Council of Europe has been considered particularly useful for the foundation. Regular and valuable contact has taken place between the foundation and the EICR. Audrey Guittard felt that the EICR had played a vital role in transferring policy “talk” into “practical” actions that could be translated to operators working on the Cultural Route. She also cited as important their help in finding an outlet for the sale of goods from the olive tree shop in Luxembourg.

The foundation holds relations with other networks that operate in the Mediterranean such as the Anna Lindh Network and the Euro-Mediterranean Foundation for Dialogue among Cultures.

5. Levels of co-operation, partnerships and networking with and between SMEs

International, national and local networking is strongly in evidence in the Routes of the Olive Tree project and involves a wide array of institutions. This foundation has negotiated co-operation agreements between the Greek and other Mediterranean chambers of industry and

commerce, European and Mediterranean universities, European research centres, museums and non-governmental organisations from more than 18 olive-growing countries.

The Routes of the Olive Tree are not one but several itineraries that have taken place since as early as 1997. The itineraries were initially developed with the objective of nurturing relations between the many actors operating at national or regional level in the Mediterranean countries. In some ways, the different regional and national members of the network are competitors and yet the objectives of the foundation seem to resonate. The complexity of encouraging co-operation in competing countries cannot be underestimated. The value of this project is seen to be the driving home of the cultural and historical symbolic link.

National interest is always likely to take precedence. The added value of existing as one clearly defined European and/or Mediterranean Route has little resonance. However, there are some initiatives currently taking place in regions to develop regional mini-Routes. It is too early to say if in the future these could be cross-marketed.

5.1 SMEs' involvement

The Routes of the Olive Tree has a special relationship with producers from olive-growing regions and as such attracts a number of SMEs to its activities. Having said this, SME involvement in the network is less formal – normally as receptors of the participants on the itinerary or as participants at stands during festivals organised by the network members.

The foundation has a special relationship with the Federation of Motorcycling (FOM). Through the FOM, each annual itinerary is publicised and it is normally members from this motorcycling club that are enlisted as participants (“messengers”).

A further sponsorship agreement has been set up with the Costa Navarino, which is a luxury hotel resort with private residences and golf courses, boasting an unspoiled coastline with 4 500 years of history. The owner of this resort recognises the importance of the Routes of the Olive Tree initiative as giving additional context and value to the Costa Navarino aims and objectives.

5.2 Bilateral agreements

It is important to note that the Routes of the Olive Tree project was specifically mentioned in a bilateral agreement signed on Friday 14 May 2010 by the Greek Minister for Culture and Tourism, Pavlos Geroulanos, and his Turkish counterpart, Ertuğrul Günay, in the framework of the Constitutive Assembly of the Superior Council of Co-operation between Greece and Turkey. The Routes of the Olive Tree was specifically included at Turkey's request and in consultation with the Chamber of Commerce of Izmir, which is a member of the foundation.

Normally, bilateral agreements are directly undertaken between the foundation and the institution concerned (which may be a department, university, museum, local entity, etc.). For example: a protocol was signed during a Routes of the Olive Tree itinerary with the Ministry of Agriculture in Algeria, and a collaboration was officially opened, but only between the foundation itself and the ministry.

The foundation has signed more than 28 bilateral protocols (figure provided in March 2010). These protocols refer to exploring possibilities of co-operation in the sector of cultural tourism around the olive tree theme, mainly through cultural itineraries. The protocol acknowledges the contribution of the Cultural Foundation “Routes of the Olive Tree” to the promotion of sustainable development, dialogue and peace among people and civilisations, as mentioned in the memorandum of the foundation.

The bilateral aspect of the Routes of the Olive Tree is quite clear; however, there are also some very good examples whereby the foundation has also provided connections between partners in different countries and these have led to bilateral partnerships in other countries (that is, not via the foundation in Greece). For example, a network partner in Jaén (Spain) was visited twice during the itineraries in 2000 and 2003. The foundation helped to build a strong relationship between them and another partner, L'Agropôle olivier from Meknès, Morocco. They now have a permanent collaboration for congresses and scientific research.

5.3 Integrated partnerships and third sector organisations

Aside from longer term protocol agreements, shorter term collaboration agreements are signed for the purpose of organising specific events or for a specific itinerary.

The Routes of the Olive Tree network includes more than 145 institutions from Mediterranean countries (excluding the chambers of commerce and industry and the individual members, scientists and others), so these agreements are varied according to need.

For example, during festivals organised by network partners, the foundation holds host to cycles of arts, music, information and historical information. These include the work of third sector organisations and SMEs.

6. New marketing activities and platforms

The itineraries of the Routes of the Olive Tree are largely made up of rural settings and the emphasis is on local traditions and customs. This study did not uncover any research specifically geared towards assessing the value of the Routes in tourism terms. Through the EICR, the foundation has been exploring the concept of sustainable tourism and regional network members are gathering tools to provide sustainable tourism packages through their own local itineraries.

The Chamber of Commerce of Messenia, in an effort to direct support for tourism in the area, has created the Bureau for Alternative Tourism. The bureau is under the umbrella of the chamber for financial reasons; however, the foundation's staff have done most of the ground work. The bureau is also a business tourism meeting point providing infrastructure to attract business demand (meetings, seminars, other events related to the area, etc.). A key tool is the bureau's website, which is about to be launched to the trade and media, and which provides general tourism information and specialised information, addressed to business tourism professionals and the operators of other thematic forms of tourism. Local enterprises from all fields are listed (not only tourist SMEs such as hotels, travel agencies, car rental services, restaurants, etc., but also local producers). In fact, the site content is estimated to be 99% related to SMEs.

6.1 Internet visibility

The website of the Foundation "Routes of the Olive Tree" is visually pleasing and available in four languages; however, it has very little traffic (see Appendix 2).

Figure 3. Screenshot of the foundation’s website



Searching using “The Routes of the Olive Tree” and the “Olive Tree Route” returns the project’s website in the number one or two spot in the four key search engines. However, searching on eight other related key terms (such as “olive oil”, “olive tree products”, etc.) the rating is below 100, which indicates a favourable rating only if the client is specifically searching for the Route and a disturbing lack of presence in related search terms. This poor Internet presence translates as missed opportunities for the project’s visibility.

Website traffic opportunities are also lost on partner websites. Neither the International Federation of Motorcyclists (FOM), nor the Costa Navarino websites provide hyperlinks to the “Routes of the Olive Tree” website.

6.2 Participation in international fairs

Between 4 and 7 November 2010, the foundation participated in the 16th edition of the International Heritage Show in Paris. The show was dedicated to Mediterranean heritage. The foundation presented an information stand on its activities and proposed tasting of products from olive oil produced in the regions that it crosses.

6.3 Taking the Route beyond the Mediterranean

Initially the annual itinerary was developed around the theme of the Mediterranean countries with the aim of consolidating partnerships and signing agreements amongst interested parties in the region. However, in more recent years the foundation has developed itineraries that take the Route beyond the Mediterranean. These latter itineraries have been aimed at developing new markets for Olive Tree products. For example, the foundation presented a large event in Stockholm, Sweden, on 22 and 23 October, which consisted of an exhibition and Conference on the Routes of the Olive Tree: an Itinerary for Intercultural Dialogue and Development of International Co-operation. This event took place at the Stockholm Museum of the Mediterranean and was organised in co-operation with the Greek Embassy and the Club of Swedish Friends of the Institute of Athens and the Greek Academy in Sweden.

7. Frequency of contacts between partners

The foundation carries out many partnerships and participates in many projects. Not all contacts, however, come through the foundation and are undertaken by the network members themselves. Also, some partnerships are more profound than others. Three examples of the

work of network partners are supplied below to demonstrate the wide variety of activities being developed under the umbrella of the Routes of the Olive Tree.

Case study: collaboration with France

The French network is important in the cultural field itself. It offers a network of museums and cultural/research institutions. The foundation makes regular use of French professionals for creating expositions and the development of research work. There is a privileged partnership with the Museum of Civilisations from Europe and the Mediterranean, which is in the process of being moved from Paris to Marseilles and which will soon house an exhibition dedicated to the Routes of the Olive Tree. Also, there is sustainable and effective collaboration with the Chamber of Commerce and Industry of Marseilles-Provence.

The collaboration between the foundation and the Chamber of Commerce and Industry Marseilles-Provence began during one of the itineraries that went through and stopped briefly in Marseilles. For this occasion, several common events were undertaken such as an exhibition at the Palais de la Bourse, a tasting of olive oil, the planting of an olive tree symbolising the passage of the foundation and Franco-Greek friendship in a square of the city, meetings, etc. Since then, the foundation has participated in several European projects co-ordinated between the Chamber of Commerce of Marseilles-Provence and the Chamber of Commerce of Messenia in Greece, both of them active members of the foundation. The foundation was asked to respond to several calls for tender as a subcontractor in this context.

Case study: collaboration with Morocco

This is one of the most active partnerships. L'Agropôle olivier is from the region of Meknès (one of the traditional olive-growing areas of Morocco). This network member collaborates with the foundation several times a year, through various events and projects including EU projects, festivals of the olive tree, agricultural fairs, tourist events, scientific and economic conferences and symposia, etc. Meknès was a reference point on one of the itineraries of the Routes of the Olive Tree in the southern Mediterranean. The foundation also maintains good relations with several other institutions in Morocco, such as the Chamber of Commerce and Industry of Rabat, the Federation of Chambers of Commerce and Industry of Morocco and the Institute of Agronomy and Veterinary Hassan II. Morocco is the partner country most active in the Maghreb region.

Case study: collaboration with Turkey

Partnerships between Turkey and the foundation are very special given the complex political situation existing between the two countries. The foundation is one of the cultural institutions that try to bring the two nations as close as possible through the organisation of joint cultural programmes. The olive tree's symbolic role is a dynamic and highly effective one. The Chamber of Commerce and Industry of Izmir has made a very important contribution to the Routes of the Olive Tree, through several itineraries of the foundation and several joint events. The Foundation "Routes of the Olive Tree" was included in the Joint Declaration on Tourism and Culture, signed on Friday 14 May 2010 by the Minister of Culture and Tourism of Greece, Pavlos Geroulanos, and his Turkish counterpart, Ertuğrul Günay, as part of the inaugural session of the Supreme Council for Co-operation between Greece and Turkey.

Case study: other collaborations

Members of the foundation sometimes apply for EU funding. These are usually time-limited projects that operate independently of the Route or include a partner role for the foundation. For example, see Appendix 3: on the KNOLEUM and OLÉOTOURISME projects.

8. Training programmes and SME involvement

The foundation has been involved in some training programmes for SMEs but these have tended to be centred in the local region. Reluctance on the part of regional entities to work together in a co-ordinated manner is a constant challenge for the foundation.

Elisabeth Chatzinikolaou, a Tourism Consultant for the Chamber of Commerce of Messenia, noted that “there are many differences in the political system and situation, the economy, the institutions, local authorities, religions, customs, etc. of these countries and these differences are reflected in their participation in the Route. The partners are not equivalent authorities, bodies, institutions and associations.”

There are also many differences in the oil-producing regions of participating countries in terms of development, and especially tourism development. Tourism and tourism development remains, also as far as EU member states are concerned, a national or, as is mostly the case, a regional matter (a competence of the regions, a regional responsibility). Regions can use in many cases EU funding for developing tourism but the development planning itself remains at the regional level. The same applies for marketing, etc.

These are the reasons why there cannot be central planning (on the part of the Route) for all regions involved everywhere along the Route. There can, however, be national or regional planning for public infrastructure, private investment, clustering, marketing, etc., and especially for the development of alternative forms of tourism, that are “compatible” with oil-producing regions (for instance, cultural tourism, nature tourism, ecotourism, marine tourism, agritourism, religious tourism, etc.). It is only reasonable that each region chooses those forms of tourism, and creates alternative tourist products, for which it has a comparative advantage.

Network members are clearly operating at a regional level in terms of training programmes and SME involvement. For example, the Chamber of Commerce of Messenia began a campaign, Alliance for the Messenian Market, which involves a set of actions that ensure the commitment of local entrepreneurs and consumers in an effort to improve the quality and prices in the local market. One of the goals of the campaign is to contribute significantly to an overall quality for goods and services that might be attractive for tourists.

8.1 Support for short cultural itineraries “Routes of the Olive Tree”

Journeys of discovery have been devised by the scientific team of the Foundation “Routes of the Olive Tree” in several regions, including Meknès in Morocco, south-west Greece, Syria and Lebanon. These are relatively new ventures and thus an evaluation of their success over time would be interesting.

8.2 Support for individual artists

The foundation has helped artistic creation through the involvement of artists in its exhibitions, for the creation of exclusive products for the olive tree shop (souvenirs, stationery, jewellery,

etc.), and by inviting artists to participate in festivals and in the itineraries. In terms of visibility, artists have appeared in the catalogues of the foundation. The foundation is also involved in sponsorship to help artists who collaborated with the Routes of the Olive Tree, through financial subsidies, to edit their exhibition catalogue, their albums, or an opening night (for example, for an exhibition).

More recently, the foundation set up a project to create an art gallery around the theme of the olive tree. In an effort to promote young artists inspired by the olive tree, the foundation has created its own collection. The Gallery of the Routes of the Olive Tree presents the work of young artists (so far only on the Internet), but artwork has been bought as a result of this initiative.

9. Sources of information for SMEs

The foundation has a scientific committee that can be consulted on technical areas of olive tree production. Other than this, information sources tend to be locally based.

The Chamber of Commerce of Messenia provides, for example, an “online consultant for entrepreneurs”. This platform offers information on entrepreneurship and green entrepreneurship, online consultancy, e-marketing for tourism and local products, consultancy on e-shopping, a national guide for enterprises, one-stop shop services, etc. This initiative aims to provide local entrepreneurs with everything they might need from tax regulations to state funding or to consultancy on marketing of goods and services.

10. Merchandising activities

The products sold at the Routes of the Olive Tree shop are mostly purchased from local producers and crafts people in Greece. In addition, a number of publications have been published by the foundation and these are now on sale in the olive tree shop.

Approximately 20-30% of stock in the olive tree shop are imported products (mainly from Portugal, Italy, Jordan and Lebanon). Audrey Guittard noted that there are difficulties in the acquisition and sale of imported products as a result of:

- high import taxes because the products are not purchased in large quantities;
- prohibitive cost of transport (for example, failure to import soap from Lebanon for the reason mentioned);
- stock replenishment (irregularity in production and delivery).

The aim is, however, to open shops in other countries and these are being considered on a case-by-case basis. The status of each store could change according to the opportunities for selling the foundation’s products. It could be a shop belonging to the foundation or a shop run by a partner of the network (in this case, the partner would own it and have permission to sell the foundation’s products alongside their own).

A six-month (sale-or-return) contract was signed on 22 January 2011, for the sale of products from the collection of the foundation in the European Institute of Cultural Routes shop in Luxembourg. Prices have been fixed with a percentage going to the shop in Luxembourg. The pilot project is currently under way.

The foundation is looking into other agreements to develop the olive tree shop initiative. Partners in Lebanon and Meknès (Morocco) are interested in opening their own shops. Merchandising sales are hoped to increase with the opening of these new outlets.

11. Planned future activities

The foundation has been approached recently by several tour operators to develop, together with its itineraries, tourism products that would be offered by travel agencies. As such, three pilot “small itineraries” have been planned in the Peloponnese, and a first contact was made with Greek partners wishing to promote the local heritage of the olive tree and integrate it into a local thematic itinerary.

A project is also currently being studied for a joint exhibition between the Chamber of Commerce Marseilles-Provence and the Chamber of Commerce of Messenia, in order to enhance trade relations between the City of Marseilles and that of Kalamata and also other Mediterranean ports. The foundation will curate and co-ordinate this initiative.

12. Closing remarks

The Cultural Routes of the Council of Europe were set up as intrinsic heritage, cultural and educational projects and this is certainly the case for the Routes of the Olive Tree. As with the other Cultural Routes, this project was not set up with the specific aim of generating SMEs. However, it is an interesting case as it has a strong dimension related to sustainable development.

The chambers of commerce (principal partners within the foundation) are willing to join forces to guarantee the survival and identity of olive-growing regions. The Routes of the Olive Tree is clearly seen as a useful tool by the chambers of commerce; possibly as a springboard from which to give added value to more localised initiatives on the same theme.

The project’s main value is in increasing the appreciation of valuable European products derived from olive tree farming. The project has a limited impact on SME generation, but despite the significant problems in measuring the indirect impact of the Routes of the Olive Tree there is evidence that the Route is able to contribute considerably to the development of existing SMEs. It should be noted that the SMEs concerned with this Route exist in rural environments where even a small input has a large impact on the local economy.

The foundation’s running costs are low if the relative value of all its activities are taken into account and even more so if one considers the spin-off effects of this initiative. The foundation’s annual budget is under €200 000 and therefore represents significant value for money. It also clearly represents value in educational, networking, economic and heritage terms.

Visibility is a key problem highlighted in all the partner responses. The Internet has not been fully exploited, traffic levels are very low and therefore there is a lot of work that could be done to build context for the project and its partner websites. Developing cross-marketing initiatives at a very basic level could have a real impact on visitor interest in local initiatives.

The problem is that finance is lacking and often dependent on regional agencies that only have an interest in the “local”. Partners of the foundation do occasionally apply for EU funding and sometimes build synergies into the Cultural Routes, but there are no guarantees.

Cross-marketing and increased networking could make a real difference over time (it should be noted that this project is still comparatively young). However, without strong investment in practical projects for the real strengthening of the network, it would be hard for the foundation to operate beyond its current capacity.

The work that the foundation undertakes to encourage partnerships and promote sustainable small economies are areas that could positively influence SME development in the future.

13. Appendices

Appendix 1. List of festivals organised by the Routes of the Olive Tree network between 2008 and 2011

- 22-23 September 2010: Stockholm/Sweden
- 17-19 June 2010: Meknès/Morocco
- 15 June-19 July 2009: Greece
- Kalamata, Igoumenitsa, Ioannina, Grevena, Kozani, Veria, Thessaloniki, Drama, Xanthi, Alexandroupolis, Kavala, Volos
- 22 August 2008: Odessa/Romania
- 19 August 2008: Kiev/Ukraine
- 2 August 2008: Almaty/Kazakhstan
- 30 July 2008: Tashkent/Uzbekistan
- 22 July 2008: Baku/Azerbaijan
- 15 June 2008: Soufli/Greece
- 7-13 July 2008: Pylos/Greece

These festivals ideally include the following “cycles”, but every festival is different depending on requests from the public, reception facilities, time and resources allotted to the event and can take very different forms:

Cycle “art”

(exhibitions of photographs and paintings, films, children's drawing contest, photo contest, etc.)

Cycle “music”

(concert musicians Mediterranean)

Cycle “information”

(presentation and tasting of olive products from several regions/countries, cooking workshops, conferences, etc.)

Cycle “history”

(exhibitions on the history of olives and olive oil, its place in the daily lives of people in the countries of southern Europe and the Mediterranean, and their relevance for local economies)

Appendix 2. Internet analysis

International visibility of the Routes – Google rating

Searching using the key terms “The Routes of the Olive Tree” and the “Olive Tree Route” returns the Route’s website in the top two spots in four key search engines. This indicates a favourable Google rating if the client knows what they are looking for. However, using eight

other related key terms (including “olive tree”), the rating is less than 100, which indicates a lack of presence in related search terms and missed opportunities for marketing.

Table 1. The visibility of www.olivetreeroute.gr using various search terms

Search term	Google	Yahoo!	Bing	AOL
“olive oil”	No	No	No	No
“Mediterranean products”	No	No	No	No
“olive tree products”	No	No	No	No
“activities Greece”	No	No	No	No
“tourism Greece”	No	No	No	No
“cultural routes”	No	No	No	No
“olive tree routes”	1	2	2	1
“the routes of the olive tree”	1	2	2	1
“olive tree”	No	No	No	No

Share of Internet coverage dedicated to providing tourism, historical, educational, crafts, events and/or practical information

On the Routes of the Olive Tree website there is contact information provided on “affiliate” organisations (museums and festivals) of the Route but unclear information about the actual Routes and contact points. As an individual traveller it would be difficult to understand if there is an actual offer other than separate museums and festivals. It seems clear that excursions are organised by motor clubs but then there is no access to these given on the website.

- visibility of international partners/sponsors: low (sponsor’s logo and website available – no cross-referencing from their websites);
- visibility of local events connected to the node/Route: high;
- visibility of cultural events connected to the node/Route (heritage/contemporary): low;
- visibility of merchandising opportunities on the node/Route: low (the olive tree shop is under construction);
- languages addressed: good (English, French, Arabic and Greek);
- practical information: poor (as there is no clear itineraries to follow, either as a motorist or individual traveller).

Appendix 3. Olive tree products and books

The olive tree shop opened in February 2008 and is situated at Plaka, near to the cathedral. It offers handmade products, including: best extra virgin olive oil from Greece, Greek delicatessen specialties, honey, herbs and tea from Taygetos Mountain, olive oil soaps, mustard, balsamic vinegar and the very famous Kalamata olives.

The olive tree shop has been advertised as being online since April 2009 by the European Institute of Cultural Routes website, and is also linked to on the Routes of the Olive Tree website, but in fact it is still under construction.

Ode to the olive tree

A book dedicated to the olive tree, assembled by the Academy of Athens, the Hellenic Folklore Research Centre and the General Secretariat for the Olympic Games.

"The olive tree has a multiplicity of meanings. It is the absolute symbol of peace and victory. It symbolises prosperity, immortality, fertility and fruitfulness. Above all the olive is indissolubly linked with Greece and the Greeks. As a prize given at the Olympic Games, it has been linked throughout history with these famous Games, and the values that they represent.

This publication makes clear the value, symbolism and sanctity of the olive. It illuminates the historical relation of the olive tree to Greek culture from prehistory to the present. Above all, it emphasises the values of athleticism and of the Olympic Games."

Author: Collective

Language: Greek

Editor: Collective

Year of publication: 2004

ISBN/ISSN: 960-404-054-5

Characteristics 342 p.

Bilingual Greek-English

Le guide des routes de l'olivier

Millenary tree, Mediterranean par excellence, the olive tree is a true symbol.

Age-old, its culture was passed on around the Mediterranean area, not only from one generation to another but above all from one civilisation to another.

It is perhaps the only tree to shower people with so many gifts: with care, it offers them fruit, smooth and fragrant oil, solid wood, light foliage that provides shade as well as its unmistakable aesthetic value.

It is an integral part of a heritage to which each one of us is truly attached.

Author : Dominique Bottani

Language: French

Editor: La Manufacture

Year of publication: 1994

ISBN/ISSN: 2-7377-0364-6

Characteristics: 12.5 x 23 cm, 271 p.

12 months with the olive tree

The history of the olive tree, the financial and social importance for the Greeks and all the Mediterranean people, the nutritional value of its products, its place in art and literature and information on the tree that enriches our lives for 12 months of the year.

Language: English and Greek

Characteristics: 60 p., including photos

On the Routes of the Olive Tree and the Mediterranean

Selected work of great photographers on the subject of the olive tree.

Languages: English, Greek, French

Characteristics: 120 p.

Appendix 4. EU projects

OLÉOTOURISME

OLÉOTOURISME was led by the Provincial Council of Jaén, Spain. It is a network for exchanging experiences in order to enhance the tourist development of local resources for the production of olive oil. Participants include seven Mediterranean countries through various government and non-profit associations. The project ended in June 2007 and had a total budget of €792 664, €557 498 of which was provided by the ERDF INTERREG IIIC South (Community initiative between southern countries of the EU and third countries to strengthen socio-economic cohesion and regional development by ring-exchange experiments on a given subject).

KNOLEUM – Landscapes of the Olive Tree

A European project for the economic consolidation of olive tree territories. Euro-Mediterranean KNOLEUM 2006-08 was aimed at contributing to the homogeneous development of "landscapes of the olive tree".

This project involved Spain, Italy, France, Portugal, Greece, Croatia and Morocco, as part of the Community Initiative Programme INTERREG IIIB – Medocc, which aims to support and fund inter-regional projects in order to promote balanced and sustainable development of the Mediterranean area.

KNOLEUM is a continuation of the project OLÉOTOURISME 2004-06 the main aim of which was to develop complementary activities including income through olive tourism. The objective was to support KNOLEUM territorial development through the establishment of a multisectoral analytical approach based on the identification and exploitation of resources related to the landscape of olive trees: economic, social, cultural and environmental areas.

Each partner then identified its territory a set of resources and built a network of experts able to provide accurate and valuable information on several themes: heritage and culture, innovation, economics, olive products, strategy, development and environment.

Appendix 5. Sources of additional information

The Routes of the Olive Tree

Epimelitirio Messinias

23rd Martiou Square

24100 Kalamata

Greece

www.olivetreeroute.gr/en/actualites_en.htm

“BIBLIOGRAPHIE sur le thème de l’olivier”

Document prepared by Audrey Guittard.

www.culture-routes.lu/php/fo_index.php?lng=en&dest=bd_do_det&id=00003340

More information on the history of the Routes of the Olive Tree:

www.olivetreeroute.gr/en/fondation_en.htm#

Via Francigena

Introduction

The European Association of the Via Francigena has recommended highlighting the Tuscan region as a best-practice example for developing tourism on the Route. Years ago, as part of the 1 800-km itinerary passing through England, France, Switzerland and Italy, the canton of Valais in Switzerland established a touristic infrastructure and products on the Via Francigena that communicate the unique cultural and historical heritage of the Route. The Inventory of Historical Routes in Switzerland established by ViaStoria (1994-2003) serves as a scientific basis for the Via Francigena in Switzerland.

The Tuscany region in Italy is equally determined to further develop cultural tourism along the Via Francigena. Bookable holiday packages and good prospects for individual pilgrimage attract a growing number of visitors every year. The current study identified a few regional partnerships and networking structures which aim to develop collaboratively the Via Francigena as an outstanding destination. Yet, the Route is obviously lacking effective and professional management structures. Without a doubt there is great potential in the regions on both sides of the Swiss-Italian border for the development of the cultural tourism offer. Nowadays, however, this potential is not yet fully exploited.

The experts of ViaStoria rate the potential of the Via Francigena Cultural Route at least as high as that of the Santiago De Compostela Pilgrim Routes. The annual sales volume of bookable packages on the Via Jacobi (the Swiss St James' Ways) had come to almost CHF60 000 by June 2011. There are strong synergies between the hiking associations of both the Valais and Vaud cantons, the national network SwitzerlandMobility,⁴³ which was created to further sustainable mobility in leisure, tourism and everyday life, and other stakeholders. The Swiss programme focuses on history and culture while ensuring a satisfactory level of accommodation along the Route. The approach is to manage the Route professionally and develop the cross-border tourist offering. The aim of this approach is the enhancement of the Via Francigena as cultural heritage of European importance. Additionally, the tourism SMEs and all tourism-related sectors in the regions will benefit from the tourism activities on the Via Francigena.

1. The beginning of the Via Francigena

Since 1994, the year in which Via Francigena became a European Cultural Route, many associations and individuals have helped to promote the Route. In 2001, in order to promote the ancient pilgrim Route more professionally, the Italian Associazione dei Comuni Italiani sulla Via Francigena was founded, representing 34 municipalities and provincial administrations in seven different regions. In 2006, the European Association of the Via Francigena (AEVF) was founded. It has been growing steadily and today the association counts 95 European members. A first handbook describing the Route from Canterbury to Rome was edited by the International Association of the Via Francigena (AIVF). It attracted the interest of regional and local authorities along the Route. However, the role of this association as well as that of the European association remain rather undefined.⁴⁴ Nevertheless,

43. www.wanderland.ch/en/welcome.cfm.

44. The problem is that both associations are still working on their own. The AIVF is hoping that the next evaluation will give them the opportunity to take over the AEVF's role. AIVF is still creating new Via Francigena Routes and new publications using the certification awarded by the Council.

as a result of an evaluation⁴⁵ conducted by the European Institute of Cultural Routes in 2008, the European association was appointed as a “network leader” to be in charge of Route co-ordination.

2. Activities in Switzerland and Italy

One of the most spectacular sections as regards natural setting and cultural richness is the passage from Martigny to the Great St Bernard Pass. Locally, the stretch Aosta-Martigny (“Chemin Martigny-Aosta”) was created by a group of friends, the Compagnons, supported by Valrando⁴⁶ (Valais hiking association) and the communities concerned. The section Martigny-Sembrancher had to be recreated to secure hiking activities. The first section between Martigny and Bovernier became accessible between the years 1975 and 1994. The section to Sembrancher was completed in 1995. The official opening of the stretch Martigny-Orsières took place on 26 April 1996. The section Orsières-Great St Bernard Pass was inaugurated on 17 August of the same year.

In 2000, after consultation with the AIVF, the Compagnons signposted the Via Francigena along its entire length in Valais, from Massongex to the Great St Bernard Pass. The signposts show a yellow coloured pilgrim. Additionally, the first brochure on the route Martigny-Aosta has been published in co-operation with the Italian Aosta Valley. In the same year, together with the Abbot of Saint-Maurice, Valrando organised a pilgrimage that reached Rome in 2006. In 2007, a group of about 30 pilgrims departed for Saint-Maurice, the central point of the Via Francigena, aiming to arrive in Canterbury in 2012.

Since 2004, the Via Francigena is officially part of the Cultural Routes of Switzerland programme, which aims to enhance the historic paths by integrating them into the network of existing hiking trails. Since 2007, ViaStoria, together with regional tourism destinations, has established bookable packages attracting a growing number of visitors each year. Based on the IVS (Inventory of Historical Traffic Routes in Switzerland) an official route has been established, and after one year of consultation (local and regional authorities) it was secured and marked. A walking guide was published and all necessary information is available on the website of SwitzerlandMobility: www.suissemobile.ch.

As a new starting point for more efficient co-ordinated actions, responsibilities and defined priorities in the future development of the Via Francigena, a round table with deputies from all administrative levels was held on 22 February 2011 in Sion (Switzerland), led by Jean-François Copt, President of the Council of the Valais. Through closer collaboration with the European Association of the Via Francigena and a better defined framework through the Cultural Routes of Europe programme, ViaStoria and interested groups are hoping for a more effective development of the Via Francigena, by making more use of synergies than before.

The Tuscany region, represented by the Gruppo di lavoro Via Francigena (ATVF – Tuscan Association of the Via Francigena), has developed a regional master plan with a focus on sustainable regional development through tourism. The creation of an inventory in Siena, likewise the Swiss IVS is in consideration. According to Irene Amadei (AEVF), the regional authority in charge of the Tuscan stretch of the Via Francigena intends to promote sustainable economic development in the future. The aim of the region is to set itself up as a model for the other European regions of Cultural Routes. The AEVF is also a member of the Cammini d’Europa (EEIG) network, which has developed standards for accommodation and awards the Via Francigena logo to these businesses. The website www.camminideuropa.eu gives a list of

45. Institut européen des Itinéraires culturels (IEIC), Thomas-Penette 2008.

46. www.valrando.ch/en/index.php.

recommended accommodation. The Via Francigena in Switzerland has been developed according to the quality standards presented in Chapter 6.

The master plan aims to be a technical document which provides the guidelines for the planning of infrastructure and facilities. This document gives suggestions for the creation of a tourist itinerary following the steps of: tracing the Route, defining signposting and information systems, offering accommodation and gastronomy for visitors, managing events, providing information and promotional material, and offering training to personnel. Two other supporting tools are the manual “Via Francigena: a new Italian tourist offer”, which provides a possible methodology for the creation of a tourist product to be promoted with an effective marketing strategy, and the Via Francigena online portal, www.viafrancigena.eu, providing information to walkers and local communities. Likewise, in Switzerland, the Via Francigena is embedded in the Cultural Routes of Switzerland Programme. Both the Cultural Routes of Switzerland business plan and the “Tool kit”⁴⁷ recommend working steps and quality standards for systematic Cultural Routes development. They can be used as supporting tools for Cultural Routes management.

3. Aim of the study

The case study aims to examine the existing and potential benefits for SMEs along the Via Francigena Cultural Route according to the available information and the established by the author of these study criteria. Threats and opportunities for the future development of the Cultural Routes shall be identified and assessed.

4. Methodology

As previously indicated, this study was conducted as a comparison of the two regions – Tuscany (Italy) and the Valais canton (Switzerland) – and accompanied by a few real-life examples from the two. Additionally, interviews have been conducted with the representatives of the Italian section of the Via Francigena⁴⁸ in order to compare the degree of development on both sides of the Swiss-Italian border and to identify areas for future collaboration between these and other destinations on the Route.

It has been recorded that the Valais canton has already been developed as a successful tourism destination, focusing on local culture and heritage and following a top-down bottom-up approach. The tourism offer on the Via Francigena was created and is distributed by regional tourism associations in collaboration with scientific and administrative partners. As co-operation with the neighbouring region of Tuscany has been fruitful for many years, this case study also presents experiences from the destination of Siena (Tuscany) (considering information gathered in the two provinces, Lucca⁴⁹ and Siena,⁵⁰ in the Tuscany region and the province of Parma⁵¹ in the region of Emilia-Romagna as well).

Pilot destination:

Country	Switzerland	Italy
Canton/region	Valais	Tuscany

47. ViaStoria “Tool kit” is available in German; with a French edition expected.
 48. Gianni Masoni, Assoturismo, Florence; and Professor Alessandro Tortelli, Centro Studi Turistico, Florence.
 49. Giovanni D’Aglia and Mario Lupi, Tuscan Association of the Via Francigena, Florence.
 50. Paola D’Orsi, Gruppo di lavoro Via Francigena, Siena; Tommaso Stufano, Siena; Antonio De Martinis, Siena; and Giuliano Mariotti and Danile Chimenti, Comune di Monteriggioni, Siena.
 51. Graziano Cenci and Fornovo di Taro (PR).

Procedure:

- desk research: review of publications and online research for information available to generate general information on the Via Francigena;
- survey: semi-structured face-to-face interviews with partners on-site and gathering additional data;
- analysis: evaluation of gathered information including interview transcripts, statistics and publications in order to identify general patterns;
- final report: presentation of main findings, and elaboration of conclusions and recommendations.

5. Main findings

Based on the Cultural Routes grid that was composed by the Council of Europe as a result of a questionnaire and direct phone contacts with the European Cultural Routes' authorities, the main findings of the current case study helped to complete the picture of the Via Francigena by revealing information about aspects of the Route such as its management structure, target groups and activities, SMEs' and NPOs' involvement, innovative planning, underlying issues (for example, marketing and networking), evidence-based practice, influential models for the future, and impact assessment.

5.1 Synopsis

<i>Participating countries</i>	The historical Via Francigena Route connects England, France, Switzerland, and Italy and the Vatican.
<i>Programme participation period</i>	The Via Francigena was designated as a European Cultural Route in 1994. Since 2007, ViaStoria has been managing the touristic offer for both organised and individual travel on the Via Francigena in Switzerland. Earlier experiences from other Routes in the programme, established in 2003, have been influential on the Via Francigena project from the outset. In Italy, in 2001, the Associazione dei Comuni Italiani sulla Via Francigena was founded, in order to promote the ancient pilgrim Route; it represents almost 3.5 million inhabitants in 47 municipalities and provincial administrations in seven regions. ⁵³ In 2006, the AEVF was established, bringing together 95 members at European level.
<i>Sectors covered</i>	Accommodation, attractions (museums, historical and natural sites), transport and mobility, gastronomy, food supply and groceries, agriculture, agritourism, retail items (equipment, souvenirs, art and handcrafts), archaeological sites, creative industries, tours and visitor services.
<i>Focus (theme, activity)</i>	Pilgrimage: the Via Francigena follows the journey of Archbishop Sigeric on his way from Canterbury to Rome in 990. The Swiss part tells about the conquest of the Romans, the importance of the Via Francigena for military and strategic purposes, transport, trade and settlement history of the regions, the Via Francigena as the connecting route between the Jura and the Alps, the cultural landscape and regional history. The main activities on the Via Francigena are: walking, hiking, trekking, pilgrimage, religion, cultural and natural heritage, transport and settlement history, historical paths and environment conservation, land use, agriculture and regional development, culture and tradition of local people, and architecture.

52. Tourism office, Verbier St-Bernard, Route de la Gare, CH-1937 Orsières, www.verbier-st-bernard.ch.

53. www.comuni-italiani.it/associazioni/francigena.

Main partners Tour operators, tourist offices, SMEs (accommodation, restaurants, transport), cultural attractions (museums, churches, historical buildings), Swiss hiking trails,⁵⁴ non-profit organisations, educational institutions, regional political bodies, national government and European network partners.

Managing organisation In Italy, the Tuscany region (Gruppo di lavoro Via Francigena, ATVF – Tuscan Association of the Via Francigena) has developed a regional master plan with a focus on sustainable regional development through tourism; for example, the creation of an inventory in Siena, likewise the Swiss IVS, is planned. At a national level, ViaStoria co-ordinates the Via Francigena in Switzerland (and is incorporated into the programme Cultural Routes of Switzerland); in Italy, the AEFV⁵⁵ is the organisation authorised to do so. In 2007, international co-ordination was taken over by the Associazione Europea del Vie Francigene⁵⁶ from the International Association of the Via Francigena (IAVF).

In Switzerland, at local level, the Via Francigena is managed by both the Abbey St-Maurice and the Compagnons; in Italy by individual communities, for example: Monteriggioni has been an important element of development (the first Via Francigena shop and efforts in collaboration with five other communities to maintain secure pathways); and Altopascio as one of the founders of the first AEFV, whilst maintaining the tradition of providing free beds for pilgrims since 1991 (1 000 pilgrims per year). At the regional level in Switzerland, again Les Compagnons, the tourism destination management organisation Verbier-St Bernard (since 2007), the tour operator Café de Tour⁵⁷ (since 2010), and Business Valais⁵⁸ (member of the AEFV).

Funding sources In Switzerland, the Via Francigena is financed by both the Valais and Vaud cantons; the establishment of the tourism project was also part-financed by the Swiss Government.

In Italy, the communities are involved in funding. There are also governmental sources and the AEFV is supported by European funding.

Principal impact Local economy/employment: in Switzerland, at least 75 SMEs and potentially 445 or more tourism-related businesses in the Valais region are directly connected to the Route; according to the OECD definition,⁵⁹ SMEs employ less than 250 persons. In conclusion, a indeterminate number of jobs up to 111 250 could potentially depend directly or indirectly on tourism along the Via Francigena:

Table 1. Numbers of SMEs in the different sectors

	Bookable package	Total (estimated)
Accommodation	18	86
Transport	4	6
Restaurants	18	139
Food supply	22	[REB11]n.s
Agriculture/agritourism	3	n.s.
Attractions (cultural and natural sites)	4	22
Retail, services ⁶⁰	n.s.	192
Tourist offices	-	6

54. www.swisshiking.ch.

55. www.associazioneVF.com, www.VF.eu.

56. www.associazioneVF.com, www.VF.eu.

57. www.cafedetour.ch/EN/Itinerary/Entries/2010/11/23_Via_Francigena.html.

58. www.vs.ch/Navig/navig.asp?MenuID=17143&Language=fr&link=.

The economic impact measured by beds sold shows a possible CHF1.5 million of revenue.

Turnover (packages sold) ⁶¹	Turnover (individual visitors)
CHF58 000/~400 nights	Approximately 100 guests per hotel and season = 8 600 more nights. ⁶² A minimum additional amount of CHF1 500 000 is possible.
Other Routes show a potential of at least CHF1 000 000 turnover from bookable packages (for example, the Via Spluga).	

Financial impact in the Valais region (accommodation only)

In Italy, the main target communicated in the Tuscany master plan is to promote sustainable regional development in less tourism-developed areas. There is a potential of 4 000 SMEs in the agritourism sector. The estimated number of SMEs in the Tuscany region is 25 000, with at least 50% of them directly or indirectly connected to tourism. For example, in 2010, the Tuscany region invested €80 000 in the event “Veglie Francigene”. With 22 municipalities involved, there was a potential of at least 2 200 people directly benefiting from this event.

5.2 SMEs’ and NPOs’ involvement (innovation, competitiveness)

SMEs’ and NPOs’ level of interaction and participation, service and product quality, intensity of co-operation, and commitment cannot be specified with the help of statistical data. It is known that a few destinations were ambitious in setting up events, for example, the province of Parma conducted the event “Cammina Cammina”,⁶³ and published a road book – “10 days and 2 000 km between Fidenza and Lucca”, but these efforts have not been sufficiently supported in the long term to provide a vision for future development.

5.3 Quality certification

In order to increase quality standards, many SMEs on the Swiss side of the Via Francigena have already been certified with national quality labels. Information about the importance of quality certification in Italy could not be gathered. ICT usage is a must for being competitive in today’s global market. On a positive note, ViaStoria and tour operators in Vaud, as well as some SMEs, are using computerised reservation systems; Verbier-St Bernard is planning to introduce this system in 2012. The Italian joint website is in the process of linking information on over 8 000 Tuscan SMEs. Further, both ViaStoria and the AEVF are collecting data about their media coverage (presence in various media, website visitors, etc.).

In Italy, the work on an indicator system for “sustainable tourism destinations”, set up by NECSTouR, is in progress. A first draft was presented at the Workshop on Innovation and Competitiveness in the Programme of Cultural Routes, held at the European Institute of Cultural Routes in Luxembourg on 28 and 29 March by Paolo Bongini, Manager for Tourism, Trade and Tertiary Activities in the Tuscany region. The indicator system is still in the phase of testing and has not yet been officially released.

59. OECD online glossary at <http://stats.oecd.org/glossary/search.asp>.

60. Specifically: sports equipment: 24; shops: 7; supermarkets: 35; shoes: 25; souvenirs: n.s; pharmacies: 21; drug stores: 5; medical services: 23; banks: 26; post offices: 8; train stations: 8.

61. Rounded to the full values.

62. No hotel has responded to the survey; the 100 people/season/hotel is an estimation.

63. <http://turismo.parma.it/Inglese/page.asp?IDCategoria=260&IDSezione=1157>; this event finished in 2010.

5.4 Innovative planning process

Italy

The Tuscany region is very ambitious in creating more offerings in hiking, biking, horseback riding and motorised visits of the Route,⁶⁴ using sustainable tourism as a tool for regional development in rural regions. The town council of the Italian municipality of Monteriggioni, in the province of Siena, has approved a proposal to consider the official Route validated by the Italian Scientific Committee of the National Council for Cultural, Historic and Religious Routes as a structural invariant. This regulation ensures formal protection to this area, and considers it a non-negotiable environmental element in territorial transformation processes. However, with the master plan, a regional management plan of Tuscany does exist and can be seen as a first step in the planning process for the Via Francigena in the framework of regional development. It is to be assumed that the Italian section of the Via Francigena benefits from strong lobbying at European level and that the AEVVF is strongly supported by the Council of Europe. But, for instance, the official website of the Via Francigena, www.viafrancigena.eu, is only available in Italian and therefore does not fulfil its task of attracting an international audience. While a lobbying group would represent an important asset for any of the existing Cultural Routes, it is obvious that not all of them could develop such a capacity. It is also evident that the AEVVF is active in promoting the Via Francigena, but visible results in terms of actual benefits for SMEs could not be quantified at the time during which this case study was carried out.

Switzerland

There is no overall planning process for the whole of the Via Francigena, but some local and regional initiatives could be identified. For instance, the Swiss destination management organisation Verbier-St Bernard in the Valais canton is continuously collaborating with ViaStoria in order to improve the management and offer on the Via Francigena. Co-ordination on tourist information is supported by Business-Valais,⁶⁵ which represents approximately 8 000 companies (98% of which are SMEs), seeking to answer common questions from entrepreneurs and providing practical assistance. An INTERREG IVA project, 360° (since January 2009) aims to develop cross-border tourism communication and education infrastructure in the Valais region (Great St Bernard Pass) and on the Italian side (Aosta Valley) is still ongoing. The purpose of this project is: to develop tourism, to enhance the uniqueness of the cultural heritage, to promote cross-border movement of customers, and to increase the attractiveness of the destination of the Great St Bernard Pass around the product "Via Francigena". Actions that have to be taken are: to develop better culture tourism, to present the strengths of other towns in the Aosta Valley and Valais region via this Route, to diversify the supply and increase the offer of accommodation, to educate the local population in understanding visitors' demands, tourism service and quality, to establish a permanent information point in the Great St Bernard Pass, to develop travel packages (accommodation, meals, visits, transportation), and to enhance the religious heritage (church, chapel, places of culture, hospice, etc.).

64. Mario Lupi, Regione Toscana, Consiglio Regionale, Florence.

65. www.guichetpmevalais.ch.

5.5 Underlying issues

Feedback

Customer feedback, collected by SMEs and Cultural Route operators, is an important issue in order to identify clients' demands, and if the tourism offer meets their requirements.

Switzerland

There is no data available from Italy, but both the Swiss destination Verbier-St Bernard and the tour operator Café de Tour collect and share customer feedback with ViaStoria. This feedback gets collected by SMEs and the two Via Storia partners, which are provided with survey sheets to give out to tourists. This co-operation is very useful in order to get information about customer satisfaction, target audience (mainly those over 50), people interested in culture, history, walking, pilgrimages, and school groups, and the number of international guests (= 39% for booked packages).

Education and interpretation

Italy

As part of the Tuscany master plan, Italy aims to set up the "Via Francigena Festival" in autumn 2011. The idea is to promote every event on the Via Francigena (internationally) under the umbrella of the AEVF. All events have to be financed by the participating communities, which could be a barrier to entry for most of the regions. The exhibition "From Canterbury to Rome: 1 800 km through Europe" is suitable for events or as a didactic tool raising awareness about the Via Francigena. Nine banners in English and Italian are to be rented by AEVF members.

Switzerland

In collaboration, the Swiss partners have placed communication panels along the Via Francigena, developed school material about the Cultural Routes, and offered guided walks and public events with the aim of raising awareness on the topic of Cultural Routes. ViaStoria is administering a picture and publications library open to partners, and producing several publications; for example the journal *Erlebnismagazin Kulturwege Schweiz* (a magazine on the Cultural Routes of Switzerland), guidebooks and the educational material for a didactic programme. Seven touring exhibitions with 39 banners in German, French, Italian and English are available to rent by anybody.

Information and publications

Italy

The portal of the Via Francigena, www.viafrancigena.eu, was set up as a result of co-operation between the Italian Ministry of Cultural Heritage and Activities, the Italian regions of the inter-regional project Via Francigena, and the local governments located along the Route, representing all 140 municipalities involved and giving space to pilgrims, tourists and travellers to give feedback. The pilot festival in 2011, Via Francigena Collective project, aims at the joint promotion of events along the Via Francigena. The *Via Francigena* magazine is a biannual publication that gives information about the activities of the European Association of the Via Francigena. The magazine will later include other pilgrimage Routes (the Santiago

Compostela Pilgrim Routes, the Saint Michael's Ways, the Route of Saint Olav Ways), turning into *Via Francigena and the Pilgrimage Routes*. AEVF is currently working on the development of this project.

Switzerland

ViaStoria has published various products, for example, a series of Cultural Routes magazines, the magazine *Routes and History*, as well as flyers and brochures. Information is provided on the multilingual Cultural Routes of Switzerland website, www.kulturwege-schweiz.ch, in the regular newsletter, and by direct communication to the interested audience at fairs and public events. The Via Francigena is also promoted on the national platform for slow mobility, SwitzerlandMobility. Both of the platforms provide information and maps for visitors. The Via Francigena packages are also promoted by local tour operators and tourist offices.

Contribution to cultural and natural heritage conservation

Italy

On the Italian side, it is said that about 30 different voluntary associations are involved in Via Francigena development, but individual actions are not specified.

Switzerland

Regional partners of the Cultural Routes of Switzerland and Heritage Trust organisations are committed to maintaining the walking paths in collaboration with Swiss Hiking (monitoring signposting and accessibility); to prevent damage to natural sites through effective visitor guiding.

Contribution to socio-economic benefits

Italy

The tourism offerings on both the Swiss and the Italian sections of the Via Francigena attract visitors and therefore generate income for the local population in various sectors (gastronomy, transport, accommodation, retail). For example, the “Cammina Cammina” tourist packages along the Via Francigena from Fidenza to Lucca offered about 134 pilgrim accommodation establishments, but this initiative ended last year.

Switzerland

Tours are organised through locally based agencies and tourism offices. Therefore, all turnover from tourism remains in the regions. Another positive effect is the sensitisation of both visitors and locals, raising awareness for regional culture and landscapes.

Research

Italy

The University of Architecture, Venice, is carrying out research on landscape ecology, environmental impact and planning. As a result of a study led by Professor Virginio Bettini, indicators concerning energy and thermodynamics will be further investigated until 2012 in

order to produce recommendations for planning and management of the Via Francigena at European level.

Switzerland

The Via Francigena has been developed as part of the Inventory of Historical Traffic Routes in Switzerland (IVS), which was elaborated in the framework of the Federal Law on the Protection of Nature and Cultural Heritage, and which lists a total of 25 000 paths and roads. The IVS is a valuable tool for the preservation of important elements of the landscape, provides fundamental information for further in-depth research, and is a valuable basis for sustainable tourism projects. As a spin-off company from the University of Berne, ViaStoria is continuously co-operating with different international educational institutions in their work on the theoretical issues of the Cultural Routes.

6. Discussion

The survey was conducted in close co-operation with regional partners of the European Association of the Via Francigena and ViaStoria. Due to the very limited resources given available, the gathering of data and the search for systematically collected information about the Route's performance over certain periods of time turned out to be a difficult task.

The absence of valuable statistics made a standardised analysis impossible. ViaStoria gained the information from personal site visits to Switzerland and Italy. At this point, this study shows that almost no data on the Via Francigena are available that would allow scientifically proved conclusions, in particular regarding the economic impact on SMEs along the Route. However, the educational institution Centro Studi Turistico in Florence is undertaking selective research on the Route, but again limited resources currently hinder further research on the topic.

Conducting this case study demonstrated the absence of scientific approaches in establishing Cultural Routes and also the lack of effective management structures to maintain cultural tourism projects along the path. At all levels, there is a lack of interconnection between SMEs and vertical organisation as well. There is no communication of a broader framework in order to harmonise any tourist activities, neither are there standards for Cultural Routes and quality criteria for services and other offerings. The organisation NECSTouR is in the process of developing an indicator system for sustainable tourism destinations, but it is unlikely that one set of quality criteria can meet all the issues on each of the Cultural Routes.

The Via Francigena is managed at different levels: namely, local, regional, national, European and international levels. The efforts of the different bodies involved seem to be poorly co-ordinated by a central leader. There seems to be no central authority and all actions are regional, which leads to a very diverse picture of the Via Francigena, providing very unequal standards of information quality (online, maps, technical and historical background information), accommodation and more. Despite the constantly increasing interest in the Route by various associations, there is a lack of internal co-ordination leading to disadvantages for pilgrims not being provided with adequate information all along the Route.

Via Francigena internal sources stated that the management of the Via Francigena is one of the most extended and democratic ones in the whole of the European Cultural Routes programme, which should be extended and adapted by all other Routes. Furthermore, the "social balance" of the Via Francigena is rated as good practice from the managerial point of view by Via Francigena internal sources. Yet, these statements are not backed up by specific arguments.

7. Conclusions and recommendations

In the course of this case study, many gaps in the organisational structure of the Via Francigena were identified. The necessity for new approaches in regional Cultural Routes management is obvious. Setting up a framework for more informative monitoring and evaluation of development processes along a Route is also required. The available and analysed data in the course of this case study allow only for broad conclusions, which indeed follow.

The Via Francigena's image suffers from the weak co-ordination of loose actions and therefore is wasting its potential for synergies. It is recommended that local bodies be established that would co-ordinate regional activities, acting as mediators between SMEs and the European Association of the Via Francigena. As mentioned before, single projects, events and activities do not seem to be sufficiently supported in the long term. This leads to the impression that events and projects come and go without contributing to a broader strategy. It also appears that the life cycle of the "product" of the Via Francigena has not been considered.

At the same time, the Tuscany master plan represents a useful initiative aimed at developing the Via Francigena in a planned manner. The master plan proposes to establish some guidelines and to provide know-how to support authorities in establishing their Cultural Route in a structured way.

This study demonstrated no quantitatively recognisable added value of cultural theme-based tourism for SMEs' development and competitiveness. The only visible effect is a higher frequency of visitors (increasing number of bookings); visitors' motivations are not defined. Pilgrimage is a valuable motivation but without tourist products that generate a countable turnover, projects have little potential for sustainable existence. Therefore, the product "Culture Route" has still to be defined and needs to meet visitors' expectations.

Cultural Routes should provide opportunities for thematic and geographical clustering to expand the market and optimise resources. In the frame of this case study only very few partnerships between stakeholders were identified. The reasons for this cannot be explained by available data. Probably, this phenomenon is based on a lack of awareness about the Cultural Routes as an added value; as a matter of fact a general solitary worker mentality within the tourism sector can often be recognised.

The main forces driving clustering of tourism SMEs is the opportunity of financial benefits and greater market appearance, wider promotion and communication channels, shared infrastructure, extended value chains and therefore more added value for the region, and sophistication in individual business performance. Also very often the reason for clustering is the desire to overcome isolation of one's own business, especially in less-frequented regions. It should be thus a priority to build up co-operation, and public-private partnerships, in particular at regional and local level, to develop tourism offerings that involve many tourism businesses and widen the value chain, and therefore create more potential value in the region. Collaboration mechanisms and processes that favour the creation and survival of clusters are: (a) a clear understanding by the SMEs of the importance and potential of a Cultural Route; (b) an identification of the SMEs with the Route and adapting the business to it; and (c) an understanding of individual and mutual benefits through clustering. Additionally, the overall turnover on a Cultural Route should be measurable so as to indicate the economic impact of tourism activity in a region.

Hence, SMEs must see personal benefits as a motivation to participate in innovation networks. Additional investments in time and finances are a deterrent. For instance, members could be provided with professional advice, personal training and support in adapting certification schemes

SMEs can use networking and knowledge-sharing to improve the quality of services. Exchanges of experiences, know-how, customer feedback, etc., help to develop skills and abilities and strengthen one's position in the market. In order to reach a wider circle of partners and clients, SMEs should also interconnect with established channels for communication, marketing and promotion (for example, national platforms, joint marketing tools, and established networks, namely, national tourism boards, destination management organisations or tourism business forums).

Clusters can then address sustainable tourism issues by creating a greater voice in decision making and promoting sustainable practices to both other businesses and visitors. They therefore contribute to a higher awareness of the destinations' value in culture and nature. It is worth thinking about the development of generally accepted criteria for Cultural Routes in order to harmonise their standards, enhance and protect cultural resources and guarantee authentic experiences to visitors; either by encouraging SMEs to adapt national quality labels or by introducing their own Cultural Routes-specific quality standards. As an example, the Cultural Routes in Switzerland (including the Via Francigena) are required to meet the following criteria in order to be given Cultural Route status:

The Cultural Route:

- contains one or more typical regionally anchored themes;
- can clearly be distinguished from other Routes by its theme;
- includes the Inventory of Historical Traffic Routes in Switzerland (IVS);
- includes the network of official hiking trails;
- incorporates public transport (at least both the start and ending are connected);
- includes federal inventories of landscapes and natural monuments;
- includes an inventory of the heritage areas (for example, national and regional places of interest);
- includes the UNESCO World Heritage sites;
- considers protected areas (national parks, nature parks, AONBs, etc.);
- includes inventories of cultural assets;
- considers regional priority areas (nature and landscape);
- considers regional nature reserves and geological sites;
- considers other landscape values (areas with regional development/management plans);
- includes isolated monuments, historic hotels and restaurants;
- includes regional and local specialties (culinary heritage);
- is included in a regional development concept or an overall management plan;
- is based on the interests of the region and the organisations concerned (authorities, trails, etc.);
- has a professional project management that is uniformly applicable to other Routes;
- conducts regular controls and evaluation to ensure constant quality standards;
- is documented over the entire course;
- develops a guide about the cultural landscape that meets quality standards;
- is part of the global marketing activities (of the programme);
- is involved in communication and networking structures (of the programme);
- ensures sustainability by applying specifically identified and verifiable sustainability criteria.

Every tourist offer:

- is based on the Cultural Route;
- meets certain quality criteria (checklist defined by the programme);
- has a professional project management.

These or similar criteria could be used as a starting point in the selection process for other Cultural Routes. At the same time, it should be remembered that any general quality criteria will not address all individual qualities and conditions of different Cultural Routes, given their geographical, political, socio-economic and sectoral characteristics.

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9. Source of additional information/websites

Francigena Library: institutional portal with open access for cultural and tourist contents concerning Cultural Routes, for example the Via Francigena: www.francigenalibrari.beniculturali.it/index_en.html.

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Transromanica

Introduction

The Transromanica Cultural Route brings together a number of regions across Europe that house monuments related to the Romanesque period. During the 11th and 12th centuries, a large number of religious buildings were created all over Europe in a similar architectural style, which created a “common language” for the time. Romanesque artists were inspired by Roman and early Christian tradition, and the use of local materials and traditions gave the architecture a regional character as well.

The Transromanica Route contains more than 45 Romanesque highlights, including many UNESCO World Heritage sites such as the Collegiate Church of St Servatius in Quedlinburg, Wartburg Castle in Eisenach and Modena Cathedral. The Route covers over 400 monuments in total spread across eight countries. The Route is not a physically continuous route, but rather a network of regions with Romanesque heritage.

The mission of the Transromanica network is:

to exert the Romanesque period as unifying element of European culture, to promote together – with a single voice – the Romanesque heritage and to develop cultural tourism for enhancing the attractiveness of cities and regions as members of the network.

Transromanica is one of the most recent Major Cultural Routes of the Council of Europe, having been designated in 2007.

1. Reasons for highlighting this case

Transromanica is a significant case study in the context of the European Cultural Routes because it is a relatively new Route, which unites a large number of regions across Europe. It is focused on a significant element of European cultural heritage and has already developed a number of projects, particularly in the area of cultural tourism. This case study is based on an analysis of the central activities of the Route as a whole, as well as a specific local analysis of one partner region (Vale do Sousa in Portugal).

2. Synopsis

<i>Participating countries</i>	Austria, France, Germany, Italy, Portugal (from 2009), Slovenia (until 2010), Spain and Serbia
<i>Programme participation period</i>	2007-present
<i>Sectors covered</i>	Monuments, museums
<i>Activity focus</i>	Heritage, cultural tourism
<i>Main partners</i>	International Study Centre for Cultural Heritage in Charolais-Brionnais, Ministry for Regional Development and Transport, Tourism Association of Saxony-Anhalt, National Tourism Organisation of Serbia, province of Modena, Regional Government of Castile and León, Regional Direction of Tourism, Culture and Sport Piedmont, Transromanica Austria, Thuringia Tourism GmbH, VALSOUSA – Associação de Municípios do Vale do Sousa

<i>Funding sources</i>	National governments, EU project funding, self-funding
<i>Principal impacts</i>	Information dissemination and awareness-raising, heritage preservation and conservation, marketing

3. History of the Route and nature of the organisation

In 2003, Saxony-Anhalt's Romanesque Road celebrated its 10th anniversary. On this occasion, a new plan was launched to foster international co-operation with other Romanesque heritage sites in Europe. As Saxony-Anhalt initiated the project, the region hosts the headquarters of the Transromanica Association, which currently consists of 10 members.

The project started in 2003 as an EU INTERREG IIB project with five regions: Saxony-Anhalt (Germany), Thuringia (Germany), Slovenia, Carinthia (Austria), and the Province of Modena (Italy). The application for a Major Cultural Route of the Council of Europe was prepared in 2006, together with partners from France, Spain and Serbia.

On 31 August 2007, Transromanica received official certification as a Major Cultural Route of the Council of Europe. The first constitutional meeting of the Transromanica Association was held in November 2007. Subsequently, the association became registered under the name "TRANSROMANICA – The Romanesque Routes of European Heritage e.V.", with nine members (Saxony-Anhalt,⁶⁶ Thuringia, Slovenia, Carinthia, Province of Modena, Europa Romanica, Paray-le-Monial, Serbia). As an *eingetragener Verein* under German law it has the legal status of a registered voluntary association. While any group may be called a *Verein*, registration as *eingetragener Verein* holds many legal benefits because a registered association may legally function as a legal person, rather than just a group of individuals. The association:

- is focused on the common cultural heritage of Romanesque art and architecture in Europe;
- combines 10 members in seven countries, forming a Romanesque network of itineraries and sites;
- is led as an international non-profit organisation for promoting and valorising this legacy and thus supporting regional and economic development;
- aims at studying the Romanesque heritage in the regions, making the sites accessible to the public, gently developing them as a marketing tool and using the monuments for cultural and tourism purposes.

Piedmont (France), Castile and León (Spain) and, most recently, Vale do Sousa (Portugal) were later also welcomed as members of Transromanica in the last few years. However, Europa Romanica (a network based on Romanic sites in northern Spain and France) and Slovenia were excluded from the association due to lack of contact and failure to pay the association membership fees (although Slovenia still has not been removed from all the web pages of Transromanica).

66. There are two members from the region of Saxony-Anhalt.

Figure 1. The current members of Transromanica

Members of the association
International Study Centre for Cultural Heritage in Charolais-Brionnais (for Paray-le-Monial)
Ministry for Regional Development and Transport, Tourism Association of Saxony-Anhalt (for Saxony-Anhalt)
National Tourism Organisation of Serbia (for Serbia)
Province of Modena (for the provinces of Modena, Parma, Ferrara)
Regional Government of Castile and León (for the region of Castile and León)
Regional Directorate of Tourism, Culture and Sport (for the region of Piedmont)
TRANSROMANICA Austria (for Carinthia)
Thuringia Tourism GmbH (for Thuringia)
VALSOUSA – Associação de Municípios do Vale do Sousa (for Sousa Valley, Portugal)

As Figure 1 shows, Transromanica members include institutions, tourism organisations and regional government bodies. The association therefore consists of both private and public sector partners. Each member pays an annual membership of:

- €10 000 p.a. for networks (five highlights and multiple associated sites);
- €1 000 p.a. for single sites (one highlight).

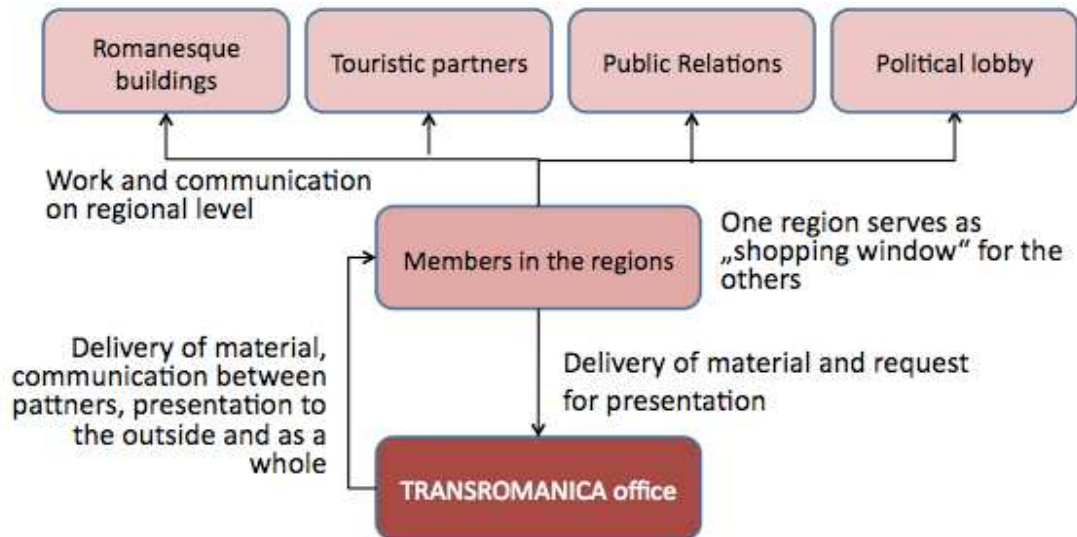
In Magdeburg, Transromanica e.V. is a registered “society”. The organisation has a not-for-profit character, as it does not “primarily pursue the aim of economic viability”. The following text expresses the purpose of the association as formulated in the statutes:

TRANSROMANICA is an international non-profit organization for supporting and fostering Europe's Romanesque cultural heritage. Its aim is to study the Romanesque heritage in the participating regions, to make aware of this heritage, make it accessible and to convey it to a general public, and to use Romanesque heritage for cultural purposes. In addition, the Society supports efforts to preserve these buildings.

By paying the membership fee, regions contribute to a European platform to exchange information and share knowledge. Transromanica develops communication strategies, new ideas and research projects, while the regions are responsible for implementing them. The website www.transromanica.com maintains an important hub for both external and internal communication. Although English is the official language, information is also available on the Transromanica website in German and Italian and local projects provide material translated into other languages.

Figure 2 provides an overview of the structure of the association. The members are considered intermediaries between local partners and the international organisation connecting Romanesque heritage sites.

[REB12] Figure 2. A visual representation of the structure of Transromanica



In addition to this general structure, the association also has an executive committee (EC) and a scientific advisory board (SAB). The EC consists of three members who come together every two months to discuss recent developments. The SAB maintains a knowledge platform and its research projects support new programmes.

CrossCulTour is another European project that includes Transromanica members in Austria, Germany, Italy and Slovenia. Members in France, Spain, Portugal and Serbia are not eligible to participate in this project since funding is provided under the Central Europe programme of the ERDF. The project runs from December 2008 until November 2011. Transromanica acts as a financing partner of CrossCulTour. All members of CrossCulTour are also connected through Transromanica. Figure 3 shows which central European regions are involved in Transromanica and CrossCulTour.

The aim of CrossCulTour is “to search for synergies, use former results and develop cross-marketing approaches to address markets with competitive cultural tourism products together, thereby assisting small and medium-sized enterprises in creating employment, increasing regional income but also assuring sustainable knowledge transfer and exchange”.

Figure 3. An overview of Transromanica and CrossCulTour member regions

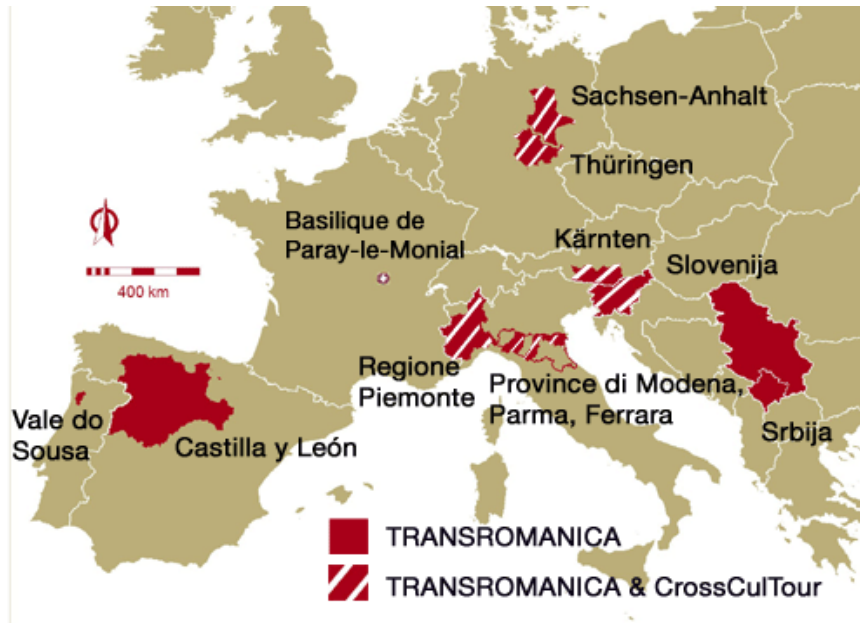


Figure 3 underlines the fact that the Transromanica Route is not actually a physically linked route, but rather a collection of different regions which each have their own route. Although it is possible for visitors to travel between adjoining regions in the Transromanica Route (such as in Italy and Germany), most of the regions are isolated from one another. However, the CrossCulTour project enables all regions to gain benefits by sharing information and research results. The physical isolation of the partner regions can therefore be compensated to some extent by transnational networking in areas such as knowledge dissemination and marketing.

The Transromanica and CrossCulTour projects are intertwined. At an organisational level, three units are responsible for CrossCulTour, which together form the central management unit:

- lead partner: Ministry of RD, Saxony-Anhalt (Germany);
- project manager: DWIF Consulting (Germany); and
- communication manager: Juliane Koch, Transromanica (Germany).

CrossCulTour stands for “Cross-Marketing Strategies for Culture and Tourism”, which means that the project aims to identify new partners, develop new marketing strategies, and create cross-sector co-operation, all in order to promote Romanesque heritage in central European regions.

By doing so, both Transromanica and CrossCulTour aim to strengthen the position of the European regions involved. As a result, local communities should gain more income and SMEs can take advantage of an increasing number of activities and visitors alike. Conserving Romanesque heritage and creating a Cultural Route is not only a purpose in itself, but the project should also empower member regions.

Each area within Transromanica also has its own local organisation structure. For example, in the Vale do Sousa area of Portugal the Associação de Municípios do Vale do Sousa (VALSOUSA) is an association comprising 10 municipalities (Castelo de Paiva, Felgueiras, Lousada, Paços de Ferreira, Paredes e Penafiel, Amarante, Baião, Celorico de Basto, Cinfães, Marco de Canaveses and Resende), working together on a supra-municipal basis.

The Rota do Romanico in the Vale do Sousa forms one part of the Transromanica network, linking a number of locations with significant Romanesque heritage. The Route here started as a local project, with the aim of stimulating heritage preservation and economic development.

The project was initiated in 1998 by six municipalities in a rural region close to the city of Porto. The region had significant employment in footwear, clothing and furniture making, largely based on the availability of raw materials. These industries have proved vulnerable to global competition, and the region, which is one of the poorest in Europe, therefore needed to diversify its economic base. One option was the development of tourism, and cultural heritage seemed a viable option as this would support local identity, closely linked to the history of the Portuguese nation. As the area traditionally had very little tourism, this was also a way of developing new tourism potential. The basic aims of the project were:

- regional planning;
- economic development;
- education and training;
- image change.

The Cultural Route therefore emerged out of a local development project led by a consortium of the municipalities involved. The first stage in the project consisted mainly of conservation measures, with the renovation and/or reconstruction of 17 monuments in order to make them accessible for visitors.

The following phase involved the development of a tourism product, with the creation of a route linking the 21 Romanesque monuments in the area. Routes were developed involving different means of transport (walking, cycling, and driving) as well as different combinations of monuments and tour durations.

The project has been firmly public sector led and financed (see section 2). This has created a challenge for the development of tourism because public sector bodies are not allowed to make profits. This has pushed the consortium into alliances and collaboration with the private sector.

One of the problems of having a consortium of municipalities is that a certain balance has to be maintained between all the partners. This can make tourism development and marketing difficult, because each municipality expects to have equal coverage in all communications.

The Vale do Sousa became involved in the Transromanica project through an initiative from the Route's co-ordinators in Germany.

A similar locally based organisation structure and development trajectory can be found in each of the different regions involved in the Transromanica project. There are efforts to develop transnational working within the network, for example through conferences and joint marketing.

4. Sources of funding

Funding for the Cultural Route and its constituent parts has come from various sources. Transromanica was co-financed by the European Union from 2003-06 as an INTERREG project, with a grant of €1.3 million out of a total budget of €2 million. Since 2007 the Major Cultural Route of the Council of Europe has been largely self-financing. Transromanica collects annual membership fees (€10 000 per major partner) from the regions. The organisation was able to save some money over the last few years, which currently gives more space to act.

The CrossCulTour project has a budget of more than €2 million. The European Regional Development Fund (ERDF) of the European Union reimburses (on average) 75% of the invested amount retrospectively. This means that the ERDF contributes €1 715 923 of the total budget of €2 261 771. Expenditure is controlled by EU rules, which specify the uses of funding according to the ERDF guidelines and the original project plan. This limits the financial flexibility of the project and the ability to use different sources of matched funding.

The different regions involved in the Transromanica Route also receive funding locally. For example, in the Vale do Sousa in Portugal considerable support has been forthcoming from locally administered EU funds and national and regional sources. These data indicate that the project in Portugal has been relatively successful in attracting EU funds, with over €6.6 million having been invested in the region by the ERDF and the European Social Fund. However, these data also make clear that it is necessary to have local or national matching funding available in order to be able to secure EU funding. In the Vale do Sousa this is not so much of a problem because the project is run by a network of local authorities that has no problem in meeting EU funding criteria. This is a lot more complicated for the private sector partners, however, and this reduces the ability of the Cultural Route as a whole to make use of EU funds.

Figure 4. Funding sources for projects in the Vale do Sousa region, 2001-12

Project	Dates	Budget (€)	EU	National
Conservação, Salvaguarda e Valorização	2001-06	2 244 591	75%	25%
Programa de Formação para a Promoção e Dinamização da Rota do Romântico do Vale do Sousa	2005-07	421 097	75%	25%
Conservação, Salvaguarda e Valorização, second phase	2005-06	794 901	75%	25%
Redefinição e Requalificação do Terreiro do Mosteiro de Pombeiro	2006	1 293 470	75%	25%
Arranjo Urbanístico do Centro Cívico de Abragão	2006	574 455	75%	25%
Requalificação Urbana da Área Envolvente e Recuperação e Conservação da Igreja do Mosteiro de Paço de Sousa	2006	1 244 218	75%	25%
Estudos de Valorização e Salvaguarda das Envolventes dos Monumentos da Rota do Românico do Vale do Sousa, first and second phases	2005-07	94 501	75%	25%
Programa de Comunicação, Informação e Interpretação	2006-08	605 800	75%	25%
Estudos para a Definição do Modelo de Gestão e Viabilidade Económica e Financeira da Rota do Românico do Vale do Sousa	2005-07	90 145	75%	25%

Plano Sectorial de Promoção da Acessibilidade	2008	428 200	71,65%	28,35%
Conservação, Salvaguarda e Valorização, Centros de Informação da RRVVS, Overbooking	2008	94 080	75%	25%
PROVERE, Programa de Valorização Económica de Recursos Endógenos – Rota do Românico do Vale do Sousa, Acções Preparatórias	2008	60 000	70%	30%
Programa de Valorização e Qualificação Turística da Rota do Românico do Vale do Sousa	2010-12	985 546	71%	29%
Total		8 931 004	6 641 487	2 289 518

5. Levels of co-operation and partnership with SMEs

Transromanica and CrossCulTour aim to realise the potential of cross-marketing opportunities. Within the project CrossCulTour, Transromanica is continuously looking out for new partners. In general, partnerships involve non-financial (or in-kind) co-operation. For instance, the hotel chain Verband Christlicher Hoteliers (VCH) is mentioned on www.transromanica.com, while the website of hotels provides a link to the Cultural Route. In a similar fashion, co-promotion takes place at trade and tourism fairs, while Transromanica occasionally offers gift coupons for accommodation – for instance, as an incentive to fill out a survey. This is an example of cross-marketing exercises with local SMEs.

Although Transromanica does not offer concrete products, their website can be used to promote offers of tour operators which share a connection to Romanesque heritage sites. In such cases, free display of travel offers on www.transromanica.com can be given in exchange for communicating Transromanica on other websites.

In addition, locally produced food and drink companies can become partners during events. The co-operation with Rotkäppchen Champagne is mentioned here, which sponsored an event and provided traditional drinks. In turn, the name of the sponsor was also mentioned in the title of the event.

Finally, new information and upcoming events are communicated in a digital newsletter to a list of partners. The information is published in several languages and keeps existing and potential partners up to date. Transromanica prepared fact sheets about the CrossCulTour project and explained the possibilities for SMEs to participate. Further information was communicated through personal talks for which an interview guideline was established.

In the Vale do Sousa region in Portugal there are links with SMEs, mainly in the tourism sector. SMEs are also involved in providing services to the Route there, mainly in terms of publications, merchandising and design. There are also good links with local universities, which produce knowledge related to the Route and the history of the area. Many of the contacts are with SMEs involved directly or indirectly with tourism, such as hotels, restaurants and wine producers. In the cultural sector, there are contacts with museums and local cultural associations. According to the project leaders in Vale do Sousa, many of the SMEs in the region are aware of the Cultural Route there, even if they do not participate directly. This includes firms in the major economic sectors in the region, furniture making and clothing. A

number of cultural events are organised in the area which helps to inform people about the Route and to attract people to specific locations along its length.

One of the problems in a predominantly rural area such as Vale do Sousa is that there are not many SMEs offering advanced services. So the service providers for the Cultural Route often tend to be based outside the region. An analysis of the SMEs involved in the various publications and merchandising items for the Rota do Romanico, for example, shows that only two SMEs are based locally (see Appendix 1). The same problem arises for the Transromanica project as a whole. For example, the market research for the CrossCulTour project was undertaken by a firm based in Munich.

6. New marketing activities and platforms

According to the latest activity report, the Transromanica website achieves 15 969 monthly visitors (202 693 monthly hits). The website provides an interactive map of all countries involved and maps of every region and their sites. The Transromanica site is relatively successful given the fact that it has not been operating for very long, and scores better than most of the other Major Cultural Routes (see Appendix 2). Information on Transromanica is also available through the websites of partners. In Serbia, videos have been placed on the Internet under the Transromanica banner, for example. See

www.videosurf.com/video/serbia-transromanica-monasteries-of-serbia-143660415?t=11.

Through the CrossCulTour project, Transromanica recently started to do marketing in China and the United States and prepare the European host organisations by engagement of sales representatives in workshops. Here, regional hotels and tour operators create products for the Asian and American market. Moreover, direct contacts between outgoing agencies in China and the United States with regional service providers were established in order to attract more foreign tourists to Romanesque heritage in Europe.

An approach that has been created to connect the different regions is universal signposting. The idea behind this is that Transromanica regions function as shopping windows for one another. The information and logo comes from the international platform, while member regions implement the outcome of the project.

In close co-operation with CrossCulTour, Transromanica developed audio guides in three different languages. In addition, a special edition for children was made to give customised information about monuments and sites that are included in the network. The files are available on www.transromanica.com to listen instantly to or to download as MP3 files. Using the “hardware” provided by Transromanica, several monuments have taken the opportunity to offer headsets as matching “software”. People downloading the audio files from the website are registered in order to monitor and evaluate the outcome and impact of the audio guides.

Considering social media, a project initiated by Modena called Walkin’n Talking has set the example. Using its own blog, Facebook and YouTube to serve a new audience, a group of Italian girls travelled along the route of Romanesque monuments and held several interviews with local experts, as can be seen on a still of a clip on Figure 5. Other regions are interested in copying this concept, but there needs to be a strategy behind it to make it work. At the moment, Transromanica does not have the expertise or the manpower to follow up the idea of Transromanica 2.0.

Figure 5. A screenshot from a YouTube video by Walkin'n Talking

Transromanica in 2.0 - Walkin'n Talking project



Furthermore, Transromanica will launch a new travel magazine this summer. In 2011, the organisation will also present a sales manual displaying offers from regional tourism service providers. Meanwhile, press tours take place and presentations have been held at tourism and heritage fairs through member regions (for example, the AR&PA fair on restoration and management of cultural heritage, Valladolid, ITB Berlin). Recently, an article was published in the German newspaper *Faszination Strasse der Romanik*, while new opportunities to publish information are still to be found.

Finally, there seems to be a shift towards event-based activities. Transromanica will continue to look out for new regional events and exhibitions that provide chances to create new cross-marketing opportunities. Future events can also be given specific information, contacts, or financial support by Transromanica.

In the context of CrossCulTour and as a base for marketing activities, visitor research was conducted in 2004 at 25 Romanesque sites in four different European countries: Germany, Austria, Italy and Slovenia. A total of 2 446 visitors were interviewed, 47% of whom came from Germany, almost 25% from Italy, 10% from Austria and almost 10% from Slovenia. The majority of respondents were highly educated, with almost 40% having some form of higher education qualification. Most of respondents had also visited other Romanesque sites in the past. Around 30% had visited Romanesque sites in the survey country, while 47% had also visited sites in other countries. Over 80% of the total sample had visited more than five Romanesque sites in total. Over a quarter of respondents indicated that the selected Romanesque site was the main motive for travel. Just over 20% of respondents visited the Romanesque site by chance, because it was on their way. The average expenditure per person was €12.70, reflecting the relatively large number of day trippers. If people who reported no expenditure are excluded from the calculations, the average spend rises to almost €40 per person (but this figure may tend to exaggerate the relatively low spend of most visitors).

There has also been limited research in the Vale do Sousa region of Portugal. The Route there has four information centres aimed at visitors. These collect basic information on visitors in

terms of their origin, which can then be used for marketing purposes. Visitors are split between organised groups (such as school parties) and individual visitors. Between July and November 2010 a total of almost 13 000 visitors were counted, the vast majority belonging to organised groups (9 730). The vast majority of visitors (81%) come from the surrounding Norte region of Portugal and only nine foreign visitors were identified during this period. Numbers of visitors to the information centres have grown rapidly in recent years, but from a very small base.

It seems that there are currently no figures on the number of visitors actually following the different Routes in the Transromanica network. At best, there is information on visitors who have previously visited other Romanesque sites, either in the same country or abroad. However detailed information on the specific Routes taken or followed by tourists is not available.

In order to enhance the visibility of the Council of Europe designation, “Members of the association committed to include:

- name of the Route
- logo of the Council of Europe
- mention in writing: Major Cultural Route of the Council of Europe
- if possible, an explanation about the meaning is added: ‘This title signals that the Route enhances the consciousness of common European citizenship and bases on sharing universal values.’”

This seems to be respected on the central Transromanica website, but not necessarily on all the partner websites, even where they refer to the Transromanica project.

7. Frequency of contact between the members

The CrossCulTour partners meet every six months, while all Transromanica members have an annual meeting. The next meeting is planned in May 2011.

According to the Transromanica co-ordinator Juliana Koch, a general meeting of the members should be held every six months. It remains hard to manage projects and initiate new plans with the current low frequency of meetings. The regions share this opinion, but finding funds to meet it is a problem. When specific projects such as CrossCulTour are running this provides funding for meetings, but in this case not for all partners. Regular teleconferencing has been tried instead, it seems there is little enthusiasm or commitment to share the latest information with other regions. Although the member regions want to be more regularly updated, the willingness to give updates is often lacking. Everyone is busy with their own issues, which is understandable, but for the network it would be good to share more information and have more frequent contact.

8. Training programmes and SME involvement

Transromanica has developed special training programmes and seminars. Seminars organised by Transromanica centrally include:

- TRANSROMANICA Congress, 2005, Magdeburg;
- The Romanesque Art as Origin of Modern Creativity, 2008, Ejea de los Caballeros;
- L’art roman à travers l’exemple de quelques édifices du Charolias-en-Brionnais”, 2008, Charolais en Brionnais;
- Romanesque Architecture, 2008, La Clayette;
- Make the Holy Visible, 2008, Merseburg;
- The Dome of Magdeburg in the European Context, 2009, Magdeburg.

SMEs have been invited regularly to join seminars and training programmes, and around 10 SMEs have attended these events. However, some courses have other target groups. Last year, a summer school focused on culinary art (25 participants), while this summer a course on symbolism in architecture will be given in Austria. Participants can join free of charge.

In addition, a best-practice workshop on Cross-marketing in Cultural Tourism was given in Berlin, 2009, while Modena was host to an 82-hour course on "Creative management of monuments" in 2010. Furthermore, Transromanica supported a chain of conferences on volunteering (especially in villages) throughout Saxony-Anhalt in 2010.

Within such training projects, attempts have been made to co-operate with regional partners. For example, one SME attending the training events is a co-operative of 20 local gastronomic producers. Training is an essential part of Transromanica's mission and so it is to get partners involved. In reality though, it remains difficult to arrange it well.

In Portugal, Vale do Sousa runs a summer school which aims to increase the tourism potential of the area. The subjects covered include:

- animation
- entrepreneurship
- crafts
- web design.

9. Sources of information for SMEs

As stated before, Transromanica uses various channels to get their message across. Not only newsletters, brochures, and the website offer information for SMEs, a DVD and audio guide portal were also made to introduce Romanesque heritage and the official Cultural Route. The leaflets and brochures are often in the regional language.

Scientific information can be found online since there is a special section on Medieval Studies in co-operation with the scientific advisory board. Specific communication about events forms an integral part of Transromanica's overarching nature and its mission to promote regional development.

Transromanica has produced a number of publications which aim to inform (potential) SME partners about their activities:

- Transromanica's own brochure material;
- flyer about the association (English, German, French, Italian, Slovenian, Serbian and Spanish);
- image brochure (English, German, French, Italian and Slovenian);
- project flyer (English, German, French, Italian and Slovenian);
- sales manual (English).

There have also been a number of specific activities aimed at SMEs, particularly in the tourism sector:

- tourism exchange: trade fair of travel agencies and tour operators in Modena, 2006 (50 participants);
- meeting to create tourist itineraries in 2010: bike trail connecting Romanesque heritage sites in several member regions (20 participants);
- training of tourist guides from Saxony-Anhalt in 2011: acquiring competences in the field of spirituality and cloistral experience, training report made available for all partners (30 participants).

10. Merchandising activities

Many regions in the network have their own merchandising activities. In the Vale do Sousa region, for example, a range of souvenirs has been produced to support the local Route, incorporating the values of “authenticity” and “honour”. Products included in the range of souvenirs include:

- books
- T-shirts
- DVDs
- flax-growing kits.



One of the problems in terms of SME collaboration is the fact that the Vale do Sousa region has relatively few suppliers of advanced and creative services. So, tasks such as design and website construction have to be contracted to firms located in Porto (the nearest big city) or even Lisbon (see Appendix 1). There is some potential to source local products, but these tend to be relatively low value compared to those contracted from other regions. This is also related to a relatively low number of creative people in the local population.

Local companies involved in the Route tend to be from a relatively limited number of sectors:

- crafts
- hotels
- restaurants
- designers.

There have been efforts to formalise a number of partnerships with SMEs. These are usually based on a formal contract. Because the Vale do Sousa association itself cannot sell products, they rely on agreements with SMEs for commercialisation.

Transromanica itself does not possess a sufficient budget to create a range of souvenirs. There was an idea to co-operate with local producers, for instance Thuringian porcelain manufactures, but in the end the costs were deemed too high.

Last year, a Transromanica calendar was printed and distributed. Due to a short “expiry date”, the monuments and heritage sites did not adopt a universal approach to selling the calendar. In the end, some gave it away free while others still charged for it.

11. Future developments

Transromanica is consulting its members on the future of the Route and what the regions expect from international co-operation. Funding is inevitably one of the big issues. In the past, the network was able to kick-start activities with EU funding. But once the current CrossCulTour project ends in 2011, there are no new EU funding possibilities until 2014. An application is therefore currently being prepared for another INTERREG project, which will centre on SMEs, entrepreneurship and tourism. Interestingly one of the areas being investigated is the establishment of “business clusters” and “virtual marketplaces”. However, there is strong competition for EU funding nowadays and the financial support also tends to be lower, and comes with restrictions, for example on the use of other means of funding.

Similar strategies are being pursued at local level as well. For example, in the Vale do Sousa region the potential for wider collaboration with commercial partners is actively being investigated, since this provides more scope for the Route to generate revenue. They are also looking at the possibility of setting up a quality control scheme for partners associated with the Route.

The need to bring the different partners in Transromanica together is clearly appreciated by the project members. There are now plans to provide a common focus and attract attention for the Route by staging a “Transromanica Day”, to be held on 3 November.

It has to be remembered that Transromanica is one of the most recent of the Routes designated by the Council of Europe. The whole network has only been functioning formally since 2007, and some members are even newer – Vale do Sousa joined in 2008. In order to bring the project partners together, there is a need for a common vision for the project. This also needs to be based on a clear idea of what Romanesque heritage represents for Europe. This will be one of the topics to be discussed in the next Transromanica conference, which will be held in Vale do Sousa in September 2011.

12. Conclusions, recommendations and implementation

12.1 Conclusions

12.1.1 Form and organisation of the Route

Rather than a traditional Cultural Route, Transromanica seems to be a new network of regions scattered all over Europe. For the central organisation, it remains challenging to overcome language issues. Texts in leaflets and brochures are often written in local languages, while English comes in second as lingua franca. The regions put extra time and effort into the translation of information, but there is often no funding available for this. European funding seems to be important in enabling regions to join specific projects (which often come with geographical and other restrictions), but once the project is over, international co-operation may end instantly. International collaboration is not a priority for each member region. Regions may also have their own Route and logo, which does not allow Transromanica to be actively present at local level, thereby reducing the visibility of the European dimension of the Route. It may well be that some regions do not perceive sufficient added value from the European Route, which may be one reason for some members leaving the consortium and for the varied levels of involvement and commitment among others.

It is also clear that some members remain to be convinced of the advantages of collaborative marketing at European level. The research commissioned by Transromanica makes it clear that tourism links between contiguous regions are often possible (for example, within Germany or

Italy), but that few opportunities are being exploited on a transnational basis. It remains to be seen if the CrossCulTour project will develop significant new initiatives in this direction.

The partners are geographically isolated, which means that face-to-face contact is necessarily limited. This is a further problem for transnational working, since it appears difficult to replace face-to-face meetings with new technologies such as videoconferencing. Meetings are limited by funding, and very often the structure and form of meetings will be dictated by the logic of projects undertaken to obtain funding.

There are relatively few data on tourism flows. In particular, there are no data on visitors travelling along the Routes as opposed to visits to specific attractions along the way. It is therefore extremely difficult to know how effective the Route is in generating tourist flows along its length or between partner regions. It also appears that information gathering has not been standardised, except in the context of the CrossCulTour project.

12.1.2 Links with SMEs

In general, because Transromanica is a relatively young Route, the involvement of SMEs is still low. It seems to be too early in the development of the Route to see significant developments in terms of competitiveness, innovation or clustering functions.

The SME links that have been made seem to be dependent on the nature of the local network. Clusters form around active partners, and local authority bodies, are dependent on commercial partners to develop products.

Most of the links with SMEs are in the tourism sector. Most local partners produce information for visitors listing local tourism service providers. There are also specific links with tour operators who bring visitors to sites along the Route. However, the market research carried out for the CrossCulTour project indicated that visitors were not generally interested in transnational tours linking different countries in the network. This reduces the possibility of working with tour operators and other tourism providers on a transnational basis.

The strong links with the tourism sector are perhaps not surprising considering the important role of cultural tourism for the Routes, but it does point to a particular danger of over-dependence on a particular type of market. Concentrating on tourism as the major source of SME partners also generates relatively limited access to knowledge and creative resources.

12.1.3 Marketing and communication

There is some innovative work being done within the Transromanica network, but this still has to be spread more widely. The Italian project on social media has remained a unique concept that quickly found a new audience. Although the videos on YouTube are not incredibly popular, there seems to be an online community that has shown interest in the topic and the special approach. It will be difficult for Transromanica to manage this in the future, because the use of English language may not always be inviting to local audiences.

The audio guide portal is another innovative feature of Transromanica. However, as evaluation is needed for a European project, users have to register before they can download the files. This measurement can be a counterproductive obstacle and consequently only about 50 downloads have taken place so far. Arguably, there may also be a mismatch between the use of new technology and the predominantly older generation's interest in the Romanesque. This, however, could also provide opportunities for intergenerational contact.

Transromanica offers training programmes and workshops. It also has added value as an international knowledge platform for Romanesque heritage sites in Europe. Nevertheless, the distance between member regions limits co-operation and cross-marketing possibilities.

Considering the available budget and manpower, Transromanica works in an effective way. The knowledge platform and signposting create a new, coherent infrastructure. The forthcoming magazine and research on visitor numbers per heritage site may also inform new strategies in the future. There have been interesting connections between SMEs and Romanesque monuments and events, which may be extended.

12.1.4 Funding

Much of the funding for Transromanica and its various partners has come from the EU. However, the heterogeneous group membership means that the network encompasses a variety of functions and motivations, which makes it harder to manage international projects.

The high level of dependence on EU funding also means that many of the activities undertaken by the Routes are steered by the funding process. This includes restrictions on what can be applied for and funded, and the limitations of EU funding areas and cycles. For example, the CrossCulTour project only includes a few of the partners in Transromanica because the funding comes from an EU programme limited to Central Europe. In addition, the Cultural Route is now waiting for the new round of ERDF funding before they are able to develop new projects.

In general, there appears to be a lack of critical mass in some areas, which makes it difficult to exploit the opportunities provided by the European Cultural Route. As there is no funding attached to the designation, funds have to be generated from EU projects or from local initiatives, but these very often have their own agenda. The real transnational element of the Route therefore remains restricted to the co-ordinator, who has insufficient resources to act independently. The weakness of the central structure means that most interaction with SMEs is likely to be found at local level, and this collaboration is also likely to be attached to local agendas. In practice, the main areas of collaboration seem to be tourism and service provision to the Route itself. There is clearly awareness in the Transromanica project of the need to strengthen SME collaboration, but the ability to develop this seems to be dependent on the availability of (EU) funding. This does not suggest that the current structure is capable of stimulating extensive self-financing activity around the focus provided by the European Route. This might change if specific Cultural Route-related funding were made available at European level, as this would allow all partners to collaborate in projects and give some substance to transnational working.

12.1.5 European dimension

The limited resources available to Transromanica at European level mean that the European dimension of the network is still not fully developed. Local partners are far more likely to have resources available to work in their specific regions, but money for meetings and joint activities is limited. This is probably reflected in the relatively low visibility of Transromanica and the Council of Europe at local level.

The value of the Major Cultural Route of the Council of Europe designation therefore appears to lie in the brand value of the Council of Europe designation and the feeling among the partners that they are attached to a bigger, European whole.

12.2 Recommendations

It is clear that the main obstacles faced by the Transromanica Route relate to funding. Most of the funding for transnational activities and a large proportion of local funding for the Routes is derived from European Union funds. Because these funds are usually related to specific time-related projects or limited geographical areas, it is difficult to maintain continuity of funding for activities related to the European Route. There is, therefore, a clear need for funding sources that cover the activities of the European Route as a whole, on a transnational basis. Such funding should also be available on a multi-annual basis to allow continuity and effective planning of activities.

The links between the Transromanica project as a whole and SMEs are still relatively weak. There should be more effort made to involve SMEs in the Route. There is a clear intention on the part of Transromanica to do this, for example through the project proposal related to business clusters. However, more strategic thought needs to be given to a more cohesive strategy to develop SME links; as such links could provide the basis for more long-term funding possibilities for the Route and for increased economic and cultural activity, which could provide a range of spin-offs for the project.

12.2.1 Need for more secure funding

Consideration should be given to setting up a dedicated funding stream for the transnational activities of the European Cultural Routes such as Transromanica. This funding should be multi-annual and allow for a combination of different types of funding (public/private/in-kind contributions). The lead on this should be taken by the EU, in conjunction with the national governments and the regions.

12.2.2 More transnational activities need to be developed

As well as funding for transnational activities, there is a need to support transnational working through adequate structures and processes. Given the experience of the EICR in transnational working, they could have an important advisory role in this area.

12.2.3 More should be done to develop clusters at key points along the Routes

One of the areas which appears to be under-developed in the Transromanica case, but which also appears to be important for other Routes, is the relatively weak articulation with SMEs. As clustering is one way in which SME activity and knowledge exchange can be stimulated, the national governments and particularly the regions should play an important role in stimulating cluster development. Incentives could be provided for the establishment of specific clusters covering cultural, tourism and business operators at key locations along Cultural Routes. This should also be linked to the development of knowledge infrastructure through collaboration with local universities and research institutes.

12.2.4 More visibility needs to be achieved for the Council of Europe certification

It is clear that the visibility of the Cultural Routes at European level can be improved. Although the Cultural Route concept itself seems to be well known, the individual Routes and the link with the Council of Europe is less clear. The Council and the EICR should review the measures that could be taken to improve transnational visibility of the Routes and the coherence of the programme. This might involve clearer guidelines, closer monitoring and regular review of the functioning and continued designation of the Routes.

13. Data sources and methodology

Reports and articles consulted

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Konečnik, M. et al. (2005), *Visitor market research on the 25 Romanesque sites*, Ljubljana.

Möller, A. and Deckert, M. (2009), “Project Report WPA 3.2.1. Best practice – Analysis in cross-marketing”, Munich.

Rota do Romanico (2010), *Avaliação de resultados relativos aos Visitantes da Rota do Românico: Relatório Preliminar, 2008-2010*, Associação de Municípios do Vale do Sousa (VALSOUSA).

Transromanica, Romanesque Routes in Europe brochure.

Transromanica (2007), “The Romanesque Routes of European heritage. Report to the Council of Europe”.

Methodology

The data for this case study were collected via a literature search, website analysis and personal interviews with key informants. The literature search was designed to identify key documents and data related to the project, including reports produced by Transromanica and its partners, data on visitors to sites along the Route and other relevant sources. The website analysis was conducted using the website www.alexa.com, which provides statistics on website traffic, users and global ranking.

The personal interviews were conducted in Magdeburg, Germany, with the co-ordinator of Transromanica and a representative of the local tourism association, and in Portugal with representatives of the Rota do Romanico, the local tourism industry and a cultural tourism expert. This mix of interviews was designed to provide different views of the work of the Route from both a global and local level and to gather data from managers of the Cultural Route as well as the tourism sector.

Interviews

Juliana Koch, Transromanica co-ordinator, Germany

Roland Johannknecht, Tourism Association of Saxony-Anhalt, Germany

Rosario Correia, director, Rota de Romanico, Portugal

Susana Alves, communications manager, Rota de Romanico, Portugal

Duarte Pinheiro, visitor planning manager, Rota de Romanico, Portugal

Tomas Brysch, tour operator, Portugal

Carlos Fernandes, cultural tourism expert, Portugal

14. Appendices

Appendix 1. SME locations, Portugal

SME suppliers to the Cultural Route Rota do Romanico in Vale do Sousa:

Ideia Ilimitada-Atelier de Design Lda.

R. Alex. Herculano 26, 4º-E

Lisbon

www.ideia-ilimitada.pt/work/object/41

Peres-Soctip Industrias Gráficas, SA

Estrada Nacional 10, Km 108,3, Porto Alto

2135-114 Samora Correia

Paula Teles Unipessoal Lda.

Porto-Paranhos Rua Silva Porto 512, 2º-H

4200 Porto

Norprint

Santo Tirso (9 km from Vale do Sousa)

Edições Livro Branco, Lda. (maps)

Rua da Lourinha, 199

Rio Tinto

Porto

Furtacores Design e Comunicação

Rua do Outeiro, 63

4590-347 Freamunde (Vale do Sousa)

SERVICE 4 YOU – Marketing and tourism solutions, Lisbon

Appendix 2. Internet traffic for Cultural Routes sites

An analysis of various Internet sites was made via the www.alexa.com website, which allows traffic volume and visit characteristics to be compared between sites.

www.transromanica.com

The level of Internet traffic to the www.transromanica.com website is ranked number 1 833 736 in the world according to www.alexa.com. The time spent in a typical visit to the site is about four minutes, with 58 seconds spent on each page view. The site's visitors view an average of 4.1 unique pages per day. About 19% of visits to this site are bounces (one page view only), and approximately 70% of visitors to www.transromanica.com come from Germany, where it has attained a traffic rank of 154 924.

The general Transromanica site seems to perform better than most local sites. For example, the Saxon-Anhalt site, www.sachsen-anhalt-tourismus.de's three-month global Alexa traffic rank is 1 254 250, but the “Strasse Der Romanik” site is ranked 4 775 184 and the Vale do Sousa site, www.rotadoromanico.com, was ranked 3 623 156. In this sense, the Transromanica site does seem to provide quantitative added value to the local sites within the network.

Major Cultural Routes of the Council of Europe

A comparison of the traffic to websites related to the Cultural Routes shows that the European Institute of Cultural Routes generates more traffic than any of the individual Routes, including the Camino de Santiago, which is rated second. Transromanica is ranked third, which is a very creditable performance given the relatively recent establishment of the Route.

Table 1. Internet traffic to Cultural Route websites according to www.alexa.com (March 2011)

	Website	World ranking 3-month traffic rank
European Institute of Cultural Routes	www.culture-routes.lu	1 188 326
Camino de Santiago	www.chemins-compostelle.com	1 526 328
Transromanica	www.transromanica.com	1 833 736
Via Francigena	www.viafrancigena.eu	2 572 621
Via Regia	www.via-regia.org	2 863 731
Routes of El Legado of Andalusí	www.legadoandalusi.es	2 884 538
The Hansa	www.hanse.org	3 640 836
The Route of Don Quixote	www.quijote.es	7 615 829
The Routes of the Olive Tree	www.olivetreeroute.gr	7 616 774
European Route of Jewish Heritage	www.jewishheritage.org	12 505 163
The Phoenicians' Route	www.rottadeifenici.it	17 266 794
European Mozart Ways	www.mozartways.com	20 664 470
The Route of the Castilian language	www.caminodelalengua.com	25 592 772

For the Cultural Routes in general, it seems to be important to think about the way in which information is presented and how the visibility of the sites can be improved. The EICR has managed to develop a strong position, as the institute's site comes up first on Google for a search of the term “cultural routes”.

Knowing what visitors are interested in is crucial to driving Internet traffic to particular sites. If we look at the search terms used for different Routes, this becomes clear. For some Routes, such as Transromanica, the Route “brand” has obtained a specific identity on search engines. However, in the case of the Route of Don Quixote, the subject matter of a character seems to be more important than the Route itself.

[REB13] www.transromanica.com

1	transromanica.com	11.45%
2	transromanica	11.41%
3	stefania severi provincia modena	6.50%
4	www.transromanica.si	5.28%
5	dom geländer paradies	5.05%
6	pellegrino medievale motto	4.46%
7	šunka na tavanici	4.29%

The Route of Don Quixote

1	don quijote de la mancha	21.77%
2	don quijote de la mancha	9.14%
3	el quijote	8.28%
4	quijote	8.12%
5	el quijote de la mancha	6.26%
6	don quijote	6.15%
7	ruta de don quijote	6.10%

Review of the relevant European and international projects

The Council of Europe Cultural Routes programme, which is formed by itineraries or series of itineraries based on a cultural concept or phenomenon of transnational importance and significance for common European values,⁶⁷ has also revealed the enormous potential for the development of educational and cultural tourism among European cities and regions. This programme contributes to the promotion of a brand of high quality European cultural destinations, some of them not so well known, and encourages sustainable cultural tourism initiatives.

Cultural labels such as the “Council of Europe Cultural Routes”, the “UNESCO World Heritage sites”, the “UNESCO Immaterial Heritage List” and the “European Heritage Label” reinforce European identity through the promotion of heritage sites associated with Europe and European values. The decision on the European Heritage Label makes a specific reference to the complementarity of the aforementioned labels.⁶⁸ Further recognition from other UN organisations, such as UNAOC or UNWTO, support this statement. In spite of this confirmed complementarity, there are currently no sites with a clear overview of these Routes and projects, nor in which state of development there are. This review provides a short listing with some comments and recommendations.

Cultural labels and recognition of UN organisations

UNESCO developed the Routes of Dialogue programme using cultural heritage and identity as common spaces for exchange and to promote intercultural and/or inter-religious dialogue, highlighting values and principles that have the capacity to bring people together. Old projects include the Silk Roads project, the Routes of Al-Andalus, the Mediterranean programme, the Iron Roads in Africa project and the Culture in the Neighbourhood project. Ongoing projects are the Arabia Plan, the Caucasus Project,⁶⁹ the Intercultural Dialogue in Central Asia project (which includes the Silk Roads project), and the Slave Route project.

The Silk Roads

At the end of 19th century, the German geographer Baron Ferdinand von Richthofen called the Eurasian trade routes the “Silk Roads”. However, this far-reaching network did not only transport merchandise such as silk, spices or precious stones. The movement and mingling of populations between China and Europe also permitted the exchange of knowledge, ideas, values and beliefs, making a deep impact on the history, culture and civilisation of the Eurasian populations.

The Silk Road project was launched by UNESCO in January 1988 within the framework of the World Decade for Cultural Development.

The UNESCO project on an Integral Study of the Silk Roads: Roads of Dialogue (1988-97) examined the various types of contact and exchanges which took place along these roads and

67. Resolution CM/Res(2007)12 specifies the criteria for the award of the label “Council of Europe Cultural Route”.

68. “Article 5: Complementarity with other initiatives: The Commission and the Member States shall ensure the complementarity of the European Heritage Label with other initiatives in the field of cultural heritage such as the UNESCO World Heritage List and the Council of Europe’s ‘European Cultural Routes’.”

69. This programme is related to the Council of Europe project to promote outgoing initiatives such as Cultural Routes in the South Caucasus: the Alexander Dumas project and the Book Route project.

their impact on the history and civilisation of our modern world, shedding light on the many identities and the common heritage of the peoples involved.

The UNESCO World Heritage Centre organised several workshops for the World Heritage sites and composed the tentative list of the Silk Roads. This list includes the proposal for a serial World Heritage nomination of the Silk Roads in Central Asia and China and activities at other important Silk Road sites in Azerbaijan, Armenia, Georgia and Iran.

Within the framework of the UN-sponsored project for the conservation and development of the four tourist centres of the Silk Roads – Samarkand, Bukhara, Khiva and Kokand – UNESCO carried out technical research in 1995 and helped to develop craft centres in historic sites of these cities and others, notably Tashkent.

UNESCO promoted the creation of research centres such as the International Institute for Central Asian Studies (IICAS) in Samarkand (Uzbekistan), inaugurated in 1995 to stimulate and co-ordinate scientific research work in Central Asia, especially on the tangible and intangible cultural heritage of the region from a multidisciplinary point of view. Another of these centres is the International Institute for the Study of Nomadic Civilisations in Ulan Bator (Mongolia), officially established in 1998, which focuses on a multidisciplinary approach of nomadic cultures.

Projects and activities connected to European countries are mainly focused on Armenia, Azerbaijan and Georgia. The Caucasus project is an example for action in this region, following the UNESCO resolution that promotes sustainable development at a national, regional and inter-regional level,⁷⁰ which embraces all areas of the organisation's activities.

Other proposals connected to the Route include World Heritage sites such as Venice (Italy) or (on the tentative list) Lucca (Italy) and the Seljuk Caravanserais on the Route from Denizli to Doğubeyazit (Turkey).

The Slave Route project

The Slave Route project was approved by the UNESCO General Conference (27 C/Resolution 3.13) in 1993, and launched in 1994 in Ouidah (Benin).

The objectives have been defined in the 29 C/Resolution 39 and 30 C/Resolution 34:

- to put an end to the silence surrounding this episode in history by bringing universal attention to the issue of the transatlantic, Indian Ocean and Mediterranean slave trade and slavery, and elucidating their underlying causes and *modus operandi*;
- to objectively highlight the consequences of the slave trade – in particular the interactions between the peoples of Europe, Africa, the Americas and the Caribbean, and the pluralism inherent in the ensuing intercultural dialogue;
- to contribute to the establishment of a culture of tolerance and peaceful coexistence between peoples.

In 1995, the Accra Declaration on the UNWTO-UNESCO cultural programme The Slave Route was signed in Accra (Ghana). The International Scientific Committee of the Slave Route project provides guidance on implementation.

After the expectations expressed by member states, particularly in 2004 during the International Year to Commemorate the Struggle against Slavery and its Abolition, UNESCO

70. Resolution 30/C/DR34, <http://unesdoc.unesco.org/images/0011/001175/117585e.pdf>.

established an evaluation process (conducted in 2005) which involved the development of a new strategy.

One of the proposals was to develop a joint strategy with the World Heritage Centre and the UNWTO in order to identify heritage sites and build paths of memory which have the capacity to promote cultural tourism.

In Europe, there are some UNESCO World heritage sites related to this Route, such as Liverpool (United Kingdom), with an important agenda co-ordinated by the International Slavery Museum. Other important initiatives are the Route of Slave Abolition and Human Rights⁷¹ (France) or the Indians Towns Network – Xarxa de Municipis Indians⁷² (Spain), with cultural, educational and tourism proposals.

Other UNESCO Cultural Routes initiatives include the Routes of the Olive Tree, the Cocoa Route and the Great Volga River Route. The Routes of the Olive Tree are motorcycling itineraries, lasting between three and 40 days, realised around a common theme: the olive tree as common element of culture and dialogue among the people in the Euro-Mediterranean area. This initiative is managed by the Cultural Foundation “Routes of the Olive Tree”⁷³ and the Messenia Chamber of Commerce.

The Routes of the Olive Tree project was elected as a World Cultural Itinerary by UNESCO in 2003, an international recognition for its contribution to cultural dialogue between Mediterranean countries and peoples. The initiative was also formally awarded the title of "Major European Cultural Route" during a ceremony at the European Cultural Centre in Delphi in 2005. The Greek government highlighted the importance of this distinction, awarded in anticipation of their official "Year of Olive Oil" in 2006. This Route is included in other related proposals, such as the Mediterranean Routes of the Olive Tree,⁷⁴ financed by INTERREG IIC South with the participation of Croatia, France, Greece, Portugal and Spain.

The Cocoa Route project,⁷⁵ co-ordinated by UNESCO-Quito and the Regional Office of Culture for Latin America and the Caribbean, is interested in the local development of the cocoa area in Latin America and the Caribbean, especially in regard to the safeguarding and management of cultural heritage. It seeks to improve the living conditions of communities living in the cocoa areas.

Other countries in Africa (Equatorial Guinea) and Europe (Belgium, France, Spain and Switzerland) have also manifested an interest in establishing a link with this initiative in association with their own industrial heritage (chocolate factories), their traditional chocolate shops and their culinary heritage.

Furthermore, UNESCO educational initiatives include the Great Volga River Route and the Blue Danube River project. These initiatives are co-ordinated by the UNESCO Associated Schools Project Network (ASPnet). The Great Volga River Route (GVRR) (2004-07)⁷⁶ was a

71. www.abolitions.org.

72. www.facebook.com/pages/Xarxa-de-Municipis-Indians-Red-de-Municipios-Indianos/118127444884691?v=info.

73. www.olivetreeroute.gr.

74. www.oleotourisme.org.

75. www.rutadelcacao.org.

76. www.unesco.org/new/en/education/networks/global-networks/aspnet/flagship-projects/great-volga-river-route-2004-2007.

UNESCO project that united the Baltic, Black and Caspian seas in order to foster (ICT supported) education for sustainable development using World Heritage and Biosphere Reserve sites. This project aimed to bring young people together through the use of information and communication technologies (ICTs) and interest them in sustainable development. Some 45 sites from 16 countries were selected for the project. The sites have been chosen according to their geographical or economic proximity to the Volga River or the three seas.

The Danube River project⁷⁷ unites the 10 countries participating in this project, launched in 1991 to combine environmental education with intercultural learning. It intends to encourage young people's participation in environmental protection, as well as their appreciation of the common heritage related to the Danube River. Interdisciplinary approaches for environmental and cultural education and appropriate teaching materials for secondary schools are developed and introduced in ASPnet schools. Students and teachers can attend summer camps and visits.

World Heritage List and Tentative Lists

At the 17th Session of the UNESCO General Conference, which was held in Paris in October-November 1972, a document of global significance was adopted – the Convention concerning the Protection of the World Cultural and Natural Heritage. The convention has been signed by 187 countries since. So far 911 cultural and natural sites have been selected to make up the World Heritage List. To organise their protection, the World Heritage Fund has been set up.

The World Heritage Committee works in co-operation with every state party through the World Heritage Convention as well as through its three advisory bodies: ICOMOS, IUCN and ICCROM, in order to make greater strides in diversifying the World Heritage List and make it truly balanced and representative of the world's heritage

“Cultural Routes” is also a category for World Heritage sites, including pilgrim Routes such as the Saint James' Way (Santiago de Compostela Pilgrim Routes), which includes the French trail in Spain (since 1993) and the four ways in France (since 1998). Cultural corridors as historic trails, borders or railways can also be included in the World Heritage List as cultural landscapes, for example, the Rhaetian railway in the Albula/Bernina landscapes or the Frontiers of the Roman Empire (German limes, Hadrian's Wall and Antonine Wall).

In continuation, ICOMOS created an International Scientific Committee of Cultural Routes and promoted the creation of an ICOMOS Charter of Cultural Routes as approved in 2008 by the General Conference in Quebec (Canada) with a clear definition of the differences between Cultural Route, cultural corridor and cultural tourism Route.

The Silk Road in Europe includes several World Heritage sites in the Caucasian Countries. Three Armenian monuments were inscribed in the World Heritage List: the Gekhard Monastery and the Upper Azat Valley; the Hagpa and Sanahin monasteries; and the cathedrals and churches of Echmiadzin and the archaeological site of Zvartnots Temple. Azerbaijan also possesses a number of impressive world heritage locations including the ancient walled city complex with the Shirvanshah Palace and Maiden Tower in Baku, the country's capital.

Other related sites are included in the UNESCO Tentative List, including some Roman ways and borders, such as the Bavay-Tongres Trail on the Roman Way from Boulogne to Cologne (Belgium), Via Appia – Regina Viarum (Italy), Via Domitia (France), the Frontiers of the Roman Empire – Ripa Pannonica (Hungary), Limes Romanus – Middle Danube (Slovakia) and the Silver Route. Other examples are the Mozarab Trail to Santiago de Compostela (Spain),

77. www.unesco.org/new/en/education/networks/global-networks/aspnet/flagship-projects/blue-danube-river.

Caspian Shore Defensive Constructions (Azerbaijan), Transhumance⁷⁸ – The Royal Shepherd's Track (Italy), the Saint Francis Xavier Cultural Route (between Orient and Occident, proposed by Spain and passing through Spain, the Philippines and India), and the Mercury Route on the Camino Real (Spanish Royal Way, as a joint project between Mexico, Slovenia and Spain).⁷⁹

UNESCO Immaterial Heritage List

When considering the vast activities of UNESCO aimed at the revival and conservation of numerous Silk Road cultures, one should also note its striving to preserve oral and intangible cultural heritage. Indeed, there is much evidence of the uniqueness of oral folk arts created by the peoples of the Silk Road region and several of them are included on the list, for instance the Georgian polyphonic singing “Shakrulo”, the Azerbaijani singing genre Mugam, the traditional art of Azerbaijani carpet weaving and the Duduk and its Music (Armenia)(2005).

In Spain, the acknowledgement of flamenco (particularly in Andalusia, Extremadura and Murcia) should be associated with the European Route of Roma Culture and Heritage.

UNESCO Memory of the World

Another UNESCO programme, the Memory of the World, aims at the preservation and dissemination of valuable archive holdings and library collections worldwide. Associated with the Silk Road, it includes the Mashtots Matenadaran ancient manuscripts collection (Armenia) and a collection of medieval manuscripts on medicine and pharmacy (Azerbaijan).

UNESCO Creative cities

Seville – a UNESCO Creative City of Music – is working for the promotion of flamenco, one of the most important immaterial cultural expressions in Spain where the Roma community is involved.

UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions

The convention on cultural diversity could involve certain European Cultural Routes, such as the pilgrimage trails (namely, Via Francigena, Saint James' Way), the Jewish heritage routes, Arab heritage circuits and itineraries (Routes of al-Andalus) or the Routes of the Roma community in Europe. This proposal is also encouraging third countries to include Cultural Routes in their development policies on culture. To support this, a recent signing of an agreement between the EU and UNESCO over a €1 million Expert Facility has been undertaken. The facility was designed to support governance in the cultural sector and enable the governments of developing countries to take advantage of experts' knowledge in devising effective and sustainable cultural policies.

78. EU funds as in the case of the Leader programme contribute to developing different actions in Europe for the study and valorisation of the old transhumance trails in Europe.

79. The Camino Real in Mexico was included as an UNESCO World Heritage Site in 2010. Following its success, there are additional initiatives to promote the Camino Real from Panama to Guatemala through Central America, among others by the Central American Integration System (SICA), which is defending a strategy to develop itineraries focused on cultural and natural heritage. Another interested actor, the Spanish Agency for International Co-operation to Development (AECID), is promoting the creation of the Colonial and Volcanoes Route. For its part, the French co-operation agency collaborates with UNESCO France Funds in the creation of a World Heritage sites Route in Central America. Finally, the Luxemburg co-operation agency is working in Nicaragua on a pilot project regarding the development of the cultural corridors there.

MAB programme: biosphere reserves

Several European sites associated with olive and vineyard landscapes are included in this programme.

United Nations World Tourism Organization – UNWTO

In addition to the aforementioned heritage programmes, the 12th Session of the UNWTO General Assembly adopted a resolution on preservation of the world heritage for the new millennium.

Thousands of tourist Routes have now been established and are currently being operated on all continents. The most attractive and longest among them, with a length of some 12 800 kilometres, is the Great Silk Road. Today's tourists follow the paths trodden by expeditions of merchants, missionaries, and geographers of the past. It is much due to these tourist itineraries arranged along the Great Silk Road that the world population has access to global heritage beyond their geographical domains.

The public interest in the Great Silk Road grew in early-1990s, when five Central Asian countries, the territories of which were intersected by the main caravan trails of the past, achieved their independence. The idea emerged to revive the ancient highway as a main channel of world co-operation in the areas of diplomacy, culture, science, trade and tourism. The concept was presented at the UN General Assembly in Bali, Indonesia, in 1993. In this sense, the World Tourism Organization played an important role in succeeding with a proposal for a long-term tourist project, the Great Silk Road. In order to integrate all countries and private persons interested in the revival of the ancient highway, the UNWTO, together with UNESCO, convoked in 1994 in Uzbekistan the first international meeting of the Great Silk Road. All 19 countries participating in the conference adopted the truly historical Samarkand Declaration on Silk Road Tourism.

At the first in a series of Silk Road international forums held by the UNWTO, a new international marketing strategy was adopted by all the participating countries in Xian (China) in July 1996. This forum included as well 110 travel company leaders, tour operators, owners of large hotels, scientists and journalists from 25 countries as well as UNESCO and UNDP representatives. For the first time, the UNWTO had the opportunity to assist Silk Road countries in building close business relations with the tour operators of the leading tourist markets. The main goal of their market strategy was to create a steady and constantly growing demand for the new travel product.

The UN General Assembly session, which was held in October 1997 in Istanbul (Turkey), enabled the Silk Road countries once again to get together and analyse the progress of the project developed by the UNWTO. The session resulted in a number of new resolutions passed by its participants. The action plan on creating and developing the Silk Road handicrafts training centres was adopted, using the broad experience of a similar UNDP project which had been implemented in Uzbekistan. The progress of the marketing strategy was also stimulated by UNWTO's thematic stand on the Great Silk Road.

The participants of the fourth international meeting of the UNWTO approved the Bukhara Declaration on Silk Road Tourism⁸⁰ (2002), in which the UNWTO resolution on opening the

80. www.unwto.org/silkroad/events/en/pdf/MicrosoftWord-BukharaDeclaration.pdf.

Silk Road International Office in Samarkand was stated. The Samarkand Office⁸¹ co-ordinates the interrelation and regional co-operation of the Silk Road countries and promotes their participation in travel fairs and in other events aimed at the development of the tourist product "Silk Road".

The Bukhara Declaration on Silk Road Tourism stressed the benefits of the development of sustainable tourism and outlined specific steps to stimulate cultural and ecological tourism to Silk Road destinations. European countries involved in this project are Armenia, Azerbaijan, Georgia, Greece, Italy, the Russian Federation, Turkey and Ukraine.

"Silk Road Destinations"⁸² is a regional project focused on Central Asia and aimed at the consolidation of the efforts of tourist companies of Silk Road countries in the promotion of that tourism product in the markets of developed countries.

The management model is the Silk Road Travel Association, created by all the participants of the region's tourist market: national tourism administrations, tour operating companies, tourist agencies, hotels, airline companies, transport organisations and the like. It strives to accomplish a number of tasks aimed at strengthening and promoting the tourist image of the region in the world's tourist market. The activity of the Silk Road Travel Association is based on the experience of such regional associations as the Pacific Asia Travel Association, the African Travel and Tourism Association, and the Latin American Travel Association.

The idea of setting up the Silk Road Travel Association, which endeavours a consolidation of the efforts to develop tourism in the region, is sure to get encouragement from the UNWTO, not least due to its experience as a successful elaborator of the long-term tourist project the Great Silk Road. Nineteen countries and many organisations and individuals have been involved in the realisation of this project. The project includes the following joint actions: promotion of the tourist product in the markets of developed countries; participation in international travel fairs; publication of printed advertising and promotional material; and promotion of Silk Road travels.

The list of project members includes the best tourist companies of the Silk Road countries: Armenia, Georgia, Azerbaijan, Turkmenistan, Uzbekistan, Tajikistan, Kyrgyzstan, Kazakhstan and China (Xinjiang).

The Silk Road Destinations project includes various forms of cultural and active regional tours. The most popular among them are the following: tourist triangle tours offer visits to three neighbouring countries within one trip; circular tours offer travellers a tour around several neighbouring countries with the tour starting and finishing in the same country; transnational tours offer travels which start in one country and finish in the third, fourth or fifth country after crossing the territory of these countries; and radial tours imply staying in one country as a base with one-, two- or three-day trips to neighbouring countries.

The Silk Road Destinations project also elaborates joint projects and puts into practice large-scale tourist projects: international tourist expeditions ("In the footsteps of Marco Polo", "Tracing Alexander the Great's Military Campaign to Asia", "In the Footsteps of Genghis Khan along the Great Silk Road"); an international auto motor rally across the Silk Road countries; and the multinational tours "The Treasures of World Heritage on the Silk Road" and "Cultural and Adventure Tours on the Silk Road".

The UNWTO is also very interested in intercultural and inter-religious dialogue, and promoted in 2007 the First International Conference on Tourism, Religions and Dialogue of Cultures, in Córdoba (Spain), with the important presence of several pilgrimage Routes.

81. <http://unwto.silkroad.travel>.

82. www.silkroad.travel.

The UNWTO promotes the Ulysses Award, the most important recognition for a tourism initiative. In the year 2011 the prize for the most innovative experience has gone to the European Cemeteries Route.

United Nations Alliance of Civilizations – UNAOC

The Alliance of Civilizations was launched in 2005 by the former Secretary General of the United Nations Kofi Annan, with the co-sponsorship of the Prime Ministers of Spain and Turkey, José Luis Rodríguez Zapatero and Recep Tayyip Erdogan, with the aim of improving understanding and co-operative relations among nations and peoples across cultures and religions and, in the process, helping counter the forces that fuel polarisation and extremism.

During the Third UN Alliance of Civilizations Forum, celebrated in Rio de Janeiro (Brazil) on May 2010, a session on “The role of Cultural Routes in building the Alliance of Civilizations” was organised by Abraham Path International.⁸³ They explained that, in the past two decades, travel with a focus on cultural, historical and religious based Routes had skyrocketed in popularity. The session drew on the experience of three existing Cultural Routes — Abraham’s Path; the Santiago de Compostela Pilgrim Routes; and the Via Francigena. The panel asked the following primary question: How can these Cultural Routes and other tourism-related products help in the creation of the Alliance of Civilizations?

Cultural labels and recognitions of the European Commission

European Heritage Label

The aim of this new label is to highlight sites that celebrate and symbolise the history of Europe, European values and the building of the European Union. The European Heritage Label will complement other existing initiatives in the field of cultural heritage such as the UNESCO World Heritage List and the Cultural Routes of the Council of Europe. It will be awarded to sites on the basis of their European symbolic value and educational work, rather than on their architectural qualities or beauty.

The original concept of the European Heritage Label emerged in 2005, was promoted by the Council of Ministers of the European Union on 20 November 2008 and was adopted on 9 March 2010. It was then sent to the European Parliament and the Council of the European Union to negotiate the final version of the text.

On 19 March 2011, the national ministers for culture in the Council reached a political agreement on the new European Heritage Label. The Council's agreement is the result of negotiations with the European Parliament on the basis of a proposal by the Commission.

Following this recent confirmation of the Council's political agreement, the decision establishing a European Heritage Label should now be officially adopted, first, by the Council in July and, secondly, by the Parliament in the autumn of 2011. Preparatory work to set up the label will be carried out in 2011 and 2012, and the first selection procedure will take place in 2013, with the first sites expected to be awarded the label in early 2014.

To date, a total of 64 sites have obtained the preliminary label, of which two are associated with the concept of European Cultural Routes and both are proposed by Germany: the sites of Reformation and the Iron Curtain Trail. Other sites form part of the Council of Europe’s Cultural Routes (see Table 2), as is the case for Cape Finisterre (Spain), associated with the Santiago de Compostela Pilgrim Route in Spain, the historic centres of Riga (Latvia) and

83. www.abrahampath.org.

Kaunas (Lithuania), associated with the Hansa Route; the Abbey of Cluny (France), the central focus point of the Cluniac Sites in Europe Route; and Zale Cemetery, part of the European Cemeteries Route. Other sites are associated with other European Cultural Routes, such as the Royal Monastery of Yuste (Spain), which is part of the Imperial Route of Charles V.

Cultural Routes as part of the cultural dimension of the EU's external actions

Europe, “United in Diversity” is the official motto of the EU, defining us as a culturally diverse community of values, in which culture can and should be a facilitator for development, inclusion, innovation, democracy, human rights, education, conflict prevention and reconciliation, mutual understanding, tolerance and creativity. Cultural co-operation and cultural dialogue, which are building blocks of cultural diplomacy, can serve as instruments for global peace and stability⁸⁴ and to consolidate a cultural dimension of external actions.⁸⁵

According to the “Report on the cultural dimensions of the EU's external actions” (2010/2161(INI)),⁸⁶ presented by Marietje Schaake to the Committee on Culture and Education, culture needs to be taken into consideration in all EU external policies, and, in line with Article 167(4) TFEU, plays a role in bilateral agreements on development and trade, notably through measures such as the European Instruments for Democracy and Human Rights (EIDHR), for Development Co-operation, for Stability, and for Pre-Accession, the European Neighbourhood Policy (ENP), the Eastern Partnership, and the Union for the Mediterranean, which all allocate resources to cultural programmes.

EU policies emphasise that transatlantic co-operation and co-operation with neighbouring European states are important to advance joint interests and protect common values.

The European Agenda for Culture sets the strategic objective of promoting culture as a vital element in the EU's international relations.

In 2008, the European Parliament's resolution on a European agenda for culture in a globalising world “recommends that the Council and the Commission support and promote the Council of Europe's European Cultural Routes programme, launched in 1987, since the Routes in question constitute exemplary networks encompassing regions and local communities and bear witness to Europe's heritage and shared history”.⁸⁷

With this in mind, a co-ordinated strategy between the EU and the Council of Europe focused on Cultural Routes that could play an important part in three ways:

84. See the United Nations Millennium Declaration (2000), in particular the articles “Human rights, democracy and good governance”; and the United Nations resolution entitled “Keeping the promise: united to achieve the Millennium Development Goals” of 22 September 2010; the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (UNESCO convention), the United Nations resolution entitled “Culture and development” of 20 December 2010.

85. See Decision No. 1983/2006/EC of the European Parliament and of the Council of 18 December 2006 concerning the European Year of Intercultural Dialogue (2008), the Council conclusions of 20 November 2008 on the promotion of cultural diversity and intercultural dialogue in the external relations of the Union and its Member States (2008/C 320/04); the ACP-EU Partnership Agreement signed in Cotonou on 23 June 2000, as first amended in Luxembourg on 25 June 2005 and as amended for the second time in Ouagadougou on 22 June 2010; the Protocol on Cultural Co-operation annexed to the model Free Trade Agreement; and the report of the Committee on Culture and Education (A7-0112/2011).

86. www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+REPORT+A7-2011-0112+0+DOC+XML+V0//EN.

87. European Parliament resolution of 10 April 2008 on a European agenda for culture in a globalising world (2007/2211(INI)).

- transference of knowledge and innovation from and between the experiences and best practices of existing European Cultural Routes in EU and neighbouring European states (practically all members of the Council of Europe);
- the extension of European Cultural Routes to the EU overseas countries and territories,⁸⁸ and especially to the Mediterranean, the Americas,⁸⁹ ACP countries and Asia;⁹⁰
- co-ordination with other global initiatives for transnational Cultural Routes which involve Europe and its neighbouring and third countries (that is, UNESCO’s Routes for Intercultural Dialogue).

Cultural European Routes financed by the European Union

Cultural Corridors of South East Europe⁹¹ is a project implemented by the Association for Cultural Tourism in collaboration with the European Institute of Cultural Routes, with the help of the Government of Luxembourg, and forms part of a macro-regional project for South-East Europe as promoted by the Council of Europe, the European Commission, UNESCO and other institutions, such as ICOMOS and the British Council, striving to foster intercultural dialogue and advance the activities in and about World Heritage sites and the immaterial heritage in the region. This partnership unites great efforts and provides outstanding results.

The project promotes notably nine Cultural Routes:

- the Danube Road as fluvial cultural corridor along the Danube River. The opinion of the Committee of the Regions on the Danube Region Strategy (2011/C 166/05)⁹² recommends the creation of a Danube macro-region, due to the particular geographical, historical and cultural significance of the Danube region, adjusting the South-East Europe co-operation area under the European Territorial Cooperation (ETC) programme (strand B);
- the Diagonal Road,⁹³ passing through South-East Europe, and connecting Europe to Asia;
- the Eastern Trans-Balkan Road, crossing South-East Europe in a north-south direction, connecting important monastery centres and the Council’s Cultural Route Via Regia (the Royal Road) in Ukraine;
- the cultural corridor Sofia-Ohrid, passing through Bulgaria and “the former Yugoslav Republic of Macedonia” and connecting the monastery agglomerations⁹⁴ around these two historic towns;

88. Willemstad, Curaçao, a UNESCO World Heritage city with the oldest synagogue in the Americas, could be an important place to develop the European Route of Jewish Heritage in the Americas. In the Caribbean region there is an important Sephardim and Ashkenazi legacy in Aruba, Barbados, Bolivarian Republic of Venezuela, Cuba, Dominican Republic, Jamaica, Netherlands Antilles, Saint Kitts and Nevis, Suriname and the Virgin islands.

89. In 2010, the Legacy of al-Andalus Foundation signed an agreement with CONACULTA (Mexican Ministry of Culture) in order to promote the Route of the Mudejar in Mexico as one of the trails in the Americas.

90. The Chinese Tourism Academy or Organization of Ibero-American States has for instance already expressed interest in benefiting from European experience and expertise in the development of Cultural Routes.

91. www.seecorridors.eu.

92. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2011:166:0023:0029:EN:PDF>. There is no mention of the Danube as a cultural corridor, but the document “stresses that the unique natural, cultural and ethnic diversity within the Danube region should be maintained as part of cultural projects and made accessible and tangible by means of sustainable tourism concepts” (point 43).

93. This Route has had various names – Via Diagonalis, Via Militaris, Carigradski drum (road, Greek), Via de Ragusi or Via Ragusina in the region of Croatia, Bosnia and Herzegovina, Serbia and Montenegro. The Diagonal Road, since the period of the Roman Empire until the present day, is the most important axis between the east and west.

94. Some of them are included in the World Heritage List: the Boyana Church (Bulgaria), Stari Ras and Sopocani, the Decani Monastery (Serbia and Montenegro), and the churches in Ohrid (“the former Yugoslav Republic of Macedonia”).

- Via Adriatica, which spreads over the entire western seaboard of the Ionian and Adriatic seas, and symbolises the results of the international exchange among the Aegean, Roman, Byzantine, Dalmatian and west European civilisations,⁹⁵ connecting in its northern part with the Council's Cultural Routes of Saint James' Way and Saint Martin;
- Via Anatolia is a cultural corridor spreading along three seas – the Sea of Marmara, the Aegean and the Mediterranean Sea, connecting two unique cultural centres: Istanbul and Antakya (former Antioch), where it meets one of the branches of the Silk Road coming from Esia, and crosses a Bronze age sea trade Route known as Via Maris, connecting present-day Turkey to Egypt, the Red Sea and the Indian Ocean;
- Via Egnatia⁹⁶ is an ancient road, built around 146 BC, during the Roman Empire, to facilitate communication between Rome and Constantinople (present-day Istanbul). It remained one of the most important roads in the Byzantine Empire, connecting Durres to Lychnidos (Ohrid), Thessalonica (Thessaloníki), Adrianople (Edirne) and, finally, Constantinople (Istanbul). This cultural corridor was very important for the dissemination of Orthodox Christianity in South-East Europe and, later on, of monkhood. It was also an important way for European pilgrims to reach Jerusalem with an important link to the Via Francigena. Also interesting is its link with the Route of the Castilian Language and its expansion to the Mediterranean, where the Sephardic Routes to a great extent exist alongside the Via Egnatia Route. Later, the Via Egnatia was fundamental for the expansion of the Islamic religion in the Balkans;
- Via Pontica is the cultural road spreading over the west and south coasts of the Black Sea, from the Danube Delta, reaching the foothills of Caucasus, and crossing Romania, Bulgaria and Turkey. It was a meeting point among sea cultures – Greeks, Vikings,⁹⁷ Venetians, Genoese, with the land cultures of Skits, Thracians, Daces, Goths, Bulgarians, Slavs, and Romans;
- the Western Trans-Balkan Road crosses South-East Europe in a north-south direction connecting western and central Europe with the Aegean and the Mediterranean seas, crossing consecutively the Danube Road, the Diagonal Road, the Sofia-Ohrid Road and Via Egnatia.

Apart from these Routes, there are other important initiatives funded by European Commission programmes, such as:

- Art Nouveau European Route;⁹⁸
- Ambert Road;
- Baltic Fortress Culture and Tourism Route;
- European Route of Brick Gothic (EuRoB);
- European Route of Historic Theatres;⁹⁹
- European Route of Industrial Heritage (ERIH);
- Imperial Route of Charles V;
- Mediterranean Route of the Olive Tree;¹⁰⁰
- Roman ways (several projects), for example, the ROMIT project;¹⁰¹

95. Along the cultural corridor a great number of historical towns are recognised as World Heritage sites at present – Poreč, Sibenik, Trogir, Split, Dubrovnik (Croatia), Kotor (Serbia and Montenegro) and Gjirokastra (Albania).

96. Since the 2nd century the cultural corridor has been named after the Roman proconsul Gnaios Egnatios.

97. From the north, the Viking Routes follow the big European rivers – Wista, Dnieper and Don – to arrive at the waters of the Black Sea, the Mediterranean and the Caspian Sea.

98. www.copdefuet.eu.

99. www.georgiantheatreroyal.co.uk/media/perspectiv.html.

100. www.oleoturisme.org.

101. www.romit.org.

- Route of Fortifications (Spain and Portugal).

European Tourism Day 2010 focused on European Cultural Routes

The European Tourism Day 2010, organised by the European Commission on the occasion of the World Tourism Day on 27 September 2010, was centred on “The role of cultural heritage in the renewed European tourism policy”. A particular focus was given to the European Heritage Label and the European Cultural Routes as two of the main cultural strategies for the new political framework for tourism in Europe (adopted on 30 June 2010). The Iron Curtain Trail was the selected experience for the European Heritage Label. The Via Francigena, the Saint Martin of Tours Route, the Legacy of al-Andalus Routes, the St James’ Way, the Routes of the Olive Tree, Phoenicians’ Route, European Route of Historical Thermal Towns and the Route of St Olav Ways were portrayed as representatives of the European Cultural Routes.

The enlarged partial agreement (EPA) and the future of the European Cultural Routes

The setting-up of an enlarged partial agreement between the Council of Europe and the European Union will continue and enlarge the outstanding work on Cultural Routes through a fresh partnership for the development of new European tourism products as part of the European Tourism Strategy.

According to Committee of Ministers Resolution CM/Res(2007)12,¹⁰² the criteria for eligibility of Cultural Route themes must focus on values, such as tolerance, respect for diversity and intercultural understanding as is the case for the Saint James’ Way, the European Route of Jewish Heritage, the Legacy of al-Andalus Routes and the Route of Roma Culture and Heritage. A second objective demands that the Routes be conducive to tourism initiatives, with both objectives expected to strike a balance in the final Route project. An additional aspect in the procedure for awarding the label has recently been introduced under the supervision of the enlarged partial agreement in consultation with CDCULT and CDPATEP, and is meant to guarantee the pan-European nature of the label. It is important to remark that resources for the support and development of Cultural Route projects will be managed by the Governing Board of the enlarged partial agreement. In order to expand the prospects of European tourism and add a new dimension to European cultural co-operation, the Route should enable the participation of other countries as partners.

One of the best examples for the coexistence of these different steps for a Cultural Route – and which already is included in the UNESCO World Heritage List and the Tentative List – is the Santiago de Compostela Pilgrim Routes in Spain, the First Council of Europe Cultural Route, managed by the Consejo Jacobeo (Saint James’ Council) (see Figure 1). This project also includes Fisterra, a heritage site on the trail from Santiago to the coast.¹⁰³

Figure 1. The Santiago de Compostela Pilgrim Routes – UNESCO and Council of Europe labels

Red point: Santiago de Compostela, a UNESCO World Heritage site	
Brown line: the first Cultural Route as World Heritage site	

102.

[https://wcd.coe.int/ViewDoc.jsp?Ref=CM/Res\(2007\)12&Language=lanEnglish&Ver=original&Site=COE&BackColorInternet=DBDCF2&BackColorIntranet=FDC864&BackColorLogged=FDC864](https://wcd.coe.int/ViewDoc.jsp?Ref=CM/Res(2007)12&Language=lanEnglish&Ver=original&Site=COE&BackColorInternet=DBDCF2&BackColorIntranet=FDC864&BackColorLogged=FDC864).

103. Fisterra, on the Galician coast, is also on the list of the European Heritage Label, a new site and label included on the Santiago de Compostela Pilgrim Routes.

Blue line: trail in tentative list to be included as World Heritage site

Green line: new sites to be included in the Tentative List



Other significant European Cultural Routes

Footsteps of Saint Paul the Apostle

When Romans destroyed Jerusalem in AD 70, Apostle St Paul decided to spread the word of Jesus. The trail of Saint Paul the Apostle started in Antioch (now, Antalya, Turkey), from where he sailed to Cyprus, and further westward to Greece visiting Kavala, Filippi, Thessaloniki, Veria, Athens-Piraeus, Corinth, and the island of Cephalonia. After a halt in Malta, the trip concluded in Rome, where St Paul brought the gospel to Europe. Some scholars defend a possible trip to Hispania, and notably Tarraco (today, Tarragona, Spain) as the city which he most probably visited. Saint Paul's Way is a Cultural Route that combines religion and history connecting Cyprus, Italy, Egypt, Greece, Jordan, Malta, Turkey and Syria. Some operators combine destinations, and it is even commercialised in thematic cruises and included in sailing and yacht tourism offers in the eastern Mediterranean. Other destinations connected to St Paul include a walking trail in Turkey.¹⁰⁴ One of the most important tour operators offering this Route is the Opera Romana Pellegrinaggi.

Great Tea Road

The Great Tea Road is the name of a famous caravan trade route from China to Russia, which provided tea to Europe between the 16th and 19th centuries, and is largely conceived as an analogue to the Silk Road. This Route in particular established trade and cultural ties between the peoples of Russia, Mongolia and China. There are important heritage cities and towns, postal stations and inns, churches and schools, factories, markets and, of course, tea shops. The total length of the route is about 10 000 kilometres. Along with such trade goods as jade, silk, salt, cinnamon, tin, wine and slaves, the Great Tea Road played an important role in the history of mankind and especially in the establishment of economic, diplomatic and cultural ties between the peoples it connected.

The tea route sets off at the city of Wuhan, and is divided into several land and water routes that pass through more than 150 cities. Movement of convoys from the Russia to China and back went mainly through the following agglomerations: Moscow, Pereslavl, Yaroslavl, Kostroma, Vologda, Veliky Ustyug, Nizhny Novgorod, Irbit, Solikamsk, Yekaterinburg, Verkhoturys Turinsk, Tyumen, Tobolsk, Tomsk, Omsk, Ishim, Novosibirsk, Krasnoyarsk, Kansk, Yenisei, Ilim, Nizhneudinsk, Irkutsk, Verkhneudinsk, Selenginsk, Kyakhta, Sayshana,

104. <http://trekkinginturkey.com/StPaulContent/aboutthewalk.html>.

Urga, Ern-Hoto, Kalgan, Beijing and other cities and towns. In Beijing, Russian merchants played a major role in the development of the local trade.

This Route was slowly abandoned with the use of the sea route between China and Russia through the ports of Shanghai, Guangzhou, Vladivostok and Odessa, making the transportation of tea cheaper. Finally, after the construction of the Trans-Siberian Railway in 1903, the end to the caravan trade was sealed.

The history of the Great Tea Road provided a wealth of material and opportunities for the development of cultural tourism and the creation of the world's largest transcontinental international tourist route. Tourism projects along the Great Tea Road developed from 1992 with the support of more than 50 organisations from three countries: Russia, Mongolia and China. The projects aim to develop a major international tourist destination with historical and cultural heritage and promote the brand of the Great Tea Road. There are many active projects in the Russian Federation, mainly in the Perm Region (Perm and Kungur), Kyakhta (Republic of Buryatia) and in the Sverdlovsk region. Here, the tour "Tea Roads Urals" communicates Moscow with Yekaterinburg and promotes the most famous Russian fairs – Irbitskoi, Talitsa, Pyshma Kamyshlov, Bogdanovich, Krasnoufimsk and, of course, Irbit.

Other routes

- The maritime republics (*Repubbliche Marinare*) of Amalfi, Genoa, Pisa, Ragusa and Venice developed control of European trade with the Middle East through the Mediterranean and the Black Sea between the 8th and 15th centuries with a key relationship with the Ottoman Empire. The Catalan-Aragonese expansion through the Mediterranean, with the control of the western Mediterranean Sea, is another example, as is the colonial expansion of the Portuguese spanning the Atlantic, Africa and Asia from the 15th to 20th centuries.¹⁰⁵
- Scenic railway routes with tour packages through Europe such as the Orient Express or the Danube Express (London/Brussels-Budapest-Istanbul); the Trans-Siberian or the Silk Road which communicates Russia with Siberia and China; and in Spain, the Transcantábrico, which covers the Santiago Compostela Route by the Cantabrian coast and the al-Andalus de luxe train, which circulates between Granada and Seville; or, in Sweden, the Inlandsbana through Sweden's Arctic north.
- River cruise routes. The most popular are the Rhine river cruises, which can be combined with cruises on the Moselle River, the Danube, the Loire, etc.

VisitEurope/European Travel Commission

Apart from these, VisitEurope also promotes other regional Routes such as the Painters' Trail along the French Cote d'Azur through the landscapes that inspired Cézanne, Van Gogh, Léger and Chagall; national routes in Switzerland such as the Salt Route, religious routes, and even the route that Thomas Cook took, the creator of the gigantic travel company (founded in 1863); and transnational Routes such as the Route of Fortifications centred on a series of fortified towns between the west of the province of Salamanca (Spain) and Portugal.

This organisation also promotes five pan-European ecotourism routes, crossing Europe along its most important iconic heritage sights. Special attention is hereby paid to include and emphasise UNESCO World Heritage sites (natural, mixed and cultural landscapes), UNESCO biosphere reserves, national parks and regional parks, but also to combine nature with culture.

105. A network of World Heritage sites of Portuguese origin has recently been created.

These five routes are the Atlantic Pan-European Route, the Central Pan-European Route, the Mediterranean Pan-European Route, the Nordic Pan-European Route and the Western Pan-European Route. They are co-ordinated by the European Network of National Parks and the Bird Life International Partnership.

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Appendices

Appendix 1. A simplified example of a Cultural Route's impact map

Input	Outputs	Outcomes	Impact (i.e. net outcomes after removing deadweight and displacement, and accounting for longer term sustainability)
<i>Renovation of cultural asset</i>			
Investment of x euros in renovating important cultural asset	Renovated cultural asset	Increase of x number of visitors to site who also spend y on other facilities in the town X schools now visit the site instead of travelling to alternative venue	Tourism growth, leading to increased business and employment opportunities
Volunteer time in assisting with work	X volunteers given work experience	Increased civic pride and image for the town Volunteers have improved self-esteem, skills and job prospects	Reduction in carbon footprint of local schools Increased property prices Increased levels of employment
<i>Organisation of cultural event</i>			
X euros spent on organising a major cultural event	X cultural activities held, e.g. musical event, cultural market, children's activities Y people visit the events	Greater awareness of cultural heritage amongst local community	Greater community cohesion leads to reduced social isolation and crime
Volunteer time helping with organisation	X euros generated from ticket sales to events X jobs and business opportunities created for those involved in the event Y increase in sales for local businesses Z volunteers given work experience	Greater community cohesion Increased business start-up and survival rates Volunteers have improved self-esteem, skills and job prospects	Local economic growth through new business and employment opportunities
<i>Investment in new website for Cultural Route</i>			
X euros spent on new web design	New website developed and attracts x hits per week Web designer gains x days of employment	Increased information available about Cultural Route attracts x% increase in visitors to key cultural assets and y% increase in hotel nights Web designer's business grows	Increased tourism in area boosts local economy, creating new business opportunities
<i>Development of new tourism trail</i>			
Staff or volunteer time spent on researching Route X euros spent on new signposting, maps and guides, and marketing	X signs installed Y maps produced Z marketing leaflets printed	X new visitors attracted to the area Y extra spend generated in the area Z extra has to be spent on clearing up damage to the environment produced by visitors	Increased tourism in area boosts local economy Unintended negative environmental impact and costs

Appendix [REB19] 2. An illustration of the different models

Consider the scenario of a cultural event based in the town square (normally used for a street market), which attracts visitors to the town who spend money on both tickets to the event but also on local accommodation, food and other purchases from local businesses or stallholders at the event or in the local area. The different models for measuring impact can produce quite different results.

Return on investment (€)	Cost–benefit analysis (€)	Economic multiplier model (€)
Expenditure	Costs	Direct impacts
Cost of organising the event (performers, staging, etc.) 50 000	Cost of organising the event (performers, staging, etc.) 50 000	Organisers salaries and costs 20 000
Marketing costs 10 000	Marketing costs 10 000	Contractors and suppliers costs 50 000
Total costs 60 000	Loss of parking fees 2 000	Marketing expenditure 10 000
	Loss of normal market square fees 5 000	Visitor spend at event 5 000
Income	Total costs 67 000	Income to local businesses 20 000
Grant funding and sponsorship 20 000	Benefits	Hotel and accommodation costs 50 000
Ticket sales for event 50 000	Grant funding and sponsorship 20 000	Total direct impacts 125 000
Total income 70 000	Income from ticket sales 50 000	Less displacement and leakage (5 000)
	Income to stallholders at event 5 000	Net direct impacts 120 000
Direct return on investment (ROI)	Income to local businesses 20 000	<i>plus multiplier (say 0.25) 30 000</i>
(income – expenditure) 10 000	Gross benefits 95 000	Total impact = 150 000 or the equivalent of five full-time (FTE) jobs
i.e. 17% ROI	Less deadweight, displacement and leakage (5 000)	(assume average salary costs in the sector are 30 000)
	Net benefit 90 000	
	Cost – benefits 23 000	

NB this is a very simplified version of how the calculations would be made in practice.

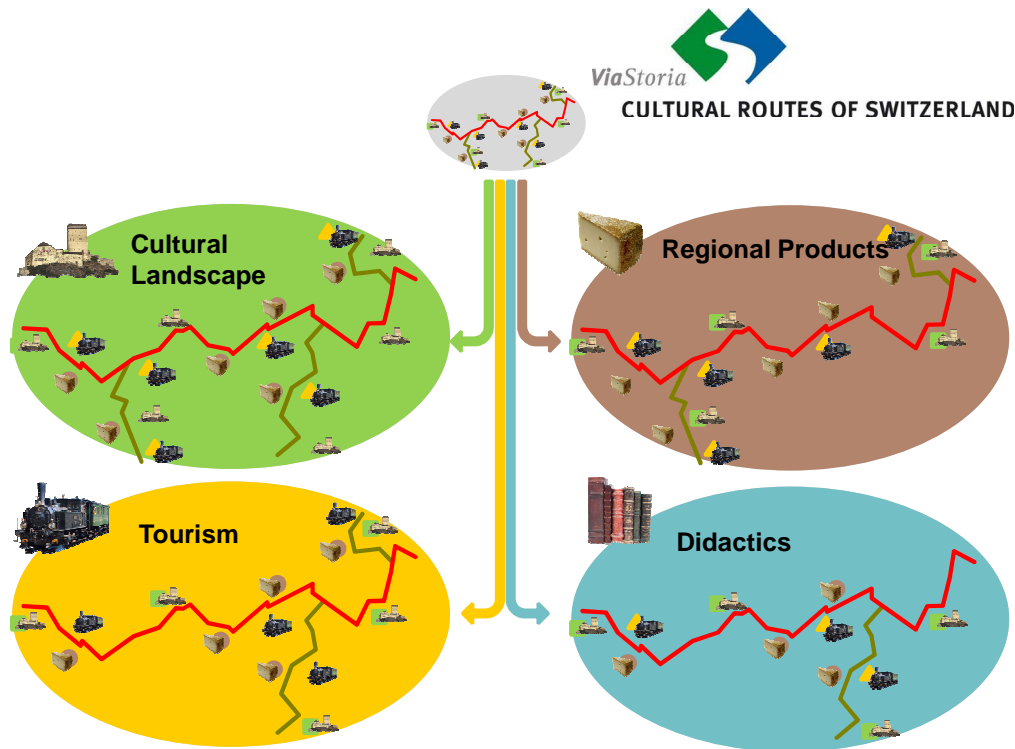
Appendix 3. Choosing appropriate models and methodologies

Activity type	Impact measurement model			Appropriate methodologies					
	CBA/ROI	SROI	Economic multiplier models	Visitor surveys	Business surveys	Traders surveys	Participant evaluations	Analysis of product sales	Analysis of web page hits
Heritage preservation	•			•					
Educational activities		•					•		
Cultural exchanges		•					•		
Events and festivals	•		•	•	•	•			
Marketing and promotion				•					•
Business support and training					•		•		
Development of tourism activities			•	•	•			•	•
Development and sale of tourism products	•				•			•	

Appendix 4

Cultural Routes of Switzerland – a tourism project coordinated by ViaStoria – joins together local Routes in Switzerland with a goal to make them self-sustainable projects. Although specific quality sustainable tourism criteria have not yet been defined for SMEs, Cultural Routes of Switzerland established a set of indicators based on which the Routes are selected for participation in the programme. Many of the tourism partners are already certified with national quality labels such as the Q label, the Steinbock label, the designation Swiss Historic Hotel, or the seven criteria for good quality hiking trails of the national umbrella organisation, Swiss Hiking.¹⁰⁶

The graphic below represents four main focus areas of the Cultural Routes of Switzerland programme.



In Switzerland, every Cultural Route project consists of two main steps:

- assessment of the conditions and objects of the destination in order to gain basic information about a candidate Route, to signpost and document it, to develop a quality guide, and to provide information to visitors – Cultural Landscape programme;
- development of a tourism offer in the form of bookable packages – Tourism programme.

If suitable, these two steps can be then accompanied by the other two components – regional products and/or didactics.

- Cultural Routes of Switzerland also use a specifically designed tool kit for Cultural Route operators, local authorities, SMEs and their clusters. This tool kit offers the following criteria for Cultural Routes selection.

106. www.wandern.ch/index.php?id=214.

Criteria for Cultural Routes selection: general concept of the Cultural Routes of Switzerland programme

- contains one or more typical regional anchored themes;
- can clearly be distinguished from other Routes by theme;
- includes the Inventory of Historical Traffic Routes in Switzerland (IVS);
- includes the network of official hiking trails;
- incorporates public transport (at least both the start and end are connected);
- includes federal inventories of landscapes and natural monuments;
- includes an inventory of the heritage areas (for example, national and regional places of interest);
- includes the UNESCO World Heritage sites;
- considers protected areas (national parks, nature parks, AONBs, etc.);
- includes inventories of cultural assets;
- considers regional priority areas (nature and landscape);
- considers regional nature reserves and geological sites;
- considers other landscape values (areas with regional development/management plans);
- includes isolated monuments, historic hotels and restaurants;
- includes regional and local specialties (culinary heritage).

Cultural landscape programme

- is included in a regional development concept or an overall management plan;
- is based on the interests of the region and the organisations concerned (authorities, trails, etc.);
- has professional project management that is uniformly applicable to other Routes;
- conducts regular controls and evaluations to ensure constant quality standards;
- is documented over the entire course;
- develops a guide about the cultural landscape that meets quality standards;
- is part of the programme's global marketing activities;
- is involved in communication and networking structures (of the programme);
- ensures sustainability by applying specifically identified and verifiable sustainability criteria.

Tourism programme

Every tourist offer:

- is based on the Cultural Route;
- meets certain quality criteria (checklist to be defined by the programme);
- has professional project management;
- receives annual quality control for a continuous improvement process.

Cultural Routes of Switzerland also use an established Cultural Route project management plan that lists the fields of action to be undertaken when establishing a Cultural Route project. The structure of the plan is presented below, where the “cultural landscape” component is highlighted in green, and the “tourism” component highlighted in yellow.

Steps in the development of a Cultural Route project management plan

Action	Time	Costs	Responsibility
Project management – Cultural Route			
Project development/project organisation			
Administration, planning, quality check			
Basic work			
Selection of Routes (paths/trails)			
Reconnaissance of the Routes			
Documentation of the Routes			
Review of the Route's history and importance			
Project management – Tourism programme			
Concept, development, launch			
Co-operation with tour operators/distributors			
Prints			
Guides and publications			
Brochures, flyers, other communication/marketing tools			
Website			
Own, and integration in other websites			
Signposting of the Route			
Check, co-ordination			
Photos/repro			
Administration/addressability			
During the development and organisational phase			
Product management			
Support of the Cultural Route's organisation			
Maintenance of partnerships			

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