



TOURISM & HISTORY

WORLD HERITAGE CASE STUDIES OF IBERO-AMERICAN SPACE

Cláudia Henriques, Maria Cristina Moreira, Pedro Bittencourt César

© CICS.NOVA.UMinho 2016

You can find this publication freely available at:
www.lasics.uminho.pt/ojs/index.php/cics_ebooks/issue/view/212

Book Title

Tourism and History
World Heritage – Case Studies of Ibero-American Space

Citation

Henriques, C., Moreira, M. C., César, P. A. B. (Eds.) (2016), *Tourism and History World Heritage – Case Studies of Ibero-American Space*, Interdisciplinary Centre of Social Sciences – University of Minho (CICS.NOVA.UMinho)

Disclaimer

This e-book contains chapters by many authors. These authors bear the sole responsibility for opinions expressed in their chapters.

Editors

Cláudia H. N. Henriques (ESGHT/Universidade do Algarve)
Maria Cristina Moreira (Universidade do Minho)
Pedro de Alcântara Bittencourt César (Universidade de Caxias do Sul)

The chapters included in this book have been submitted to blind peer-review process

Publisher

Interdisciplinary Centre of Social Sciences – University of Minho (CICS.NOVA.UMinho)

With the collaboration of the
Research Centre for Spatial and Organizational Dynamics (CIEO)
University of Algarve

This book is financed by National Funds provided by FCT- Foundation
for Science and Technology through project UID/SOC/04020/2013

Format

E-book, 583 pages

Layout

Marlene Fernandes
Clarice Rodelo Capitão

ISBN

978-989-99768-0-1

December, 2016

Braga, Portugal

Tourism and History

World Heritage

Case Studies of Ibero-American Space

TABLE OF CONTENTS

Preface	9
By Ambassador Ana Martinho President of the National Commission of UNESCO Portugal	
Chapter I	16
The Alternative Path of Strategic Tourism for Alcobaça: Legacy and Sustainability Alberto Guerreiro, António Valério Maduro, Eduardo Cordeiro Gonçalves	
Chapter II	40
The Impact of the World Cultural Heritage Classification by Unesco on the Cultural Touristic Demand in Oporto Maria Cristina Moreira, José M. Lopes Cordeiro	
Chapter III	54
Tourism Dynamics and Architectural, Cultural and Symbolic Heritage: The Case of Oporto City Centre Célia Ferreira, Teresa Marques, Paula Guerra	
Chapter IV	74
The Alto Douro Landscape and Vineries: World Heritage with Literary and Artistic Potential Isilda Leitão	
Chapter V	99
Tourists' Motivation toward Visiting a World Heritage Site: The Case of Guimarães Paula Remoaldo, Laurentina Vareiro, José Cadima Ribeiro, Vítor Marques	
Chapter VI	123
Historic Gardens and Patrimonialization by UNESCO: The Botanical Garden of Coimbra, Portugal Susana Gastal, Viviane Rocha Palma	

Chapter VII	144
Sagres Fortress in the Algarve: Between the Myth, the Cultural Tourism Destination and the European Heritage Label	
Maria Alexandra Gonçalves, Rui Parreira, Natércia Magalhães, Luciano Rafael	
Chapter VIII	167
Bom Jesus do Monte: From Sanctuary to the Dynamics of Religious Tourism	
Eduardo Gonçalves, Varico Pereira	
Chapter IX	182
Comparative Study on (Dis)use of Heritage in Ouro Preto-Br and Oporto-Pt	
Rodrigo Burkowski, Carlos Rodrigues, Juca Villaschi	
Chapter X	201
The World Heritage Convention and its Effects on the Tourism Public Policies in Olinda (Pernambuco, Brazil)	
Gloria Maria Widmer, Fernanda Abreu dos Santos, Ana Julia de Souza Melo, Maria Helena Cavalcanti da Silva Belchior	
Chapter XI	229
Ruins of the Jesuit - Guaranis Missions of São Miguel Arcanjo: An Overview on the UNESCO World Heritage in Brazil	
Pedro de Alcântara Bittencourt César, Bruna Tronca	
Chapter XII	248
From Ruins to Heritage of Humanity: Interfaces between Preservationist and Tourism Policies in <i>São Miguel das Missões</i> (RS)	
Darlan de Mamman Marchi, Luciana de Castro Neves Costa	
Chapter XIII	269
Salvador, Capital City, City Heritage	
Maria Estela Lage Santos, Heloísa Helena Fernandes Gonçalves da Costa	

Chapter XIV	287
The World Heritage Brand and Tourism: An Approach to the Historic Centre of São Luís, Brazil - Heritage Tourism Marketing	
Miriam Mota, Manuela Guerreiro, Patrícia Pinto	
Chapter XV	313
Importance of Heritage and its Accessibility for Tourism in Diamantina MG: Cultural Heritage of Humanity/ UNESCO	
Elcione Luciana da Silva	
Chapter XVI	336
New Technologies and Heritage Tourism: Making Cultural Itineraries with GIS at São Cristóvão/SE - Brazil	
Cristiane Alcântara de Jesus Santos, Antonio Carlos Campos, Larissa Prado Rodrigues	
Chapter XVII	356
The Perception of Cultural Heritage in the City of Trinidad de Cuba	
Paula Vasconcelos	
Chapter XVIII	381
Lisbon Fado as Heritage of Humanity: Interconnections with Tourism	
Cláudia H. N. Henriques	
Chapter XIX	408
The Mediterranean Diet and Traditional Algarvian Gastronomy: Gastronomic Itineraries as a Tool to Raise the Profile of the Algarve's Traditional Products	
Francisco Serra	
Chapter XX	426
"Cante Alentejano" and Tourism in Alentejo	
Bernadete Dias Sequeira, Paulo Mariz Lourenço, Manuela Guerreiro, Júlio Mendes	

Chapter XXI	454
The Intangible Heritage as Cultural Tourism Product: Attractiveness and (Re) Construction of the Territories - The Case of Cante Alentejano	
José Mendonça, Eunice R. Lopes	
Chapter XXII	468
World Heritage, Grassroot Management: A Community Participation Experience Inventorying Six “Milongas” in Buenos Aires	
Mercedes González Bracco	
Chapter XXIII	484
Belém in the Pathways of Faith: World Heritage and the Amorcomtur Web!	
Maria Luiza Cardinale Baptista, Renato dos Santos Lima	
Chapter XXIV	502
Traditional Mexican Cuisine and Tourism: New Meanings of Heritage Cuisine and Its Sociocultural Implications	
Humberto Thomé-Ortiz, Daniel De Jesús-Contreras	
Chapter XXV	523
Portugal: UNESCO Creative Cities Network	
Ana Mafé García	
Chapter XXVI	547
Tourism in the Biosphere Reserve of Serra do Espinhaço: Opportunities and Threats to the Cultural and Natural Heritage	
Solano de Souza Braga, Bernardo Machado Gontijo, Marina Furtado Gonçalves, Guilherme Augusto Pereira Malta, Maria Flávia Pires Barbosa	
Chapter XXVII	568
What if Documentary Heritage Attracted Tourists? Thoughts on the Potential for Tourism of Historical Libraries and Archives	
Gilberto Coralejo Moiteiro	

Preface by Ambassador Ana Martinho

President of the National Commission of UNESCO Portugal

The Portuguese National Commission for UNESCO is pleased to give its support to the II International Conference on Tourism and History, a timely project that the University of the Algarve and the University of Caxias do Sul have jointly organised. This conference focuses on the role of tourism in the cultural and historical enhancement of Ibero-American space, especially those properties inscribed on the UNESCO World Heritage List.

Although the main cultural objectives of the World Heritage Convention are to protect and promote monuments, groups of buildings and sites, the value of UNESCO properties to tourism has long been established and attracts increasing numbers of visitors. Whether buildings, historic centres, archaeological sites, cultural routes, landscapes or even natural properties, a site's inclusion in the World Heritage List is evidence of increased interest and quality, and becomes a place that deserves to be visited and enjoyed. The reason for this is clear. Only sites with outstanding universal value, authenticity and integrity are eligible to join this List after an extensive, detailed and demanding nomination process.

For a long time, culture and tourism were considered mutually exclusive and were managed separately, since it was believed that the interests of each sector were conflicting. At times, cultural heritage appeared to be an obstacle to the legitimate aspirations of tourism development and the use of cultural and natural resources. At other times, tourism projects were perceived as a real threat, a destabilising subject within communities that destroyed cultures and damaged cultural and natural heritage.

This is no longer the case. Today UNESCO recognises that the relationship between culture and tourism can be beneficial and that this connection may contribute to the protection and promotion of heritage. Since 2001, the Organisation has been developing a specific initiative on this subject called the "UNESCO World Heritage and Sustainable Tourism Programme". The Programme identifies tourism as a positive force that contributes to maintaining the value of sites on the World Heritage List and to mitigate potential threats by advocating sustainable tourism in these classified properties. This approach is based on dialogue and cooperation between stakeholders for better planning of tourism and more efficient heritage management, through which natural and cultural sites are valued and protected.

Portugal has currently 15 World Heritage sites: Central Zone of the Town of Angra do Heroísmo in the Azores; Convent of Christ in Tomar; Monastery of Batalha; Monastery of the Hieronymites and Tower of Belém in Lisbon; Historic Centre of Évora; Monastery of Alcobaça; Cultural Landscape of Sintra; Historic Centre of Oporto, Luiz I Bridge and Monastery of Serra do Pilar; Prehistoric Rock Art Sites in the Côa Valley and Siega Verde; Laurisilva of Madeira; Alto Douro Wine Region; Historic Centre of Guimarães; Landscape of the Pico Island Vineyard Culture; Garrison Border Town of Elvas and its Fortifications; University of Coimbra – Alta and Sofia. Nearly two dozen more sites have been included in the Tentative List of Portugal, which was recently updated through a collaborative process coordinated by the Portuguese National Commission for UNESCO, in which representatives of public and private entities and specialists in several areas participated and that will be submitted to UNESCO in 2017.

Portuguese heritage is also spread throughout the world, with more than 25 World Heritage properties of Portuguese Influence on four continents. This shared heritage is particularly rich in Latin America, where UNESCO has recognised ‘the outstanding universal value’ of 12 sites linked to the Portuguese Expansion in four countries. These are the Historic Quarter of the City of Colonia del Sacramento in Uruguay, the Jesuit Missions of La Santísima Trinidad de Paraná and Jesús de Tavarangue in Paraguay and the transnational site Jesuit Missions of the Guaranis: San Ignacio Mini, Santa Ana, Nuestra Señora de Loreto and Santa Maria Mayor (Argentina), Ruins of Sao Miguel das Missoes (Brazil). Also in Brazil are the Historic Centre of Salvador de Bahia; Historic Centre of São Luís; Historic Centre of the Town of Diamantina; Historic Centre of the Town of Goiás; Historic Centre of the Town of Olinda; Historic Town of Ouro Preto; Sanctuary of Bom Jesus do Congonhas; and Rio de Janeiro: Carioca Landscapes between the Mountain and the Sea.

The study of issues concerning the classification of heritage properties in Ibero-America is, therefore, quite important, since this may lead to the identification of shared solutions to concerns common to all these sites - such as its use and enjoyment, or physical and virtual accessibility - in accordance with the requirements of the World Heritage Convention. Other concerns are the impact of UNESCO recognition on heritage sites and their environment; economic, social and environmental sustainability; community participation; heritage public policies; and, of course, tourism and its benefits and risks. Many articles in this book focus on these issues, and it is useful to ponder on the different perspectives here presented.

Finally, it is important to acknowledge the relationship between World Heritage and other UNESCO recognitions such as Intangible Cultural Heritage, Creative Cities Network, Biosphere Reserves, Global Geoparks and the Memory of the World Programme. The chapters in this e-

book published by the Interdisciplinary Center of Social Sciences of University of Minho may sow the seeds for future studies that will address globally and interconnectedly both tangible and intangible, cultural and natural heritage issues, thereby significantly contributing to the preservation, conservation and safeguarding of Ibero-America's valuable heritage.

Prefácio pela Embaixadora Ana Martinho

Presidente da Comissão Nacional da UNESCO de Portugal

É com muito gosto que a Comissão Nacional da UNESCO se associa à II Conferência Internacional sobre Turismo e História, que em boa hora a Universidade do Algarve e a Universidade de Caxias do Sul decidiram conjuntamente organizar sobre o tema do papel do turismo na valorização histórico-cultural do espaço ibero-americano, em especial nos locais inscritos na Lista do Património Mundial da UNESCO.

Apesar de os principais objetivos culturais da Convenção do Património Mundial serem a proteção e a promoção dos monumentos, conjunto e locais de interesse, desde há muito que foi reconhecido o interesse turístico dos sítios com a chancela UNESCO, que atraem cada vez mais visitantes. Quer sejam edifícios, centros históricos, sítios arqueológicos, rotas, paisagens culturais ou mesmo bens naturais, o facto de um bem-estar inscrito na Lista do Património Mundial é sinónimo de interesse acrescido e qualidade, merecendo que seja visitado e fruído. E há uma razão para tal. De facto, apenas os bens com valor universal excecional, autenticidade e integridade são elegíveis para integrar esta lista, num processo de candidatura extenso, detalhado e exigente.

Durante muito tempo a cultura e o turismo estiveram de costas voltadas e foram geridos individualmente, acreditando-se que os interesses de uns e outros eram antagónicos. Por vezes, o património surgia como um entrave às legítimas aspirações de desenvolvimento turístico e de aproveitamento dos recursos culturais e naturais; outras vezes, os projetos turísticos eram sentidos como uma verdadeiras ameaças, como elementos desestabilizadores das comunidades e destrutivos de culturas, danosos para os bens patrimoniais, culturais e naturais.

Atualmente isto já não acontece. A UNESCO reconhece que a relação entre cultura e turismo pode ser benéfica e contribuir para a proteção e promoção do património. Assim, a Organização desenvolve desde 2001 uma iniciativa específica sobre este tema designada “Programa UNESCO Património Mundial e Turismo Sustentável”. Este Programa identifica o Turismo como uma força positiva que contribui para manter o valor dos sítios inscritos na Lista do Património Mundial e para mitigar eventuais ameaças, advogando um turismo sustentável nestes locais classificados. Constitui uma abordagem baseada no diálogo e na cooperação entre as partes interessadas com vista a um melhor planeamento da gestão do turismo e do património, em que os bens naturais e culturais são valorizados e protegidos.

Em Portugal existem atualmente quinze sítios do Património Mundial, designadamente o Alto Douro Vinhateiro, o Centro Histórico de Angra do Heroísmo nos Açores, o Centro Histórico de Évora, o Centro Histórico de Guimarães, o Centro Histórico do Porto, Ponte Luiz I e Mosteiro da Serra do Pilar, a Cidade-Quartel Fronteira de Elvas e suas Fortificações, o Convento de Cristo em Tomar, a Floresta Laurissilva na Madeira, o Mosteiro da Batalha, o Mosteiro de Alcobaça, o Mosteiro dos Jerónimos e Torre de Belém em Lisboa, a Paisagem Cultural de Sintra, a Paisagem da Cultura da Vinha da Ilha do Pico, os Sítios Pré-Históricos de Arte Rupestre do Vale do Rio Côa e de Siega Verde e a Universidade de Coimbra, Alta e Sofia. Muitos outros, cerca de duas dezenas, foram inscritos na Lista Indicativa de Portugal, recentemente atualizada através de um processo colaborativo coordenado pela Comissão Nacional da UNESCO, no qual participaram representantes de entidades públicas e privadas, bem como especialistas nas mais diversas áreas, e que será transmitida à UNESCO em 2017.

Mas a herança lusa encontra-se também espalhada pelo mundo, podendo contar-se, mais de 25 bens do Património Mundial de influência portuguesa nos quatro continentes. Esta herança partilhada é particularmente fértil na América Latina, onde a UNESCO reconheceu o Valor Universal Excepcional de doze sítios ligados à expansão portuguesa, em quatro países, nomeadamente o Bairro Histórico da Cidade de Colónia do Sacramento (Uruguai), as Missões Jesuítas da Santíssima Trindade do Paraná e Jesus de Tavarangue (Paraguai), o bem transnacional Missões Jesuítas Guaranis: San Ignacio Miní, Santa Ana, Nuestra Señora de Loreto e Santa María la Mayor (Argentina), Ruínas de São Miguel das Missões (Brasil) e ainda nove bens brasileiros: Centro Histórico de Ouro Preto, Centro Histórico de Olinda, Centro Histórico de São Salvador, Santuário do Bom Jesus de Congonhas, Centro Histórico de São Luís, Centro Histórico de Diamantina, Centro Histórico de Goiás e Rio de Janeiro, paisagens cariocas entre as montanhas e o mar.

O estudo das questões relativas à classificação dos bens patrimoniais no espaço ibero-americano é, pois, muitíssimo relevante, e permitirá porventura encontrar soluções partilhadas para questões comuns a todos estes sítios como a sua utilização e fruição, as acessibilidades físicas e virtuais, a gestão de acordo com as exigências da Convenção. São também preocupações os impactos do reconhecimento UNESCO no património e na sua envolvente, a sustentabilidade económica, social e ambiental, a participação das comunidades, as políticas públicas para o património e, naturalmente, o turismo e os seus benefícios e riscos. Muitos dos artigos que fazem parte deste livro incidem sobre estas questões, sendo importante a reflexão a partir das diferentes perspetivas apresentadas.

Finalmente, importa conhecer a relação entre as várias chancelas UNESCO além do Património Mundial, como o Património Cultural Imaterial, as Cidades Criativas, as Reservas da Biosfera, os Geoparques e ainda o programa “Memória do Mundo”. Os artigos sobre estas convenções e programas na presente publicação do Centro Interdisciplinar de Ciências Sociais, Universidade do Minho, constituem a semente para outros estudos que abordem o património cultural e natural, material e imaterial, na sua globalidade e inter-relação, contribuindo valiosamente para a preservação, conservação e salvaguarda do riquíssimo património Ibero-Americano.

Chapter I

The Alternative Path of Strategic Tourism for Alcobaça:

Legacy and Sustainability

The Alternative Path of Strategic Tourism for Alcobaça: Legacy and Sustainability

ALBERTO GUERREIRO¹

ANTÓNIO VALÉRIO MADURO²

EDUARDO CORDEIRO GONÇALVES³

Abstract:

The Cistercian Monastery of Alcobaça – a World Heritage site – is the prime monument in the local area, and is visited by hundreds of thousands of tourists every year. This flow of tourists alone represents an enormous potential and an outlook for the creation of a network-based tourism model that is able to stimulate a distinctive and complementary set of cultural attractions. This network, although informal, is largely already operational, and is composed of important natural and cultural features.

This article takes as its starting point the statement that there is no formal, operational tourism model contributing to Alcobaça's heritage brand that uses the Cistercians as its reference point. Using a deductive method, the paper's primary goal is to carry out a theoretical reflection on the theme of cultural tourism as a strategic element for the very preservation and sustainability of legacy and heritage.

This study aims to frame the still controversial and under-conceptualised relation between the recognition of an area's historical value and the path to future sustainability of material and immaterial heritage based on tourism models as mechanisms for building identity and, at the same time, disseminating culture.

This article reviews the historical background that has strengthened the unique Alcobaça "brand" so that it comprises the extent of the territory as a founding, strategic element for preserving cultural heritage and, ultimately, local development. An understanding of these two factors – historical (and immaterial) and territorial (material) – determines the formation of a sustainable way based on a tourism model that takes cultural heritage as its main bond.

¹ University of Évora, CIDHEUS (UID/HIS/00057 – FCT) and CEDTUR (ISMAI), alberto.guerreiro@gmail.com

² University Institute of Maia, CEDTUR and CETRAD – (UID/SOC/04011 – FCT), avmaduro@gmail.com

³ University Institute of Maia, CEDTUR and CETRAD – (UID/SOC/04011 – FCT), egoncalves@ismai.pt

It can be concluded that by following this path, tourism services can form vital leverage for Alcobça to affirm its political and economic position. In this context, the idea of territory takes centre stage and, by preserving and revitalising heritage and socio-cultural manifestations, it can create a compendium of identity that should be easily recognised inside and outside the area through a distinctive chain, a unique brand, which includes the tourist value of the product as well as historical features.

Keywords: Cistercians; Alcobça; Tourism; Heritage; Destination Management

Resumo:

O Mosteiro cisterciense de Alcobça, Património da Humanidade, é a primeira referência monumental local, sendo anualmente visitado por centenas de milhares de turistas. Este fluxo, por si só, representa um enorme potencial e perspectiva a constituição de um modelo turístico de estrutura reticular (rede), dinamizador de uma oferta cultural diferenciadora e complementar. Esta rede, em grande parte já operacional, ainda que sob uma existência de natureza informal, é constituída por importantes polos de feição ambiental e cultural.

Deste modo, o presente artigo parte da constatação da inexistência de um modelo turístico formal e operatório potenciador da marca patrimonial alcobacense que tem como referência Cister. Assumindo uma metodologia dedutiva, o trabalho tem como objetivo primordial o estabelecimento de uma reflexão teórica sobre o tema do turismo cultural enquanto elemento estratégico para a própria preservação e sustentabilidade da herança patrimonial.

Este estudo pretende enquadrar a relação ainda controversa ou pouco concetualizada sobre o reconhecimento do valor histórico do território e a via da sustentabilidade futura do património material e imaterial a partir de modelos turísticos que sejam, simultaneamente, mecanismos de agregação identitária e disseminação cultural.

O artigo passa em revisão os antecedentes históricos que potenciaram a “marca” singular de Alcobça, de forma que se compreenda a dimensão do território enquanto elemento fundador e estratégico para a preservação da herança cultural e, em última instância, para o desenvolvimento local. O entendimento destas duas dimensões, histórica (de feição imaterial) e territorial (compleição material), determinam a constituição de uma variante de sustentabilidade baseada num modelo turístico que assume o património cultural como o seu principal vínculo.

Conclui-se que, por esta via, o préstimo turístico constitui uma alavanca vital para a própria afirmação política e económica alcobacense. Nesta equação, a noção territorial toma

centralidade, alcançando, pela preservação e dinamização das manifestações patrimoniais e sócio-culturais, um compêndio identitário que deve ser reconhecido facilmente de forma endógena e exógena através de uma cadeia diferenciadora, uma marca singular, que dá, para além do porte histórico, o valor turístico do produto.

Palavras-chave: Cister; Alcobaça; Turismo; Património; Gestão do Destino

Resumen:

El monasterio cisterciense de Alcobaça, Patrimonio de la Humanidad, es la primera referencia monumental local, siendo visitado anualmente por cientos de miles de turistas. Este flujo, en sí mismo, tiene un enorme potencial y perspectiva la creación de un modelo de turismo de estructura reticular (red), dinamizador de una oferta cultural diferenciadora y complementar. Esta red, ya en gran parte operacional aunque de manera informal, se compone de importantes centros de índole cultural y ambiental.

Así pues, este artículo tiene como punto de partida la constatación de la ausencia de un modelo de turismo formal y operativo potenciador del valor de la marca patrimonial "Alcobacense" cuya referencia es la orden de Cister. Suponiendo una metodología deductiva, el trabajo tiene como objetivo principal la creación de una reflexión teórica sobre el tema del turismo cultural como un elemento estratégico para la correcta conservación y sostenibilidad de la herencia patrimonial.

Este estudio pretende encuadrar la relación aún controvertida o poco conceptualizada sobre el reconocimiento del valor histórico del territorio y el camino de la sostenibilidad futura del patrimonio material e inmaterial a partir de modelos de turismo que sean al mismo tiempo mecanismos de agregación de la identidad y difusión cultural.

El artículo revisa los antecedentes históricos que potenciaron la "marca" única Alcobaça, de manera que se entienda la dimensión del territorio como un elemento fundador y estratégico para la conservación del patrimonio cultural y, en última instancia, para el desarrollo local. La comprensión de estas dos dimensiones, histórica (de índole inmaterial) y territorial (con carácter material), determinan la constitución de una variante de la sostenibilidad sobre la base de un modelo de turismo que asume el patrimonio cultural como su vínculo principal.

Llegamos a la conclusión de que, de esta manera, el turismo es un estímulo vital para la propia afirmación política y económica alcobacense. En esta ecuación, la noción territorial toma centralidad alcanzando a través de la preservación y promoción del patrimonio y las manifestaciones socioculturales un compendio de identidad que debe ser fácil de reconocer de

forma endógena y exógena a través de una cadena diferenciadora, una marca singular, que da más allá de la posesión histórica, el valor turístico del producto.

Palabras Clave: Cister; Alcobaga; Turismo; Patrimonio; Gestión del Destino

1. Introduction

Cultural tourism provides an opportunity for full sustainable development as long as there are cultural assets that encourage people to visit and maintain the inflow of people. It also requires public policy, civil society actions and private initiatives to be strategically connected under the common umbrella of culture. Alcobaga has the ability to make culture a determining part of its way of life, thanks to its historical background as a town of monuments and its own particular identity.

The aims of this research focus on interdisciplinary study and the assessment of cultural heritage in connection with cultural tourism. However, they also include connections with places' sustainable development and interaction, in the sense of integrated development with other economic activities and aspects that help create a product, based on the three pillars of sustainability: economic sustainability, environmental sustainability and social sustainability. The research is based around the following:

a) An approach to culture as a product, with "cultural tourism" and "heritage tourism" understood as synonyms. The research deals with a primary area of study: heritage tourism and the planning and development of tourism within the scope of heritage attractions.

b) The study will be cross-referenced with social memories of cultural heritage as a metacultural symbolic representation of identities, from a socio-anthropological perspective, discussed as social constructs.

c) It also aims to study the processes arising from inserting the tourism system into cultural policies and managing heritage with a view to "marketing culture", i.e. the way in which the consumption of cultural tourism influences the production, form and location of cultural attractions, strategic cultural momentum and the imposition of the tourism system.

d) The study also attempts to reflect on the design of public policies that involve historical and cultural heritage. This reflection is based on concepts and a model for analysing public policies that boost cultural tourism through on-the-ground knowledge of the Alcobaga case study.

We therefore propose a reflection on the implementation of a cultural tourism model and stakeholders' awareness of the new challenges brought by cultural distinction through heritage. Starting from this analytical basis, this article reflects on the theoretical considerations behind the construction of a distinctive, viable cultural tourism model. With this issue at its heart, the first part of the study discusses the historical idiosyncrasy that has anchored and guided the Alcobaça brand and then deals with issues of territory, development and tourism from the perspective of opportunities and risks. Cultural tourism is therefore understood as a compendium of several integrated natural, cultural, social and economic resources, which requires a wide-reaching, multi-case analysis (Beni, 1998). The conclusions of such analysis must include an interdisciplinary reflection arising from the intersection of several subjects, namely anthropology, history, economics, management, sociology and other sciences (Jafari, 1990).

2. The unique Alcobaça brand: design and destiny

The emblematic legacy of Alcobaça's identity now calls for dynamic, flexible cultural management and programming based on local development in which tourism emerges as a stimulating factor of renewal and sustainability. Preserving Alcobaça's heritage therefore to a great extent involves actions to reconcile historical and cultural heritage with local forces (local authorities, businesspeople, associations...) by integrating identity values that define the territory. This perspective becomes effective from the moment that meaningful urban regeneration policies gain momentum (e.g. monumental heritage, museums, historic centres, cultural centres, theme parks), thereby reconciling memory with society's changing destiny (Ribeiro, *et al.* 2011).



Figure 1. Monastery of Alcobça

Source: Virgolino Ferreira Jorge

In this line of action, the focus is on making use of heritage and cultural assets and putting them at the service of society to create revenue and employability, while at the same time acting to conserve them and pursuing a research and knowledge policy that is indispensable to strengthening social structure and identity.

Alcobça has a historical base that singles it out from the rest of the country. Portugal's self-assertion in medieval Europe actually involved the donation of monastic estates in Alcobça to the Cistercians. This granting of land confirmed the Order's international expansion (along with its religious ideals) and demonstrated the monarchy's interest in being in the good graces of Bernard of Clairvaux and his network of influence on Christianity and the papacy. It was, in fact, a question of tracing a path to get the religious institution to recognise the kingdom, which would open doors to a new central political role. The generous donation of 440 km² of land was legitimated by political and diplomatic reasons which brought together the king's benevolence with Europe's recognition of the Portuguese state (1179).

Alcobça's dominant position in the long term was reflected in a set of dynamics that had the Monastery at its heart. The scholar Joaquim Leite de Vasconcelos (1980: 500) never tired of publicising the region's specific features and advantages, thanks to the prolific work of the "farming monks" and their ability to order, manage and administer the land (the Cistercian monastic estates in Alcobça, in the author's opinion, stood out among the lands at the heart of Estremadura west of the Tagus). Furthermore, this view had already been discussed and

defended by illustrious travellers (diplomats, traders, politicians and men of leisure who in the 18th century regularly visited the Monastery and the monastic estate). William Morgan Kinsey assertively highlighted the advantages of the monks' farming knowledge, which was reflected in the productive landscape, in contrast with the general state of abandonment in which the rest of the country found itself (1829: 440). But other visitors, including William Beckford (2009: 29) and Giuseppe Gorani (1992: 159), had already underlined the exemplary nature of the region's material progress under the protective cloak offered by the Abbey.

Monasteries were undoubtedly national projects, created by political and religious powers, which over time became monuments and anchors for identity. For Alcobaça, this aspect was enhanced by the building's material, spiritual and symbolic power. It stood out as the largest and richest monastic landowner in Portugal, as the head of the Independent Congregation of Portugal (1569), and became the royal pantheon, among other things. James Murphy, another illustrious traveller who was part of the elitist Grand Tour, described Alcobaça's appeal to travelling foreigners due to its intimate relationship with the Portuguese monarchy and the fact that the monuments represented the St. Bernard of Clairvaux design and the new architecture that he called "modern Norman Gothic" (1998: 86-87). Memories of the Grand Tour highlight references to the cultural mapping of the landscape, the artistic, architectural and sculptural monuments, the majesty of the Gothic church and the Baroque design, and the historic tombs of Pedro and Inês. This caught the eye of all the travellers who, as well as visiting the capital and surrounding areas, temporarily extended their tour to let themselves be enchanted by Alcobaça, Batalha and Tomar. Interestingly, at a time marked by industrialisation and political and economic liberalism, which produced a deep divide in development levels, national identities emerged in search of cultural legitimacy among the people, thus leading to journey reports that lean towards the ethnographic (Maduro, 2012: 150-151). But the Grand Tour, which was encyclopaedic in nature, also predetermined the path of the journey, leading to some locations being visited repeatedly, making way for meticulously and constantly improved tour routes and guides in the following century.

Not even the extinction of the religious orders in Portugal (1834) would diminish the Monastery's monumental appeal, despite the fact that the building was now considered to be a symbol of leisure characteristic of the Old Regime and the society of dignities. 17th-century visitors continued to go to Alcobaça, however, and they would routinely describe the area, restoring some of the preconceived ideas of the educated elite that came before them, although the cultural settings defined different priorities and perspectives for analysis (which we can

confirm in travelogues by Lichinowsky – 1842, Raczynski – 1846, Bégin – 1852, Rattazi – 1879, Vigneron –1882, Bergman –1889, Lavigne – 1890, Madame Adam – 1896, Galois – 1898...).

A citizenship movement began to emerge among the intellectuals of the constitutional monarchy that intended to safeguard the monumental and artistic heritage that was understood to represent the nation, in other words, the heritage that unarguably represented universal/civilisational attributes and, at the same time, was bestowed with historical ties. This movement had Alexandre Herculano as its leading figure and he was the historian that best understood that built, monumental heritage cements and raises up a people's cultural heritage (Custódio, 1993: 34-71).

The Monastery therefore continued not only to fascinate but was the place's determining feature, imposing itself as a historical monument and a virtuous celebration of the past. The emblematic assertion of the nation state began and this solidified a feeling of belonging to a homeland. This outpouring of romantic, historicist awareness, tied to the recreation or reinterpretation of times gone by, validated the building's past and gave visibility to the community's values (Custódio, 2011: 79-81).

But it was not until the Republic was founded that a classified heritage inventory was drawn up and legislation was passed that aimed to protect properties from neglect or abandonment. With the advent of the military dictatorship and the New State, a centralist policy emerged from which heritage was not excluded. With the formation of the Directorate-General for Buildings and National Monuments, the interventionist state began to carry out a thorough historiographic review that took form in political action for restoration. The nationalistic ideology, or one that glorified the homeland, appropriated monuments and exploited them, although this bond did not stop them being propagated and advertised, bringing the population closer to higher levels of recognition and identity.

The changing ideology and culture in the context at the time led to work being carried out from the period of the constitutional monarchy until the first decades of the New State. Restoration updated the image of the Monastery (purging it of Baroque ornamentation in order to recover Gothic purity, i.e. a supposed initial authenticity, following a clearly dated reading) and helped reconfigure the way in which it was seen; the monument and its meaning were strengthened regardless of this, however. With identity and belonging defended, although under the ideological banner of a resurgence in nationalism based on celebration and memorialism, the monument remained, nonetheless, frozen in time. In actual fact, the monument viewed as or reduced to a symbol is restricted to the building itself and is disconnected from the areas of belonging and meaning. The land that had the Monastery as a

reference point is, in particular, forgotten, thus removing the opportunity for an integrated view that would provide a better understanding of the past. The rural heritage of the monastic institution was affected, in fact, by the heavy weight of time; bonds that could not only enrich the discourse but also define the Monastery in space began to fade away. Only after the 25th April Revolution did heritage begin to form bonds locally, something which heritage defence associations were able to achieve to varying extents. Local awareness grew but this momentum was not enough to raise the region up around the fundamental monument. Although democratic openness stimulated the adoption of ideas such as ecomuseums and intelligent relations with heritage in networks, the ability to make successful projects locally was limited and conflicted with the dominant idea of heritage uncoupled from the economy, employability and development (Silva *et al.*, 2015).

Although inseparable from the majestic and erudite scale of the Abbey, the singular nature of the Alcobaça area today reminds us of the gradual replacement of monastic austerity and strictness with a different, more worldly (although no less eloquent) dimension, led by the brilliance and expressiveness of the wealth of industrial heritage related to manufacturing and trade. It should be noted that Alcobaça's socio-economic history helped develop a culture of technology – of which water was the greatest exponent – a legacy which formed a proto-industrial movement and agriculture based on capitalism (Maduro, Mascarenhas, Jorge, 2015). This data confirms the innovation and economic efficiency of the land in Alcobaça, a model that was led by the Cistercians for a long time. In the 18th century, it gained a new impetus: reconfiguring Man's relationship with the landscape, changing and taming the courses of the rivers, building a new map of the forests, encouraging the colonisation of the high moorlands with fields of olive trees, drying and working the lands that the retreating sea had left vacant for plants from the new world, spreading the irrigation system throughout the fields, mobilising techniques that furthered the land's productivity, encouraging a reorganisation of the land, increasing commerce, and beginning, ahead of time, what could be called "monastic capitalism"; in short, stoking the fire of sustainable economic development (Maduro, 2011).

Historical research confirms, in fact, that there was an important industrial presence in the Estremadura region with the remnants of textile and ceramics manufacturing sites that had been undeniably important to the geo-economic context since the 18th century. It also reveals the spirit of innovation and socio-economic development which, despite being based on the monastic technical and cultural legacy, was not exclusive to the Cistercian context (Guerreiro, 2015: 105-120).

Throughout the 20th century, the urban Alcobaça brand was extensively shaped by industrial activity. The agricultural Alcobaça of the surrounding parishes was heavily rivalled by an urban, industrial Alcobaça, composed of large and medium-scale factories and workshops (Tainha, Moreira and Gouveia, 1979). Nonetheless, as we can see today, the urban situation in Alcobaça has been gradually worn away in the face of the representativeness and attraction of the Monastery. Indeed, institutional policies and investment in heritage have not had the same kind of reach in safeguarding distinctive heritage in nearby areas.

One example of this is the importance of hydraulic systems as assets that justify the classification of the Monastery of Alcobaça as World Heritage, described as "*an example of a great Cistercian establishment with a unique infrastructure of hydraulic systems and functional buildings*" (UNESCO, 1989). Considering the justification, the implementation of the hydraulic system itself conveys a (unitary) rationale for preserving and promoting heritage that is the same as the rationale used for the monastery. Nevertheless, the surrounding area has not seen the same investment and monitoring, corresponding to a clear bankruptcy in surrounding areas that are dominated by an urban landscape peppered with heritage, economic and cultural references in ruins or on their way to becoming ruins.

The example of the urban perimeter of Alcobaça shows the need to integrate and, as a result, make use of places. It is important, then, to avoid taking only a marginal view of the town that has surrounded the Monastery for centuries, while also developing autonomously and often out of synch with the monument. It is also necessary not to fall into intervention programmes and administration positions that work against its inhabitants, who have protected the monuments for centuries against successive neglect; instead, it is important to empower and encourage, following an integrated, sustained development strategy.

Alcobaça's singular heritage brand, although benefiting from recognition by UNESCO, remains outside the design and destiny of regional sustainability. This separation requires remedial measures. The "heritage brand" should, therefore, be envisaged as a whole, in which the notion of "Alcobaça as a cultural town" takes a central position; it is a cultural town thanks to the Cistercian features but also due to new policies that bring the critical mass of civil society together with political power and those involved in the cultural economy. This situation requires investment and development policies sustained by new cultural attractions that intersect to generate synergies and maximise audiences. This is the case, for example, for programming and network management initiatives (such as the "Stories of the Centre" Project, which connects heritage/leisure spaces in different municipalities), the growth in renewed attractions (thematic tours, museum centres, cultural events), thereby achieving a new level of tourist attractiveness

(Maduro, Guerreiro, Oliveira, 2015). A new discourse and practice may emerge from this undertaking to understand and explore territorial and cultural resources in a register of sustainability and development for Alcobaça as a destination.



Figure 2. Oil mill of Ataija

Source: Jorge Barros

3. The strategic purpose of legacy: territory and cultural development

The importance and specific nature of Alcobaça's cultural heritage demands programming and management with strategic purpose. This requirement is evident and an urgent need. There are two relevant aspects here that must follow their paths together, even though we know they represent two situations that are at times difficult to reconcile: the acclaimed "culture of development" led by political decision-making bodies and the "cultural development" practised by local stakeholders. Work to defend the strategic purpose of legacy requires values, concepts and action practices to be included that require knowledge of the territory. The work's aims should be favourable to an assessment that balances the people's aspirations with those of the promoters. To this regard, interaction with other stakeholders, players and the community is essential.

A conscious, up-to-date impact assessment, showing positive flows and warning of negative flows, is therefore fundamental. It is true that the formation of a cultural development policy, necessarily connecting worlds that are not always easy to reconcile (culture/economy) by implementing the rule of sustained development, carries with it some risks that may call into

question intrinsic values of conservation and recognition of cultural heritage. For that reason, it is important to understand how these rationales are organised and operate (Guerreiro, 2010).

The territorial model has its own advantages: it boosts cultural momentum based around a primordial economic, strategic and identity-related resource (the territory itself), in that it generates competitiveness and stimulates the *place* and, moreover, favours a closer relationship between culture and the different local economic activities, whether they are directly connected to heritage and tourism or not, such as industries linked to leisure. Naturally, an up-to-date idea of the territory will be fundamental to understanding this strategic aspect of legacy. The notion of *place* should not, therefore, be understood merely as an unmoving abstraction that floats over everyday life, resisting the economic, social and cultural forces that come from globalisation (Cresswell, 2006). In truth, with globalisation, *places*, instead, largely tend to extend beyond the perimeters surrounding them and become a constituent part of globalisation itself. One piece of data that confirms this statement is the exponential rise in the speed of social flows and spatial mobility that condition any type of bond to places (whether by identity or simply by social acquaintance). This appears to be particularly influenced by conditioning factors generated by (global) tourism and culture flows within the local identity space (Carmo, 2008). In this case, competitiveness takes on a determining role for territories' future sustainability, and this is what has changed in recent years in four fundamental ways, as Aragonez and Alves (2012) point out:

- Competitiveness happens at global level;
- Competitiveness between companies provides an increase in innovation;
- Innovation is born of information dynamics intersecting with codified knowledge and technical knowledge;
- Globalisation of the markets and an increase in competition contribute to expanded organisational capacities for the territory and enhance regional dynamics.

The involvement of all stakeholders is beneficial to building a network, promoting the region's creative and participative base. The strategy to follow is based above all on expanding participative models that aim to promote a notion of well-being and sustainable development (Cedrais, 2006). A gradual transformation of the territory supported by a cultural development policy, with a view to form an extensive intangible network of the region's "living" heritage, is a justifiable alternative that presents itself alongside the characteristics of local geography. The

local geography possesses a vast array of resources of historical, ethnographic, archaeological and environmental interest, to mention only the most obvious.

Regeneration of the town's urban areas based around their cultural heritage is recurrently presented as a strategy to follow in the context of local development policy. The iconoclastic force exerted by the monastery is well known; it is an overly unifying temptation that requires everything to revolve around its sphere of influence. Nevertheless, cultural development in the region is not limited to urban areas, confined to the historic centre of Alcobaça, but instead extends a long way beyond it, to the furthest outskirts, to the rural environment, where a significant portion of heritage has yet to be studied and made available and is even at risk of being lost. The joining of forces here should always be considered to be enormously useful. Today, new challenges facing regional and local policy have been identified, and it is necessary to move forward with action, taking measures so that public and private institutions and organisations can enhance and contribute to competitiveness and productivity while at the same time preserving their heritage (Aragonez and Alves, 2012).

Promoting the territory was always one of the main goals for social and political organisation, mainly thanks to the significant influence that it exerts on ways of life and the impact it has on the notion of growth and local development. This explains why some municipalities (such as Alcobaça) have recently invested in policies directed at the territorial market (Aragonez and Alves, 2012). These public policies are gradually making way for a new notion of territory, linked to a feeling of wider community ("territory of citizenship") which is characterised by new social groups that are part of a perspective that is more transversal and heteronomous and therefore focuses less on traditional attributes and the standardisation of socio-economic and cultural activities (Guerreiro, 2015).



Figure 3. Alcobaça Wine Museum

Source: António Cruz



Figure 4. Alcobaça Pottery Museum

Source: António Cruz

4. The tourism alternative: management and sustainability

The state-market functional dichotomy is clearly present at the current time, which does not exclude the development of alternative models, but instead involves the stimulation of partnerships between state, public bodies on one side, and commercial private bodies, on the other. At the heart of this is the cultural democratisation model itself, which directly brings

together types of public policy that include the promotion of spaces for participation and socio-cultural expression (Barbieri, 2015). During this process, the “marketing” role that the label “heritage” represents and which is invested in a network of relations and reference points is an important one (Esperança, 1997). The problem lies in the co-existence of two distinct and perhaps antithetical essences within the same world of symbolic assets, which may lead to two modes of production and movement through opposing programming rationales (the cultural rationale of heritage opposing the economic rationale of tourism). For that reason, it is important to understand how these two rationales are organised and operate.

This gradual commercialisation of culture, heavily led by aggressive territorial marketing policies, cannot fail to elicit preventive measures for heritage, above all when they focus their attention on encouraging cultural tourism. The different stakeholders (public bodies, companies and the population) have to share these principles and maintain the resulting behaviour, which means investing in education and raising public awareness. Underlying this, is the concept of sustainable tourism, so it is worth remembering the six principles of the ICOMOS Cultural Tourism Charter (1999):

- Domestic and international tourism is among the foremost vehicles for cultural exchange and conservation should provide responsible and well managed opportunities for members of the host community and visitors experience and understand that community's heritage and culture, at first hand;
- The relationship between Heritage Places and Tourism is dynamic and may involve conflicting values. It should be managed in a sustainable way for present and future generations;
- Conservation and Tourism Planning for Heritage Places should ensure that the Visitor Experience will be worthwhile, satisfying and enjoyable;
- Host communities and indigenous peoples should be involved in planning for conservation and tourism;
- Tourism and conservation activities should benefit the host community;
- Tourism promotion programmes should protect and enhance Natural and Cultural Heritage characteristics.

Since the beginning of the new century, international heritage bodies have begun to recognise the economic dimension of historical and cultural heritage. At this point we should remember: the *Vienna Statement*, issued at the 4th Annual Meeting of the European Heritage Heads Forum, which acknowledges that investment in heritage is a successful sustainable solution to cope with the economic recession by recognising its economic, environmental and

socio-cultural dimensions (EHHF, 2009); the *Brussels Charter*, recognising the role of cultural heritage for the economy (ICOMOS, 2009); and even the *Valletta Principles*, directed towards safeguarding and managing historic urban areas, which highlights, among other things, the importance of planning and sustained management for historic centres (ICOMOS, 2011).

It is important to pay attention to the relation between cultural tourism and territory, which is not limited to the relation between cultural tourism and *place* (Juanchich, 2007). Territorial identity, heritage and tourism flows all enter into consideration when seeking a definition for this relationship. Mónica Morazzoni, in her book *Turismo, Territorio e Cultura* (2003), suggests establishing different levels of definition based on four different types of cultural tourism region:

- Potential tourist region: the tourism flow is still marginal, and new products need to be created using culture and heritage, i.e. by creating and adapting cultural attractions/services for tourist clientele;
- Expanding tourist region: cultural tourism attractions/services already exist, but increase exponentially in volume and are diversified in accordance with the growing demand, above all, in regard to the capacity to receive tourism flows (hotels, camp sites, restaurants);
- Mature tourist region: territories that already have a tourist product associated with their image and have stable tourism flows. The demand for the territory is growing, but less intensely than during the expansion stage. There is a well established market in which the local supply of services is successively and eternally reorganised.
- Saturated tourist region: the territory's power of attraction falls and flows may be diverted to competing territories. Demand, rates and investment levels fall and the tourism flow, territorial "brand" and cultural attractiveness are downgraded.

A conscious, up-to-date impact assessment, showing positive flows and warning of negative flows, is, therefore, fundamental. One of the safeguards is an assessment of small projects driven by small groups or by the community itself, often "crushed" in favour of big initiatives that bring together public investment and the interests of economic stakeholders. Another risk can be identified in the creation of measures that end up causing already established values, important for places' memories, disappear. These values may include traditional activities or the free movement of people and goods in historic centres, which is essential to preserving their original energy.

According to Morazzoni's (2003) definition, Alcobça's territory remains a potential tourist region and, for that reason, needs to link potential natural and cultural sites following an

operational dynamic rationale so that they become functional sites that contribute to strengthening the tourism and culture sector. In other words, it needs to bring together high-quality, diversified attractions with competitive prices, which is a rationale that can only be achieved by properly managing resources and improving complementary services (goods and services organised in a network), thereby improving the population's quality of life and boosting existing services regarding external demand. In turn, the infrastructures created should take on the battle to educate and raise awareness about local culture in the search for solutions to make resources viable, in accordance with a strategy to create a hierarchy of attractions.

It is indispensable to achieve a framework of reference for the structuring principles of balance (best practices) that includes cultural actions and economic solutions applied to the integration and revitalisation of heritage within the scope of commercialisation (Benhamou, 2004). This model implies the recognition of tourism as a path of fundamental importance, both as an intangible factor of sustained development (boosting cultural industries, goods and resources) and as a contributor to other, similarly intangible factors that create social well-being, cultural progress and economic prosperity. This recognition is therefore based on the understanding that Alcobaça's heritage is a founding part of a *cultural cluster* integrated into a process of growth and development (Guerreiro, 2015).

It is important to perform a systematised analysis of the tourism attractions/services on offer to understand the Alcobaça's situation. Using an inductive method based on the notion of territory, it is necessary to first establish the (heritage) attractions that form the main component of the tourism services on offer that, in turn, stimulate demand in the market by enhancing attractiveness and, in the background, create resources to form a consistent tourism product. This requires a range of specific basic infrastructures to support tourist activity itself. The analysis demands scrutiny of the tourist products in terms of quality and sustainability from the perspective of integration and upgrading for the different components of the heritage on offer.

Let us assume an understanding of tourism as one of the largest economic activities in the world, and one which emerges as an activity for the future (World Tourism Organisation, 2008). In this respect, public policy views the tourism sector as an activity that can help solve some of its economic and social problems (Mathieson and Wall, 1982). But there are significant risks in these activities since they are not anchored in sustained development strategies (Costa, 1996). Tourism development without a concern for planning and rationality may culminate in decline for the territory (Butler, 1980). Forming a model based on planning may, therefore, constitute an essential tool for promoting sustainable tourism development.

For Alcobaça, as far as investment is concerned, cultural heritage has a significant position and requires integrated policies to be followed, i.e. connections between central or local policies and sectoral policies. This opportunity involves symmetrical positions at regional and local levels as regards the cultural promotion of heritage, strengthening both its relationship with the territory and linking it with a diversified cultural product based on the programming and management of infrastructure networks. These networks include three centres of influence, with the Monastery of Alcobaça as a unifying and disseminating core:

- Historic centre: formation of cultural circuits and areas bringing together spaces for leisure, regular cultural events and roaming projects (some of which already exist, such as the International Exhibition of Conventual Confectionery and Liqueurs or the *Cistermúsica* music festival, or are being prepared, such as the Gastronomy Festival); following the research lines of Mason and Paggiaro (2012), it is also believed that gastronomy essentially denotes an experience formed of foods, wine and landscape, linking values and customs to products and how they are made (Richards, 2015); revitalisation of industry and commerce with particular focus on a policy to certify and promote quality local and regional products (farming, fruit growing, ceramics, cutlery);
- Surrounding area: The Wine Museum (refurbished and renovated museum that houses the most important wine production collection in Portugal); the Ceramics Museum (resizing the current Raul da Bernada Museum and other local spaces, such as the Pereira de Sampaio Faience Museum, thereby giving expression to one of the cornerstones of Alcobaça's identity); the Talking Machines Museum (currently being installed, includes one of the most important collections of radio and telecommunications equipment in Portugal); the Arts Warehouse (an excellent space for cultural programmes, integrated into the national contemporary art circuit);
- Periphery: The Monastery of Cós (monument of public interest – Cistercian heritage); the Museum of the Monastic Estates of Alcobaça (intersecting the notions of "collection"/"territory"/"community", with a museum programme dedicated to the monastic estates of Alcobaça, providing information on the features of the relation between the region and the Monastery, which has lasted for centuries and crosses municipal borders, with a network of museums); intervention and interpretation of the landscape, including the preservation of landscape elements by following a new, integrated approach (such as the upgrading of riverside areas of the River Alcoa and information centres on the natural and cultural features of the Serra de Candeeiros).

One of the positive effects that come out of the model proposed here may be the contribution to regional development. This idea leads us to Cunha's (1997: 287) finding that *"no economic sector guarantees the close connection that should exist between regional development and national development other than tourism, in that the economic and social effects of tourism found in a region spread to the country as a whole"*. The same is demonstrated by the World Tourism Organisation (1998), which shows that the benefits of tourism are based not only on its ability to generate wealth in the area where it operates, but also on the contribution it makes to regional balance. Therefore, tourism is the activity that can best make internal use of local (natural, historical or cultural) resources, since it follows the specific features of each area, which is only feasible when there are local and regional values that guarantee a calling for tourism (Cunha, 1997; Fazenda, Silva and Costa, 2009). It is, then, a factor that can boost local economies but it requires a planning policy based on a model that promotes sustainable tourism development.



Figure 5. Power plant Museum of Alcobaça

Source: Alberto Guerreiro

5. Conclusion

Tourism is a multifaceted activity, which has economic features that include dynamic mechanisms for regions' growth and development. In turn, the territory is itself a piece of cultural apparatus. Strengthening a territorial "brand" should, therefore, recognise that cultural apparatus and have an essential strategic purpose to foster policies to enhance sustained development and planning based on a tourism model that is consistent and distinctive. In light of this, there is a need to formally create a cultural tourism model for Alcobaça, with stimulation of the economy and regional development as priorities. This model should recognise that the repercussions of cultural tourism activities are not restricted to the pulse of the economy, since maintaining levels of cultural attractiveness demands the preservation and upgrading of the visited spaces. In essence, this model should encourage a virtuous cycle of compromise between the local economy and the region's historical legacy and heritage, reinvigorating the bonds between identity-based awareness and responsible citizenship.

References

- Aragonez, T., Alves, G. C. (2012), "Marketing Territorial: O futuro das cidades sustentáveis e de sucesso", in *Book of Proceedings – Tourism and Management Studies International Conference Algarve 2012*, Faro, ESGHT – UALG, Vol. 1, 316-329.
- Barbieri, N. (2015), "A Legitimidade das políticas culturais: das políticas do acesso às políticas do comum", *Políticas Culturais Para o Desenvolvimento. Conferência ARTEMREDE* (Coord. Pedro Costa). Santarém: ARTEMREDE, 24 -38.
- Beckford, W. (2009), *Diário de William Beckford em Portugal e Espanha*, Lisbon, Biblioteca Nacional de Portugal.
- Benhamou, F. (2004), *L'économie de la Culture*, Paris, Editions La Découverte.
- Beni, M. C. (1998), *Análise Estrutural do Turismo*, 2ª edição, São Paulo, Editora Senac.
- Butler, R.W. (1980), "The concept of a tourist area cycle of evolution: implications for management of resources", *Canadian Geographer*, N.º 24, 5-12.
- Carmo, R. (2008), "Do espaço abstracto ao espaço compósito: reflectindo sobre a tensão entre mobilidades e 'espacialidades', in *VI Congresso Português de Sociologia. Mundos Sociais: Saberes e Práticas*, Lisbon, FCSH-UNL.
- Cedrais, A. (2006), "Marketing territorial dos territórios inteligentes: instrumentos para uma nova visão", *Revista Portuguesa de Marketing*, 19, 23-34.

- Costa, C. M. M. (1996), *Towards the Improvement of the Efficiency and Effectiveness of Tourism Planning and Development at the Regional Level: Planning, Organisations and Networks. The Case of Portugal*, Ph.D. Thesis, University of Surrey, England.
- Costa, C. M. M. (2000), "O papel e a posição do sector privado na construção de uma nova política para o turismo em Portugal", *Novas Estratégias Para o Turismo*, Porto, AEP, 65-87.
- Cresswell, T. (2006), *On the Move: Mobility in the Modern Western World*, London, Routledge.
- Cunha, L. (1997), *Economia e Política do Turismo*, Alfragide, McGraw-Hill, Portugal.
- Custódio, J. (1993), "Salvaguarda do património – antecedentes históricos. De Alexandre Herculano à Carta de Veneza (1837 - 1964)", *Dar Futuro ao Passado*, Lisbon, IPPC, 34-71.
- Custódio, J. (2011), "*Renascença*" *Artística e Práticas de Conservação e Restauro Arquitectónico em Portugal, durante a I República – fundamentos e Antecedentes*, Caleidoscópico.
- EHHF (2009), *Vienna Statement. Statement on the Heritage Stimulus in a Time of Economic Recession*. 4th Annual Meeting of the European Heritage Heads Forum, Vienna, May 2009.
- Esperança, E. J. (1997), *Património e Comunicação: políticas e práticas culturais*, Lisbon, Vega.
- Fazenda, N., Silva, F. N. da, Costa, C. (2009), "Política e planeamento turístico à escala regional: o caso da agenda regional de turismo para o norte de Portugal", *Revista Portuguesa de Estudos Regionais*, N.º 18, Boletim APDR, N.º 1, 77-100.
- Gorani, G. (1992), *Portugal. A Corte e o País nos anos de 1765 a 1767*, Lisbon, Círculo dos Leitores.
- Guerreiro, A. (2010), "A Etnopaisagem cabo-verdiana: museus, globalização e desenvolvimento", *Revista de Estudos Cabo-verdianos*, N.º 6, Património e Museus, Uni-CV.
- Guerreiro, A. (2015), "Museologia alcobacense (I): antecedentes, pioneirismo e anomia", *Cadernos de Estudos Leirienses*, n.º 4, Leiria, Textiverso, 105-120.
- Guerreiro, A. (2015), "Museus na mudança: o indutor referencial, vivencial, sustentável", *Revista da Fundação Lopes Filho*, Praia, Fundação Lopes Filho, 203-240.
- ICOMOS (1999), *International Cultural Tourism Charter*, 12th General Assembly, México, October 1999.
- ICOMOS (2009), *Carta de Bruselas Sobre El Papel del Patrimonio Cultural en La Economía, y par la Creación de Una Red Europea de su Reconocimiento y Difusión*, Brussels, 30th June 2009.
- ICOMOS (2011), *The Valletta Principles for the Safeguarding and Management of Historic Cities, Towns and Urban Areas*, Valletta, 17th ICOMOS General Assembly, 28th November 2011.
- Jafari, J. (1990), "Research and scholarship. The basis of education", *Journal of Tourism Studies*, 1, 33-41.
- Juanchich, L. (2007), *Culture, Tourisme et Territoire: Les Apports du Tourisme Culturel au Développement Local*, Lyon, Université Lyon 2.
- Kinsey, W. M. (1829), *Portugal Illustrated*, London.

- Maduro, A. V. (2011), *Cister em Alcobça. Território, Economia e Sociedade (séculos XVIII-XX)*, (série: Tempos e Lugares 2), Maia, Ed. ISMAI and CEDTUR.
- Maduro, A. V. (2012), "Viajar e beber. Os vinhos cistercienses de Alcobça (Portugal) na literatura de viagens", *ROTUR, Revista de Ocio y Turismo*, Universidade da Corunã, 5, 149-160.
- Maduro, A. V., Guerreiro, A., Oliveira, A. (2015), "O turismo industrial como potenciador do desenvolvimento local – estudo de caso do Museu do Vinho de Alcobça em Portugal", *Pasos - Revista de Turismo y Patrimonio Cultural*, 13 (5), 1129-1143.
- Maduro, A. V., Mascarenhas, J. M., Jorge, V. F. (2015), "A Construção da Paisagem Hidráulica no Antigo Couto Cisterciense de Alcobça", *Cadernos de Estudos Leirienses*, nº 4, Leiria, Textiverso, 29-60.
- Mason, M. C., Paggiaro, A. (2012), "Investigating the role of festivalscape in culinary tourism: The case of food and wine events", *Tourism Management*, 33, 1329-1336.
- Mathieson, A., Wall, G. (1982), *Tourism: Economic, Physical and Social Impacts*, Essex, Longman Publishing Group.
- Morazzoni, M. (2003), *Turismo, Território e Cultura*, Milan, Editions de Agostini.
- Murphy, J. (1998), *Viagens em Portugal*, Lisbon, Livros Horizonte.
- Natividade, M. V. (1885), *O Mosteiro de Alcobça. Notas Históricas. Alcobça d'Outro Tempo*. Relatório da Exposição Alcobacense, 1906.
- Pereiro Pérez, X. (2014), *Turismo cultural: uma visão antropológica*, Maia, Ed. ISMAI and CEDTUR.
- Ribeiro, J. C., Remoaldo, P. C. (2011), "Património cultural e estratégia de desenvolvimento turístico da cidade de Guimarães", in *Actas do 2º Congresso 'Casa Nobre um património para futuro*, Arcos de Valdevez, C. M. de Arcos de Valdevez.
- Richards, G. (1996), "Production and consumption of European Cultural Tourism", *Annals of Tourism Research*, 23(2), 261-283.
- Richards, G. (ed.) (2007), *Cultural Tourism: Global and local perspectives*, New York, Haworth Press.
- Richards, G. (2015), "Tourism and gastronomy: From foodies to foodscapes", *Journal of Gastronomy and Tourism*, 1, 5-18.
- Santana Talavera, A. (2003), "Patrimonios culturales y turistas: unos leen lo que otros miran", *PASOS. Revista de Turismo y Patrimonio Cultural*, 1 (1), 1-12.
- Santana Talavera, A. (2008), "El turismo cultural: ¿un negocio responsable?", *Estudios y Perspectivas en Turismo*, 17 (3), 279 -294.

- Santana Talavera, A. (2010), *Patrimonio cultural: ¿entre diferenciación y cohesión identitaria? Tourismes, Patrimoines, Identités, Territoires*, Perpignan, Presses Universitaires de Perpignan, 23-33.
- Silva, A. S., Babo, E.P., Guerra, P. (2015), "Local cultural politics: contributions to an analytical model", *Sociologia, Problemas e Práticas*, 78, 105-124.
- Tainha, M. M., Moreira, C. A., Gouveia, A. (1979), *Plano Geral de Urbanização da Vila de Alcobaça*, Alcobaça.
- Timothy, D. J. (2011), *Cultural heritage and tourism: an introduction*, Bristol, Channel View Publication.
- Vasconcelos, J. L. (1980), *Etnografia Portuguesa*, vol.II, Lisbon, Imprensa Nacional-Casa da Moeda.
- World Tourism Organisation (1998), *Guide for Local Authorities on Developing Sustainable Tourism*, Madrid, WTO.
- World Tourism Organisation (2004), *National and Regional and Tourism Planning: Methodologies and Case Studies*, Madrid, WTO.
- World Tourism Organisation (2008), *UNWTO Tourism Highlights*, UNWTO, Madrid, available at: <http://www.unwto.org/facts/eng/highlights.htm> (consulted on: 11.2008).

Chapter II

The Impact of the World Cultural Heritage Classification by UNESCO on the Cultural Touristic Demand in Oporto

The Impact of the World Cultural Heritage Classification by UNESCO on the Cultural Touristic Demand in Oporto

MARIA CRISTINA MOREIRA⁴

JOSÉ M. LOPES CORDEIRO⁵

Abstract:

Classified in 1996 as World Cultural Heritage, the historic centre of Oporto has been registering, since then, an increasing demand by the tourists who visit the city, raising the appearance of new cultural spaces and the requalification of many others. In this study, the authors will try to analyse the tourism impact on the historic centre after its classification by UNESCO as a World Heritage, through the analysis of the tourism activity's indicators, in a period of two decades, between 1996 and 2015. It will be analysed the international tourists' profile who visit Oporto and/ or the North of Portugal. It will be analysed, too, the visits to the municipal museums in the historic centre comparing to the remaining variety of museums existent in the city of Oporto, in order to detect an UNESCO classification influence. It will be given particular attention to the cultural tourism segment, namely the creation of new cultural attractions and spaces, as well as the requalification of the existent ones. By the end, it will be made an analysis to the historic centre's touristic advertising by official and private entities.

Keywords: Touris; Touristic Demand and Offer; World Heritage; Oporto Historic Centre

Resumo:

Classificado em 1996 como Património Cultural da Humanidade, o Centro Histórico do Porto vem registando, desde então, uma crescente procura pelos turistas que visitam a cidade, suscitando o surgimento de novos espaços culturais e a requalificação de muitos outros. Neste artigo, os autores procurarão analisar o impacto do turismo na zona do Centro Histórico após a sua classificação pela UNESCO como Património da Humanidade, através da análise dos

⁴ Department of Economics, School of Economics and Management and research centre: Interdisciplinary Centre of Social Sciences, University of Minho (CICS.NOVA.UMinho), Braga, mcristinamoreira@gmail.com

⁵ Department of History, Institute of Social Sciences research center: Interdisciplinary Centre of Social Sciences, University of Minho (CICS.NOVA.UMinho), Braga, jmlopes.cordeiro@gmail.com

indicadores da atividade turística, no período de duas décadas, compreendido entre 1996 e 2015. Será analisado o perfil dos turistas internacionais que visitam o Porto e/ou Norte de Portugal. Procurar-se-á analisar também as visitas aos museus municipais do Centro Histórico em relação à restante oferta de museus existente na cidade do Porto, tendo em vista detetar uma influência da classificação da UNESCO. Será ainda prestada uma particular atenção ao segmento do turismo cultural, nomeadamente à criação de novas atrações e espaços culturais, assim como à requalificação dos existentes. Por fim, será efetuada uma análise à promoção turística do Centro Histórico por parte das entidades oficiais e privadas.

Palavras-chave: Turismo; Procura e Oferta Turística; Património Cultural da Humanidade; Centro Histórico do Porto

Resumen:

Clasificado en 1996 como Patrimonio Cultural de la Humanidad, el Centro Histórico de Oporto ha ido experimentado desde entonces una creciente demanda por parte de los turistas que visitan la ciudad, alimentando con ello la aparición de nuevos espacios culturales y la mejora de muchos otros. En este estudio, los autores tienen como objetivo analizar el impacto del turismo en la zona del Centro Histórico tras su clasificación por la UNESCO como Patrimonio de la Humanidad, a través del análisis de los indicadores de actividad turística durante un período de dos décadas, entre 1996 y 2015. Se analizará el perfil de los turistas internacionales que visitan Oporto y/o el Norte de Portugal. Se analizarán también las visitas a los museos municipales del Centro Histórico en relación a la restante oferta de museos existentes en la ciudad de Oporto, con el fin de detectar una (posible) influencia de la clasificación de la UNESCO. Se prestará también una particular atención al segmento del turismo cultural, particularmente en lo que respecta a la creación de nuevas atracciones y espacios culturales, así como a la mejora de los ya existentes. Finalmente, se llevará también a cabo un análisis de la promoción turística del Centro Histórico por parte de las entidades oficiales y privadas.

Palabras Clave: Turismo; Demanda y Oferta Turística; Património Cultural de la Humanidad; Centro Histórico de Oporto

1. Introduction

The study about the impact of UNESCO World Cultural Heritage classification on the cultural touristic demand of Oporto, in the period of two decades, between 1996 and 2015, intend to be a contribute to the academic debate about the appreciation of tourism in spaces considered World Heritage.

It was defined a text structure. First, it will be presented the methodological aspects, followed by the revision of literature about the theme, and then the case study, which concerns two aspects: the international tourists' profile who visit the city of Oporto and/ or the North of Portugal, as well as the appreciation of the cultural touristic offer of Oporto in the Cultural World Heritage historic centre, and, at the final, the conclusion.

2. Methodology

The methodology used closely followed the procedure used to this kind of studies: delimitation of the subject in study, quantitative and qualitative data collection and its posterior analysis.

In what concerns to the data collection, it was conducted a researchof information, using primary sources concerning to the number of visitors/ tourists at the Oporto official Tourism Offices (1996-2015) and the number of visitors of the main Municipals Museums (2011-2015), provided by the *Departamento de Turismo da Câmara do Porto* (Oporto City Hall Tourism Department).

At the same time, it was used a secondary sources set, namely a selection of the results of a few number of works published until then, which analyse the subject and became useful for the appreciation of the Oporto historic city centre touristic offer, implementing surveys, questionnaires and interviews on the subject matter, in which we highlight the two documents conducted by the *Turismo Porto e Norte de Portugal* (Oporto and North of Portugal Tourism) (2015), *Estratégia de Marketing Turístico do Porto e Norte de Portugal* (Oporto and North of Portugal Tourism Marketing Strategy) (2015-2020) and *O Perfil dos Turistas do Porto e Norte de Portugal* (The Oporto and North of Portugal tourists' profile) (2015-2020), as, as well as two studies sponsored by the Oporto City Hall Tourism Department about the surveys applied to the visitors and tourists at the Oporto official Tourism Offices in the Summer of 2014 and Easter of 2015.

The lack of primary and secondary statistical sources about the tourism at the Oporto historic centre, namely the absence of tourists entry records in the Oporto historic centre, testify the relevance of the study about the impact of UNESCO classification as World Heritage on the cultural tourism offer of Oporto.

In the data analysis, there was an attempt to eliminate the subjectivity inherent to the tourists' perceptions about the Oporto historic centre, valuing the resulting economic impact of the demand.

3. Literature review

Although it may be considered the existence of a cultural tourism since the beginning of the tourism activity, the definition of this specific modality has just gained shape since the middle of the 80's of last century, with the appearance of the first cultural tourism projects. There were several causes on the basis of this new tourism offer. Among them, it is important to highlight the relative exhaustion of the traditional tourism offer – mainly in the South European countries – based on sun and beach, arousing interest in a new type of possibility, which could correspond too to the alteration on demands that new social sectors had been providing in cultural terms.

In 1985, the World Tourism Organization presented one of the first definitions of cultural tourism, which included "movements of people mainly for cultural motivations, such as field trips, performing arts and other cultural trips, festivals and other cultural events, visits to sites and monuments, trips for studying Nature, folklore, art or pilgrimages." (World Tourism Organization, 1985: 131).

However, it was by the initiative of the Council of Europe in 1987, under the programme of "European Cultural Routes", that began the first cultural tourism projects as a structured tourism product. It began thus to forge the concept of cultural tourism with the launch of the first cultural tourism itineraries, covering four specific main themes - the Routes of Santiago de Compostela, the Baroque, Rural Habitat and the Silk Routes -, each presenting a historical, social and cultural interest, such as to facilitate the rapprochement between the different European peoples and cultures in their own subject area.

Since then, cultural tourism has become diversified, covering a very wide range of cultural content, with particular emphasis on the historical heritage and the development of cultural tourism itineraries, following on the Council of Europe initiative itself also involved in the

creation of new routes, mainly from 1998, with the establishment of the European Institute of Cultural Routes, based in Luxembourg.

In 1999, ICOMOS - International Council on Monuments and Sites also published an International Cultural Tourism Charter, with the aim, among others, to "facilitate and encourage those involved in the conservation and heritage management to make the significance of that heritage accessible to resident community and visitors "(ICOMOS, 1999: 3).

The literature on the cultural tourism has grown very quickly - books, magazines, guides and articles - being virtually impossible, under a single article, to provide a summary of the work hitherto established. It also varies according to the theme of different types of cultural tourism and the prospects that it is seen, for example, as a tool for sustainable economic development. The same is true with the literature on the classification as a World Cultural Heritage.

However, among the extensive literature related to cultural tourism published in recent years, stands out the book "Cultural Tourism: Global and Local Perspectives", coordinated by Greg Richards, and that is the Proceedings of an organised Congress in Barcelona, in October 2003, by the Association for Tourism and Leisure Education (ATLAS). Focused almost exclusively on experiences that have taken place in European countries, the book highlights, however, an essential aspect, the need to consider a striking reality in the tourism in general, but with the same implications for cultural tourism, ie, increased competition in the tourism offer (Richards, 2006: 109). Thus, it is essential not only to maintain the authenticity and affirm the identity of tourist destinations, in order to enhance its attractiveness, a key aspect in the case of the Oporto historic centre. The book also highlights the need and importance of the site (or sites) to visit constitute more than an aesthetic version of the tourist gaze, and that the cultural experiences provided by the visit must be authentic (Richards, 2006: 97). Thus, a steady stream of tourists will be guaranteed, maintaining the stability of income from visits to the local economy.

4. Case Study: UNESCO World Cultural Heritage in cultural tourism of Oporto

4.1 The profile of international tourists visiting Oporto and / or Northern Portugal

It is undeniable the dynamics of tourism in the region of Oporto and North of Portugal (see attached map, Figure 1), in particular in the 21st century, as shown by document *Estratégia de Marketing Turístico do Porto e Norte de Portugal* (Tourism Marketing Strategy of Oporto and North of Portugal) (2015-2020) (Turismo Porto e Norte de Portugal, 2015) by a set of tourism indicators (including VAB, 2004: 15.7% and 2014: 21.5%; Guests 2004: 1.8 million and 2014: 3

million; Overnights stays 2004: 3.3 million and 2014: 5.4 million and Bed-occupation rate: 36.8% in 2004 and 2014: 41.4%). According to the source, "the performance of the tourism is concentrated in the Oporto Metropolitan Area, absorbing about 61% of overnight stays in the region" (Turismo Porto e Norte de Portugal, 2015).



Figure 1. Oporto and North of Portugal

Source: Turismo Porto e Norte de Portugal, 2015, *Estratégia de Marketing Turístico do Porto e Norte de Portugal (2015-2020)*

In the recent November 2015 study *O Perfil dos Turistas do Porto e Norte de Portugal* (The profile of tourists from Oporto and North of Portugal) (2015-2020), based on the analysis of the application of the results of 1,320 personal surveys in 2014 "in the Sá Carneiro Airport boarding lounge (eliminating the Resident in Oporto and North of Portugal, Transit Passengers and National Tourists/ Excursionists) "visits to family and friends (39%) and leisure travels (37%) are the main segments of the tourist destination Oporto and North of Portugal, 76% of the visitors. Even point out the relevance of the third reason for visit, business, representing 18% target segment of the Oporto area and North of Portugal, a markedly industrial region with a strong export focus.

According to the document *Estratégia de Marketing Turístico do Porto e Norte de Portugal* (Tourism Marketing Strategy of Oporto and North of Portugal) (2015-2020) (Turismo Porto e Norte de Portugal, 2015), the product "Cultural and Landscape Touring" is part of anchor

products of all sub-destinations of Oporto and North of Portugal region: Oporto, Minho, Douro and Trás-os-Montes (Table 1 and Figure 2) and Heritage Cultural-Historical Wealth is one of the destination positioning elements of the region of Oporto and North of Portugal, one of the main reasons for the attractiveness of the Oporto historic centre area – World Cultural Heritage, as we will get to know in this study.

	Oporto	Minho	Douro	Trás-os-Montes
Anchor products	<ul style="list-style-type: none"> • City and short breaks; • Cultural and landscape touring • Nautical tourism • Gastronomy and wine • Business 	<ul style="list-style-type: none"> • Nature (active tourism) • Cultural and landscape touring • Religious tourism • Nautical tourism • Gastronomy and wine • Golf 	<ul style="list-style-type: none"> • Nautical tourism (cruises and tours in Douro) • Gastronomy and wine (farms) • Cultural and landscape touring • Nature 	<ul style="list-style-type: none"> • Health and well-being • Nature • Cultural and landscape touring • Gastronomy and wine
Complementary products	<ul style="list-style-type: none"> • Health and well-being • Golf • Sun and sea • Nature 	<ul style="list-style-type: none"> • Health and well-being • City and short breaks • Sun and sea 	<ul style="list-style-type: none"> • Religious tourism • Health and well-being • Golf • Business 	<ul style="list-style-type: none"> • Religious tourism • Golf

Table 1. Oporto and North of Portugal

Source: Turismo Porto e Norte de Portugal, 2015, *Estratégia de Marketing Turístico do Porto e Norte de Portugal (2015-2020)*

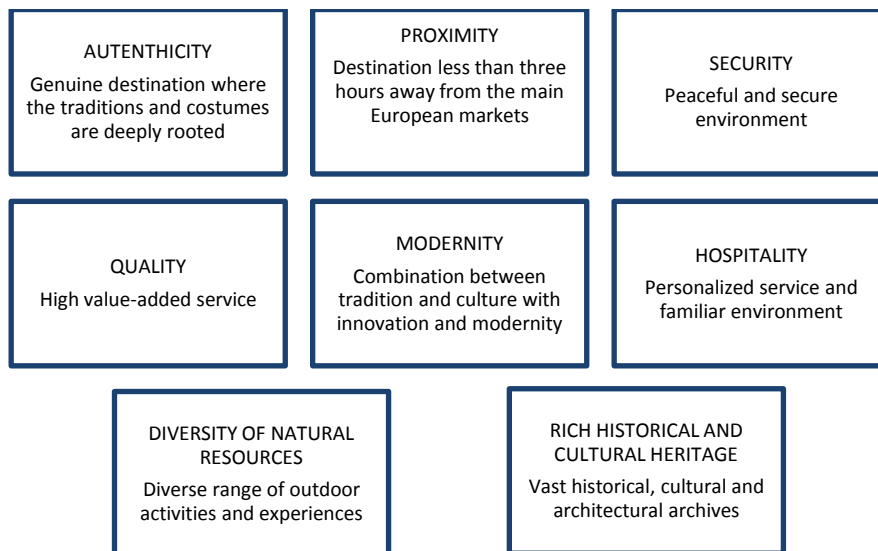


Figure 2. Oporto and North of Portugal – Destination Positioning Elements

Source: authors based on Turismo Porto e Norte de Portugal, 2015, *Estratégia de Marketing Turístico do Porto e Norte de Portugal (2015-2020)*

4.2 The appreciation of cultural tourism of Oporto in the World Cultural Heritage Historic Centre

The award of the World Cultural Heritage by the UNESCO (Mexico) on 4th December 1996 to Oporto historic centre encompasses part of the area of the inner city to the route of the ancient wall Fernandina, from the 14th century, and some adjacent areas with identical characteristics or valued by later achievements for a total of about 49 hectares, territories located in the parishes of Sé, São Nicolau, Vitória and Miragaia in the Oporto city (Figures 3 and 4).



Figure 3. Panoramic view of Historic Centre of Oporto

Source: <https://www.dreamstime.com/>



Figure 4. Oporto historic centre map

Source: provided by Oporto Official Tourism Board, 2016

The study *Estatísticas de Turismo Urbano. O Centro Histórico do Porto e o Turismo*, from Francisco Dias, is particularly useful for analysing the impact of the UNESCO World Cultural Heritage classification in cultural tourism of Oporto. Thus, according to this author, the most relevant data on the tourist/ visitor's profile of the city of Oporto, in 2008, and, consequently, its historic centre, can be seen in the following Table 2.

Educational background	Around 70% of the visitors have a college degree (graduated or post-graduated).
Nationality	70% of the visitors correspond to five nationalities: Portuguese, Spanish, British, French and German.
Visit motivation	70% of the visitors admit the main motive of their visit is the cultural tourism, and they refer as destination's main attractions the monuments, the museums, the historical sites and the wine cellars of Oporto.
Duration of the stay in Oporto	In 75% of the cases, it is under a week (45% from 2 to 3 days; 30% from 4 to 6 days).
Destinations' information source	48% used the Internet
Air transport booking	39% used the Internet
Accommodation booking	39% used the Internet

Table 2. Visitor/ tourist's profile of the city of Oporto (2008)

Source: Authors, based on Dias, 2011: 195

In addition to several problems and shortcomings indicated by the visitors / tourists, the field work of the author also points out the "car and pedestrian mobility, cleaning, recovery and conservation of heritage and tourist information" (Dias, 2011: 196). However, it is still significant that 70% of visitors have assumed that cultural tourism was the main reason for their visit, referring to major attractions monuments, museums, historical sites and the wine cellars of Oporto.

In this study, we present the results of two case studies in research on the impact of UNESCO World Cultural Heritage in the historic centre of Oporto: 1) evolution of the number of visitors of Municipal Museums of Oporto and 2) evolution in the number of tourists / visitors in the Oporto Tourism Offices.

Thus, the results of research carried out on the data courtesy of the Tourism Department, regarding the main Municipals Museums of Oporto, the city and the historic centre of the same city, from 2011 to 2015, allow us to state that the total number of Municipal Museums remained - being 13 in total - 3 of which are located in the historic centre of Oporto.

From 2011 to 2015, the number of visitors of Municipal Museums at the historical centre of Oporto increased considerably: in 2011 reached 47.5% of total demand (118,278 visitors / year) in 2015 amounted to 69.4% (214,965 visitors / year) ie, we can state that the historic centre of Oporto is the main geographical space in demand for museums (Table 3).

Municipal Museums	2011	2012	2013	2014	2015
Museu Romântico da Quinta da Macieirinha	27.846	24.932	28.557	29.842	27.498
Casa Museu Guerra Junqueiro	16.254	19.791	25.545	27.234	23.559
Casa Museu Marta Ortigão Sampaio	11.230	13.189	9.621	11.106	7.694
Museu do Vinho do Porto	23.859	24.843	28.052	26.035	24.351
Casa Tait	23.436	22.015	13.882	8.054	8.208
Casa Oficina António Carneiro	5.776	5.526	4.524	4.791	4.753
Gabinete de Numismática	5.310	4.492	6.026	5.166	5.480
Arqueo-sítio da Rua de Dom Hugo, n.º 5	406	1.232	780	1.568	1.050
Visitas à Cidade	682	1.714	3.419	5.580	8.287
Palacete Pinto Leite	11.279	3.327	8.285	4.174	4.261
Palacete Viscondes Balsemão	16.339	12.550	12.002	12.073	8.915
Banco de Materiais	4.763	4.914	5.524	6.314	7.240
Núcleo Museológico da Casa do Infante	101.618	134.590	145.170	176.663	217.356
TOTALS	248.798	273.115	291.387	318.600	348.652

Table 3. Number of visitors of Oporto's main museums, 2011-2015

Source: data provided by Oporto Official Tourism Board, 2016

The most visited municipal museum of the historic centre of Oporto during the five years of the review period was the Museum Centre of the Infante House, with 101,618 visitors in 2011 and 217,356 visitors in 2015, which corresponds to a significant increase in the cultural demand, 113,8%. The remaining two Municipal Museums - Guerra Junqueiro House-Museum and Rua de D. Hugo no 5 archaeo-site - registered a number of visitors, respectively, 16,254 and 406 in 2011 and 23,559 and 1,050 in 2015. Although both register a lower demand, when comparing to the Casa do Infante Museum Centre, the data show the growth of cultural demand in the Guerra Junqueiro House Museum, 44.6%, and Rua D. Hugo No. 5 archaeo-site, 158%.

Thus, we can conclude that the growth of the annual number of visitors 104.6% in the historic centre of Oporto in the last five years was based on a sustainable increase in the cultural demand for municipal museums placed in this area.

The results allow us to state that the richness of historical and cultural heritage of the Municipal Historic Centre of Oporto Museums is a target element and attraction of motivation of the Oporto historic centre area – World Cultural Heritage.

From the side of tourism demand, the amazing evolution of the number of visitors / tourists annually in official Tourism Offices of Oporto, of 542% between 1996 and 2015, is, in turn, a clear indicator of the positive impact of the classification as World Cultural Heritage by UNESCO in the cultural tourism demand of Oporto. The research results concluded that tourism demand has grown 106% from 1996 to 2000, 36% in the first decade of this century and the trend is for growing, based on the registered value between 2010 and 2015, 128% (Table 4).

1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
70.453	87.313	90.806	102.474	132.321	145.120	122.884	147.791	186.230	138.020
2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
148.652	191.165	194.139	174.858	198.55	236.408	262.228	303.147	308.694	452.322

Table 4. Evolution of the number of visitors/ tourists at the official Tourism Offices, 1996-2015

Source: data provided by Oporto Official Tourism Board, 2016

The results allow us to state that the classification of the historic centre of Oporto by UNESCO as a World Cultural Heritage in December 1996 had the immediate effect on the increasing demand by visitors / tourists.

An interesting study by Oporto City Hall based on surveys applied to visitors and tourists in official Tourism Offices of Oporto in Easter 2015 also highlights the tourism appreciation of the historic centre of Oporto:

The World Heritage is for 24% of tourists and visitors the main attraction of the city, followed, according to the preferences of respondents, by Port Wine with 14% of calculated answers. Events and city nightlife are the least scored by tourists and visitors, respectively 2.3% and 1.3% (...). To 19.4% of the sample, the Ribeira is assumed as city icon, capitalising Ponte D. Luís 18.5% of preferences of tourists and visitors. The Clérigos Tower and the Port wine arise soon after, respectively 14% and 13%.

In turn, a similar study, applied in the Summer of 2014 by the same entity, shows that the historic centre of Oporto comes in first place in the preference of tourists and visitors of Oporto (21% and 20% of the tourists and visitors of Oporto, respectively in 2014 and 2015, intended to visit the historic centre of Oporto).

Along with the tourism demand growth, UNESCO classification also promoted the rehabilitation of the historic centre and, in recent years, the licensing for rehabilitation of homes for hostels. Although there are no specific statistics that record tourist demand only for the historic centre of Oporto, it is easy to understand that this was one of the attractions that contributed to the growth of that demand.

The opening of the new terminal from Oporto airport at the end of 2005 favored the increase of its air accessibility, to which must be added the progressive availability of low cost flights from over four dozen European cities. The case of Oporto confirms that airports are the main entrance borders of foreign tourists in Portugal, since more than 60% of those who visited Oporto and the North of Portugal, in the years of 2012 and 2013, went through the airport and travelled on low-cost companies, according to a IPDT (*Instituto de Planeamento e Desenvolvimento do Turismo*) study - *Instituto do Turismo* (Carvalho, 2013). The fact that the low-cost airline Ryanair has established in 2009 its base in Oporto contributed surely to the city has becoming an increasingly sought destination. The capacity of Leixões Port for large cruise ships, with the consequent entry into terminal operation cruise, opened in July 2015, also contributed to the increase in tourism demand of Oporto and its historic centre.

The performance of the different tour operators - public and private - over the past few years, through an effective marketing strategy, established the Oporto brand in international markets, with increasing interest and demand for its heritage values, of which the historic centre is a clear example.

5. Brief Conclusion

The research results are quite clear regarding the existence of a relationship between the classification of the Oporto historic centre as World Heritage Site and the increased demand of the city as a tourist destination. It is, however, a situation that is not exclusive of Oporto, being verified, generally, in the following years to a classification by UNESCO of a particular good/ site as a World Heritage Site. What gives some particularity to the case of Oporto is that the tourist demand have mainly increased in the last five years, after 2010, that is, more than 14 years after the classification date.

This increase in demand, specially in recent years, was due also to other factors, such as the qualification of the cultural offer of the city and its historic centre, with the creation of new museological infrastructure (for example, the Museu das Marionetas (Museum of Marionettes), opened in February 2013, or the Museu da Misericórdia (Museum of Mercy), opened in July 2015, but whose assets was already visitable), the emergence of low cost flights - greatly facilitating access to Oporto from numerous European cities - the phenomenon of hostels, which accompanied it, and yet, with a slightly smaller effect, because it was only opened in July 2015, the capacity of the Leixões Port for large cruise ships.

References

- Carvalho, P. (2013), "Companhias *low cost* garantem mais de 60% dos turistas no Norte", *Público*, from 28th of October.
- Dias, F. (2011), "Estatísticas de turismo urbano. O Centro Histórico do Porto e o turismo", in Manuel Joaquim Moreira da Rocha (Coord.), *Actas do Seminário Centros Históricos: Passado e Presente*, Porto, Faculdade de Letras da Universidade do Porto, 165-197.
- ICOMOS (1999), *Carta Internacional do Turismo Cultural*, available at: http://www.turismodeportugal.pt/Portugu%C3%AAs/AreasAtividade/desenvolvimentoeinovacao01/Documents/Doc10_CartaInternacionalTurismoCultural.pdf.
- Ministério da Economia e do Emprego (2013), *Plano Estratégico Nacional do Turismo: Revisão e Objetivos 2013-2015*, Lisboa, Turismo de Portugal.
- Richards, G. (ed.) (2006), *Cultural Tourism: Global and Local Perspectives*, London, Routledge.
- Turismo Porto e Norte de Portugal (2015), *Estratégia de Marketing Turístico do Porto e Norte de Portugal (2015-2020)*. Edição TPNP/IPDT.
- World Tourism Organization (1985), *The Role of Recreation Management in the Development of Active Holidays and Special Interest Tourism and the Consequent Enrichment of the Holiday Experience*, Madrid, World Tourism Organization.

Chapter III

Tourism Dynamics and Architectural, Cultural and Symbolic Heritage: The Case of Oporto City Centre

Tourism Dynamics and Architectural, Cultural and Symbolic Heritage: The Case of Oporto City Centre

CÉLIA FERREIRA⁶

TERESA MARQUES⁷

PAULA GUERRA⁸

Abstract:

Tourism is, nowadays, one of the most important economic activities. European cities compete for attracting visitors and tourists, using urban marketing strategies to ensure their visibility and projection at European and global level. The design and implementation of innovative architectural and urban projects and the realization of scientific, cultural or sporting events are instruments for attracting investment and people.

The identity and image of the city are differentiating factors that determine their competitiveness and that are translated in its architectural, historical, socio-cultural heritage, in its climatic features, its gastronomy and, increasingly, in the experiments, experiences and animation provided by the city.

In Oporto, tourism has had an increasing importance in recent years due to diverse factors. There is an increasing visibility of the city at national and international level. The main goals of public policies in this matter are mainly related with the creation of a city brand – Oporto brand, enhancing the identity and characteristics of the city in general and in particular of the city centre. A main objective is also to promote and hold events all year long mitigating the seasonality effects that characterize tourism industry.

In this work, it is our objective to analyse the recent dynamics of tourism in Oporto city centre. We used a methodological approach that combines quantitative and qualitative methods, namely the analysis of statistical indicators and interviews to Oporto city centre agents. The strengths, weaknesses, the opportunities and challenges of the local tourism sector are systematized.

Keywords: Oporto City Centre; Tourism Dynamics; Cultural Heritage; Symbolic References; City Marketing

⁶ Faculty of Letras of University of Oporto, CEGOT, celiamarisaferreira@gmail.com

⁷ Faculty of Letras of University of Oporto, CEGOT, teresasamarques@gmail.com

⁸ Faculty of Letras of Universidade of Oporto; IS –UP / Institute of Sociology / CEGOT, University of Oporto; Griffith Centre for Cultural Research / Griffith University / Australia, mariadeguerra@gmail.com

Resumo:

O turismo é, na atualidade, uma das mais importantes atividades económicas. As cidades europeias competem entre si pela atração de visitantes e turistas, recorrendo a estratégias de marketing urbano para assegurar a sua projeção a nível internacional. A conceção e implementação de projetos urbanos e arquitetónicos inovadores e a realização de eventos científicos, culturais ou desportivos são usados como formas de atração de pessoas e de investimento.

A identidade e imagem da cidade constituem-se como fatores diferenciadores que determinam a sua competitividade, traduzindo-se no património arquitetónico, histórico e sócio-cultural, nas condições climáticas, na gastronomia e, de forma crescente, nas experiências e na animação que a cidade propicia.

No Porto, o turismo adquiriu uma crescente importância nos últimos anos, o que se deve a diversos fatores. Verifica-se uma crescente visibilidade da cidade a nível nacional e internacional. Os principais objetivos das políticas públicas nesta matéria estão relacionados, sobretudo, com a criação da Marca Porto, projetando a identidade e as características da cidade, em geral, e do seu centro, em particular. Uma das principais medidas consiste na promoção de eventos durante todo o ano, mitigando assim os efeitos de sazonalidade que caracterizam a indústria do turismo.

Neste trabalho, constitui nosso objetivo analisar as dinâmicas recentes do turismo no centro do Porto, sistematizando os pontos fortes, os pontos fracos, as oportunidades e os desafios do setor do turismo local. Para o efeito, recorreu-se a uma abordagem metodológica que combina métodos quantitativos e qualitativos, designadamente a análise de indicadores estatísticos e a realização de entrevistas a agentes locais.

Palavras-chave: Centro do Porto; Dinâmicas do Turismo; Património Cultural; Referências Simbólicas; Marketing Urbano

Resumen:

El turismo es hoy una de las actividades económicas más importantes. Las ciudades europeas compiten entre sí por la atracción de visitantes y turistas, utilizando estrategias de marketing urbano para asegurar su proyección a nivel internacional. El diseño e implementación de proyectos urbanos y de arquitectura innovadores; así como la realización de eventos científicos, culturales y deportivos se utilizan como formas de atraer a personas e inversiones.

La identidad y la imagen de la ciudad son factores diferenciadores que determinan su competitividad, traduciendo hasta el patrimonio arquitectónico, histórico y sociocultural, las

condiciones climáticas, la gastronomía y, cada vez más, las experiencias y entretenimiento que ofrece la ciudad.

En los últimos años, el turismo ha adquirido progresivamente más importancia en Porto, lo cual se debe principalmente a varios factores. Hay una creciente visibilidad de la ciudad a nivel nacional e internacional. Los principales objetivos de las políticas públicas en esta área están relacionados principalmente con la creación de la Marca Porto, proyectando la identidad y las características de la ciudad en general y de su centro en particular. Una medida clave es la promoción de eventos durante todo el año, mitigando así los efectos de la estacionalidad que caracterizan a la industria del turismo.

En este trabajo, nuestro objetivo es analizar la dinámica reciente de turismo en el centro de Porto, a través de la sistematización de las fortalezas, debilidades, oportunidades y retos del sector turístico local. Con este fin, hemos utilizado un enfoque metodológico que combina métodos cuantitativos y cualitativos, incluyendo el análisis de los indicadores estadísticos y la realización de entrevistas con actores locales.

Palabras Clave: Centro del Porto; Dinámica del Turismo; Patrimonio Cultural; Referencias Simbólicas; Marketing Urbano

1. Introduction

At the end of the 20th century, was recognised the important role that tourism plays in economic development of countries, by creation of wealth and employment (Fayos-Solá, 1996).

At present, cultural industries are considered drivers of economic activity, linking up to what is the world's largest industry nowadays – tourism (Soja, 2013).

Recently, in academia, there has been a particular interest in the relation between tourism specialization and economic growth. Studies reveal that tourism dynamics are related with the existence of natural, cultural and historical resources and that places with relative abundance of these resources have comparative advantages (Sequeira and Nunes, 2008).

Tourism is a complex industry that affects and interconnects with a wide range of areas (Mei *et al.*, 2012, Hjalager, 2015). Interaction and interleaved bonds between sectors should be considered for the development of tourism industry (Yildiz and Akbulut, 2013).

Cities aim to create distinction in order to distinguish them from other destinations (Yildiz and Akbulut, 2013). Trademarks are used to project the image and to recognition of products

that cities offer. Entrepreneurs in tourism sector put great effort in creation, maintenance and grow of their brands (Hjalager, 2007).

Tourism is an economic and social phenomenon. It refers to the willingness of consumers to spend money to buy products or experiences in a certain period of time. So it is constrained by the amount of time and money that consumers have (Serra *et al.*, 2014).

Consumers constantly renew their needs and above all their desires and expectations, change their behaviors and lifestyles, which has direct consequences for trade activities.

There are several factors that have led to an increasing tourist attractiveness of Oporto in recent years.

There is an increasing visibility of the city at national and international level. The main goals of public policies in this matter are mainly related with the creation of a city brand – Oporto brand, enhancing the identity and characteristics of the city in general and in particular of the city centre. A main objective is also to promote and hold events all year long mitigating the seasonality effects characteristic of the tourism industry. Agents of Oporto recognize the importance of tourism to economic development of city centre. Entrepreneurs are quite aware of consumers' needs and expectations. It is our objective to analyse the recent dynamics of tourism in Oporto city centre. Our results are based in official statistical information and in 24 semi-structured face-to-face interviews, made during 2015, to entrepreneurs of different types and formats (fixed establishments and urban markets) of economic activity. We used also direct observation.

In what concerns to the structure of this work, we first explain the main theories and empirical evidence related with tourism activity in urban context. Then, we explore recent developments in tourism sector in Oporto city centre, framing them in recent city dynamics. Finally, we present the main conclusions of this research.

2. Theories and empirical evidences of tourism dynamics in urban economy

Travel and tourism are causes and results of globalization (Hjalager, 2007). Decades of 1930s and 1940s were marked by social changes that led to the appearance of new forms of tourism. Fayos-Solá (1996) argued that this period was marked by mass tourism or Fordian tourism, characterized by an offer of standardized and at a good price holiday to consumers that search mainly sun and beaches, in a different environment. The author argue that in 1980s a *New Age of Tourism* emerged due to new consumer's needs, new technologies available and new forms of

production and management. This *New Age of Tourism* was marked by an in-depth knowledge of consumer's expectations, an efficient system of communication and information, distribution of products and flexibility (in reservation and payment methods, for example) in order to be competitive with the development of old standardized products (Fayos-Solá, 1996).

In the 90s of the 20th century, the dynamics and impacts of economic globalization became particularly evident (Seixas, 2013). Globalization affects economic, social, cultural and political levels of urban development (Yildiz and Akbulut, 2013). Economic and social development stemming from globalization influence changes related with local government and management practices (Beaumont and Dredge, 2010). Instead the loss of importance of local in new geographies marked by global influence, it occurs the affirmation of both the global and the local. Glocalization, in the interconnection between the different scales of action and influence, has become one of the most important phenomenon of contemporaneity (Seixas, 2013).

At the end of the 20th century, it was recognised the important role that tourism plays in economic development of countries, by creation of wealth and employment (Fayos-Solá, 1996).

After the high-tech industries and financial services as engines of urban growth, at present, cultural industries are considered drivers of economic activity, linking up to what is the world's largest industry nowadays – tourism (Soja, 2013).

It was only in the beginning of the 21st century that tourism attracted attention in the scientific literature on economic development. Recently, there has been particular interest in the relation between tourism specialization and economic growth (Sequeira and Nunes, 2008). Researchers aim to analyse whether tourism dynamics causes economic growth, and to what extent, or if economic development contributes to growth in tourism sector (Pablo-Romero and Molina, 2013).

Studies reveal that tourism dynamics are related to the existence of natural, cultural and historical resources and that places with relative abundance of these resources have comparative advantages (Sequeira and Nunes, 2008).

Governance is increasingly associated with tourism. Since the 90s of the 20th century that governance approach has a prominent role on tourism policy literature. It has implications in tourism sustainability, in that it influences relations between policy actors, the state's action capacity and the selection of policy instruments and indicators (Hall, 2011).

There are an increasing number of studies related with local tourism policy-making, networks, impact of different network arrangements and collaboration and organizational complexity. In the increasingly networked tourism sector, the effectiveness of tourism

governance depends on the effectiveness of institutional processes and structures (Beaumont and Dredge, 2010).

Tourism is a complex industry that affects and interconnects with a wide range of areas (Mei *et al.*, 2012, Hjalager, 2015). Interaction and interleaved bonds between sectors should be considered for the development of tourism industry (Yildiz and Akbulut, 2013).

Urban planners, urban designers and architects are working together with the aim of designing buildings and public spaces and create cultural, artistic and symbolic activities and events that project the city and streamline its tourist attractiveness (Table 1). Cities are working to make them unique, to distinguish them from other destinations (Yildiz and Akbulut, 2013). Trademarks are important to the products' image and recognition. Nowadays, entrepreneurs in tourism sector put great effort in creation, maintenance and grow of their brands (Hjalager, 2007).

Innovation and adaptation are inherent to natural activity of tourism agents. Their goal is to offer new or different products or experiences to continue to attract customers and reach new audiences, in order to increase their productivity and performance and make them more recognised and profitable (Mei *et al.*, 2012, Hjalager, 2015). There are many studies that present evidences that accommodation, restaurants and transportation companies are not particularly innovative; instead, attractions and travel agencies are considered more slightly innovative. Innovations in tourism, more than in other economy sectors, occur in networks and through external ideas (Hjalager, 2015). According to Hjalager (2015), tourism innovations can be framed in impact categories: i) properties and varieties of goods and services as experiences to tourists; ii) social and physical efficacy; iii) productivity and efficacy in tourism enterprises; iv) new destinations formation; v) mobility to and within destinations; vi) information transfer within and across organizational boundaries; vii) institutional logic and relations power.

Urban renewal projects	<ul style="list-style-type: none"> Re-transformation of port districts and coastal regulations Opening new museums The new additions to the fabric of the historical city Theme parks Re-use of historical buildings Architectural competitions organised by central and local governments Prestigious landscape Producing metropolitan centres
Innovative Approaches	<ul style="list-style-type: none"> Innovative approaches to accommodation services (hotels with different concepts) Innovative, technological and ecological approaches in architecture
Cultural Organizations	<ul style="list-style-type: none"> Festivals Design and fashion weeks, fairs Guided tours, city walks Local meetings, lectures Courses in art education Concerts The cultural capitals
Sport Events	<ul style="list-style-type: none"> Olympics World cups Tournaments Local races

Table 1. Examples of activities used to project cities

Source: Yildiz, 2013: 298-299

Tourism sector is extremely sensitive to world macro-economic conjuncture. Tourism demand is affected by issues like economic crises, insecurity, health conditions, natural disasters, wars, political instability or terrorism (Pablo-Romero and Molina, 2013).

Tourism is an economic and social phenomenon. It refers to the consumers' willingness to spend money to buy products or experiences in a certain period of time, so it is constrained by the amount of time and money that consumers have (Serra *et al.*, 2014).

Consumers constantly renew their needs and, above all, their desires and expectations, change their behaviours and lifestyles, which have direct consequences for trade activities. This implies challenges to entrepreneurs, in order to survive, which leads them to introduce new concepts, innovative environments and new goods and services or goods and services with distinguishing characteristics (Cachinho, 2014). Consumer preferences are today much more heterogeneous and of highly individual nature (Seixas, 2013). In urban contexts, this society's individualization increased the needs of more entertainment and cultural activities (Yildiz and Akbulut, 2013).

Institutional theory is used as theoretical basis in many tourism studies, focused mainly in research areas such as entrepreneurship, innovation, institutional arrangement, governance structures and public policy. Institutions are defined as the game's rules or humanly-devised structures that provide incentives and constraints to economic actors. They represent the social

rules that are developed in and through history. There are studies that prove that different types of tourism organization are influenced by institutional environment. And there is also evidence that organizations are active agents that, through action of managers or entrepreneurs, have influence in institutions, altering them (Lavandoski *et al.*, Fevereiro 2014). Estrin *et al.* (2013) and Simón-Moya *et al.* (2014) emphasize the importance of the institutional context to entrepreneurship. Authors refer that institutions can be formal (such as the laws or regulations where are defined the economic incentives and bureaucratic costs that influence individual and organizational choices) or informal (social, cultural or religious norms, customs, traditions, beliefs). Informal institutions are socially rooted and are, therefore, more difficult to change. They develop informally over time.

In the last two decades, there has been a strengthening of research in entrepreneurship, with particular attention to the spatial dimension of entrepreneurial activities and its causes and effects (Bosma and Sternberg, 2014). It is considered that entrepreneurship has a positive effect on economic growth by generating economic activity (Castaño *et al.*, 2015, Galindo and Méndez, 2014, Audretsch, 2015).

The scientific literature explains entrepreneurship as a product of local context and individuals' characteristics. Entrepreneurship process depends on the opportunities offered by the territories and the capacity and motivation of individuals to identify, evaluate and exploit these opportunities (Bosma and Sternberg, 2014, Boschma and Martin, 2010).

A growing number of academic studies show that entrepreneurial activity is strongly influenced by the institutional context: the entrepreneurs' strategies reflect the opportunities and limitations set by institutions. They create the incentive structures that determine the choice of being entrepreneur. They also influence the entrepreneurship type and business dimension. (Estrin *et al.*, 2013, Simón-Moya *et al.*, 2014). In scientific literature are identified two fundamental types of entrepreneurship according to motivation: entrepreneurship by opportunity and entrepreneurship by necessity (Bosma and Sternberg, 2014).

Castaño *et al.* (2015) noted the importance of cultural factors and economic performance of the territories, to the extent that this performance, being positive, generates positive economic expectations and improves the perception of opportunities, motivating individuals to engage in entrepreneurial activities.

Since the gos of the 20th century that governance approach has a prominent role on tourism policy literature. It has implications in tourism sustainability, in that it influences relationships

between policy actors, the action capacity of state and the selection of policy instruments and indicators (Hall, 2011).

In a work related with governance and networks, Beaumont and Dredge (2010) examined three types of local tourism networks in Redland City, in State of Queensland, Australia: i) a council-led network governance structure, ii) a participant-led community network governance structure and iii) a local tourism organization-led industry network governance structure. They conclude that these different types of networks may be better or worse successful in achieving good local tourism governance depending on local characteristics and specificities.

Hall (2011) considers that the work of Beaumont and Dredge is useful at an operational level, but can't be applied to conceptualisations of governance behind intervention and policy choice. Michael Hall present four types of governance with implications in tourism policy analysis: Hierarchies, Communities, Networks and Markets. The author argues that although literature in tourism stresses the role of public-private relations, hierarchies remain a significant governance type because of the continuous importance of state in international relations, the enforcement of international regulations and the ongoing importance of laws and regulations as mechanisms of state control. However, hierarchical governance has become weakened because of globalization and the strengthening of political powers at local level. Markets have an increased role as a governance mechanism, namely by corporatization and / or privatization of tourism functions that were in the domain of the state. This doesn't mean that government ceases to influence the market; instead, state uses other forms of intervention (such as financial incentives, tax incentives, among others) to encourage tourism industry to move in particular directions. Networks have a particular attention in tourism policy and planning because it is recognized that they may facilitate coordination of public and private interests and resources. Communities are a governance type very much influenced by citizen involvement and public participation in tourism public policymaking. These modes of governance could change over time, reflecting the dynamic structures of governance and public policymaking.

The role of public policies in tourism development has long been an issue of interest in academia (Hall, 2011).

Traditionally, public policies related with tourist destinations focused on attracting a greater number of visitors, through promotional activities of local places. Despite promotional activities remain a key component, in many destinations it has been replaced or supplemented by strategies of change in tourism offer, with the aim of making it more environmentally sustainable and above all more appealing to new public willing to pay for quality and new experiences (Henriksen and Halkier, 2009). Fayos-Solá (1996) argued that issues like

globalization of markets, segmentation of demand, the creation of integrated value in tourism activities, the availability of new technologies, the demand for sustainable initiatives and the challenge of competitiveness through quality and efficiency create the need of new forms in public management. The author states that in a first generation of tourism policy, which marked the first decade of mass tourism (1930s), the approach was predominantly quantitative; the aim was to increase the number of tourists and the volume of receipts. The crisis of 1970s and beginning of 1980s, when tourism was up and down, originated a second generation of tourism policy, characterized by concerns with social, economic and environmental impacts of tourism activity and with the integration of tourism policies in general policies of economic development. Legal, economic and financial instruments were used to increase the contribution of tourism to the well-being of destination's residents and workers. The resurgence of entrepreneurial paradigm, in the mid of 80s of the 20th century, originated a third generation of tourism policies, marked by entrepreneurial competitiveness, quality and efficiency. Issues like social, economic and environmental impacts on tourism regions were on the agenda in order to guarantee the long-term viability of tourism sector success. In this new form of policy, the private initiatives were essential, but also the public-private partnerships.

In what concerns to the work of Fayos-Solá, Henriksen and Halkier (2009) consider that the typology proposed was a systematization of paradigms in terms of tourism policies built over time: a first generation marked by *more of the same*, a second generation marked by *more of most* and a third generation marked by *more of the best*. The authors state that the establishment of strong mutual network dependencies is a requirement for policy change, towards more effective and efficient local tourist development strategies. They consider also (in 2009) that the development of new experiences able to attract more and new tourists would be the great challenge of the near future.

Local governments have increasingly supported a pro-economic development approach of local tourism policy, stressing the marketing and promotion of tourism, and in some cases the establishment of public-private partnerships (Beaumont and Dredge, 2010).

The evolution of European urban policy, among other things, goes towards the city marketing: promoting the city and the development of image styling for the business and tourist markets (Seixas, 2013).

In the increasingly transnational world system, destinations seek to be the most competitive in order to remain in the global tourism industry. In this sense, there has been an increasing focus on innovation in order to achieve competitive advantage in tourism (Mei *et al.*, 2012).

3. Tourism dynamics in Oporto city centre

In this work, we analyse tourism dynamics in Oporto city centre.

In terms of geographical area, it should be noted that there is no formally defined and agreed limit of the Oporto city centre, whether in academia or within public decision.

In Figure 1, it is represented both the limit of Oporto Historic Centre and the limit of central Urban Rehabilitation Areas, assumed by municipality. City centre is considered broader than the Historic Centre, but not as extensive as the limit of Urban Rehabilitation Areas. We consider the limit of Urban Rehabilitation Areas as city centre, because it would be reductive and misleading choose the other limit. Statistical information available to our analysis scale is scarce. We use a data collection mixed-method, combining quantitative and qualitative approaches.

Our results are based in official statistical information available and in 24 semi-structured face-to-face interviews, made during 2015, to entrepreneurs of different types and formats (fixed establishments and urban markets) of economic activity.

We used content analysis to analyse the interviews. This is considered one of the most elaborate techniques in the field of documentary observation (Bravo, 1994).

We used also direct observation, using a framework with aspects on which it was intended to gather information as a guide. The news of newspapers and magazines were also taken into account, because they reflect what is going on in the city.

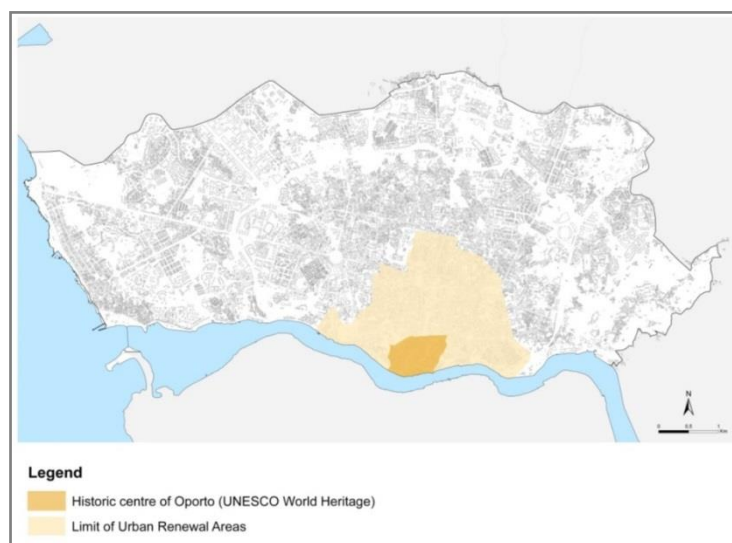


Figure 1. Reference limits of city centre

Source: Authors, 2015

3.1 Oporto city background

There are several factors that have led to an increasing tourist attractiveness of Oporto in recent years. This is due to its landscape, its architectural, historical and cultural heritage, the international projection of emblematic equipments (such as the House of Music or Serralves Foundation) or buildings (like Lello Bookstore or Café Majestic, both in city centre). And because of the Oporto Historic Centre (classified as World Cultural Heritage in 1996 and as official national monument in 2010) , but also because of Port wine, gastronomy, cultural and leisure events and nightlife (*Movida*) that city has and offers. The growing international projection of the city is due, in large extent, to the proximity of Francisco Sá Carneiro Airport and the growing number of low-cost flights and new aviation routes, generating a greater influx of foreign tourists. In 2015, Oporto took first place in the "Travelers' choice" list of TripAdvisor in the category *High season best destinations in Europe*. This is just an example of many awards that city has conquered in the last years as tourism destination.

These dynamics are associated with an increased number of accommodation businesses, an environment where traditional formats coexist with more modern ones (that hostels are a good example).

The number of hotel beds is considered a significant indicator of tourism potential of cities (Yildiz and Akbulut, 2013). There is evidence in Oporto, in recent years, of an increasing accommodation capacity, increasing quantity of overnight stays registered in accommodation and the growth of earnings by hotels (Table 2).

Oporto is a city where mass tourism coexists with tourism niches, with particular emphasis on the business tourism or tourism related to scientific meetings.

In terms of public strategies, there is a focus of the municipality on minimizing the effects of seasonality by promoting differentiated events throughout the year. There is a concern to enhance economic sustainability of tourism, through bringing people not only in the high season, but also in the low season through cultural and sporting events. Another important goal of city council is to strengthen and project the Oporto brand, a distinctive brand that promotes the city nationally, and especially internationally, attracting more people and more investment.

Indicator	Year												
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Accommodation capacity in hotel establishments (no of beds/1000 hab)			35,8	37,3	40,6	42,7	46,9	49,4	53,2	46,2	52,4	54,6	66,3
Overnight stays in hotels (no)	1.048.462	996.615	1.064.188	1.113.237	1.302.763	1.460.382	1.513.311	1.457.336	1.690.918	1.783.781	1.815.157	2.012.153	2.548.591
Average stay in hotels (no of nights)	1,9	1,8	1,8	1,8	1,9	1,9	1,9	1,8	1,9	1,9	1,9	1,9	
Proportion of foreign guests (%)	55,9	51,6	54,2	52,5	55,3	57,1	57,2	54,5	56,6	61,1	63,4	66,0	67,6
Total earning of hotels (1000 €)								74.245	84.208	83.851	85.169	93.594	
Gains for overnight stays on hotels (1000 €)								51.863	61.038	62.011	63.096	69.302	

Table 2. Tourism dynamics indicators in Oporto

Source: INE, *Infoline*, 2015

3.2 Recent tourism dynamics in Oporto city centre

The centre is an emblematic area of Oporto for its role in the city's history. Traditionally an important economic hub, it is currently the centre of political and institutional decision of the municipality, in addition to the richness of its architectural and cultural heritage (Quatenaire, 2000).

Its economy is supported in retail sector, mainly trade and services.

Recent years are marked by the development of new economic dynamics: strengthening and enhancement of coffees and restaurants, trade diversification, the boosting of handicraft trade, proliferation and diversification of accommodation businesses and the emergence of urban markets. The retail sector has focused on marketing products that meet the expectations of visitors, whether they are traditional products either because they have distinguishing characteristics. Other strategies are related with the spaces of establishments: entrepreneurs seeking to create pleasant, warm and inviting environments.

This dynamics led to a greater use of the city centre, marked by the intensification of tourists and visitors influx and for a stronger use by different social groups of Oporto and the nearby

(such as students or workers) at different times of the day. The attractiveness of the centre are due also to the different cultural and sporting events that occur throughout the year. It is important to note the music festivals, the Fantasporto (a reference in terms of film festivals), the festivities of St. John, the editions of Portugal Fashion (one of the most important fashion events in Portugal), the business and scientific meetings, the numerous guided tours, the local races, among others. Avenida dos Aliados, the emblematic central avenue of centre, is host to numerous events: Christmas animation, the New Year's Eve and other casual celebrations.

In the specific case of Historic Centre of Oporto, it turns out that the riverfront has become an important attractive place, being a factor of development of the economy of the city, and even the Douro region, in what concerns to tourism industry (Porto Vivo, Dezembro 2011).

In terms of interviews' respondents profile, we inquiry owners, managers or workers of establishments and a responsible for urban markets' organization. Respondents of establishments with an innovative character, establishments of accommodation and tourism and urban markets are generally younger (in their 20s, 30s and 40s). Respondents of traditional economic activities are generally older (in their 60s, 70s and 80s) and have lower levels of qualifications. Centenary establishments were inquired, some of them emblematic establishments of city (like Lello Bookstore), that constitute a family heirloom, this is successful business passed from parents to their children. Establishments opened in recent years were also surveyed. And here we have two types of situation in terms of motivations to open the business: situations of unemployment or precarious employment, to whom the openness of a business was a way of getting a source of income and situations of those who work or were somehow connected to the type of economic activity, aspiring to have their own business.

In respondents' opinion, urban rehabilitation had a crucial role in tourism dynamics of city centre. Renewal projects of Quarteirão das Cardosas, Praça de Lisboa or Rua das Flores are examples of private and public initiatives that constitute driving forces of the emergence of new businesses in the area and of a greater influx of people, particularly tourists.

The rehabilitation of historical buildings was another factor of attractiveness. Culturgest is an example of a cultural equipment that settled in a historical building at Avenida dos Aliados. This equipment opened in 2002 upon the completion of the Oporto as European Capital of Culture, in 2001.

Modern approaches in terms of accommodation buildings are a factor of attractiveness of new audiences. In recent years, has increased the number of hostels and other formats of accommodation targeted to young people that don't have much money to spend and families

that prefer to spend money in cultural equipment and events and other experiences than in accommodation.

The location of business in the city centre brings advantages derived from the centrality of the area, particularly in terms of the high concentration of shops and services, and to that extent a large supply area is more prone to increased demand. The flow of people is greater and the potential number of customers is naturally potentially higher.

This concentration occurs particularly in the case of hotels, travel and tourism agencies and recreational tourism operators. Data for 2015 shows that accommodation establishments located in city centre represent 69% of all accommodation establishments existing in the city (hostels not included). Of all travel and tourism agencies existing in the city, 52% are located in city centre. The recreational tourism operators (including activities such as boating, boat rental or organization of tours related to the historical, architectural, cultural and natural heritage) located in city centre represents 46% of the total existing in the city. It should be noted that, in this case, operators located in the Historic Centre represent 29% of the total, largely due to proximity to the Douro River (Table 3).

	Oporto	City centre	% of City centre in Oporto	Historic centre	% of Historic centre in Oporto
Accommodation (no of hotels)	80	55	68,8	8	10,0
Travel and tourism agencies (no)	85	44	51,8	4	4,7
Recreational tourism operators (no)	28	13	46,4	8	28,6

Table 3. Tourism agents by location – December, 2015

Source: Turismo de Portugal I.P., *Registo Nacional de Turismo*, December 2015

Tourists generate a greater flow of people and strengthen the economic activity of city centre. The most traditional retail stores (health food stores, pharmacies, jewelry shops or bookstores) do not consider to have great benefits of these positive dynamics, with the exception of the flagship establishments (such as Lello Bookstore, for example) that are themselves tourist attractions. Recent accommodation establishments (particularly hostels) opened because of the opportunities created by the increasing tourist attractiveness of the centre in recent years and currently benefit from this same attractiveness. The focus on urban renewal that has been made in recent years helps to make the centre more attractive. They confirm a positive economic dynamism marked by investment in accommodation, restaurants

and marked by diversification of trade. Nightlife bars and entertainment are factors of a great attractiveness of people at night, mainly in weekends. Respondents of 24 semi-structured face-to-face interviews confirm a positive economic dynamism marked by investment in accommodation, restaurants and marked by diversification of trade. Nightlife bars and entertainment are considered factors of a great attractiveness of people at night, mainly in weekends.

In the general opinion of respondents of the interviews, tourism dynamics are considered positive factors shifting the city centre; but it is important refer that not all respondents see tourism as positive to the area.

Respondents consider that the city centre is today a modern and cosmopolitan place, with innovative features compared with past. However, they consider that still remain the downturn in consumption caused by economic and financial crisis. There are many people moving in the streets, that enter in establishments only to see but do not consume. And this is attributed generally to the lower purchasing power of the population compared to the years before the crisis. This situation occurs especially with inhabitants and workers of the area. Tourists generally buy products or services.

There are still many vacant buildings in the centre that reflect local degradation and social and territorial exclusion of some people and some places. In addition, there are social problems, many of them evident in the main streets (begging, poverty, drugs and prostitution). Insecurity is intensely perceived in some places, often to suit the reality (there are areas where burglaries actually happen), sometimes caused by "bad" environment of some spaces.

Respondents would like that urban renewal continue, resolving the problems that persist; they would like that centre attracts more investment in trade, including through the location of major global brands and anchor tenants capable to attract even more people - and tourists - to the area. It is generally agreed that parking should be cheaper or even free, because in the respondents' opinion, despite the good supply of public transport (in terms of quantity, diversity and land cover) and public encouragement efforts to their use, a large part of consumers move in their own vehicle. It is suggested the creation of more pedestrian areas, which are considered more likely for the movement of a greater flow of people and for encouragement of consumption. Evening entertainment (Movidá) is considered responsible for excessive noise and dirty streets and this is a challenge to public policies, in order to solve the conflict between those that want to have fun and those that live in the area and want to rest at night.

Finally, say that the dynamics of tourism has led to greater internationalization of this urban space (more foreign tourists, more international franchising, and more citations in international journals). The territory of city centre is spatially organized, has its own temporal dynamics supported by different social appropriations. This poses challenges to public policies, given the complexity of interests and issues involved.

4. Conclusion

Since the 90s of the 20th century, the dynamics and impacts of economic globalization became particularly evident in cities of developed countries, occurring the affirmation of local on global and of global on local – the phenomenon of glocalization. Tourism sector is nowadays a key economic activity. In Oporto, tourism has had an increasing importance in recent years. There is an increasing visibility of the city, and particularly its city centre, at national and international level.

In this research, our focus was study tourism dynamics in Oporto city centre through a quantitative and qualitative approach.

Oporto is, at present, marked by the dynamics of tourism. The city, and in particular its centre, is a fashionable tourist destination.

Quantitative indicators show the concentration of accommodation establishments, travel and tourism agencies and recreational tourism operators in city centre.

Respondents of 24 semi-structured face-to-face interviews consider that tourism dynamic is the main factor of the recent economic development of city centre of Oporto, mainly by the investment in new accommodation establishments (particularly hostels), restaurants and nightlife bars, the diversification of trade, the promotion of cultural, artistic, and sportive events and the promotion of city centre at national and international level. This generates a greater influx of people, in general, and tourists, in particular, all them potential customers. Urban rehabilitation had a crucial role in development of attractiveness of city centre; however, there are still many vacant buildings in city centre that reflect degradation. Social problems and territorial exclusion of some streets are problems to solve. There are some conflicts between residents and people who want to have fun, especially at night. Moreover, not all respondents (business owners or managers) consider tourism positive to the centre. This constitutes challenges to public policies in order to conciliate interests and to promote a sustainable development of tourism sector.

Above all, we conclude that tourism dynamics are positive to city centre and that city centre is nowadays a modern and cosmopolitan place, with innovative features compared with past.

References

- Audretsch, D. B. (2015), "Joseph Schumpeter and John Kenneth Galbraith: two sides of the same coin?" *Journal of Evolutionary Economics*, 25, 197-214.
- Beaumont, N., Dredge, D. (2010), "Local tourism governance: A comparison of three network approaches", *Journal of Sustainable Tourism*, 18, 7-28.
- Boschma, R., Martin, R. (2010), *The Handbook of Evolutionary Economic Geography*, Edward Elgar.
- Bosma, N., Sternberg, R. (2014), "Entrepreneurship as an urban event? Empirical evidence from European cities", *Regional Studies*, 48, 1016-1033.
- Bravo, R. S. (1994), *Técnicas de Investigación Social: Teoría y Ejercicios*, Madrid, Editorial Paraninfo S.A.
- Cachinho, H. (2014), "Consumerscapes and the resilience assessment of urban retail systems", *Cities*, 36, 131-144.
- Castaño, M.-S., Méndez, M.-T., Galindo, M.-Á. (2015), "The effect of social, cultural, and economic factors on entrepreneurship", *Journal of Business Research*, 68, 1496-1500.
- Estrin, S., Korosteleva, J., Mickiewicz, T. (2013), "Which institutions encourage entrepreneurial growth aspirations?", *Journal of Business Venturing*, 28, 564-580.
- Fayos-Solá, E. (1996), "Tourism policy: a midsummer night's dream?", *Tourism Management*, 17, 405-412.
- Galindo, M.-Á., Méndez, M. T. (2014), "Entrepreneurship, economic growth, and innovation: Are feedback effects at work?", *Journal of Business Research*, 67, 825-829.
- Hall, C. M. (2011), "A typology of governance and its implications for tourism policy analysis", *Journal of Sustainable Tourism*, 19, 437-457.
- Henriksen, P. F., Halkier, H. (2009), "From local promotion towards regional tourism policies: Knowledge processes and actor networks" in *European Planning Studies*, North Jutland, Denmark, 17, 1445-1462.
- Hjalager, A.-M. (2007), "Stages in the economic globalization of tourism", *Annals of Tourism Research*, 34, 437-457.
- Hjalager, A.-M. (2015), "100 Innovations That Transformed Tourism", *Journal of Travel Research*, 54, 3-21.

- Lavandoski, J., Silva, J. A., Vargas-Sánchez, A. (2014), "Institutional Theory in Tourism Studies: Evidence and Future Directions", CIEO-Research Centre for Spatial and Organizational Dynamics. Fevereiro
- Mei, X. Y., Arcodia, C., Ruhanen, L. (2012), "Towards tourism innovation: A critical review of public policies at the national level", *Tourism Management Perspectives*, 4, 92-105.
- Pablo-Romero, M. D. P., Molina, J. A. (2013), "Tourism and economic growth: A review of empirical literature", *Tourism Management Perspectives*, 8, 28-41.
- Porto Vivo (2011), *Delimitação da Área de Reabilitação Urbana do Centro Histórico do Porto em Instrumento Próprio (Projeto)*, Porto, Porto Vivo, Sociedade de Reabilitação Urbana - SA, Dezembro.
- Quatenaire (2000), *Programa de Revitalização do Comércio e Serviços na Baixa Portuense: Estudo Global*, Quatenaire Portugal ed., Porto, Quatenaire Portugal.
- Seixas, J. (2013), *A Cidade na Encruzilhada: Repensar a cidade e a sua política*, Edições Afrontamento, Maio.
- Sequeira, T. N., Nunes, P. M. (2008), "Does tourism influence economic growth? A dynamic panel data approach", *Applied Economics*, 40, 2431-2441.
- Serra, J., Correia, A., Rodrigues, P. M. M. (2014), "A comparative analysis of tourism destination demand in Portugal", *Journal of Destination Marketing and Management*, 2, 221-227.
- Simón-Moya, V., Revuelto-Taboada, L., Guerrero, R. F. (2014), "Institutional and economic drivers of entrepreneurship: An international perspective", *Journal of Business Research*, 67, 715-721.
- Soja, E. W. (2013), "Regional urbanization and third wave cities", *City*, 17, 688-694.
- Yildiz, S., Akbulut, M. T. (2013), "Current trends in developing urban tourism", *Archnet-IJAR*, 7, 297-310.

Chapter IV

The Alto Douro Landscape and Vinerias: World Heritage with Literary and Artistic Potential

The Alto Douro Landscape and Vineries: World Heritage with Literary and Artistic Potential

ISILDA LEITÃO⁹

Abstract:

The Douro, the river that lends its name to a region, and deemed a *cultural landscape of universal value* by UNESCO in 2001, has long since been as a source of inspiration for writers, filmmakers and artists. With this article, with some of the most important contemporary intellectuals as our company, we seek to voyage through this fictional environment, which welcomed many such *cultured travellers* that toured here and all contributing in one way or another to this region attaining its universal heritage status.

Taking the river Douro as our guide, we set out on this journey with a brief description of the Alto Douro Wine region and the reasons justifying its candidacy. We then advance with a reflection on the relation between this *landscape*, Literature, Arts and Tourism. We then subsequently summarise some of the literary promotional initiatives implemented in the period since the region received its UNESCO recognition and correspondingly presenting some of the national and international 19th and 20th centuries intellectuals that might, through their works, motivate a journey through these lands. Between what remains and what changes, we close with some final considerations as to the great tourism potential of this region.

Keywords: Alto Douro Wine Region; Douro Landscape; Literature and Arts

Resumo:

O Douro, rio que dá nome a uma região, considerada *paisagem cultural de valor universal* pela UNESCO em 2001, foi fonte inspiradora para escritores, cineastas, pintores. Com este artigo, tomando por companhia alguns dos nossos mais importantes intelectuais contemporâneos, pretendemos viajar através desse espaço ficcional, a que não foram alheios muitos *viajantes cultos* que o cruzaram, contribuindo todos eles, de alguma forma, para elevar esta região a património universal.

⁹ Estoril Higher Institute for Tourism and Hotel Studies, Estoril, isilda.leitao@eshte.pt

Tomando como guia o rio Douro, iniciaremos este percurso com uma breve apresentação da região do Alto Douro Vinhateiro e razões da sua candidatura. Seguidamente, faremos uma reflexão sobre a relação entre *paisagem*, Literatura, Artes e Turismo após o que, sumarizando algumas das iniciativas de promoção literária levadas a cabo desde o ano de atribuição desta classificação, apresentaremos alguns intelectuais, nacionais e estrangeiros, dos séculos XIX e XX, que nos poderão motivar, através das suas obras, a partir em demanda destas terras. Entre o que permanece e o que muda, terminaremos tecendo algumas reflexões finais sobre a grande potencialidade de exploração turística desta região.

Palavras-chave: Alto Douro Vinhateiro; Paisagem Duriense; Literatura e Artes

Resumen:

El Duero, río que da nombre a una región considerada *paisaje cultural de valor universal* por la UNESCO en 2001, fue fuente de inspiración para escritores, cineastas, pintores. Con este artículo, en compañía de algunos de nuestros más importantes intelectuales contemporáneos, pretendemos viajar a través de ese espacio ficcional ante el que no permanecieron ajenos muchos *viajeros cultos* que lo cruzaron. Contribuyendo todos ellos de alguna forma a elevar esta región a patrimonio universal.

Tomando como guía el río Duero, iniciaremos este recorrido con una breve presentación de la región del Alto Duero Vinatero y las razones de su candidatura. Seguidamente haremos una reflexión sobre la relación entre *paisaje*, Literatura, artes y Turismo. Tras lo cual, -resumiendo algunas de las iniciativas de promoción literaria llevadas a cabo desde el año de atribución de esta clasificación-, presentaremos a algunos intelectuales, nacionales y extranjeros, de los siglos XIX e XX. Quienes podrán motivarnos, a través de sus obras, a salir en busca de estas tierras.

Entre lo que permanece y lo que cambia, terminaremos tejiendo algunas reflexiones finales sobre el gran potencial de explotación turística de esta región.

Palabras Clave: Alto Duero Vinatero; Paisaje Duriense; Literatura y Artes

1. Introduction – The Douro and Alto Douro Vinhateiro regions

Just as travel guides influence specific spatial practices (of tourism), the tourism development plans and the subsequent developments favour certain spatial practices that result from specific ways of perceiving the landscape.¹⁰

(João Sarmento, 2004: 340)

The source of the river Douro lies at 2080 metres in altitude, up in the Serra de Urbión mountains (Sória, Castela-a-Velha, Spain) and flows down to the Atlantic Ocean alongside the city of Oporto (Portugal) over a route spanning some 850km in length¹¹. For the Alto Douro Vinhateiro landscape to rank as world cultural and natural heritage, this necessarily first involved meeting the criteria defined by UNESCO for this status and covering both the ecological and biological characteristics endowing its natural beauty (as regards, the international and national routes of the river Douro and its respective tributaries, amongst other aspects), and the aesthetic component established by its vineyards¹², within the framework of the Pombaline Era Demarcation (*the world's first institutional model for the organisation and control of a wine producing region* (Aguiar, 2002), hence, this represents the longest established regulated wine production region worldwide.

The first demarcations came upon the orders of the Marquis of Pombal (between 1757 and 1761) and were followed by others expanding the original scope, the “Marian demarcations” before subsequent demarcations during the reign of King Carlos (1907) and the classification of wine producing plots of land by Álvaro Moreira da Fonseca (1932-1980), already under the Estado Novo regime. The Demarcated (and regulated) Region of Douro is now almost 300 years old and currently divided up into three zones: Baixo-Corgo, Cima-Corgo and Douro Superior. The Region classified by UNESCO spans the councils of Mesão Frio, Peso da Régua, Santa Marta de Penaguião, Vila Real, Alijó, Sabrosa, Murça, Carrazeda de Ansiães, Torre de Moncorvo, Lamego, Armamar, Tabuaço, S. João da Pesqueira and Vila Nova de Foz Côa¹³. Vila Nova de Gaia

¹⁰ With the exception of Saramago's and Schultz's english quotations, all the other were made by us.

¹¹ 112 km of border are shared with Spain and designated Douro International, following which there is a 213km distance before the river reaches its mouth at Foz.

¹² Wine was cultivated here under Roman rule and later, in the 12th century, during the period of Reconquest by the monks of Cister. In the second half of the 17th century, the production and export of Port began before getting strengthened by the Treaty of Methuen in 1703, celebrated between Portugal and England, and by the trading post that the English would set up in the city of Oporto (alongside the Douro river mouth).

¹³ Vide on this issue, Bianchi de Aguiar (2002) and Roteiros Turísticos do Património Mundial no Norte de Portugal, Douro Vinhateiro e Vale do Côa (2012).

(the city located in front of the city of Oporto) was the site where port would be matured in cellars and almost exclusively transported here by the famous rabelo vessels through to the building of a railway connection¹⁴ in the 19th century.

Beyond the historical nature of the wine region demarcation, highlights among the distinctive heritage features also include “terraces” (traditionally with schist walls but currently with new means of supporting the vines) and the “interchange of cultures” stretching back millennia (from Pre-History to contemporary days). Bianchi de Aguiar (*ibidem*: 146-147) summarises the other justifications presented in the application that, resulting from a multidisciplinary study project, provided clear evidence for a total area spanning some 250,000 hectares of “the exceptional character of the Alto Douro Vinhateiro within the context of the entire hydrographic basin of the Douro/Duero”. As regards the proposed area, which covers some 24,600 hectares¹⁵ (thus representing around 10% of the demarcated region) and that extends all “along the banks of the river Douro and its tributaries, in particular the Varosa, Corgo, Távora, Torto and Pinhão rivers” (*ibidem*: 145), the following aspects are especially worth highlighting:

The unique character of the relationship between Man and Nature in a situation of scarcity and the adversity of the natural elements – water, soil and the steeply sloping banks; the dimension of wisdom in the relationship resulting from deep knowledge about the Mediterranean cultures and their adaptation to scarcity and the diversity of the natural elements where vines provide the crop of excellence in association with olive and almond trees. A significant example of a landscape illustrating various periods of human history. Bearing witness to the different modes of organising the vines in the respective historical periods that have evolved in function of the emergence of new technology while maintaining a strong identity and reflecting the knowledge, technical customs and the traditional rituals and beliefs of the local populations (...) The diversity and richness of its architectural vernacular (ibidem: 146).

¹⁴ To provide but one example, Régua Railway Station, which serves this historical port wine city, was built in 1879 (*Caminhos-de-Ferro- Portugueses*, 2006: 31). The Douro line, which departs from S. Bento station, in Oporto, ends in Barca d’Alva (a station on the border with Spain closed in 1988).

¹⁵ We would note however that the Alto Douro region covers 36,000 hectares of steep slopes in total and is considered the most significant in Europe as regards steeply sloping wine making regions (Bianchi de Aguiar, *ibidem*).

We would also stress the different dimensions taken into consideration in the justification of this application as they also draw upon the literature and the artistic works that portray the Douro River in general, and the Douro region in particular¹⁶, and that also ensure this region gets associated with events relevant to European and world culture and history (as is, for example, the case with the period of the French invasions at the beginning of the 19th century).

2. The Landscape, the Literature, the Arts and the Places of Tourism

The discourses (...) that highlight the intact character of regions may be studied from diverse perspectives. The dominant representations have emerged above all from the exterior and contributing towards the construction of another space. Nevertheless, this intact and unpolluted character needs to be broken down. Presently, these (...) regions (West Cork and the Azores) bear few resemblances, in physical, social, economic or political terms with that which they were centuries ago or even just one or two decades back. (...) These landscapes stated and publicised as natural are in fact human and cultural landscapes, worked and lived. (Sarmiento, ibidem: 259-260).

Before turning our attentions to the Alto Douro Vinhateiro landscape as perceived by the intellectuals who described it, we would like to first provide a few considerations that may aid in grasping the importance of Literature and Art to the construction of places of tourism. The former, recalling that the term and concept of *landscape*, that initially emerged in the 16th century (Buescu, 1990), and took root and underwent consolidation in the period from late 18th century over the course of the 19th century “as a privileged place for approaching the question of «representation» and the «world» (*idem, ibidem: 18*), and the ways in which certain “personalities” interrelate with “nature/landscape” (*ibidem: 19*). The nationalisms of the 19th century, emergent and convergent with the Romantic Movement, consolidated the European nation-states “artificial” to a greater or lesser extent. These political spaces would end up circumscribing and bringing about the consolidation of those cultural spaces deemed relevant.

¹⁶ Vide the study by Pinto da Costa (1977) as regards the local Alto Douro community; its traditions, habits and customs; its official (Catholic) and marginal religions (blending with other beliefs, myths and rites drawing upon the profane); the tasks and labours involved in wine production (that consists of both the vine growing, the “agricultural nature”, which takes place exclusively in the Alto Douro, and the “wine making”, already “industrial”, which finds its “final and decisive phase in the warehouses of Vila Nova de Gaia”, already beyond the scope of the demarcated region), in the first three decades of the 20th century. Another important study to the knowledge on this tourism region was made by Sousa e Pereira (1988).

Whether Naturalism/Realism is deemed a scientific art (Hobsbawam, 1988: 392) in Literature or in Art, the way in which the Author/creator represents the *world* and interrelates with a specific *landscape* has ever since been a constant presence. In the literary landscape, through literary description while the artistic landscape gets approached by pictorial, photographic and later cinematographic descriptions.

The second such consideration stems from the relationship between Literature and Tourism highlighting the role this plays in “promoting tourism”. In times when there were no photographs, cameras or mobile phones, we would here recall the important role played by literature as a driver of tourism destinations. As Florence Deprest states, the poem *Die Alpen* by Hallier, published, translated and widely circulated as from its original publication in 1732, and which undergoes “at least ten editions between 1749 and 1772”¹⁷, was what brought the Alps into fashion and even before the publication of *Nouvelle Héloïse* by Jean Jacques Rousseau, in 1760. The author also refers to how the Enlightenment period, the century of the *philosophes*, also correspondingly provided “an entire social, ideological and aesthetic context that favoured the invention of the Alpine mountain” (Deprest, 2004: 94- 95).

The landmark is thus an *inventio*, a fundamental *construto* of culture as these and other mountains in Europe and the rest of the world were normally only crossed by traders, were inhospitable places, home to rural populations, in the majority illiterate, dedicated to agriculture or raising animal stock. And, in this way, courtesy of the philosophers, writers and artists of the 18th and 19th centuries, western culture advanced with the “aesthetic consecration of nature”, which enables us to grasp, with the current resurgence of Aesthetic, “the possible foundation of a new philosophy of nature, capable of integrating the aesthetic dimension or uniting the scientific vision with the aesthetical vision of nature at some higher level (...) for a new relationship between Man and Nature in which aesthetics are not considered a luxury but rather an essential component to a good life (...)” (Santos, 2001: 173-174). In these principles, we perhaps perceive the consecration of the matrix to a substantial proportion of that constituting Rural and Nature Tourism, the mountain.

Furthermore, we should not overlook how, simultaneously and paradoxically, from the second half of the 18th century onwards, the Industrial Revolution brought about “the systematic practice of the landscape as a place-in-the-world, as a hypothesis for immanence (...that) emerges from confronting the awareness that the landscape also gets lost (...) This awareness of the precarious character of Nature, its historicity (human in overall terms) integrates into the

¹⁷ A. Roger, cit. Deprest, 1997: 95.

notion of landscape and in some way or other its most varied manifestations” (Buescu, 2012: 11). Many of these philosophic assumptions, to a greater or lesser extent dissimulated, have broadly been carried over into the current concerns displayed by sustainable tourism. In relation to the authors cited above, with their literary or artistic works potentially suggesting tourist itineraries, their descriptions equally reflect everything of the most human and real that these landscapes contain, specifically the humble lifestyles of their populations. Alternatively expressed, the *paisagem literária* (literary landscape) “constituted one of the most interesting manifestations of the historical nature of place as well as how such reflects and configures the human relationship with that imagined as transcendent. The landscape is one way of demonstrating how place falls very far short of any confinement to an idyllic vision of its respective components (...) its aesthetic foundations (and hence historical-cultural), as a concept, forms part of this same nature (...) A landscape is never restricted to «being there». This thereby constitutes a *happening* that the subject constructs in history” (Buescu, 1990: 9).

In “Learning to go out”, Deprest furthermore explains regarding the role played by the intellectuals and the contribution towards the diffusion of tourism that “that was not so much about the legislation for paid holiday periods but rather the centuries old work of the cultural elites to disseminate models of spatial practice that do not belong to the quotidian, which enabled the development of tourism. This phase of learning provides an explanation for the difference in the legislation (1936 for France) and the actual start-up of tourism phenomena in the 1950s and 1960s beyond the fact that World War II took place in between this period” (*ibidem*: 19)¹⁸.

Whilst not fully in agreement with the author, given we also place emphasis on the role of the political framework and the trade union movements in fostering culture and the learning reflected in tourism travel as she herself does elsewhere reference (*ibidem*: 16-19), we did not wish to fail to emphasise this point regarding the role of intellectuals in spreading the taste for travelling and even the right to travel across all social levels whenever possible. We should also not forget how the author of *Nouvelle Heloise* is also the author of the *Social Contract*, a fundamental foundation stone of European and world democracy.

Furthermore, as regards Rousseau and the rural bucolic portrayal of *Nouvelle Heloise*, we would finally highlight that the term *landscape* subsequently recalls the famous city-country dichotomy, a “theme of fascination for the European imaginary that crystalised around the

¹⁸ In the case of Portugal, holiday pay was granted in the wake of the 25th April 1974 revolution. Portugal had hitherto been essentially only a tourism receptor country. Cuts in holiday pay or its non-payment clearly jeopardises the domestic tourism of any country.

concept of civilisation" (Machado, 2001: 34), that would suffuse European Literature and the Arts of the final decades of the 19th century and would echo in Portugal through the *Generation of 70* and Eça de Queirós as its great precursor. In his work, *The City and the Mountains*, with its peasant backdrop scenario unfurled exactly in Santa Cruz do Douro (the famous Quinta de Tormes, in the Queirós imaginary, today the Eça de Queirós Foundation, which is dedicated both to cultural diffusion and to Rural Tourism), Eça had already expressed his doubts as regards the concept of *civilisation*, in analogy with other authors and "expressing at each step of the way a profound disillusionment and an infinite tedium towards the great civilisations of the great metropolises, especially as regards Paris" (*ibidem*: 38-39).

The city is of interest here because although while we are primarily dedicated to the Douro landscape of steeply sloping vineyards, in this article, even if only briefly, we also refer to the landscapes of the Douro in the place where they mingle with the Atlantic: the city of Oporto and its river mouth. Indeed, the city gets widely referenced (both the city and its river) by artists and poets. To provide but one example, we would point to the anthology *Ao Porto, Colectânea de Poesia sobre o Porto* (2001).

We would recall here some of the reflections and concepts because we thereby encounter the matrixes of Western thinking on the mission undertaken by UNESCO World Heritage in seeking to ensure all countries around the world sign up to its 1972 Convention in the sense of guaranteeing that they thus protect their natural and cultural heritage across all of its different facets: landscapes, biological, geological, architectural, artistic, literature, tangible and intangible.

3. Some Literary Tourism promotion projects implemented in the North of Portugal and in the Alto Douro Vinhateiro region

The spatial practices structure and construct places (...) Duffy (1997...) suggesting that the paths followed by artists in their «search for views» not only identify with but also favour those paths taken by tourists. (João Sarmento, 2004: 340)

While the interest in the House-Museums of writers (or other intellectuals), the cemeteries where they are buried, literary places and site have always been the objective of curiosity and worship, we also know of their rising importance within the scope of literature related tourism

phenomena as from the 17th century onwards but especially as from the 1980s (Watson, 2006; Robinson, 2007; Hendrix, 2012 and Leitão, 2012).

Despite some pioneering projects (as is the case of the House-Museum of Guerra Junqueiro, in Oporto, or the House of José Régio, in Portalegre), this interest in Literary Tourism arrived in Portugal primarily since the beginning of this century, a time when both the Centro Regional Directorate of Culture and the Norte General Directorate of Culture began developing Literary Tourism related projects. In the case of the latter, in the specific case of the *Travel With...* project that established itineraries dedicated to writers such as Aquilino Ribeiro, Miguel Torga, José Régio, Eça de Queirós, Guerra Junqueiro, Teixeira de Pascoaes, Trindade Coelho and Ferreira de Castro. The books published within the scope of this *Literary Suitcase* functioned almost as route guides for those who know the works of these authors as they refer to their respective “places of inspiration” and “literary typography”, in addition to conveying gastronomic and other information associated with their works and their host regions. These works also included maps of the cities and regions, indications for tourism offices, etcetera. (Leitão, 2012 and 2016).

More recently (2013), the Norte General Directorate of Culture relaunched the *Travel with... The Paths of Literature* projects, reissuing some of the works by the aforementioned authors, especially Eça de Queirós and Aquilino Ribeiro, but stripping them of the tourism literature mentioned above that, from our perspective, was a step backwards for Literary Tourism. However, this strengthened the role of the *Writers of the North*, including in this initiative the Cupertino Miranda Foundation and the writers-painters Cruzeiro Seixas and Mário Cesariny (Leitão, 2016).

Within the scope of the most recent Literature dedicated initiatives, susceptible to promoting Literary Tourism in the Douro region, we encounter references to the project “The Douro on the Paths of Literature”, an initiative also staged by the Norte Regional Directorate of Culture. This correspondingly announced that the aforementioned project, which spans writers of the 19th and 20th centuries,

takes as its central theme the literary heritage of the Douro region, in particular that which has been created by multiple writers, with prominent positions in the history of Portuguese Literature, who had their birth roots and lives in the Alto Douro Vinhateiro region (...) Thus, a series of seven documentaries was produced in the DVD format and all dedicated to Douro writers (...) Thus, the following writers were included: Miguel Torga, João de Araújo Correia, Aquilino Ribeiro, Guerra Junqueiro, Trindade Coelho, Pina de Moraes and Domingos Monteiro (...) With the goal of capitalising on the work undertaken during the production of these

*documentaries based upon the photographic, iconographic and documental materials gathered, seven bibliographic exhibitions were produced respectively alluding to each one of the panels (...) The exhibitions themselves are made up of a total of 147 panels (...).*¹⁹

According to the information provided, we also learn that this project then toured the municipal libraries of the northern regions including S. João da Pesqueira as well as its exhibition in the “Monuments of the Douro”, such as the Monastery of Tibães. The project also extended to non-Douro writers but who had nevertheless written about the Douro, such as Alves Redol.



Figures 1 and 2. Panoramic view of Douro Wine Region.

Source: <http://www.dourovalley.eu/en/>

We would cite these initiatives as among the means of deepening the involvement of cultural and local government institutions and ongoing in the North of Portugal (which does not always

¹⁹ <http://www.portodosmuseus.pt/redirect-teste/direccao-regional-da-cultura-do-norte/> (consulted on: 26.01.2016).

prove the case in the Centro and Sul regions with the exception of the recent 2015 Folio Festival in the town of Óbidos (Leitão, 2016)) in the affirmation of Literary Tourism, especially in the Alto Douro Vinhateiro region as well as a means of discovering some of the most illustrious 19th and 20th centuries Portuguese writers connected to its northern region.

However, not only are there these projects that reference the national writers and have most contributed to launching the image of this region. Despite Literature mixing the real with the imaginary, we would interestingly point to the extent that, in order to understand just how the populations on the two banks of this beautiful river actually lived over the course of the 20th century, there are many researchers who have made recourse not only to the agricultural or ethnographic technical records, all of great interest to the lives of the vine growers, or even the records of traders, but rather the fictional pages containing descriptions of the practically inhuman hardships of the labours involved in the agriculture and the transport of grapes and other products via the rabelo boats, making up the daily lives not only of the men but also the women and children in this region (indeed, the exploitation of male labour, as well as female and child, became a *leit motive*, both fictional and real, mentioned above all by the writers of Neo-Realism, prior to the revolution in 1974). Pinto da Costa, in his important anthropological study on this region, referenced encountering the need to consult the works such as those by “Campos Monteiro, Pina de Morais, Miguel Torga, Araújo Correia, Alves Redol, Domingues Monteiro, Guedes de Amorim and José Aguiar” (*ibidem*: 19) in order to be able to study the way of life then prevailing.

3. 1. The Literature: the vision of some national writers

Among the works either referring or dedicated to this region, written in the middle of the last century by Portuguese authors, we would like to highlight one that provides a fairly poetic description of the characteristics already mentioned about this place. This came against the background of Spanish and Portuguese (Miranda do Douro, Picote and Bemposta) dams having tamed the formerly raging torrents of the river. The work is entitled *Portugal*, first published in 1950, and might serve as a literary itinerary as it spans the country from north to south. Within, the Transmontano who was born “In S. Martinho²⁰, the first land in the Douro and hence of a vine growing patronage” (Torga, 1945:13), Adolfo Coelho da Rocha (1907-1995) a doctor who

²⁰ This refers to S. Martinho da Anta, in the council of Sabrosa, one of those incorporated into the UNESCO heritage area.

adopted the pseudonym of Miguel Torga²¹, knowing the importance of the river, a pillar for the entire region, affirms as regards the "Doiro":

Beginning in Miranda (do Douro) and ending in Foz (in Oporto), this calvary (...) Doiro, region and river, is certainly the most serious reality that we have. No other of our rivers flow at such a heavy rate, encountering the most embedded obstacles, most arduously struggling along all the route (...) In summer, the heat of a furnace bakes the schist and transforms the current into a hallucination of moving lava; in winter, even the eyes of the vines weep with the cold. Beauty it does not lack whatever the season (...) (1993: 45-47).

The work had been preceded by the author's first novel, published in 1945, *Vindima*, in homage to the Douro landscape and its peoples, who went through troubled and impoverished lives, in the midst of an unfair society, a description that contrasts with the idyllic, natural and human scenarios and landscapes that contemporary tourism hands down to us. Torga evokes the River Douro (and its tributaries), the Douro estates/vineyards, recalling some of the most resounding names in the 19th century construction of the Port empire, including Antónia Adelaide Ferreira and the Baron of Forrester (also known for his cartographic contribution to this region). He conveys a clear image of the landscape and the work of vineyard labourers both before and after the harvesting. As he states:

The great grape must festival is about to begin. And the pilgrims flock in from afar, drawn in by the wave of vine shoots (...) From early dawn (...) women harvest the grapes, the children empty the full baskets, the men hoist them up onto their shoulders (...) Until nightfall. But along the steep and yellowish slopes along the entire length of the Douro, on terraces held up by a succession of walls and parallels, the grape harvesting continues. Flocks of women, here and then (...) knots of men bearing their burdens aloft as they head to the depths of the grape presses (...) doubled up in sweat under the weight (...) In the profile of the harvested slope, the moonlight throws into emphasis the sadness of the vines without their grapes. The vines reach for the heavens with their stripped branches as if in some protest (...) (Torga, 1945: 15, 19, 39, 190-191).

²¹ Among the other dedicated to the Alto Douro region, such as some of the pages from his *Diaries* (16 Volumes), or the *Stories of the Mountain* (1987), especially that entitled "The Grape Harvest".

João de Araújo Correia (1899 - 1985), a doctor and writer, born in Peso da Régua, where he lived and died, dedicated much of his work to the Alto Douro region. From among his works (short stories and novels, some best sellers in their time), we would highlight his chronicles in which allusions to the town and its surrounding parishes almost invariably make an appearance.

In *Portugal Pequeno (Small Country, 1977)*, for example, reflections commonly dwell upon the problems faced in local populations' lives, stressing the importance of revitalising the railway line, "The Express" that set off from S. Bento (Oporto) and ran through Régua (and vice-versa), but that contrary to what the name might suggest, really made its very slow way over a three hour period, as well as defending the introduction of "Buses", for the "proletarians" who "live in Peso, in Corgo, in Moledo and in Rodo" (1977: 81). As regards the "most wonderful excursion that you make" by car, "From Régua to Pinhão", he criticises how the road had "degenerated into a rural thoroughfare", and how "the Reguenses, slaves of football or the café", should at least make "on Sundays, at least once per each season, that very rich excursion" (*ibidem*: 117), affirming, as regards the landscape: "That stretch of road, that runs from Régua to Pinhão, in sight of our river, views a noble proportion of our vineyard country", where visitors may enjoy this "slice of bleak choreography", the "efforts expended on maintaining this land" as well as spotting the "line of estates (...) venerable", the "first chapter in any poem or novel about Port" (*ibidem*: 117-118).

Despite the temporal distance separating us from Araújo Correia, we cannot but evoke how this writer, beyond his love for his homeland, strives to draw attention to the problems afflicting the country, for example, abandoning the maintenance of many secondary roads and railway lines that serve not only the daily lives of their inhabitants but also national and international tourism in place of strictly tourism based products. In this latter case, there is currently a tourism train running from Régua to Pocinho pulled by a historical steam powered engine dating to the early 20th century with wooden carriages (*Comboios de Portugal, 2011*) alongside the tourism cruises along the Douro valley and through the UNESCO registered zones. Furthermore, as regards the regional train today plying the Douro line, we may still describe it as belonging to the times of the "Express" (in his 1957 written chronicle) described by Correia.

Another of the authors interconnected with this heritage, even while the contents of her work step beyond the essentially regionalist character, is Agustina Bessa-Luís (Vila Meã, Amarante, 1922 – Oporto). In her novel *Vale Abraão*, she begins her fictional narrative as follows:

The demarcated region of the Douro, that occupies almost the totality of its right bank, at least proves that the solar rays have an effect on the business of Men and determines their addresses (...). However, there is on the curve that feeds

the river and its gritty rock bluff, on leaving Régua, a river valley that still produces the scented vines that extend off in the direction of the city of Lamego (...) This is Vale Abraão, with its estates and presses that seem to deepen memories of Moorish transit, which would bring from Granada the goods from the Orient and, perhaps, the tastes for the citrus groves (...) Almançor was once a resident in Lamego and wrote there a history of the campaign with his allies, the Mozarab counts (Bessa-Luís, 2014: 5).

The *Voyager through the low lands* (in his case, born in Ribatejo) José Saramago (1922-2010) equally focuses his attentions on this region in the literary itinerary he set out for the country, *Journey in Portugal* (first edition in Portuguese, 1981). He begins his tour in international Douro²², in Miranda do Douro. Remaining close to the dorsal spine that is the river (and its tributaries), he sets out a series of considerations regarding the UNESCO demarcated regions and its landscape heritage along with those who have worked these lands down through centuries, in addition to the built heritage distinguishing this region as is the case with the 18th century manor houses:

Here, between Vila Real and Peso da Régua, the art of terracing reaches its peak of perfection. It's a permanent, on-going process (...) Seen from a distance, men and women appear as dwarves, natural inhabitants of the kingdom of Lilliput, and fiercely mistrustful of the mountains they seek to tame (...) The best thing, the one sure way he couldn't possibly lose out, was to go up to Fontanelas and higher still among the farmsteads, gaze out over the terraced vineyards, see the river far below him, pausing with a great sense of peace in his soul before the minutely quartered vineyards – Nasoni's rustic grandsons, descendants of the blessed architect who came to these lands (...). (Saramago, 2002: 44)

3.2. The Literature: the vision of some international writers

Within the scope of the international authors referring to the river Douro and praising its landscapes in the first half of the 20th century, we would highlight the Spanish writer Miguel de Unamuno (1864-1936). He is one of the leading Spanish writers and not only displayed an interest in Portugal and reading and/or maintaining relations with some of its own writers, but

²² Currently, there is a *Rota do Douro Ibérico do Património Mundial*, which brings together ten World Heritage sites located in the Norte region of Portugal and the Castilla-Léon region over the border in Spain.

also travelled throughout the country and publicised the voyages he made through articles in the Spanish press.

His first visit to Portugal, in 1906, took in Oporto. Among others, in this city he would write one of the poems dedicated to Portugal entitled: "En una ciudad extranjera" (Unamuno in Marcos de Diós, *ibidem*: 77-82). In 1910, on route to the same city, he wrote: "A bordo del «Romney rumbo a Oporto»" (*idem, ibidem*: 85-90). Between 1928 and 1930, he wrote three versions of his poem "Durium-Duero-Douro", where he refers to locations in the Spanish and Portuguese Douros. From the first version of this poem, we here transcribe the following lines:

(...) Tormes, Águeda, mi Duero (...) / ya Douro cojes al Tâmega (...) /
abrevando pardos campos (...) / Barca d'Alva del abrazo / del Águeda con el Duero, /
Douro que bordando viñas / vas a la mar prisionero. / En la Foz de Oporto sueña / con
el Urbión altanero (...) (Unamuno in Marcos de Diós, 1985: 93).

In 1949, *The Selective Traveller in Portugal* was published in Britain before going on later to get an American publication. Fairly recently translated into Portuguese under the title *Duas Inglesas em Portugal* (2008), the English ladies referenced in the Portuguese title are the writers Ann Bridge and Susan Lowndes, who toured the country in the summer of 1947 in a car they rented along with a driver (Vicente, 2008: 8-9). The book proved an enormous success at the time and became one of the guidebooks to mainland Portugal. Ann arrived in Lisbon in 1939, and immediately set off to discover Portugal. In a letter to Susan, she tells about her tourist experience in Alto Douro:

I've just returned from a marvellous week in the river Douro, seeing how you do the entire grape harvesting process. I myself trod the grapes, wearing a bathing costume to feel just what it was like (Bridge, cit. Vicente, ibidem: 5).

Many of these enthusiastic impressions do not always come across in such a way in *Selective Traveller*, with its writing more contained even while not in the merely denotative language typical of current guidebooks. While they do not overlook the landscapes, the Douro region is presented through observations more (as in the case of the built heritage such as the churches and manor houses) or less favourable (in the case of the accommodation available at that time). By their side, we may enter into this territory:

In the direction of the North, setting off from Lamego, the road descends, approximates the Douro, over a big, modern bridge in Régua, where the Country of Wine begins (...) (Bridge and Lowndes: 243).

In turn, veteran American travel journalist Patricia Schultz (?- ?), in her work *1,000 Places to See Before you Die*, refers as follows to "Porto and the Douro Valley":

There's magic in the air – or the rocks – in the upper Douro River Valley, where the vintners conjure wine from the stony river banks. The vineyards that cling to towering cliffs above the golden river that snakes along a deep gorge are tended by hand because tractors can't negotiate the steep incline. Yet out of the (...) landscape comes one of the world's sweetest and richest wine – port (...). The port wine grown in the upper Douro comes downriver to Porto, the country's second largest city, to mature (Schultz: 2011: 244-245).

4. The Arts

Despite the UNESCO classified region spanning only the aforementioned councils, the entire extent of the landscape running alongside the river Douro, from its source to its mouth, has elicited the inspiration of multiple authors and expressed through different literary and artistic works, given the beauty, sparse and bleak, to a greater or lesser extent, beauty of the lands adjoining the river and its tributaries. After all, the Douro has been flowing since the beginning of time.... However, not always has painting captured these landscapes and the ways of life that best define them with photography instead successfully attaining this goal from the mid-19th century onwards (for example the photographer to the Royal Household Emílio Biel, the industrialist who set up the country's first hydroelectric plant in Rio Corgo), which has subsequently also proven the case with literature and cinema through into this century. As stated above, in relation to the Alps of the 17th century and afterwards, we continue to believe that the reasons primarily stem from changes in the mentalities and living conditions with the very means of communications, such as the railways, coming to revolutionise ancestral practices and facilitate access to such localities.

4.1 Painting

If the *voyager* Saramago experienced, during his *Voyage*, difficulties in expressing the colours of the Alto Douro and their associated landscapes through writing, this task would certainly be no easier in the case of painting even while the vine growing and wine making activities have triggered the attentions of artists.

In the *corpus* chosen for this pictorial research, we selected some of the most renowned Portuguese landscape painters (featuring the customs, mountains and fields, whether or not cultivated, with or without cattle; locations whether by the river or by the sea, with vessels and fishermen, beaches with bathers), who were dedicated not only to the painting of landscapes but also produced commissions (such as historical facts, portraits, etc.) from the mid-19th century through to the first decades of the 20th century, painters who experienced the “Grupo do Leão” and Naturalism²³ periods, some with impressionist characteristics as well as those working as the 20th century dawned within the context of Decadentism-Symbolism. As specifically regards the

20th century itself, we also drew upon some of the painters that span the Neo-Realist phase, which formally began in the 1930s.

Without wishing to overlook any artist, we here specifically refer to António Carvalho da Silva/Silva Porto²⁴, João Marques de Oliveira²⁵, António Ramalho²⁶; Henrique Pousão (painter, sculptor)²⁷, Aurélia de Sousa²⁸, António Carneiro²⁹, Joaquim Lopes³⁰ and Dominguez Alvarez³¹

²³ Vide, to this end, “The Leão Group” and “The first Naturalist Generation” (França, 1990: 23-67).

²⁴ Born in Oporto in 1850, he passed away in Lisbon in 1893. He studied at the Oporto Academy of Fine Arts. He was invited to teach at the Academy of Lisbon as master of landscape painting. He was a member of the *Grupo do Leão* alongside José Malhoa, António Ramalho, João Vaz, Cesário Verde, Columbano and Bordalo Pinheiro (França, 1990: 23-45)

²⁵ Born in Oporto in 1853 and passing away in this same city in 1927. He studied at the Oporto Academy (França, *idem*, *ibidem*).

²⁶ Born in 1859, in Vale Moreira, in the parish of Barqueiros, in Mesão Frio council, “his father was the owner of a rabelo boat, the majority activity in this region economically dominated by wine production activities” and where the majority of inhabitants lived in poverty (Markl, 2004:11); in Oporto, he took up residence on Rua Formosa; fled to Lisbon in 1874-1875 before entering the School of Fine Arts in Lisbon; and between 1905-1909 painting the Noble staircase in Palácio da Bolsa, Oporto; in 1916, he died in Figueira da Foz. *He painted two universes, those who work and those out strolling* (ibidem: 47) (Vide Rodrigues, 2004)

²⁷ Born in Vila Viçosa in 1859, son of a magistrate; in 1872, he enrolled in the Oporto Academy of Fine Arts; in 1880, alongside fellow artists, he founded the Portuense Artistic Centre; he died in Vila Viçosa in 1884. (Vide Silva, 2004)

²⁸ Born in Valparaíso in 1866; daughter of an Oporto man who emigrated to Chile and a Chilean mother, she arrived in Oporto at the age of 3 with her numerous family occupying the Quinta da China estate, on the right bank of the Douro, just outside the city of Oporto after 1869; between 1893-1896, she attended the Oporto Academy of Fine Arts; she died on the aforementioned estate in 1922. (Vide Castro, 2004)

²⁹ Born in 1872 in Amarante, a city bathed by the river Tâmega, a tributary to the river Douro; he came from a poor family; in 1879, he was left an orphan and interned in an asylum; in 1884, he is a student of the Oporto Academy of Fine

(still connected to Portuguese/Galician and Spanish Naturalism). We thus chose those artists interrelated with Oporto or its adjoining regions, whether through birth, period of residence, study or employment. We also include all of those with international experiences whether in France, Italy or Spain. Some came from extremely humble backgrounds, such as António Ramalho (born in one of the councils later gaining Unesco recognition, that is Mesão Frio) or António Carneiro, whose career did not prevent him from chasing his artistic dreams. This also includes Aurélia de Sousa, who, while not having financial issues, did encounter some of the difficulties inherent to a period not yet populated by female intellectuals.

In common, within the research that we undertook, it would nevertheless seem that no artist allowed themselves to be taken by surprise by the landscapes and working practices surrounding the vine growing and wine making activities of the Alto Douro even while, in accordance with that stipulated by Naturalism-Realism and the end-of-century Symbolism, depicting the city of Oporto and its surroundings, for example, Henrique Pousão - "Rustic House in Campanhã" (1880), or "Landscape of Oporto (1880), with this latter work portraying a bull-cart transporting grapes; the river Douro – as António Carneiro, "Calm Port – The River Douro at Ancede" (1927); or depicting the more tranquil landscapes in a more impressionist style as is the case with Aurélia de Sousa ("On the Veranda" (s.d.), "View of the Douro" (s.d.), "Landscape, On the Banks of the Douro" (s.d.), "Landscape" and "River Douro" (s.d.).

In relation to the absence of landscape works of vine and wine producing activities, this perhaps derives from what Andrade refers to in his article "On this Douro downwards": "We then discovered that the Douro of the highlands (for example Sebadelhe, in Vila Nova de Foz Côa) was, through to the middle of the last century, a land of corn sowers and reapers (...) prior to having been colonised by vine culture. And we grasped how the stretches of river show significantly different geographies to those after having been redesigned following the installation of dams" (2009: 7).

In keeping with this, we encounter Almeida Moreira stating in 1935 as regards the landscape of these cornfields and the mountain heights of "Lands of Sebadelhe" (1923) (belonging to the

Arts; in 1918, he became a full time teacher at that Academy; in 1925, he opens an *atelier* on Rua Barros Lima (now Rua António Carneiro), in Oporto; he died in this city in 1930.

³⁰ Born in Vilar do Paraíso (Vila Nova de Gaia), in 1883 and dying in Oporto in 1956. He was a student of Teixeira Lopes, José de Brito and Marques de Oliveira. Painter, designer and watercolourist, he painted everything from landscapes to portraits. He was a Professor at the Oporto School of Fine Arts. As is the case with these other artists, he has works in various national museums (Soares dos Reis, do Douro, Grão Vasco...) (Silva, 2012). (Vide *Catálogo* 2006)

³¹ Born in 1906 in Oporto, son of an employed tradesman and a Galician mother; in 1926, he became a student at the Oporto School of Fine Arts; in 1942, he was a guest professor at the Oporto based Infante D. Henrique industrial school; in 1942, he died at his father's home at no. 770 at Rua da Vigorosa, Oporto. (Vide Couto, 2005)

aforementioned council of Foz Côa) painted by Joaquim Lopes, in a letter to this artist: "I went through Sebadelhe (...) Now, I admire still deeper your painting after having toured all of that landscape from Pinhão to São João da Pesqueira and from there to Vila Nova de Foz Côa, taking in Sebadelhe on the way! Your work is very impressive and that I already admired greatly even without having gone through all those mountains" (Moreira, cit. Silva, 2012: 65). Indeed, confirming this change in agricultural landscape (in the transition from cereals to vines), which reflects in the different mutations these places have undergone, courtesy of human action on the landscape, far from dampening the tourism interest in the work of art or the specific landscape, paradoxically may serve to boost a more creative type of tourism in which the duly informed tourist may imagine another landscape distinctively different to that under contemplation.

Dominguez Alvarez painted, in a disturbing fashion, the city of Oporto, with its streets and taverns ("Door of a House" (s.d.), "Santo Ildefonso", (s.d.) , "Adega do Galo" (1930), "Tavern" (s.d.), "Russian Tavern" (1929), "View from the Clérigos" (1932), and alongside riverside ("Landscape with River and Rocks" (s. d.) and agricultural scenes, with the latter without either any river or people working the land. The exception in relation to this vine related theme would seem to be the painter of customs and habits, with Silva Porto a pioneer of Naturalism in Portugal, José Malhoa³². The author of "Fado" and "On Route to the Pilgrimage Festival" at the end of the 19th century painted "The Grape Harvest", a work depicting rural activities even while not knowing either which location is under portrayal or where the painting itself actually is.

Another of the artists who, like Malhoa, was not born in Oporto but who "promoted" the Douro region was Falcão Trigo (Lisbon, 1879 - Lisbon, 1956), with his work "Our Lady of Salto", painted in Rio Sousa, a tributary on the right bank of the river Douro. In this place, there is a Chapel dedicated to Our Lady of Salto about whom there is a legend interrelated with the miracle that she is said to have made. In the following generations, we also come across Lima de Freitas³³ who, in his Neo-Realist phase, illustrated the work *Blood Grape Harvest* (1949), the third volume in the *Port-Wine Cycle* by Alves Redol (1911-1996), which also includes the works *Closed Horizon* (1949) and *The Men and the Shadows* (1953)³⁴.

³² José Vital Branco Malhoa was born in 1855 in Caldas da Rainha and died in Figueiró dos Vinhos in 1933. He studied at the Royal Academy of Fine Arts in Lisbon. (Vide França, 1985)

³³ José Lima de Freitas was born in Setúbal in 1927 and died in Lisbon in 1998. He was an illustrator and opted in a first phase for Neo-Realism before later work demonstrated his Surrealism influences.

³⁴ In our research on grape harvesting in the region, we also unsuccessfully revisited the Chiado Museum's (2000) retrospective catalogue of the great landscape painter from Lisbon, João Cristino da Silva (1829-1877), who was in Oporto in 1865 for the *International Exposition* in Palácio de Cristal.

Of the catalogues that we surveyed, there were references to three retrospective exhibitions, among others, of the artist Júlio Pomar³⁵, in keeping with the period the artist was associated with Neo-Realism, the 1940s and 1950s, specifically: *Pomar, Autobiography* (2004); *Júlio Pomar and the Neo-Realist Experience* (2008); *Júlio Pomar, Works from the Millenium BCP Collection* (2015); with the latter two containing some references to the paintings/murals done for the Batalha Cinema between 1946-1947. In the 2008 catalogue, in his “Study for the Batalha Cinema fresco” (1st version, 1946: 94), there are clear references to vine related activities, including men carrying the baskets of harvested grapes.

4.2. The Cinema of Manoel de Oliveira

Aware of the importance of artistic works to candidacies to world heritage, we should correspondingly incorporate the contributions made by the Seventh Art. Inevitably included among the elites of cinema is the Portuguese filmmaker Manoel de Oliveira (1908-2015), with his entire career at the national and the international level involving the exporting of images of Oporto, his city of birth, and the landscapes of the river Douro out to the American or broader European worlds.

In 1993, he filmed *Vale Abraão*, based on the similarly named novel by Agustina Bessa-Luís (1991)³⁶ about the Douro. Set on the Quinta da Pacheca estate, amidst the vine covered slopes of the Douro, the painter Graça Morais affirmed as regards the film: “I marvel at the landscapes of the Douro. A film that is the exaltation of life and death” (JN 2008: 7). In turn, the writer Amadeu Baptista dedicated to the director and his film the poem “Manoel de Oliveira. On a sequence from *Vale Abrão*” (2001: 215). This film was shown at the FOLIO Festival (2015), in Óbidos.

³⁵ Júlio Pomar (Lisboa, 1926 -). In 1947, Cinema Batalha, in Oporto, was inaugurated with its largest fresco unfinished given that Pomar was under arrest. Following a hostile campaign, the mural paintings (the mural stretched over 100 square metres), commissioned from Pomar, were removed in 1948 on the orders of the Estado Novo regime (1926/1933 - 1968/1974). In 1946, he was sacked by the Oporto School of Fine Arts for having participated in student protests against the Salazar dictatorship (2014: 84-86).

³⁶ As Almeida states: “Of the 32 full length feature films that make up his catalogue, a half find their origins in literary works. However, like no other writer, he cultivated the proximity he established with Agustina-Bessa-Luís. In total, this novel writer made her mark on seven films, including *Francisca* (1981), *Vale Abraão* and *The Convent*.” (JN Almeida, 2008: 12)

5. Final Reflections

In the 1940s, as regards the external communications of the region and the role of the train, Alves Redol recalled: "Another life has arrived in the Douro. There are travelling traders, prostitutes, thieves, technicians and tourists, a totally different humanity. Those who were living there feel oppressed as if they had had their homes invaded and wished to expel them (...) In came all the vices (...) Shares and companies arrived along with the bank. In came Usury and Letters. Getting off the train came Sealed Paper and the Tax Inspector" (Redol, cit. Pinto da Costa, *ibidem*: 47)³⁷. Almost immutable in its flows, despite the dams and dikes, the Douro continues unstoppably to form part of one of the phenomena of *longa duration* that Braudel told us about, resisting any and all mutations to human tastes and fashions.

However, nothing prevents, and this is here our goal, dynamically boosting the tourism of this region through taking as our point of departure the literary texts alongside references to the artists, especially the pictorial. These may trigger the motives and interests in visiting the other tourism infrastructures such as the museums, in particular the Soares dos Reis Museum, in Oporto or the Museum of the Douro, in Peso da Régua. Hence, tourism agencies might develop literary tourism itineraries that not only present the region from the vineyard and wines point of view but also include the reading (in Portuguese or in other languages) to tourists (national and international) of extracts from the authors and their works such as, and for example, those referenced above. The guides, specialised in tourism information, who frequently accompany trips by coach and minibus parties, would have to develop these skills in terms of knowing how to interact with the literary texts, works of art and films that form part of the cultural heritage of a country, its surrounding environment in this and in other geographic contexts. On the cruise ships or the tourist trains might also serve as venues to convey this means of looking at the landscape. As is widely known, there are already literary and artistic circuits and itineraries (in urban and rural zones) incorporating visits to the House-Museums of writers and artists that have had their lives influenced by the surroundings or places that they refer to in their works.

Through safeguarding such heritage emerges the value of difference, a stance in the battle against the ever advancing homogenisation. The attention paid to history and to the tangible and intangible heritage, as factors enhancing the tourist experience, testify to this and ranging from the restoration of water mills to historic city centres, Minho and Mediterranean gastronomy through to Fado and Alentejan Cante. Similarly, the landscape and nature have

³⁷ Alves Redol (1911 - 1969), in his period known as the *Port-Wine Cycle*, dedicated three novels to Oporto, to the Douro, and to Alto Douro and harvesting the grapes: *Closed Horizon*, *The Men and the Shadows* and *Grape Blood Harvest*.

become increasingly valued in attempts to ensure their preservation within the framework of the struggle to halt the environmental and human risks that may lead to their break-up.

Without a doubt, this region, alongside other areas, including the surrounding cities and towns, given the richness of its landscapes, features great potential for tourism development correspondingly also reflected and confirmed by some of the already diverse initiatives that have already taken place with some referenced over the course of this article in addition to others associated with the Arts (with the Rupestrian ancestral art of Foz Coa as its flagship landmark). They are nevertheless all potential sites for the attentions of artistic and literary itineraries. These would come alongside gastronomic itineraries (there are “menus” that are described and proposed in the very works of writers), religious (also referenced in works by the aforementioned authors such as Torga; with a guide to the religious heritage already in publication *Douro Religioso*, Pereira, 2011); or the built and intangible heritage (broadly described/registered in many of the works of these writers and painters). As tourism should not be molecular in structure, these all constitute contributions that may be drawn upon to collectively continue the development of tourism in Alto Douro Vinhateiro and in Portugal.

References

- Almeida, S. (2008), “Cineasta livresco. Literatura é influência obrigatória da obra do realizador”, *Jornal de Notícias, Suplemento 100 Anos Manoel Oliveira*, 11th December, 2008.
- Baptista, A. (2001), “Manoel de Oliveira. Sobre uma sequência de Vale Abraão”, *Ao Porto, Colectânea de Poesia sobre o Porto*, Lisboa, Publicações Dom Quixote.
- Bessa-Luís, A. (2014), *Vale Abraão*, Portugal, Babel.
- Bianchi de Aguiar, F. (2002), *O Alto Douro Vinhateiro, Uma paisagem Cultural, Evolutiva e Viva*, Douro – Estudos e Documentos, Vol. VII (13), 143-152.
- Bridge, A., Lowndes, S. (2008), *Duas Inglesas em Portugal, Uma Viagem pelo País nos Anos 40*, Lisboa, Ed. QUIDNOVI.
- Buescu, H.C. (1990), *Incidências do Olhar: Percepção e Representação*, Lisboa, Ed. Caminho.
- Buescu, H.C. (2012), “Paisagem Literária. Imanência e Transcendência”, *Colóquio-Letras*, nº 179, Janeiro/Abril, Lisboa, Fundação Calouste-Gulbenkian, 9-17.
- Castro, L. (2004), *António Carneiro*, Lisboa, Edições INAPA.
- Catálogo (2004), *Pomar, Autobiografia*, Odivelas, Assírio & Alvim e Sintra, Museu de Arte Moderna - Coleção Berardo.

- Catálogo (2006), *Dominguez Alvarez, 770, Rua da Vigorosa, Porto*, Lisboa, Fundação Calouste Gulbenkian.
- Catálogo (2008), *Júlio Pomar e a experiência Neo-Realista*, E. Câmara Municipal de Vila Franca de Xira e Museu do Neo-Realismo.
- Catálogo (2014), *Júlio Pomar, Obras da Coleção Millenium bcp*, Gráfica Maiadouro, Ed. Fundação Millenium BCP.
- Correia, J. de A. (1977), *Pátria Pequena*, Régua, Imprensa do Douro.
- Deprest, F. (2004), *Inquérito Sobre o Turismo de Massas, A Ecologia Face ao Território*, Lisboa, Ed. Piaget.
- Duarte, A. (2010), *Aurélia de Sousa*, Lisboa, QUIDNOVI.
- Falcão Trigo, S.P. de F. F. (2004), *Falcão Trigo (2004)*, Lisboa, Ed. INAPA.
- França, J.A. (1990), *A Arte em Portugal no Século XIX*, Venda Nova, Bertrand Editora, 3rd ed.
- França, J.A. (2008), "Manoel de Oliveira. O Cineasta e a Cultura Portuguesa", *Cem Anos de Manoel de Oliveira, Jornal de Letras*. Nº 996, 3rd-16th December, 2008.
- Gomes, R. M., Gomes, G. (Coord. Científica) (2006), *Os Caminhos-de-Ferro Portugueses, 1856-2006*, Tipografia Peres, Ed. CP, Comboios de Portugal.
- Hendrix, H. (2012), *Literature and Tourism: Explorations, Reflections, and Challenges*, V. N. Famalicão, Ed. Húmus.
- Henriques, C. (2003), *Turismo, Cidade e Cultura*, Lisboa, Edições Sílabo.
- Hobsbawm, E. J. (1988), *A Era do Capital*, Lisboa, Editorial Presença.
- Leitão, I. (2012), "Reflections on Literature and Tourism", IGOT, Universidade de Lisboa, (attending publication).
- Leitão, I. (2016), "Reflections about Writers House Museums and Foundations", TMS Algarve, 2016, (attending publication).
- Lima, I. P. (2008), "Filmografia, Douro, Praia Fluvial", *Jornal de Notícias, Suplemento 100 Anos Manoel Oliveira*, 11th December, 2008.
- Machado, A.M. (2001), "Eça e a Mitologia da Cidade", *A Cidade. VII Cursos Internacionais de Verão de Cascais*, Cascais, Câmara Municipal de Cascais.
- Marcos de Diós, A. (1985), "Estudio, Recopilación y Notas", *Escritos de Unamuno sobre Portugal*, Paris, Fundação Calouste Gulbenkian, Centro Cultural Português.
- Markl, A. R. G. (2004), *António Ramalho*, Lisboa, Edições INAPA.
- Morais, Graça (2008), Filmografia, "Vale Abraão", *Jornal de Notícias, Suplemento 100 Anos Manoel Oliveira*, 11th December, 2008.
- Oliveira, M. (2008), "Tributos deixam-me comovido", *Jornal de Notícias, Suplemento 100 Anos Manoel Oliveira*, 11th December, 2008.

- Pinto da Costa, A.L. (1997), *Alto Douro, terra de vinho e de gente*, Lisboa, Edições Cosmos.
- Portugal, *Ida e Volta, Por terra de Sabores, a bordo do comboio regional, Guias de Lazer*, (s.d.), Lifecooler, Comboios de Portugal.
- Ramos, A. (2010), *António Carneiro*, Lisboa, QUIDNOVI.
- Robinson, M. (2007), "Narrativas de Estar Noutro Sítio: Turismo e Literatura Turística", *Compêndio de Turismo*, Lisboa, Instituto Piaget.
- Rocha, I. (1996), *Roteiro da Literatura Portuguesa*, Lisboa, Instituto da Biblioteca Nacional e do Livro.
- Rodrigues, A. (2004), *Henrique Pousão*, Lisboa, Edições INAPA.
- Roteiros Turísticos do Património Mundial no Norte de Portugal*, Lisboa, Imprensa Nacional-Casa da Moeda e Turismo de Portugal.
- Santos, A. (2008), "Cidade natal como fonte estética e criativa", *Jornal de Notícias, Suplemento 100 Anos Manoel Oliveira*, 11th December, 2008.
- Santos, L. R. dos (2001), "Kant e o Regresso à Natureza Como Paradigma Estético", *Natureza e Ambiente, Representações na Cultura Portuguesa*, Lisboa, Centro de Filosofia da Universidade de Lisboa, 169-193.
- Saramago, J. (1995), *Viagem a Portugal*, Lisboa, Editorial Caminho, 11ª Ed.
- Sarmiento, J. C. V. (2004), *Representação, Imaginação e Espaço Virtual: Geografias de Paisagens Turísticas em West Cork e nos Açores*, Lisboa, Fundação Calouste Gulbenkian e Fundação Para a Ciência e Tecnologia.
- Silva, R. H. da (2004), *Aurélia de Sousa*, Lisboa, Ed. INAPA.
- Silveira, C. (2010), *Henrique Pousão*, Lisboa, QUIDNOVI.
- Silveira, M. de A. (2000), *João Cristino da Silva (1829-1877)*, Lisboa, Museu do Chiado.
- Sousa, F. de, Pereira, G.M. (1988), *Alto Douro, Douro Superior*, Lisboa, Ed. Presença.
- Tomás do Couto, M. (coord) (2005), *Museu de José Malhoa, Roteiro*, Caldas da Rainha, Museu José Malhoa.
- Torga, A. P., Ferreira, M. T. (coord.) (2001), *Ao Porto, Colectânea de Poesia sobre o Porto*, Lisboa, Publicações Dom Quixote.
- Torga, M (1945), *Vindima*, Coimbra, Coimbra Editora, Lda, 1st Ed., numerada e rubricada pelo autor., ex. nº 4292.
- Torga, M (1987), *Contos da Montanha*, Coimbra, Ed. do Autor, 7th Ed.
- Torga, M (1993), *Portugal*, Coimbra, Ed. do Autor, 6th Ed.
- Unamuno, M. (1985), *Escritos de Unamuno sobre Portugal*, Paris, Fundação Calouste Gulbenkian, Centro Cultural Português.
- Vicente, A. (2008), "Introdução à edição portuguesa e notas biográficas sobre as autoras", *Duas Inglesas em Portugal, Uma Viagem pelo País nos Anos 40*, Lisboa, Ed. QUIDNOVI.

Chapter V

Tourists' Motivation toward Visiting a World Heritage Site: The Case of Guimarães

Tourists' Motivation toward Visiting a World Heritage Site: The Case of Guimarães

PAULA REMOALDO³⁸

LAURENTINA VAREIRO³⁹

JOSÉ CADIMA RIBEIRO⁴⁰

VÍTOR MARQUES⁴¹

Abstract:

Within the major role, the tourism industry is taking in sustaining and enhancing growth in economies all around the world, the cultural segment deserves a particular look as, in most cases, it is playing a leading role. This has to do with the idea of tourists' visits as a memorable happening and an authentic experience and relates to the psychological dimension of tourist demand. This study investigated the motivation behind the choice of a cultural/heritage destination, and particularly a World Heritage Site (WHS). Taking the case of Guimarães, the study inquired on the tourists' motivations and perceived attributes of the city to conclude on the level of satisfaction tourists get from their visits and the destination attributes. The methodology used in this research had a quantitative nature, based on a self-administered survey applied to 325 tourists who visited Guimarães during 2015. In that analytical approach, tourists were organised according to their main visit motivation, i.e., if they were mainly motivated by visiting a World Heritage Site or by other reasons. An interesting result was that despite WHS visitors reporting higher satisfaction levels, the other type of visitors want to return in greater numbers. The study concluded that the destination is performing well, but is suffering from not having a consolidated image in the market. Looking at these and other results obtained, several recommendations were made to increase tourists' satisfaction vis-à-vis the

³⁸ Department of Geography, Social Sciences Institute, and research centre: Laboratory of Landscape, Heritage and Territory – Lab2PT, University of Minho, Braga and Guimarães (Portugal), premoaldo@geografia.uminho.pt

³⁹ Department of Management, School of Management, Polytechnic Institute of Cávado and Ave, and research centres: Unidade de Investigação Aplicada em Gestão (UNIAG) and Laboratory of Landscape, Heritage and Territory – Lab2PT, University of Minho (Portugal), lvareiro@ipca.pt

⁴⁰ Department of Economics, School of Economics and Management and research centre: Economic Policies Research Unit (NIPE), University of Minho, Braga (Portugal), jcadima@eeg.uminho.pt

⁴¹ City Hall of Guimarães, Guimarães, vitor.marques@guimaraesturismo.com

destination, by mainly addressing the strategy to be used in advertising the set of products and services it can provide to visitors.

Keywords: Heritage Tourism; Cultural Tourism; Destination Attributes; Tourists' Satisfaction; Guimarães

Resumo:

Considerando o papel crescente que a indústria do turismo tem vindo a desempenhar no crescimento das economias em todo o mundo, o segmento cultural merece uma atenção especial. Esta importância deriva da ideia de os turistas visitarem e vivenciarem acontecimentos memoráveis e experiências autênticas, e está relacionada com a dimensão psicológica da procura turística. Este estudo investigou a motivação da escolha de um destino cultural/patrimonial e particularmente um local classificado como Património Mundial (WHS). Tomando o caso de Guimarães, o estudo analisou as motivações dos turistas e os atributos percebidos da cidade para concluir sobre o nível de satisfação dos turistas relativamente à visita e aos atributos do destino. A metodologia utilizada neste estudo foi de carácter quantitativo, com base num questionário autoadministrado aplicado a 325 turistas que visitaram Guimarães durante o ano de 2015. Na abordagem analítica realizada, os turistas foram organizados em dois grupos, de acordo com a motivação da visita principal, ou seja, se escolheram Guimarães por se tratar de um local classificado como Património Mundial (um grupo) ou por outras razões (outro grupo). Um resultado interessante foi que, apesar de o grupo que escolheu Guimarães por ser Património Mundial reportar maiores níveis de satisfação, o outro grupo de visitantes deseja retornar em maior número. O estudo concluiu que o destino está a desenvolver-se bem, mas ressentem-se de não ter uma imagem consolidada no mercado. Analisando estes e outros resultados obtidos, várias recomendações foram feitas para aumentar a satisfação dos turistas em relação ao destino, principalmente ao nível da estratégia a ser utilizada na publicidade relativa aos produtos e serviços que pode oferecer aos visitantes.

Palavras-chave: Turismo Patrimonial; Turismo Cultural; Características do Destino; Satisfação dos Turistas; Guimarães

Resumen:

Considerando el creciente papel que la industria del turismo ha desempeñado en el crecimiento de las economías de todo el mundo, el segmento cultural merece una especial atención. Esta importancia se deriva de la idea de que los turistas visiten y vivan acontecimientos memorables y experiencias auténticas, relacionada con la dimensión psicológica de la búsqueda turística. En este estudio se investigó la motivación de la selección de un destino cultural/patrimonial, y particularmente de un lugar clasificado como Patrimonio Mundial (WHS). En este trabajo se ha seleccionado el caso de Guimarães. En este estudio se analizaron las motivaciones de los turistas y los atributos percibidos de la ciudad, con el fin de obtener las conclusiones sobre el nivel de satisfacción de los turistas en relación a la visita y a los atributos del destino. La metodología utilizada en este estudio fue de carácter cuantitativo, en base a un cuestionario auto-administrado aplicado a 325 turistas que visitaron Guimarães durante el año 2015. En el abordaje analítico, los turistas se dividieron en dos grupos, de acuerdo con las motivaciones principales de la visita, es decir, si estos escogieron Guimarães por tratarse de un lugar clasificado como Patrimonio Mundial (un grupo) o bien si estos escogieron la ciudad por otras razones (otro grupo). Como resultado destacado a resaltar en este estudio se obtiene que, a pesar de que el grupo que escogió Guimarães por ser Patrimonio Mundial reporta mayores niveles de satisfacción, el otro grupo de visitantes manifiesta mayor interés por regresar. El estudio concluye que, el destino evoluciona de forma adecuada, sin embargo no tiene una imagen consolidada en el mercado. Analizando estos y otros resultados obtenidos, se recogieron en la investigación varias recomendaciones, con el fin de aumentar la satisfacción de los turistas en relación al destino, principalmente orientados a la estrategia que debe ser utilizada en el ámbito de la publicidad, relativa a productos y servicios que se pueden ofrecer a los visitantes.

Palabras Clave: Turismo Patrimonial; Turismo Cultural; Características del Destino; Satisfacción de los Turistas; Guimarães

1. Introduction

Heritage tourism has been pointed out as one of the most ancient forms of tourism (Timothy, 2011). Nowadays, motivations to visit a destination are very diverse and can range from the desire to get an educational experience from a cultural destination to just use some free time.

Nevertheless, there is still some controversy around the concepts of heritage and cultural tourism in terms of separating one from the other. This article refers to the debate on the issue later in the review of the literature. In this chapter, it makes use of both concepts; as the authors conceive it, heritage tourism is a segment of cultural tourism.

The understanding of tourists' perceptions of a heritage destination and the motivation behind choosing to visit such a site are essential keys to developing successful marketing strategies to promote and position the destination. This chapter addresses the motivations of tourists towards visiting Guimarães and the perceived attributes of the city. The issue of visitors' general satisfaction was also inquired in the survey of 325 visitors taken during 2015.

The number of studies conducted in Portugal on the aforementioned issues is still quite scarce, and those focusing on heritage tourism destinations are even scarcer (Remoaldo *et al.*, 2014). This empirical investigation adds knowledge on the issue by contrasting the motivation of cultural/heritage tourists with the ones who don't elect world heritage sites as a primary destination but have contact with them when they do their touring through a set of neighbour cities or choose to visit them with other attributes of the destination as main motivations.

From that, the questioning of the visitors' satisfaction makes sense to be raised: do the tourists who are heritage motivated tend to express a satisfaction level greater towards a heritage destination than the other visitors? Do those visitors often tend to return to the destination? Is there a case for committing the promotion strategy more toward the capture of a larger segment of those visitors or is it more rewarding investing in attracting other segments of tourists, even if heritage or culture comes as only a second or third motive?

Inquiring on the strategy of the destination does not assume that there is a case for changing the destination image, and surely not in the case of Guimarães. In this regard, the authors believe that the most sustainable strategy to be followed by any tourism destination has to rely on its endogenous resources and singularity. Just in this way can it differentiate from the competitors and offer visitors an authentic experience.

In the remaining part, this chapter is organised in four sections along with final conclusions and recommendations. The first section briefly reviews the criteria taken into account by UNESCO to classify Guimarães as a World Heritage Site (WHS). A literature review on the concept of cultural destination and on tourists' motivations towards visiting those sites is presented in the second section. The issue of tourists' satisfaction is addressed as well in that section. In the third section, the analytical methodology used is presented as well as a summary description of the city that is the object of analysis. The 4th section is devoted to the results of

the empirical study conducted and its discussion. The last section presents the study conclusions and policy recommendations.

2. Guimarães – A UNESCO World Heritage Site

The convention concerning the protection of the World Cultural and Natural Heritage was signed in Paris in November, 1972 (UNESCO, 1972). It is an international agreement through which nations join together to conserve a collection of the world's timeless treasures (Drost, 1996; Pedersen, 2002). Its goal was to encourage identification, protection and preservation of cultural and natural heritage around the world that was considered to be of outstanding value to humanity (Arezki *et al.*, 2009). Many outstanding monuments make part of the list certified by UNESCO and each of them can be seen as a unique contribution to the human history (Li *et al.*, 2008).

The certification by UNESCO is important as it states their universal recognition and remembers that sites can be important sources of tourism affluence. This certification makes more visible the classified site (it increases its international visibility) and acts as a significant incentive to turn it more attractive, that is, enhances the investment in its preservation (Drost, 1996; Arezki *et al.*, 2009). To acquire the designation of a World Heritage Site is quite desired and is seen as a mean of attracting tourists (Li *et al.*, 2008; Landorf, 2009).

At present, Portugal has 15 sites that were certified by UNESCO. This corresponds to 1.5% of the whole patrimony certified by UNESCO up to the beginning of 2016. 14 of them have a cultural nature (UNESCO, 2016) and the Historic Centre of Guimarães (Northwest of Portugal) is one of them and had its certification in December, 2001 (Figures 1 and 2).



Figure 1. View of the Historic Centre of Guimarães

Source: Photo provided by Guimarães Turismo from Municipality Council at 07/11/2016



Figure 2. View of the statue of the first King of Portugal and of the Paços do Duque de Bragança

Source: Photo provided by Guimarães Turismo from Municipality Council at 07/11/2016

Guimarães is a place of deep symbolic meaning and reveals a strong cultural identity. Its main attributes are the historical and cultural elements, especially those located in its historic city centre. The city centre has only 121 hectares with 5.3% of the total area of the town (Atlante, 2005).

Several criteria were taken into account in the classification by UNESCO of the historic centre of Guimarães as a World Heritage Site. Among them, UNESCO pointed out the close relationship of the city to the birth of Portugal as an independent state in the 12th century and to the emergence of Portuguese as an autonomous language. It noted that the high level of

preservation of the buildings in the old city (particularly from the 15th to the 19th century) is an authentic example of the evolution of a medieval settlement into a modern town. Finally, it valued its rich building typology, which exemplifies the development of Portuguese architecture from the 15th to the 19th century. Some specialised building techniques developed there in the Middle Ages were transmitted to the Portuguese colonies in Africa and the New World, becoming their typical features (Comissão Nacional da UNESCO, 2014; UNESCO, 2016).

The certification of the historical centre of Guimarães was a key factor behind the emergence of the city as a tourism destination, that is, a destination endowed with a cultural/heritage nature. In this regard, it is useful to underline that cultural tourism is, no doubt, the main motivation to choose visiting Guimarães. As proposed by Pedersen (2002), this tourism segment is associated with visiting historical, artistic and scientific or heritage attractions.

3. Cultural and Heritage tourism and Visiting Motivations

3.1 Cultural and heritage tourism

Even though heritage tourism has been done over many centuries, there is not yet a complete consensus on its definition. It is difficult to separate heritage tourism from cultural tourism. Frequently, these two terms have been used as two separate ones even if related, but somehow they represent, as stated by Timothy (2011) an overlapping phenomena. The authors share this view as the overlapping area of the two concepts is greater than the divergent one.

Concerning cultural tourism, Besculides *et al.* (2002) considered it in a broader sense, focusing on visiting historical or archaeological sites, involvement in community festivals, watching traditional dances and ceremonies, or merely shopping for handcrafted art. More recently, Timothy (2011), following what researchers have found during the last decades, stated that cultural tourism is a more modern concept of tourism than heritage tourism. It refers to people that visit and participate in living cultures, including several contemporary elements of modern culture such as contemporary art or music. Remoaldo *et al.* (2014) highlighted that cultural tourism is a segment of the tourism industry that places special emphasis on heritage and cultural attractions. Along with Secondi *et al.* (2011), these authors have called attention to this is one of the fastest tourism growing segments in the world.

Richards (1997) highlighted that it includes all movements of people that visit specific cultural attractions, like heritage sites, arts, drama and cultural manifestations, outside their usual place of residence. To Richards and Munsters (2010), cultural tourism is concerned with cultural

experiences. In recent years, the search for cultural experiences has become one of the main motivations to travel.

Some factors have contributed to the fast increase in cultural tourism, such as the new middle class with higher education levels and income (Richards, 1996). This came along with the changes that occurred over time in working conditions and in the expectations about holidays. Visitors became more demanding in their holiday and tended to include more cultural elements (Remoaldo *et al.*, 2014). In this regard, Ritchie and Hudson (2009) and Yankholmes and Akyeampong (2010) highlighted tourists' desires to experience other cultures in multiple forms and the need of getting authentic and memorable experiences.

As noted by OECD (2009), creative activities and intangible heritage must be also added to the concept of cultural tourism. Russo and Van der Borg (2002) underlined that the cultural experience has to be viewed as a holistic process.

Some authors tried to differentiate cultural from heritage tourism (e.g., Pedersen, 2002; Goh, 2010; Timothy, 2011). Following Pedersen (2002: 24), heritage tourism can be viewed as "(...) a broad category that embraces both eco-tourism and cultural tourism, with an emphasis on conserving natural and cultural heritage." It can be seen as "(...) a category or market segment that includes visits to historic sites, museums and art galleries, and exploring national and forest parks". Goh (2010) also seems to follow the same perspective, including in it visiting built, cultural and natural arenas such as national parks. For some researchers (e.g., Pedersen, 2002), this kind of tourism is worried with environmental issues and tends to favour minimal environmental impacts. But others that use the concept of cultural tourism (e.g., Secondi *et al.*, 2011) underlined that cultural tourism has highly encouraged the preservation of the environment and the historical and artistic heritage, following a developing path contradicting the one of mass tourism.

Even Timothy (2011: 5) agrees that the elements that can be highlighted in cultural tourism also have meaning in heritage tourism: "Casual observers or serious hobbyists 'consuming' living and built culture in rural or urban contexts and their own personal experiences, including education and cultural edification, are an important part of the heritage tourism experience."

Covering so many activities and territory attributes and keeping so much in common with other tourism segments, it is hard to define either cultural or heritage tourism. Can the motivations of the visitors help in the clarification of this issue or should one conclude that it is unlikely to come to consensual definitions of cultural and heritage tourism? One can, of course, do as Timothy (2011) and use the two concepts, indistinctly.

3.2 Motivations of visiting a World Heritage Site and profile of visitors

Why does someone visit a destination? A desire to enhance his/her own cultural knowledge or mainly for spending some free time?

Since the 1960s, the literature has been concerned with tourism motivation as it is fundamental to understanding tourist behaviour (Li *et al.*, 2015). Even so, it was in the 1970s that researchers began evaluating tourism motivations using factors associated with the individuals and their context, and with the supply turned available by the destinations. The so-called “push and pull” factors are one way of materializing those two essential dimensions behind the decision of making a tourist visit and choosing a destination. The first “push” is the one that takes the tourist to decide to travel and has to do with personal and/or social status of individuals. The second “pull” is an outside force that is embodied in the attributes of a particular destination, which exert an attraction (stronger or weaker) on the visitor, are decisive in his/her choice, and that acts through the perception that the potential visitor keeps of the destination (Dias, 2009; Mendes and Vareiro, 2013).

Crompton (1979) identified seven “push” factors and two “pull” factors. As pushing factors, he listed escape to the routine environment, exploring new environments, self-evaluation, relaxation, prestige, return to the origins, and strengthening of family ties and facilitation of social interaction. The pull factors are novelty and training/learning.

Today, this “push and pull” model is still generally accepted (e.g., Mohamed and Othman, 2012; Li *et al.*, 2015). It presupposes a distinction among the different factors that determine in each individual the need to leave his/her usual environment through the journey (push), and the attributes identified in the destinations that serve as an attractive force, encouraging individuals to do the trip (pull). So while the first ones are contexts/environments that predispose the individual to visit some destination and can explain the desire of satisfying the need felt, the second ones have to do with the destination and its attributes that induce the individual “to stay away from the recreation area” (Mohamed and Othman, 2012: 176).

Li *et al.* (2015), using what was called a sociologist perspective (Wang, 2000), highlighted that motivation must be faced in a broad context using global structures and social changes. Using this kind of approach, one can not only consider bio- or psychogenesis in the individual. Instead, it is mainly “(...) a matter of sociogenesis at the levels of society and culture” (Li *et al.*, 2015: 36). Due to that, any changes in the global environment can influence the needs and desires of individuals and determine their motivations.

This leads to modern life, which begins in the home environment and continues in different environments during the day and week. The fragmentation of daily life and its relationships is a feature of society. The relationships became more fragmented and can result in anomie (following the perspective of Durkheim in the 1970s) in people's lives. This can force a person to feel the need for escaping from his/her home environment and "(...) seek authenticity and self-enhancement at a destination, through the experience of the products, services and facilities provided there" (Dann, 1981, cited by Li *et al.*, 2015). So, one can state that nowadays, the search for releasing from stress and gaining a positive psychological effect is understandable. On the other side, the behaviour of tourists has become more and more sophisticated and it is difficult to identify their motivations.

When speaking about cultural and heritage tourism, what kind of motivations must one look at? When dealing with a World Heritage Site, are the motivations different?

Do the cities declared by UNESCO as World Heritage Sites have an outstanding tourist competitive advantage over the ones not benefiting from such a label? The answer is probably "yes", as destinations are greatly affected by their image (Baloglu and McCleary, 1999; Secondi *et al.*, 2011). World Heritage Sites have a status that can influence positively the choice of destinations by visitors and can be used in their marketing promotion.

Heritage (or cultural) visitors have been marked as "upscale", which means they tend to have high income earnings, high education level and are of mature age. This was noted first by Silberberg (1995) and later remembered by Kima *et al.* (2007). Upscale visitors tend to spend more time and money at the destination. Meanwhile, the group of cultural tourists has been increasingly diversifying and cultural tourism has tended to attract younger people. Also over time, women have tended to do cultural tourism more than men (Remoaldo *et al.*, 2014).

4. Analytical Methodology and Destination Summary

4.1 Analytical methodology

As previously mentioned, data used in the empirical research came from a survey during 2015 among the tourists that chose to visit Guimarães. It was conducted by the Tourism Services of the Municipality and the questionnaire was designed by that entity together with the study research team. The results presented in this chapter made use of data collected in 2015 that crossed all the tourism seasons and is the first exploration of that data.

Taking advantage of the survey data, the methodology used in this empirical study had a quantitative nature and as set forth, envisaged concluding on the tourists' motivations to visit the city, its perceived attributes and the level of satisfaction tourists got from visiting the destination.

The questionnaire included a total of 20 questions, most of them categorized and closed. Portuguese and English versions of the questionnaire were used. Before its use, a pre-test was conducted to adjust some of the questions, to use language better understood by eventual respondents and to check the time the survey needed to be fully answered. The locality chosen for applying the survey was the Tourism Office that exists in the city of Guimarães. In this way, the survey respondents had full support from the staff of the office to fill it in.

The survey included three main parts: one dealing with the visit to the destination and the motivation behind it and another where the tourist was invited to express his/her opinions towards the attributes of the city and the level of satisfaction he/her got from the visit. This included the intention to return or to recommend a visit to Guimarães to family and friends (identification of who chose the destination previously was also sought). In the third part, the visitors were inquired on their socio-demographic features (gender, age, education, local of residence, being or not married, level of income).

In the questions about the attributes of the destination, a 5 points Likert scale was used, where one meant total disagreement and five meant full agreement. In this research in relation to all the research issues, just a few of the questions from the survey were analysed.

In the analysis of data, descriptive statistics, chi-squares tests and *t* tests were used to check the statistical significance of the results.

4.2 Summary presentation of the destination

Looking to the city of Guimarães, what main tourism "pull" factors should be considered? Which of its features can attract visitors?

Guimarães is a medium sized city in the northwest part of Portugal. In recent years, northern Portugal has been one of the fastest growing territories among those that have developed a tourist vocation within the country. The National Strategic Plan for Tourism implemented by the Portuguese government between 2013 and 2015 (Ministério da Economia e Emprego, 2012) assumed the following strategic products: sun and sea (which represents the most traditional and mass product); religious and cultural tourism structured in routes or circuits; city short

breaks; meetings, incentives, conferences and exhibitions (MICE) tourism; golf; nautical tourism; residential tourism; health tourism; gastronomy and wines (OECD, 2014). The diversity of products supplied has to do both with the set of resources available around the country and with the wish to follow the customers' demand.

In the last census (2011), the municipality had a total of 156 246 inhabitants (INE, 2015). In 2013, 1,707 lodging beds were available in the Guimarães municipality, accounting for 49.5% of the NUTS III Ave accommodation capacity (sub-region where Guimarães is located) and 3.5% of the total accommodation capacity of the NUTS II northern Portugal (INE, 2014). The city received 3.8% of the guests of the NUTS II northern region in 2013. Noticeable is that, in the same year, overnight stays in Guimarães municipality accounted for 3.4% of total overnight stays of the NUTS II north region and 59.0% of overnight stays in the hospitality facilities of NUTS III Ave. Having these figures in mind, one can conclude on the increasingly tourist role played by Guimarães in the regional context (considering the Ave sub-region).

Analysing the economic structure of the municipality, highlights the importance and historical impact of the textiles and clothing industries. Despite the difficulties these industries are facing, today they still make a major contribution to exports and local employment.

The historic centre of Guimarães was classified by UNESCO as a World Heritage Site on December 13, 2001. That certification came after a consistent effort made by local authorities on the restoration and preservation of the city historic centre and can be considered one of the most durable and productive investments ever made by the municipality. As mentioned before, the unique character of the city's architectural heritage is one of its most remarkable attributes.

With regard to tourism competitiveness factors, Guimarães was also one host of the 2004 European Football Championship, a 2012 European Capital of Culture and a 2013 European City of Sport. The local authorities are presently trying to obtain the title of European Green Capital 2020. So the city has been increasingly occupying an important role in the European context, if one considers the last 15 years. Accordingly, it has been pursuing a path in the tourism industry that has allowed crossing over from an internal (domestic) consolidated destination to an emergent international one.

New cultural and sports facilities were built in recent years, including the Multipurpose Hall (Pavilhão Multiusos) of Guimarães, the Sports City, the D. Afonso Henriques Stadium restoration, the Vila Flor Cultural Centre and the Platform of Arts and Creativity. These new modern facilities improved the capacity and quality for hosting events, whether of a cultural or sports nature.

After the opening in 2005 of the Multipurpose Guimarães, able to host major cultural, sports and congress events; the opening in 2006 of the Vila Flor Cultural Centre, endowed with two auditoriums, conference rooms and a large exhibition area; and the developing of projects specially prepared with the aim of hosting the 2012 European Culture Capital 2012 (with the Platform of Arts, the House of Memory, the Laboratory of Landscape and the urban regeneration of the Leather Quarter), the city reinforced its positioning in the cultural and urban national tourism context. These public investments got a return on the installed hotel capacity, which increased a lot between 2008 and 2013. Along its central geographical location, 50 km away from Oporto (less than that from the Oporto airport, the main entrance of visitors in the northern region of Portugal), this contributed to a more sustainable development of the tourism industry.

5. Empirical Results and Discussion

Data considered in the empirical approach were collected using a survey applied to tourists that visited Guimarães in 2015. The results presented in this section are a first exploration of those data.

A total of 325 filled questionnaires were collected through the end of 2015 and analysed. The number of questionnaires collected was more than the average used in several other similar investigations (e.g., Poria *et al.*, 2006; Yankholmes and Akyeampong, 2010). In the first research mentioned, 205 interviews were conducted at a historical site (Anne Frank House in Amsterdam, the Netherlands), and in the second one 218 questionnaires were applied at another heritage site (Danish-Osu, Ghana).

Table 1 refers to the socio-demographic profile of the survey respondents, which was organized to differentiate WHS visitors from visitors with other motivations. Based on that, the chi-square test was used to identify structural changes in the profile of the visitors.

As can be observed in Table 1, the profile of the visitors is structured around an equilibrium of males and females, aged from 26 to 65 years old (86.4%), well educated (those with an university degree plus those with a Masters or a PhD degree account for 63.9%), married (65.6%), and mostly foreigners (84.8%).

Looking to the issue of WHS visitors versus visitors endowed with other motivations, the most remarkable thing is the major differences detected in what regards education, as indicated by the chi-square test. The results show that WHS visitors are endowed with higher levels of

education than those with other motivations, which may relate to enhancing the cultural profile of the destination. Regarding this dimension, the results were in line with the findings in relevant literature (Silberberg, 1995; Kima *et al.*, 2007).

The high number of foreigners among the visitors can be viewed either as a surplus of the image obtained from the destination abroad in recent years or as a limitation of the implementation of the survey in the Guimarães Tourism Office, where Portuguese visitors may tend to go less than foreigners.

Before addressing tourists' perceived attributes of Guimarães, it is worth commenting about the motivations behind their choice of the destination. As shown in Table 2, taking in all the sample, the choice of Guimarães had to do first with being part of a tour around the cities of the region (Touring, visiting cities in the region), mentioned by 66.5% of the respondents. This tells a lot about the importance of leisure and curiosity on the others and their places has for the tourists of our time, as mentioned by Li *et al.* (2015).

	WHS visitors		Other motivations		Total		X ²	Sig.
	N (204)	% (62.8)	N (121)	% (37.2)	N (325)	% (100)		
<i>Gender</i>							0.572	0.449
Male	94	46.1	61	50.4	155	47.7		
Female	110	53.9	60	49.6	170	52.3		
<i>Age</i>							0.413	0.938
0-25	13	6.4	9	7.5	22	6.8		
26-45	98	48.0	58	48.3	156	48.1		
46-65	80	39.2	44	36.7	124	38.3		
Over 65	13	6.4	9	7.5	22	6.8		
<i>Education</i>							13.421	0.004*
Basic	14	6.9	14	11.6	28	8.6		
Secondary	44	21.7	45	37.2	89	27.5		
University	86	42.4	36	29.8	122	37.7		
Masters/Doct.	59	29.1	26	21.5	85	26.2		
<i>Marital status</i>							0.755	0.860
Single	42	21.9	28	24.1	70	22.7		

Married	126	65.6	76	65.5	202	65.6		
Divorced/Widow	24	12.5	12	10.3	36	11.7		
<i>Residence</i>							0.189	0.664
Portugal	32	15.8	17	14.0	49	15.2		
Other countries	170	84.2	104	86.0	274	84.8		

Table 1. Some respondents' characteristics

Source: Authors' own survey data

* indicated $p < 0.01$

The second highest reason is being a World Heritage Site (considered in the first differentiation of visitors) and the third is its architectural heritage, closely related to the previous one. This underlines the importance of the cultural patrimony of the destination in the visitors' attraction. Not far below the third reason in terms of mention comes the idea of benefiting from the Cultural activities supplied by the city, together with the circumstance of having hosted the 2012 European Capital of Culture. All considered, the reasons speak to a cultural motivation behind the choice of the destination. In other words, the image of the city is mostly associated with its cultural characteristics and being so, the authors believe this is dealing with cultural tourism in a large amount. Of course, leisure and educational experiences do not have to be seen as opposed sides of a tourist visit. Profiting from both is probably the best achievement a visitor could attain if the destination is able to supply such a set of products.

Looking again at the segmentation between WHS motivated and other visitors, it is worthy to note the importance that seems to take the Cultural activities, having hosted the 2012 European Capital of Culture and the Architectural heritage for WHS visitors, as underlined by the chi-square statistics. In the opposite situation, as a reason behind the choice of the city by other visitors, Sport events, Business and Religious motivations have higher percentages, although the latter two reasons do not show statistically significant differences.

Of course, the motivation for someone to choose a destination has a close relationship with his/her preferences, which is the kind of tourism experience he/she wants to have and the perceived attributes of the site elected.

	WHS visitors		Other motivations		Total		X ²	Sig.
	N (204)	% (62.8)	N (121)	% (37.2)	N	%		
Touring, visiting cities in the region	138	67.6	78	64.5	216	66.5	0.345	0.557
Business	12	5.9	12	9.9	24	7.4	1.808	0.179
Religious motivation	22	10.8	21	17.4	43	13.2	2.857	0.091
Gastronomy and wines	75	36.8	33	27.3	108	33.2	3.084	0.079
Conferences and Seminars	11	5.4	10	8.3	21	6.5	1.037	0.309
Cultural activities	97	47.5	32	26.4	129	39.7	14.130	0.000*
Sports events	7	3.4	15	12.4	22	6.8	9.673	0.002*
Visit to family and friends	39	19.1	20	16.5	59	18.2	0.343	0.558
European Capital of Culture 2012	82	40.2	27	22.3	109	33.5	10.896	0.001*
Architectural heritage	106	52.0	31	25.6	137	42.2	21.611	0.000*

Table 2. Tourists' Motivations

Source: Authors' own survey data

* indicated $p < 0.01$

In the second part of the questionnaire, tourists were asked to what extent they agree/disagree with the characteristics and attributes of the city based on a five-point Likert scale (1= total disagreement to 5= full agreement). Table 3 refers to the rank of perceived attributes of Guimarães accorded by both WHS motivated and other visitors.

Generally speaking, there is not a marked difference found in the way both groups ranked the perceived attributes of the destination. Even so, a few differences do exist with WHS visitors' data presenting lower averages, except for Good Rehabilitation of Historic Centre (linked to the origin of Portuguese Nationality), Good Signage and Tourist Information, and Good Transport Service. All other attributes seem to be better perceived by those who visit Guimarães not for a WHS main motivation, although the differences are not statistically significant. From these results, one can conclude that the destination is perceived as being able to offer much more than its historic centre.

Approaching the issue of satisfaction gained by the tourists, which is a main key for returning to the destination or recommending its visit to family and friends, data on this issue is shown in

Table 3, contrasting the expressed positions of visitors more committed to visiting World Heritage Sites and the remaining others.

	WHS visitors			Other motivations			t-value	Sig.
	Rank	Mean score	SD	Rank	Mean score	SD		
Good rehabilitation of Historic Centre	1	4.47	0.607	3	4.45	0.707	0.262	0.794
Cleaning of visited sites	2	4.45	0.751	1	4.55	0.695	-1.209	0.228
Relevant, artistic and monumental heritage	3	4.41	0.707	4	4.43	0.630	-0.238	0.812
Welcoming city	4	4.37	0.742	2	4.50	0.647	-1.572	0.117
Linked to the origin of Portuguese Nationality	5	4.22	0.867	7	4.18	0.885	0.336	0.737
Safe city	6	4.19	0.805	5	4.31	0.837	-1.298	0.196
Professionalism in service delivery	7	4.16	0.766	6	4.26	0.748	-1.148	0.252
Good value for money of services	8	4.05	0.795	8	4.11	0.762	-0.602	0.547
Quality and diversity of restaurants and coffee shops	9	3.99	0.778	10	4.06	0.830	-0.780	0.436
Good gastronomy	10	3.95	0.823	9	4.07	0.838	-1.292	0.198
Good signage and tourist information	11	3.94	0.937	11	3.92	0.945	-0.175	0.861
Quality and diversity of general shops	12	3.76	0.798	12	3.86	0.799	-1.088	0.278
Good dissemination of cultural events	13	3.72	0.810	16	3.73	0.866	-0.069	0.945
Quality hotels	14	3.70	0.725	13	3.82	0.827	-1.336	0.182
Good transport services	15	3.69	0.786	18	3.68	0.829	-0.145	0.885
Good shopping opportunities	16	3.63	0.805	17	3.72	0.951	-0.876	0.381
Good range of entertainment in terms of quantity	17	3.63	0.787	15	3.73	0.866	-1.039	0.300
Good range of entertainment in terms of quality	18	3.61	0.777	14	3.79	0.827	-1.894	0.059

Table 3. Perceived Attributes of Guimarães

Source: Authors' own survey data

SD = standard deviation

From a first look at Table 4, what seems to be most impressive is the remarkable contrast between the overall satisfaction expressed with holidays spent in Guimarães, together with the

declared willingness for recommending its visit to relatives and friends (Recommendation to Family and Friends), and the intention to return (Will Return). In this regard, the findings of the relevant literature provide suitable explanations, that is, enjoying a destination and wishing to repeat the visit is not the same (Yoon and Uysal, 2005; Nam *et al.*, 2011).

In their approach to this issue focused on the same destination, Freitas Santos *et al.* (2013) related this with the size (small/medium) of the city, expressed in the set of tourism products perceived by visitors at first glance.

An interesting result is that despite WHS visitors reporting higher satisfaction levels, other visitors want to return in a greater amount. This is probably to do with their recognition that there is more to explore in Guimarães than just the historic/cultural component. This result is consistent with the first conclusion, commenting on the results found on the visitors motivation, that “all other attributes (other than the heritage patrimony) seem to be better perceived by those who visit Guimarães not for their WHS main motivation, although the differences are not statistically significant”.

	WHS visitors (N=204)		Other motivation (N=121)		t-value	Sig.
	Agree (%) ¹	Average scores	Agree (%) ¹	Average scores ²		
Global quality of destination ²	94.6	4.35	90.1	4.27	1.139	0.256
Satisfaction with holidays in Guimarães ³	94.6	4.40	92.2	4.36	0.529	0.598
Will return ⁴	38.2	3.29	46.2	3.49	-1.466	0.144
Recommendation to family and friends ⁵	93.1	4.52	85.6	4.41	1.252	0.211

Table 4. Satisfaction and Recommendations

Source: Authors' own survey data

Notes: ¹ Percentage of respondents that agree are those that answered 4 or 5 on the 5-point Likert scales; ² Scale ranges from 1=bad to 5=excellent; ³ Scale ranges from 1=not at all satisfied to 5=very satisfied; ⁴ Scale ranges from 1=0% hypothesis to 5=100% hypothesis; ⁵ Scale ranges from 1=not recommend to 5=strongly recommend.

The results in terms of declared overall satisfaction are in line with the ones for the attributes satisfaction, not questioning the findings of Chi and Qu (2008), who claimed that attributes satisfaction can be taken as an antecedent of destination loyalty. In turn, having in mind the high level of satisfaction declared by respondents and the intention declared of repeating the visit to

the destination, one can conclude, following Nam *et al.* (2011) and Yoon and Uysal (2005), that behaviour loyalty and psychological commitment are not the same.

As a final comment on the results shown in Table 4, having in mind the results for perceived quality of the destination towards recommendation of the visit to family and friends (both for WHS and other visitors), the main idea that comes to mind is the quality of the provision of the product or service does have a positive influence on satisfaction and the intention to repeat the visit, as assumed by Bigné *et al.* (2001).

Looking to the empirical results attained as a whole, there are enough reasons to conclude the destination is performing well, even though suffering from not having a consolidated image in the international tourism market and almost certainly from not being able to adequately advertise the set of products and services it can provide to visitors. Of course, budget constrains are very relevant when dealing with the tourism promotion of the destinations.

6. Conclusions and Recommendations

The tourism industry, and within it the cultural segment, is playing a major role in sustaining and enhancing growth in economies all around the world. The importance of cultural/heritage tourism has to do with the idea of tourists visits as a memorable happening and an authentic experience and relates to the psychological dimension of tourists demand.

This empirical study, based on a survey applied to the Guimarães visitors, inquired on the motivation behind their choice of this destination, remarkable namely by being a World Heritage Site since 2001. Besides their motivations, tourists were questioned on the perceived attributes of the city on the level of the satisfaction they got from their visits.

The survey was conducted in 2015 throughout the year. In the analysis of data, descriptive statistics, chi-squares tests and t tests were used to check the statistical significance of the results. For analytical purposes, following data on visit motivation, the survey respondents were grouped between WHS motivated visitors and other visitors.

Within the main results, the authors underline the following ones as important:

- 1) The profile of the visitors showed an equilibrium of males and females, aged from 26 to 65 years old (86.4%), well educated, married (65.6%), and mostly foreigners (84.8%);
- 2) Contrasting this data on WHS motivated visitors versus visitors endowed with other motivations, the most noticeable is the major differences detected regarding education, which is in line with the findings reported in the relevant literature;

- 3) A large number of the Guimarães visitors (66.5%) visited the city with the aim of a tour around the cities of the “region”. A second reason to go to Guimarães emerged as being a World Heritage Site and third as its architectural heritage. This shows the importance of the cultural patrimony of the destination behind its attraction of visitors. Having hosted the 2012 European Capital of Culture also mattered. Putting this data together, the authors believe there is a place to speak of a city endowed of an image associated mostly to its cultural characteristics;
- 4) Approaching the city attributes, there wasn't a marked difference in the way both groups rank the perceived attributes of the destination. However, WHS visitors' data presented lower averages, except for Good Rehabilitation of Historic Centre, Good Signage and Tourist Information, and Good Transport Service. From these results, one can conclude that the destination is perceived as being able to offer much more than its historic centre;
- 5) Regarding satisfaction taken from the visit, despite WHS visitors reporting higher satisfaction levels, the other visitors declared wanting to return in a greater amount. A possible explanation for this is the recognition by them that there is more to explore in Guimarães than just the historical/cultural component;
- 6) The results also make visible that one thing is enjoying a destination and another is wishing to return to it, even having declared in large amounts intending to recommend its visit to family and friends. These results are in line with the findings of Chi and Qu (2008), who claimed that attributes satisfaction can be taken as an antecedent of destination loyalty, but loyalty should be interpreted in the sense used by Nam *et al.* (2011) and Yoon and Uysal (2005) to whom behaviour loyalty and psychological commitment are not the same.

Looking for possible policy recommendations derived from these results, they seem to confirm the idea that the destination still does not has a consolidated image in the international tourism market. The issue of the advertising for the set of products and services the city can provide to visitors seems to be one to which tourism authorities and agents need to pay particular attention. Even so, in relative terms, the city seems to be performing well, considering its emergent nature.

The results presented in this study are from a first approach chosen for the research subject and a first exploration of data collected through the survey implemented in 2015. Deeper analysis and the use of other methods could surely help in the interpretation of the results and in the consolidation (or not) of the conclusions formulated following the results.

Finally, the adequacy of the sample is under question as the number of foreigners among the visitors was larger than expected, having in mind previous data on the structure of the destination visitors. This biased sample is probably a consequence of the option taken for implementing the survey in the Guimarães Tourism Office, where Portuguese visitors tend to go less than foreigners. That being said, one has to admit that available data can express the visit motivations, perceived attributes of the city and satisfaction towards it of the foreigner visitors. They may be more representative of their approach and not necessarily the one of Portuguese tourists. This is a major limitation that should be dealt with in future research.

References

- Arezki, R., Cherif, R., Piotrowski, J. (2009), *Tourism Specialization and Economic Development: Evidence from the UNESCO World Heritage List*, International Monetary Fund, Munich Personal RePEc Archive, Paper No. 17132, 26.
- Atlante (2005), *Estudo sobre o despovoamento dos Centros Históricos da Rede Atlante*, Évora, Câmara Municipal de Évora.
- Baloglu, S., McCleary, K. (1999), "Model of destination image formation", *Annals of Tourism Research*, 26(4), 868-897.
- Besculides, A., Lee, M., McCormick, P. (2002), "Residents' perceptions of the cultural benefits of tourism", *Annals of Tourism Research*, 29(2), 303-319.
- Bigné, J. E., Sanchez, M. I., Sanchez, J. (2001), "Tourist image, evaluation variables and after purchase behaviour: interrelationship", *Tourism Management*, 22(6), 607-616.
- Chi, C. G., Qu, H. (2008), "Examining the structural relationship of destination image, tourist satisfaction and destination loyalty: an integrated approach", *Tourism Management*, 29(4), 624-636.
- Comissão Nacional da Unesco (2014), *30 anos de boas práticas. Portugal e o património mundial*, Lisbon.
- Crompton, J. L. (1979), "Motivations for pleasure vacations", *Annals of Tourism Research*, 6(4), 408-424.
- Dias, F. (2009), "Visão de síntese sobre a problemática da motivação turística", *Revista científica do IS CET*, 1, 2ª série, 177-143.
- Drost, A. (1996), "Developing sustainable tourism for World Heritage Sites", *Annals of Tourism Research*, 23(2), 479-492.
- Freitas Santos, J., Vareiro, L., Remoaldo, P., Cadima Ribeiro, J. (2013), "Evaluating the Guimarães 2012 European Capital of Culture: a tourist experience approach", Paper

- presented at *TMS ALGARVE 2013 - Tourism and Management Studies International Conference*, Olhão, Algarve, Portugal, 13 to 16 November.
- Goh, E. (2010), "Understanding the heritage tourist market segment", *International Journal of Leisure and Tourism Marketing*, 1(3), 257-270.
- Guimarães Turismo, available at: <http://www.guimaraesturismo.com> (consulted on: 25.01.2016).
- INE (2014), *Anuário Estatístico da Região Norte 2013*, Lisboa, Instituto Nacional de Estatística.
- INE (2015), *Anuário Estatístico da Região Norte 2014*, Lisboa, Instituto Nacional de Estatística.
- Kima, H., Chengb, C.-K., O'leary, J. (2007), "Understanding participation patterns and trends in tourism cultural attractions", *Tourism Management*, 28(5), 1366-1371.
- Lanford, C. (2009), "Managing for sustainable tourism: a review of six cultural World Heritage Sites", *Journal of Sustainable Tourism*, 17(1), 53-70.
- Li, M., Wu, B., Cai, L. (2008), "Tourism development of World Heritage Sites in China: A geographic perspective", *Tourism Management*, 29, 308-319.
- Li, M., Zhang, H., Xiao, H., Chen, Y. (2015), "A grid-group analysis of tourism motivation", *International Journal of Tourism Research*, 17, 35-44.
- Mendes, R., Vareiro, L. (2013), "The effects of place of residence on tourist motivations: a revised case of the Urban Quadrangle of Minho", *Tourism and Hospitality International Journal*, 1, 157-180.
- Ministério da Economia e Emprego (2012), *Plano Estratégico Nacional do Turismo: Horizonte 2013-2015*, Lisbon.
- Mohamed, N., Othman, N. (2012), "Push and Pull Factor: Determining the Visitors Satisfaction at Urban Recreational Area", *Procedia - Social and Behavioral Sciences*, 49, 175-182.
- Nam, J., Ekinci, Y., Whyatt, G. (2011), "Brand equity, brand loyalty and consumer satisfaction", *Annals of Tourism Research*, 38(3), 1009-1030.
- OECD (2009), *The Impact of Culture on Tourism*, Paris, OECD Publishing.
- OECD (2014), *OECD Tourism Trends and Policies 2014*, Paris, OECD Publishing.
- Pedersen, A. (2002), *Managing Tourism at World Heritage Sites: a Practical Manual for World Heritage Site Managers*, Paris, UNESCO World Heritage Centre.
- Poria, Y., Reichel, A., Biran, A. (2006), "Heritage site management: motivations and expectations", *Annals of Tourism Research*, 33(1), 162-178.
- Remoaldo, P., Cadima Ribeiro, J., Vareiro, L., Freitas Santos, J. (2014), "Tourists' perceptions of world heritage destinations: The case of Guimarães (Portugal)", *Tourism and Hospitality Research*, 14(4), 206-218.
- Richards, G. (1996), "Production and consumption of European cultural tourism", *Annals of Tourism Research*, 23(2), 261-283.

- Richards, G. (1997), "The social context of cultural tourism", in Greg Richards, *Cultural Tourism in Europe*, Wallingford, Cab International, 47-70.
- Richards, G., Munsters, W. (ed.) (2010), *Cultural Tourism Research Methods*, Wallingford, Cab International.
- Ritchie, J. R. Brent, Hudson, S. (2009), "Understanding and meeting the challenges of consumer/tourist experience research", *International Journal of Tourism Research*, 11(2), 111-126.
- Russo, A., Van Der Borg, J. (2002), "Planning considerations for cultural tourism: a case study of four European cities", *Tourism Management*, 23, 631-637.
- Secondi, L., Meseguer-Santamaría, M. L., Mondéjar-Jiménez, J., Vargas-Vargas, M. (2011), "Influence of tourist sector structure on motivations of heritage tourists", *The Service Industries Journal*, 31(10), 1659-1668.
- Silberberg, T. (1995), "Cultural tourism and business opportunities for museums and heritage sites", *Tourism Management*, 16(5), 361-365.
- Timothy, D. (2011), *Cultural heritage and tourism: An introduction*, Aspects of Tourism Texts, 4, Bristol, Channel View Publications.
- UNESCO (1972), *Convention concerning the protection of World Cultural and Natural Heritage*, Paris, UNESCO.
- UNESCO, Available at: <http://whc.unesco.org/en/list/> (consulted on: 22.01.2016).
- Wang, N. (2000), *Tourism and Modernity: A Sociological Analysis*, Oxford, Pergamon.
- Yankholmes, A. K. B., Akyeampong, O. A. (2010), "Tourists' perceptions of heritage tourism development in Danish-Osu, Ghana", *International Journal of Tourism Research*, 12, 603-616.
- Yoon, Y., Uysal, M. (2005), "An examination of the effects of motivation and satisfaction on destination loyalty: a structural model", *Tourism Management*, 26(1), 45-56.

Chapter VI

Historic Gardens and Patrimonialization by UNESCO:

The Botanical Garden of Coimbra, Portugal

Historic Gardens and Patrimonialization by UNESCO: The Botanical Garden of Coimbra, Portugal

SUSANA GASTAL⁴²

VIVIANE ROCHA PALMA⁴³

Abstract:

Contemporary marks include expansion of cities, extinction of nature, mobility and past as an important value. These marks enlighten historic gardens as cultural heritage and tourism product. The World Heritage List inscription ensures safeguards, but also places heritage as tourist differential. This article presents Botanical Garden of the University of Coimbra, World Heritage Site since 2013, with the aim of describing heritage historical reasons for its inscription on World Heritage List, presents visitor's profile and their knowledge about the Botanical inscription on the UNESCO list. The results show the success of the decision of UNESCO, but as this occurred associated with the University there is low visibility to Botanical Gardens patrimonialization inside and outside the University. Current management has in its planning to expand visibility of the Botanical Garden using communication and tourism tools.⁴⁴.

Keywords: Garden Tourism; Historic Gardens; World Heritage; Botanical Garden of University of Coimbra; Coimbra; Portugal

Resumo:

A expansão das cidades, a extinção da Natureza, a mobilidade e a valorização do passado são algumas das marcas do contemporâneo. Essas marcas levam à valorização dos jardins históricos como patrimônio cultural e como produto turístico. A certificação pela UNESCO como Patrimônio Mundial deve garantir salvaguardas ao Bem, mas também o coloca como diferencial turístico. Este artigo apresenta o Jardim Botânico da Universidade de Coimbra, Patrimônio Mundial desde 2013, com o objetivo de descrever as razões histórico-patrimoniais que levaram à

⁴² University of Caxias do Sul, susangastal@gmail.com

⁴³ University of Caxias do Sul, interacao05@hotmail.com

⁴⁴This research integrates the project that involves the University of Caxias do Sul and the Federal University of Rio Grande do Sul, with CNPq support, and in this moment, in partnership with the University of Coimbra

sua certificação pela UNESCO, apresentando-se o perfil do visitante e o seu conhecimento sobre a certificação da área. Os resultados apontam o acerto da decisão da UNESCO, mas, como essa se deu associada ao conjunto da Universidade, há pouca visibilidade à patrimonialização do Jardim Botânico dentro e fora da Instituição. A atual gestão tem no seu planejamento dar maior visibilidade ao Jardim Botânico, usando ferramentas de comunicação e turismo.

Palavras-chave: Turismo de Jardins; Jardins Históricos; Patrimônio Mundial; Jardim Botânico da Universidade de Coimbra; Coimbra; Portugal

Resumen:

En este artículo se presenta el Jardín Botánico de la Universidad de Coimbra, Patrimonio de la Humanidad desde 2013, con el objetivo de describir las razones históricas que llevaron a su certificación por la UNESCO. Además, a través de un estudio, se presenta el perfil del visitante y su conocimiento de la certificación. Alguno de los argumentos contemporáneos más utilizados en relación a las diferentes políticas de gestión del territorio urbano han sido: la expansión de las ciudades, la extinción de la naturaleza, la movilidad o la exaltación del pasado. La gobernabilidad y gestión de las mismas, podrían conducir a la recuperación de los jardines históricos como recurso turístico a ofrecer en forma de producto dentro del patrimonio cultural. La certificación por la UNESCO como Patrimonio Mundial debería no solo garantizar su mantenimiento, sino que también situarlo como un diferencial dentro de la oferta de turismo. Los resultados de nuestra investigación, muestran el éxito de la decisión de la UNESCO. Pero también se reseña que como esta declaración fue asociado con el conjunto de la Universidad, hay poca visibilidad a patrimonialización del Jardín Botánico en términos internos y externos a la Institución. Concluimos con la idea de que la gestión actual debería de dar en su planificación mayor visibilidad al Jardín Botánico, entre otros, con herramientas de comunicación no solo a la población autóctona, sino también a los visitantes y turistas que vienen a la ciudad.

Palabras Clave: Turismo de Jardines; Jardín Botánico de la Universidad de Coimbra; Jardines Históricos; Patrimonio Mundial

1. Introduction

Historic or botanical gardens have gain visibility in recent years due to contemporary scene, characterised, among others, by wide territorial, economic, political and population expansion of the city. Nature is disappearing in urban areas and there is an increased mobility of people as well as a specialization of trips. Fredric Jameson (2001) sums up saying that contemporary society is culturalised and that nature is gone forever, just being ransomed or sustained as product, most especially, if incorporated as heritage.

The social emphases are associated to economic emphases. Mobility, for example, leads to increasingly larger number of travellers going through the world, contributing not only to well-known mass tourism, but also expanding specialised and culturally motivated trips, among others, in search of gardens. (Galli, 2015). Data from Botanic Gardens Conservation International (BGCI, 2010) recorded 200 million visits to botanical gardens in 2010, creating a niche tourism that is analysed as garden tourism.

Even culture and its expressions are associated with the economics. Nowadays, culture is an economic sector that involves significant figures, leading to market disputes between products, such as it happens with historic centres of the cities. For that reason, UNESCO inscription as World Heritage has become highly valued. It means recognition of the importance of property, giving it visibility and adding differentiated value to it in competitive cultural and tourism markets.

Positive scenario, however, does not assume that historic centres, museums, historic gardens and botanical gardens, even those recognised as World Heritage by UNESCO, have no worries about financial maintenance and a greater integration in community, leading to actions in favour of loyalty of visitors and the expansion of this public in terms of numbers and diversification. BGCI proposes audience development, i.e. expansion of number of visitors, users and even communities (Moussouri, 2013). To achieve these goals, BGCI recommends conducting research (audience research), i.e. investigations that focus on public, their opinion and feelings, as proposed by cultural studies.

Audience research is an important means of knowing how people want to enjoy and participate, and then it may assist in the production of content for educational projects of heritage interpretation. Such content should be easily assimilated, contributing to greater awareness about proceedings carried out on Botanical Gardens (Moussouri, 2013; White 1998; Van Valkenhoef, 2013; Wang and He, 2013; Willison, 2013; Walker, 2003; Ryland, 2010; Furse-Roberts, 2009).

This chapter intends to analyse garden tourism and to introduce Botanical Garden of University of Coimbra, Alta and Sofia (JBUC), inscribed on UNESCO World Heritage List in 2013, in procedure that certified University. Finally, we present results of exploratory level research conducted in 2016 in Botanical Garden. Research traced the profile of the visitors (audience) and questioned their knowledge on area under study, in particular regarding recognition of Botanical Garden as World Heritage by UNESCO. For collecting data, we used questionnaire with open and closed questions applied to 120 individuals in July 2016.

2. Gardens, Historic Gardens and Garden Tourism

Florence Charter⁴⁵, signed by the International Council of Monuments and Sites (ICOMOS), defines historic garden as an architectural and vegetal composition which has public interest from the point of view of history and art, and for that reason it should be considered as a monument. Gardens are vegetal compositions, whose living material are perishable and at same time, renewable. Historic garden results from cyclical movement of nature associated with artistic expression and human skills in its maintenance, through gardening and natural sciences. They are equivalent to living museums, and must ensure future generation's access to natural and cultural preserved heritage. This led UNESCO and other safeguard entities to recognise its importance to figure in World Heritage List.

Among historic gardens there are some botanical gardens. Creation of botanical gardens refers to the 15th century, when great navigations, on their return to Europe, began to bring vegetal species from new worlds. Thereafter, they were deposited in enclosed areas to guarantee their survival and, if possible, reproduction. Historically, botanical gardens have demarcated a long association with researches, first ones being auxiliaries for teaching in medical schools, "with botany lessons aimed to apothecaries and surgeons" (Campbell, 2007: 250). Botanical gardens were consolidated in Italy (Pisa, 1543; Padua and Florence, 1545; Bologna, 1547), all of them associated with universities⁴⁶.

⁴⁵ The Florence Charter, 1981. International Committee of Gardens and Historical Sites. Available at: <<http://portal.iphan.gov.br/uploads/ckfinder/arquivos/Carta%20de%20Florenc%CC%A7a%201981.pdf>>. Consulted on: April 20th, 2016.

⁴⁶ The Botanic Gardens Conservation International (BGCI, 2015) does not consider that these spaces represented in the act of their foundation, the purpose and the function of botanical gardens in essence, even if they had the support of a university in their design. And it points out, however, the Botanical Garden of Missouri, in the United States, as the 1st garden considered botanical, in essence. The space had a scientific basis for identifying and researching the plants of its collection and exchange seeds with other institutions in order to expand the botanical knowledge around the world (BGCI, 2015).

Expansion of international trade routes in the 16th and 17th centuries changed botanical gardens. Kew Gardens in London and the Botanical Garden of Madrid, for example, were created to acclimatise and cultivate species brought in through expeditions to the tropics. European gardens began then to give rise to new botanical gardens in regions visited by them, to conserve and cultivate species for commercial purposes. This was the case, for example, of an *herbarium* created by Dutch in Recife, Brazil, in the 1st half of the 17th century (Gesteira, 2004). As time passes, function of these areas started being expanded. Today, they have as main objectives researches in biotechnology, biodiversity maintenance and natural environment preservation of the Planet.

Every garden is unique in its botanical content and for artistic pieces such as fountains and statuary that complement landscape and expand symbolic value of the area. That is why gardens are among most prominent tourist attractions, being example Central Park (New York, USA), Tivoli (Denmark) and Giverny (France). Among those classified by UNESCO as World Heritage are Royal Exhibition Building and Carlton Gardens (Australia), Classical Gardens of Suzhou (China), Kew Gardens (Britain) and Botanical Garden of University of Coimbra (Portugal), all of them attracting considerable visitation.

Portugal, in particular, has registered significant numbers in garden tourism. In 2008, Autonomous Region of Madeira, for example, in its 3 main gardens (Botanical Garden of Madeira, Monte Palace Tropical Garden and Quinta do Palheiro Ferreiro) registered more than 580,000 visitors who gave revenue of 3,5 million euros. In Continent, Serralves Park (Oporto) receives an average of 100,000 visitors a year. The gardens of Marquês da Fronteira Palace (Lisbon), and Botanical Garden of University of Coimbra (Coimbra) count every year 11,000 visits each⁴⁷.

Such demand leads academic literature to present what has been referred to as garden tourism (or garden visiting) (De Angelis and De Angelis Neto, 1998; Smith, 2013; Brum and Santiago, 2011; Deladerrière, 2004; Evans, 2001). Garden tourism is included as an important trend of niche tourism, understanding that "niche is nothing more than a small market consisting of a single customer or a small group of customers with the same characteristics or needs" (Silva e Carvalho, 2013:633). Garden tourism, in general terms, involves trip to visit gardens which have significance to gardening history, and to festivals or events related to botany (Thomas et al 1994:2.). Quintal (2009:71) is more restrictive and defines it as "a

⁴⁷Source: the author from the data obtained in the Tourism and Creative Economy Congress. Porto, 18th and 19th, May 2016, and in an interview with the director of the Botanical Garden of University of Coimbra.

specialised tourism niche in visits to botanical gardens, historic gardens and other gardens with high phytodiversity.”

3. Botanical Garden of the University of Coimbra

Botanical Garden of University of Coimbra has 244 years of history full of events and people who contributed to it to reach in 2013 the recognition by UNESCO as World Heritage, in same nomination process as University. University of Coimbra was founded in 1290, being part of an exclusive group of 15 higher education institutions that refer to the 13th century. Until 1537, when it is definitively installed in Coimbra, University was alternately based in this city and Lisbon.

Botanical Garden is an emblematic space for city of Coimbra and a prestigious space for Portugal due to its scientific contribution to botany. Like its counterpart in other countries, its creation is associated with medical sciences. Gradually, Garden began to interact with other areas of knowledge, such as Biology, Ecology, Anthropology, Philosophy, Pharmacy, Education, and at last Tourism. Integrating UNESCO list of properties registered as World Heritage, Botanical Garden expanded its visibility and consequent presence of visitors, who want to enjoy a public space for leisure, meeting and appreciation of natural landscape in addition to scientific culture. They are new ways of using the gardens, which managers seek to respect, without neglecting its scientific functions.

Back in time, Botanical Garden of Coimbra history started at Marquis of Pombal's administration (1750-1777), when University was modernised, particularly Medical School. University reform sought to improve Portuguese elite, only class with access to University, encouraging culture, arts and sciences (Maxwell, 1990: 110). This context led to the creation of University Botanical Garden in 1772, on land donated by Benedictine friars, next to St. Benedict College. It was called Horto Botânico, taking up only the area that is still known as Quadrado Central (Central Square).

Botanical Gardens should be a "common Establishment of Medical and Philosophical Colleges, for the cultivation of plants that are useful to Arts in general, and Medicine, in particular" (Statutes of University of Coimbra, 1772). Same document determined cultivation of all kinds of plants, especially of those that could contribute to Medicine, including plants of Portuguese overseas dominions. Even today, Garden keeps this scientific component, but it has also expanded its role in the dissemination of science and environmental education, its potential as a recreational space, as green lung in the middle of town, and now, as an important tourist

attraction and Coimbra postcard. Nowadays, Jardim Clássico (Classical Garden) occupies 3,5ha in upper level. In other 9,5ha is Mata (forest), an area that connects Upper and Lower part of city of Coimbra.

Botanical Garden original design was idealised by naturalist Domenico Vandelli, who had already founded first Portuguese Botanical Garden (Ajuda, Lisbon) in 1768. Professor Dalla-Bella and Julius Mattiazzi, the gardener responsible for Padua Botanical, also contributed to first sketches. Italian school was therefore, reference to the project of Botanical of University of Coimbra, in particular of Padua Garden (Henriques, 1876). Vandelli's project added 18 fountains, statuary and vases with floral arrangements (Figure 1). The project sent to Marquis of Pombal for approval was considered luxurious⁴⁸ and it was refused. A new project was designed with greater modesty and oriented to functionality proposed by Pombal.

Figure 1

Plant cultivation began in Quadrado Central (Central Square) in 1774, and it was completed in 1790, with addition of only a central fountain, setting that remains to present day. In that decade, Medical School to study plants therapeutic properties and Escolas Sistemáticas (Systematic Schools) for botanical studies, as well as a series of rectangular flower beds for cultivation of medicinal plants were all concluded (Henriques, 1876).

Italian botanist Domenico Vandelli was first director of Botanical Garden, a position he held until 1791 when Portuguese botanist Félix Avelar Brotero, Professor of Botany and Agriculture, took over direction (Brites, 2006). Brotero was a scholar of Portuguese flora and went around the country searching for species hitherto unknown or little studied and he cultivated such plants on site (Braga, 1898). German physician and naturalist, Heinrich Friedrich Link, who visited Coimbra in 1799, wrote about Botanical Garden that "this property was superiorly organised and it is more interesting than the Lisbon Botanical Garden. Next to each plant it is found a stake with the name of the plant written on it, which is a similar distribution to the Jardin des Plantes in Paris (...)" (Braga, 1898).

⁴⁸ The letter in which the Marquis of Pombal expresses its indignation at time of writing: "Os dictos professores são italianos: e a gente d'esta nação, acostumada a ver deitar para o ar centenas de mil cruzados de Portugal em Roma, e cheia d'este entusiasmo, julga que tudo o que não é excessivamente custoso não é digno do nome portuguez ou do seu nome d'elles. Eu, porém, entendo até agora, e entenderei sempre, que as cousas não são boas porque são muito custosas e magnificas, mas sim e tão somente porque são próprias e adequadas para o uso que d'ellas se deve fazer" (Carvalho, 1872).

Brotero's long work included publication of *Flora Lusitânica* (Lusitanian Flora) in 1804. This book describes 1,885 species in Latin, using Linnaean classification system (Carvalho, 1987). Brotero also signed extensive report, exposing garden conditions in terms of accomplished work and what was still necessary to be done, and submitted it to the rector of University in 1807. Report echoed, leading to purchase of new areas and duplicating Garden (Figure 2). During Napoleonic wars, Brotero took refuge in Lisbon, but remained as director of Institution until 1811 (Henriques, 1876).

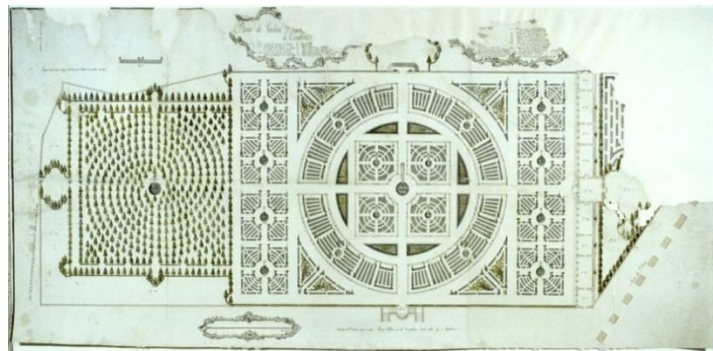


Figure 1. Plant of the University of Coimbra Botanical Garden, 1773

Source: Botany Library of University of Coimbra

Figure 2

António Neves de Mello succeeds Brotero as Professor of Botany and also as director of the Garden. In his administration, impressive railing made of stone, iron and brass was installed and project for main gate by Joseph Couto dos Santos Leal was approved (Brites, 2006). Neves de Mello was also responsible for *Garden Catalog* (1882), reporting existence of 1,834 species of plants and a store of 4000 species of seed. In same year he was expelled from University and – even returning between 1825 and 1834 – he was dismissed for political reasons (Henriques, 1876). From 1834 to 1854, stairs of the Alameda Central were built and the main iron gate was installed in 1844 (Image 3), a blacksmithing work by Master Manuel Bernardes Galinha. His signature can still be seen in locks of the gate (Henriques, 1876).

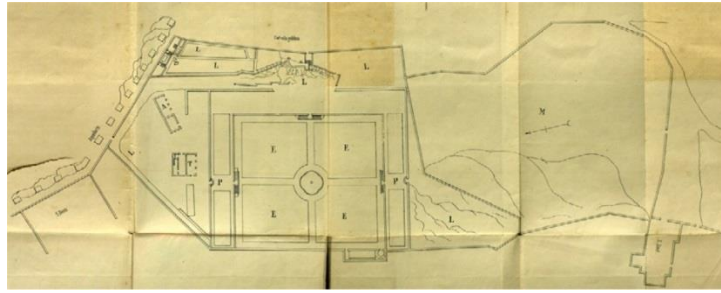


Figure 2. Plant of the University of Coimbra Botanical Garden, around 1800

Source: Henriques, 1876

Figure 3

In 1852, director Antonino Rodrigues Vidal presented a proposal for building a greenhouse, which was approved only two years later, in Henrique Couto d’Almeida’s administration. Couto named Pedro José Pezerat, a French engineer, to carry out construction. Three years later, most of the structure was ready, but for money reasons, only in 1862 last part was ordered to Massarelos Foundry, in Oporto. Conclusion only happened in 1865 and greenhouse is still viewed as main structure in Botanical Garden of Coimbra (Brites, 2006; Sousa, 2001) (Figure 4).



Figure 3. Project for the main gate of the JBUC, 1818

Source: Reis Trincão, 2014

Figure 4

Conclusion of the greenhouse allowed expanding exchanges and acquisition of plants, and hiring of German gardener Edmond Goeze, who had worked at Botanical Gardens at Kew, in England, and in Paris. It inaugurated a new phase for JBUC. In 1868, Antonino José Rodrigues Vidal, director of the Garden, encouraged Goeze to organise and publish first *Index Seminum*, a catalogue listing seeds of Garden that are available for exchange; a practice that still happens. The so-called 'Mata' began to be systematically planted at that same time.

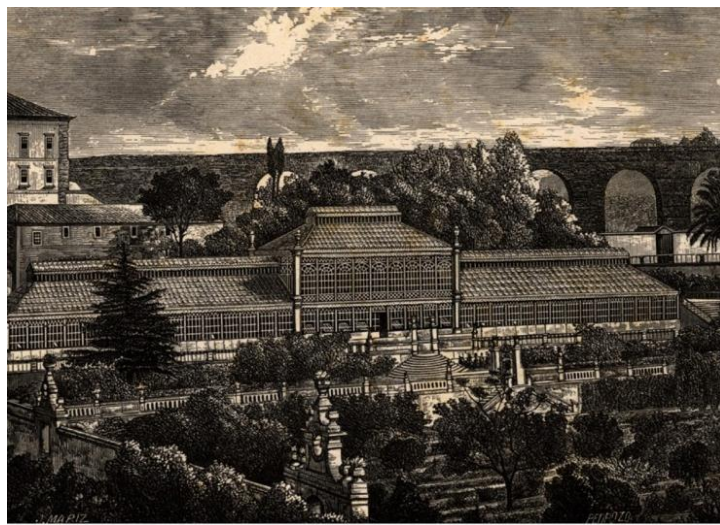


Figure 4. Engraving of the University of Coimbra Botanical Garden's greenhouse

Source: Joaquim Mariz, 1867 (University of Coimbra Botany Library)

Another major player in construction of Botanical Garden of Coimbra was Júlio Henriques, who took office in 1873. He was director for 45 years, exercising this activity in parallel with teaching and researching in Botany and Agriculture. He established relationships with other botanical gardens and assembled a qualified team to introduce new collections in different spaces. He organised Herbarium, created Botanical Library and founded Botanical Museum. During his management, building of São Bento School, which was extinct in 1868, was connected to Botanical Garden (Figure 5). In building, they settled classrooms, work offices, accommodations for employees, workshops, storage houses, botanical museum, herbarium and a library. It is architectural configuration that is still present today.

Figure 5

Henriques was responsible for some contributions in the city of Coimbra, such as afforestation projects of Quinta de Santa Cruz, current Sá da Bandeira Avenue, and Jardim da Sereia. He introduced exotic species in other areas of the city, such as Mata do Choupal and Mata do Vale de Canas. He was the founder of Broterian Society and its Bulletin. In 1887, it was built in Botanical Garden, by suggestion of Júlio Henriques, a statue in honour of Avelar Brotero, first statue in Portugal to honour a man of science (Fonseca, 2009; ICNF, 2005; Loureiro, 2007; Henriques, 1890). (Figure 5).



Figure 5. University of Coimbra Botanical Garden plant, in 1873

Source: Henriques, 1876

Figure 6

Before retiring, Henriques started planting bamboos in Mata, completed work on Alameda Tílias and reshaped Quadrado Central. He replanted upper terrace with ornamental plants and plants arranged by botanical family and concluded placement of stone and iron railing in interior spaces of the Garden. His work was publicly recognised in a decree determining that Garden and its annexes - Herbarium, Museum, Library and Laboratory - would be renamed as Julio Henriques Institute (Brites, 2006; Coimbra Gazeta, 1925. The Institute, 1925).

The difficult task of continuing Júlio Henriques's work fell to Luís Carrisso in 1918. He worked to strengthen relations and exchanges with other botanical gardens. He restructured Seed Bank and secured international recognition of *Index Seminum*. He opened spaces for large trees and ornamental plants and created areas for visitors. As researcher, he invested in overseas territories, being a great expeditionary in Africa, where he died in one of his missions (Balcony, 2007; Martin, 2011; Guimarães, 2008; Brites, 2006).

Garden was for a few years under direction of Professors from Science Department until Abílio Fernandes took the office. He improved garden, together with Administrative Commission of Work Plan of University City of Coimbra (Barros Neves, 1980). Improvement, between 1944 and 1950, became known as works of arrangement and embellishment. The planning included restoration of railing, stairs and gates; water tank installation; construction of accommodations for employees, building of a cold greenhouse and of a bridge between Mata and Jardim Clássico.

Project also contemplated installation of fountains in Quadrado Central lake, and hundreds of benches all over the Garden. Finally, there were some improvements in landscaping, introduction of new species of plants, placement of plates describing plants, installation of living fences, introduction of lawns and shrubs and flowering plants. Historical component was not forgotten. Abílio Fernandes managed to receive funding for construction of a statue in honour of Júlio Henriques and for a medallion honouring Luís Carrisso. In 1969, University Commission was extinct and, in 1974, Abílio Fernandes left the Garden direction, after an intense life as a manager, professor and researcher (Brites, 2006; Barros Neves, 1980; Quintanilha, 1980).

In 1990s, under direction of José Mesquita, Mata was once again a target for action, with all main paths being cobbled. Six years later, Botanical was classified as Public Interest Property (Decree-Law No. 2/96). Modern Era in the Garden was marked by Helena Freitas's contributions (2004 - 2012), who led projects and partnerships in order to attract national and European funds for major actions and reforms in Botanical Garden. In total, there were more than two million euros for rehabilitation of scientific and technological infrastructure, which ensured historic contribution of the area, a better teaching and dissemination of knowledge, rehabilitation of tropical greenhouse and cold greenhouse, building of a new greenhouse, improvement of storage conditions for seed bank and also building of space for science divulgation and improvement of support equipment. Freitas also orchestrated decision to open a path in Mata that would be a link between Upper and Lower Town, reunifying Coimbra.

Meantime, in January 2012, formalization within UNESCO for application of University of Coimbra as World Heritage is also submitted, which was result of a process started in 2003. Botanical Garden was part of proposal and request accepted by UNESCO in 2013 (Figure 7).

In May 2015, António Carmo Gouveia, researcher and doctor in Biology, became Garden director, replacing Paulo Trincão who was in office for three years, both specifically appointed for director title. Until, position was accumulated with teaching in some University department. Change marks new position of Rectory, understanding need for professionalization of management, but also meeting demands arising from inscription in UNESCO List. Plan of action, coordinated by Gouveia, highlights five strategic lines established to achieve objectives set by new scientific and social functions that Botanical Garden should pursue (Reis and Trincão, 2014):

- (1) Encouraging scientific research, providing access and appropriate research conditions: preserving existing botanical collections and foster new areas; rescuing the garden history and its architecture to make them world reference in history of science.
- (2) Disseminating Science and Scientific Culture: through formal and informal means, contributing to social understanding of plants, establishing close links between the Garden and people.
- (3) Restructuring the educational service: implementing programmes with greater diversity, flexibility and visibility, which are appropriate to profiles and needs of various audiences (students, families, children and youth), awakening their interest in science, nature and botany.
- (4) *Ágora* - Citizenship and Public Area of Recreation: Garden should be a strategic place for enjoyment of citizens, in view of its central location in city. Equipping garden with necessary infrastructure for use of leisure, such as the implementation of urban furniture, proper signalization of areas and routes and creation of permanent spaces for dissemination of science, culture and arts.
- (5) Promoting tourism: For tourist insertion it will be required some improvements in accessibility, implementation of support services, availability of urban mobility and proper signalization. Later, guided tours in different languages will be created, supported by graphics and editorial material for sale and free distribution to tourists.



Figure 6. Tribute Monument to Avelar Brotero

Source: Authors, 2016

Figure 7

In addition to targets set in Strategic Plan, management aims toward financial sustainability demands some actions of communication and promotion of Botanic Garden, and also qualification and professionalization in relationship with tourist. Going through online portal of University of Coimbra, it is observed a timid presence of Botanic Garden on it. The 'Tourism UC' link in portal cover refers to a page that highlights Royal Palace, College of Jesus, visitation programmes and permanent exhibitions. Another link indicating what to visit lists, once again, Royal Palace, Saint Michael Chapel, Iron Gate, Baroque Library, College of Jesus and University Tower. Botanical Garden appears only within pages 'Extension' and 'Academy'. This finding leads to believe that University itself still ignores the importance of Botanic Garden as a historic garden, in addition to its value as a scientific research area.



Figure 7. Coimbra panoramic view

Source: Terceira Dimensão Fotos Aéreas, 2015

3.1 The goer

Audience poll interviewed 120 people in Botanical Garden in the last week of July, 2016. As proposed by BGCI, audience researches allow understanding demands and interests of goers, to support future actions of heritage interpretation (prints, signalling, visitor centre ...) and communication with wider public. Original questionnaire has 32 open and closed questions, divided into five sections. This analysis considers only 12 closed questions included in fifth section (called Characterization of the Respondent) to meet objective of tracing a profile of goer. Moreover, two closed questions of second section (called Characterization of Travel) were used to meet objective of evaluating knowledge of inclusion of Botanical Garden in UNESCO list. Finally, three questions were selected from first section (called Characterization of Visit) trying to understand people's motivation to visit or learn about Botanical Garden, and how this visit takes place and where tourists and excursionists come from.

Numbers that come from research reveal that visitor in Coimbra is mostly woman (62.6%). Greater presence of women is explained by most common form of visit to garden, that is, by family groups (44%) which, when approached by a female researcher, tend to elect women (partners, mothers or daughters) to answer the questionnaire. Public attending Botanical is under 35 (50%), but there are many (36%) between 50 and 60 years, indicating a mature goer. In this public, there are a small majority of singles (47%), a significant number of married people (43%), and fewer divorced people (7%) and widowers (3%). In terms of occupation, most of them are employees (42%), but there are freelancers or independent professionals (16%) and a considerable percentage of students (27%).

Number of students is justified by the proximity of Botanical and University of Coimbra, one of the most popular places in Portugal for graduation, academic mobility programme and postgraduate studies. University of Coimbra currently estimates a number of 30,000 enrolled students and some of these students elect Botanical as a place to relax between classes or to study under the shadows of old trees, especially in the summer, period of the survey. But regardless situation of students, the sum of the graduates (43%) and postgraduates or masters (34%) and doctoral degrees (10%) reaches a significant percentage of 87% of the sample. This percentage may be associated with aforementioned higher age group, but also refers to what has been stated on niche tourism, which in case of historic gardens; it would be associated with a good academic educational background.

Among respondents, Portuguese nationality is predominant (38%), but there is a good number of French (12%), followed by Germans (7.5%), Spaniards (7.5%), Brazilians (6%), Dutch (5%) and Belgians (5%). Other nationalities were British, Chinese, Italians, Poles, Australians, Maltese, Angolans, Hungarians, Romanians, Argentineans, Americans, Canadians, Swiss, Lithuanians and Russians who together represent 19% of those surveyed. Although Portuguese are majority in figures, in absolute numbers they are supplanted by foreigners from 18 countries (12 from Europe, 2 from South America, 2 from North America, 1 from Asia and 1 from Australia).

Among Portuguese visitors, city of Coimbra, as expected, leads the ranking (26%), but 18 other Portuguese districts are cited, being 12 located in the Central Region where the city of Coimbra is, 4 located in the North and 1 in Lisbon. Second most mentioned Portuguese city in the survey was Leiria (3%), matched, for example, with same number of visitors from Brazil, Belgium, Lisbon, Italy, England and Poland (3%). Places like Aveiro, Mealhada and Cantanhede, neighbours of Coimbra, brought to Botanical Garden a number of visitors equivalent to the number of visitors from Australia, Switzerland and China (2%).

Public interviewed visited Botanical Garden accompanied (88%) by family members (44%) friends (14%) and boyfriends or partners (25%). A considerable number of them (26%) claim to be in Garden because it integrates a tourist circuit of the city of Coimbra, others for pleasure, for practicing outdoor sports, for reading or dating (28%), but also for escaping noise and movement of the city (22%). In small, but significant number, there are some visitors with botanical interest who want to see plants and participate in activities related to nature and science (16%).

Two-thirds (77%) of respondents answered affirmatively when asked about their knowledge on fact that University of Coimbra, Alta and Sofia is a property inscribed on List of World

Heritage by UNESCO. When same question was asked in relation to Botanical Garden, half of respondents (50%) were unaware of the fact. If we consider high level of academic education of respondents, the result is, to some extent, surprising. Likely reason for discrepancy is supported on verbal reports from visitors about absence of specific disclosure on botanical and historic garden, on patrimony in University materials and local and regional tourist authorities.

4. Conclusion

The data collected by survey show the rich history of Botanical Garden of University of Coimbra since its creation, 244 years ago, during Pombalino government and justify its treatment as historic garden and, of course, its inclusion on World Heritage List of UNESCO. Data also indicate that inclusion in the list does not guarantee public recognition of property as a significant heritage. Expanding frequency of visitors, users or communities, as proposed by Moussouri (2013), will be result of management actions and communication policies.

Results achieved by research in Coimbra indicate that growing tourist flow in Botanical Garden is associated with visits to University, as 26% was part of a visitation itinerary. Even so, they are modest numbers compared to total visits to Institution. In 2015, University received 350,000 visitors, 90% of them were foreigners; these numbers express only those who purchased tickets. Forecast for 2016 is 400,000 paid visitors, an increase of 166% compared to 150,000 visitors recorded in 2013. Botanical, on the other hand, recorded 11,000 visits in 2015, even without charging admission.

Joanina Library, considered in most international rankings as 'one of the most beautiful in the world', is the space of University that attracts more tourists, followed by former throne room, called now Hall of Capelos, also known as Great Hall of Acts. And these are places of greater integration and visibility in the tourism products offered by Tourism Special Project and UC Shop, which is the department responsible for ticket sales and service to visitors. Neither Botanical Garden nor any information about free admission appears among visitation programmes available for purchasing of tickets on online page. Attractions map of University, given to those who purchase tickets directly from shop, also does not include Garden.

It is notable the lack of coordination between academic sectors in the marketing of tourist attractions. It is possible to conclude, therefore, that visit to Botanical is spontaneous, because only 16% declared botanical interest in visit. Current management of Botanical Garden presents, in target five of planning, proposals of actions for disclosure and guidance to tourists, such as maps of the site and use of social networks to give visibility to programming. Other actions

include help desk, distribution of information material, signs for orientation and patrimonial interpretation, guided tours and development of a smartphone application for self-guided visit.

The contribution proposal contained in submission to UNESCO includes redevelopment project of area for better use of existing historical buildings, restoring their original functions or adapting them to new uses. Architectural heritage built, sculptural elements, statuary, gates and greenhouses have already been restored. Plan also provides for recovery scientific, educational, social importance and greater dialogue with tourism.

Time is opportune for this approach, considering what literature presents in terms of garden tourism and interests of public specialised in historic gardens and botanical gardens. This is a niche tourism booming, which is given as a complement to scientific and structural activities that are fundamental to Botanical Gardens.

References

- Barros Neves, J. (1980), "Prof. Doutor Abílio Fernandes", *Boletim da Sociedade Broteriana*, V. LIII, 2.^a série, 1^a parte, VII-XXXVIII.
- Braga, T. (1898), "História da Universidade de Coimbra nas suas relações com a Instrução Pública Portuguesa", *Tomo III - 1700-1800*, Lisboa, Typografia da Academia Real de Ciências.
- Braga, T. (1902), "História da Universidade de Coimbra nas suas relações com a Instrução Pública Portuguesa", *Tomo IV - 1801-1872*, Lisboa, Typografia da Academia Real de Ciências.
- Brites, J. (2006), "Jardim Botânico de Coimbra: contraponto entre a arte e a ciência" in Bernaschina P., *Transnatural*, Coimbra, Artez.
- Brum, P., Santiago, J. (2011), *Os jardins históricos de Macau proposta de um itinerário turístico*, Dissertação Mestrado Arquitectura Paisagista, Instituto Técnico de Lisboa.
- Camargo, H.L. (2007), *Uma pré-história do turismo no Brasil. Recreações aristocráticas e lazeres burgueses (1808- 1850)*, São Paulo, Aleph.
- Carvalho, J.M. de. (1996), "A Construção da Ordem: a elite política imperial", *Teatro de Sombras: a política imperial*, Rio de Janeiro, Editora UFRJ.
- De Angelis, B.L.D., De Angelis Neto, G. (1998), "Paisagem, turismo e planejamento urbano", *Acta Scientiarum*, 20(4), 537-543.
- Deladerrière, B. (2004), "Le tourisme de jardins, quelsenjeux?", *Revue Parcs&Jardins*, 24/11, 10-12.
- Estatutos da Universidade de Coimbra (1772), *Compilados debaixo da immediata e suprema inspecção d'el-Rei D. José I pela Junta de Providencia Litteraria*, Lisboa, Regia Officina Typografica.

- Evans, M. (2001), "Gardens tourism - is the market really blooming?", *Tourism Insights: Sharing sector expertise, analysis and intelligence*, 12(4), 153-159.
- Fonseca, R. (2009), *Coimbra, a cidade verde – introdução à análise dos espaços verdes da cidade de Coimbra*, Prova final de Licenciatura apresentada ao Departamento de Arquitectura da Faculdade de Ciências e Tecnologias da Universidade de Coimbra.
- Furse-Roberts, J. (2009), "Interpretation master planning: creating holistic narrative experiences", *Botanic Gardens Conservation International*, 6(1), s.p.
- Galli, P. (2015), "Cidades e desenvolvimento de destinos turísticos secundários: uma abordagem com foco no sistema de transporte aquaviário", *Caderno Virtual de Turismo*, 15 (3), 362-377.
- Gastal, S., Da Silva, A. F. (2015), "Jardins e Jardim Histórico: Espaço de memória e possibilidades para o turismo", *Revista Ibero Americana de Turismo*, número especial, 63-85.
- Gastal, S., Da Silva, A.V. F. (2014), "Lazer, tempo e espaço: o Jardim Botânico de Porto Alegre, RS", *Anais Seminário Associação Nacional de Pesquisa e Pós-Graduação em Turismo*, available at: http://www.anptur.org.br/anptur/anais/v.11/DCL4_pdf/27.pdf.
- Gazeta de Coimbra (1925), "Consagrando um sábio – A sessão de homenagem ao sr. Dr. Júlio Henriques", *Ano XIV*, 19 de Maio.
- Gesteira, H. M. (2004), "O Recife Holandês: História natural e colonização neerlandesa (1624-1654)", *Revista SBHC*, 2(1),6-21.
- Guimarães, J. (2008), *Carriso, LuísWittnich 1886-1937*, Biblioteca Digital de Botânica, available at: <http://bibdigital.bot.uc.pt>.
- Henriques, J.A. (1876), *O Jardim Botânico da Universidade de Coimbra*, Coimbra, Imprensa da Universidade.
- Henriques, J.A. (1890), *O monumento a Brotero*, Coimbra, Imprensa da Universidade.
- ICOMOS (1982), *Historic Gardens – The Florence Charter, 1981*, Paris, International Council on Monuments and Sites.
- Jameson, F. (2001), *Cultura do dinheiro*, Petrópolis, RJ, Vozes.
- Loureiro, A. C. (2007), *Júlio Augusto Henriques: pioneiro nas ideias evolucionistas em Portugal*, Tese de Mestrado em Comunicação e Educação em Ciência apresentada à Secção Autónoma de Ciências Sociais, Jurídicas e Políticas da Universidade de Aveiro.
- Martins, A.C. (2011) "Colher plantas. Semear ideias. Luís W. Carriso (1886-1937) e a ocupação científica das colónias portuguesas (1934)", *Congresso Luso-Brasileiro de História das Ciências*, Coimbra.
- Maxwell, K. (1996), *Marquês de Pombal – Paradoxo do Iluminismo*, Rio de Janeiro, Paz e Terra.
- Moussouri, T. (2013), "Good connections making audience research a collaborative process", *BGCI-Roots*, 10 (2), 6-9.

- O Instituto (1925), "Instituto Botânico Dr. Júlio Henriques", *O Instituto*, 72(3), 247-265.
- Quintal, R. (2009), "A importância dos jardins como nicho turístico na Madeira" in J. Simões and C. Ferreira (eds.), *Turismos de nicho: motivações, produtos, territórios*, Lisboa, Centro de Estudos Geográficos da Universidade de Lisboa, 71-93.
- Quintanilha, A. (1980), "Evocando o passado", *Boletim da Sociedade Broteriana*, LIII, 2.^a série, 1.^a parte, LXXV-LXXXIX.
- Reis, C., Trincão, P.R. (2014), *Jardim Botânico da Universidade de Coimbra: 241 anos de história*, CIDTFF - Centro de Investigação Didática e Tecnologia na Formação de Formadores da Universidade de Aveiro and JBUC – Jardim Botânico da Universidade de Coimbra.
- Ryland, P. (2010), "Who Goes There?", *Association for Heritage Interpretation Journal*, 10 (2), 15-17.
- Sampaio, G. (1896), "Estudos de flora local. I. Vasculares do Porto", *Revista de Ciências Naturaes e Sociaes*, 4, 150 -158.
- Silva, S., Carvalho, P. (2013) "Os jardins históricos: da dimensão patrimonial ao seu potencial turístico", *Turismo & Sociedade*, 6 (3), 605-625.
- Silva, S. M. P. (2013), "A dimensão patrimonial e o potencial turístico dos jardins históricos: o caso de Portugal", *Biblio 3w: revista bibliográfica de geografia y ciencias sociales*, 18, s.p.
- Sousa, L. P. (2001), *Jardim Botânico da Universidade de Coimbra: introdução ao estudo da sua evolução*, Coimbra, Prova final de Licenciatura apresentada ao Departamento de Arquitectura da Faculdade de Ciências e Tecnologias da Universidade de Coimbra.
- Thomas, R. P. et al. (1994), *Garden tourism and its potential organization in Canterbury*, Canterbury, Department of Parks, Recreation and Tourism, Lincoln University.
- Van Valkenhoef, L. (2013), "Audience participation using visitor surveys to drive innovation", *BGCI-Roots*, 10 (2), 18-21.
- Varanda, J. (2007), "O biombo de fotos", in Bernaschina P., *Missão Botânica Transnatural – Angola 1927-1937*, Coimbra, Artez.
- Walker, T. (2003), "Wry reflections on a botanical garden", *Association for Heritage Interpretation Journal*, 9(2), s.p.
- Wang, X., He, H. (2013), "Binocular vision puts new audiences in the frame", *BGCI-Roots*, 10(2), 26-29.
- White, R. A. (1998), "Recepção: a abordagem dos estudos culturais", *Comunicação & Educação*, (12), 57- 76.
- Willison, J. (2013), "First word our audience keeps us real and relevant", *BGCI-Roots*, 10 (2), 2-5.

Chapter VII

Sagres Fortress in the Algarve:

**Between the Myth, the Cultural Tourism Destination and the
European Heritage Label**

Sagres Fortress in the Algarve: Between the Myth, the Cultural Tourism Destination and the European Heritage Label

MARIA ALEXANDRA GONÇALVES⁴⁹

RUI PARREIRA⁵⁰

NATÉRCIA MAGALHÃES⁵¹

LUCIANO RAFAEL⁵²

Abstract:

The reflection about the Fortress of Sagres - the main monument of the Algarve - is associated with many different issues, such as: territory policies, landscape, sustainable development, cultural reconstruction and with the enormous challenge of capitalizing the community as usual heritage user. The cultural sustainability of the monument, the sense of the place, the stories, the fortress as a territorial brand, communication and mediation, community volunteering groups are some of the topics to develop in relation to this space of glory, a place of preservation of memories and splendour of the discoveries that we will address and develop in the approach to this heritage. The new reality brought about by the recognition of European Heritage Label makes us return to the idea of a heritage that is renewed and that has a narration which is essential to the history of the region. We will defend the sustainable development of heritage and cultural resources and strategies associated with the work being implemented.

Keywords: Politics and Management; Visitors; Tourism; European Heritage Label

Resumo:

A reflexão em torno da Fortaleza de Sagres, o principal monumento do Algarve, está associada a diferentes questões, tais como: políticas de território, paisagem, desenvolvimento

⁴⁹ University of the Algarve / Regional Cultural Office of the Algarve, CIEO - Research Centre for Spatial and Organizational Dynamics, alexandra.goncalves@cultalg.pt

⁵⁰ Regional Cultural Office of the Algarve, Archaeological Research Centre of the Lisbon University (UNIARQ), rparreira@cultalg.pt

⁵¹ Regional Cultural Office of the Algarve, nmagalhaes@cultalg.pt

⁵² Regional Cultural Office of the Algarve, University of the Algarve, lrafael@cultalg.pt

sustentado, reconstituição cultural e o desafio de capitalizar a comunidade enquanto público frequentador deste património. A sustentabilidade cultural do monumento, o sentir do lugar, as histórias que a Fortaleza conta, o lugar como marca territorial, a comunicação e a mediação, os grupos voluntários da comunidade são alguns dos tópicos a desenvolver na dinamização deste espaço de glórias, lugar de preservação de memórias e de grandiosidade que procuraremos tratar na abordagem a desenvolver sobre este património. A nova realidade suscitada pela consagração de Marca do Património Europeu faz regressar a ideia de um património que se renova e que possui uma narrativa essencial para a história da região. Defenderemos que o desenvolvimento sustentado do património e dos recursos culturais é possível e as estratégias associadas a este trabalho a ser implementadas.

Palavras-chave: Políticas e Gestão; Visitantes; Turismo; Marca do Património Europeu

Resumen:

La reflexión sobre la Fortaleza de Sagres, el monumento principal del Algarve, se asocia con diferentes temas, tales como las políticas de territorio, el paisaje, el desarrollo sostenible, la reconstrucción cultural y el desafío de la capitalización de la comunidad como un frequentador de este patrimonio. La sostenibilidad cultural del monumento, la sensación del lugar, las historias que Fortaleza tiene, el lugar como una marca territorial, la comunicación y la mediación, los grupos de voluntarios de la comunidad, son algunos de los temas que se desarrollan en la estimulación de esta zona de glorias, lugar de preservación de memorias y de grandeza que buscaremos tratar como el enfoque para desarrollar este patrimonio. La nueva realidad planteada por la consagración Sello de Patrimonio Europeo que intenta traer de vuelta a la idea de un patrimonio que se renueva y tiene una narrativa esencial para la historia de la región. Vamos a argumentar que el desarrollo sostenible del patrimonio y los recursos culturales es posible y presentar estrategias asociadas con este trabajo a implementar.

Palabras Clave: Políticas y Gestión; Visitantes; Turismo; Sello de Patrimonio Europeo

1. Introduction

Cultural heritage is a fragile resource and therefore requires a prudent and sustained management, especially if it is associated to the development of tourism and an economic and business activity. It has been widely recognised in other articles that tourism uses the uniqueness

and the distinctive particularities of the locations as main attraction forces of destinations. Cultural heritage is essential as proof of an authentic and distinctive speech (see Gautham, 2003 and 2007). Tourism and cultural heritage have been responsible for the emergence of a great diversity of cultural products; however, this relationship has not always been balanced. On the other hand, the economic and financial resources that tourism can generate for the conservation and preservation of cultural heritage are very encouraging benefits (McKercher and du Cros, 2002; Russian and Van der Borg, 2002).

The use of the cultural heritage for tourism purposes it is a matter of some sensitivity, recognising some heritage managers that tourism is often a threat (AHC, 2004; Butler, 1999; Herbert, 1995). Today, it is also assumed that the cultural heritage can be a main resource for the community, but it is required a balanced use (Ashworth, 1994; Bellacasa, 1999; Nuryanti, 1996).

This article is a case study and seeks to understand, explore or describe events and complex contexts in which are simultaneously involved several factors. The main objective is to describe and analyze the phenomenon and evaluate its impact and process of development. Bell (1989) defines the case study as a broad term for a set of research methods whose main concern is the interaction between factors and events. It is a research that studies a particular situation that we define as unique and special, and that we wish it can contribute to a global perception and comprehension of an interesting phenomenon.

This is a very particular research, that looks deliberately about a specific situation that is supposed to be unique or special, at least in certain aspects, seeking to find out what's in it more essential and characteristic, and thus wants to contribute to the overall understanding of a given phenomenon. In the Algarve, the fortress of Sagres is simultaneously a regional and national reference but is also the national monument that receives the largest number of visitors and school visits in the South of Portugal. Sagres Fortress is the monument with the greatest notoriety recognised in the Algarve region and any intervention generates big sensitivities.

2. The holy place and its heritage

The Algarve region of Portugal was the last to be conquered to the Moors. The extreme southwest of this Algarve, where Sagres and the fortress are located, ends in two promontories (São Vicente and Sagres), having a great scenic beauty and old aged traces of settlements that date back to the Mesolithic and the Neolithic. Among the most significant archaeological remains are the *Concheiro Mesolithic Holy Valley*, some fragments of cardinal ceramic discovered in Sagres and the menhirs that have been found throughout all the *Vila do Bispo* council.



Figure 1. Sagres Fortress (aerial view)

Source: Authors

The significant presence of menhirs and religious monuments of Neolithic period dated those signs to the third millennium BC (Garcia and Cunha, 2004). Sagres is a place of memory where the Nature, the sacred and the action of Man always acted in a symbiotic way, creating new myths and religious practices. It is the birthplace of new myths, old memories and knowledge, which led to incessant demand by visitors from all over the world. Is the most visited monument on the South of the Tejo River and has been the subject of an intense rehabilitation and valorisation efforts by public authorities over the past few years. Its history linked to Discoveries refers to a first age of what we today call ' the first globalisation' era.

There begins and ends Europe. It is frequently said that "Sagres gave new worlds to the World." The monumental set consists of the Sagres promontory and the fortress, classified as a national monument in 1910. From the built elements, we can refer some of the main spotlights, such as: the wall in the shape of saw teeth that dates from "Henry, the Navigator" presence at Sagres; the ramparts that were added in the 16th century, the barbican changed in Philippine time and subsequently incorporated in the 18th century tower; the buildings of the «tide» whose origin dates back to the 15th century, known as *Vila do Infante* and including a tower and tank, and the 'Governor house'; the Church of Our Lady of Grace (primitive Church of Santa Maria), built by Prince Henry in 1459; the enigmatic 'rose of the winds'; the fortress of the late 18th century, with two bastions, linked by a curtain wall, neoclassical gate with the access corridor to the guardhouse installed on the ground floor of the central tower, a set of batteries arranged along the fortress and an old stable (nowadays adapted to auditorium).

There is also an important natural heritage associated. The promontory of Sagres offers an interesting fauna and flora biodiversity of exceptional importance and of rare endemics.

The latest interventions in the 20th century resulted of central state intervention. Again, in the late 50's took place a reordering of the landscape, and latter in the 90's some rehabilitation works were promoted with the aim to recover and met the symbolic value that the common European citizen gives to the Promontory of Sagres and to its key role of place in European history.

This place has special relevance both in discoveries and expansion of maritime trade and the overseas territories undertaken by the Iberian nations in the 15th century (in particular by the fact that it was one of the *Infante D. Henrique's places of residence*, the prince that dedicated his life to the direct management of overseas interests) or in the control of navigation between the Atlantic and the Mediterranean between the 15th and 18th centuries. Sagres Promontory is a privileged maritime control point and the largest military corner of Europe, with particular relevance to the naval defence of the Peninsular and European territories. It is a privileged point of southern European maritime border and the border of Western Christianity with the Muslim world.

A place of myths and memories, Sagres has long since become a property of European culture and universal reference. The symbolic, historical and physical values of the Promontory give visibility to a place that celebrates and symbolizes the integration, ideals and history of Europe.

The cultural landscape includes, in its historical dimension, one of the greatest concentrations of menhirs from the Megalithic period in Europe and in the memory of *Crow Church*, the most important place of pilgrimage of the Christian Mozarabs between the 8th and 12th centuries. The history of Sagres is related to other cultural items from the far west of Algarve, in a 'cluster' particularly relevant to European history: the Chapel of our Lady of Guadalupe (that refers to the religious dimension of the Maritime Discoveries and for the redemption of captives in this part of Christianity); the city of Lagos (headquarters of the commercial empire from the Henry the Navigator's era that received the first black slaves captured by Europeans in sub-Saharan Africa in the 15th century – remembered in the building called "Slaves' Market" and as evidence shows in the "cemetery" of slaves in *Vale da Gafaria*, the oldest on European soil - which in the mid-16th century was endowed with the first wall bastion built with modern precepts in Portuguese territory); the set of fortresses depending from the fortified place of Sagres (which includes *São Vicente*, *Beliche* and *Baleeira*); and a remarkable

underwater cultural heritage (which includes remains from the 18th and 19th centuries that may be visited, making Sagres a privileged dive destination in Europe).

In the introduction to the publication of José Manuel Garcia about Sagres, with Rui Cunha photographs (dated from 1990) the first sentence says:

Sagres is one of the places in Portugal that reached a wider global projection, which is due both to its beauty and geographical location but also to the indelible presence in this place of such a striking figure in world history as it was Henry the Navigator (Garcia and Cunha, 1995: 8).

The uniqueness of this National Monument because of its geographical location, its historical context and immaterial symbolism, associated with the natural environment, the role of the Discoveries and the ancestral religiousness make it an immaterial and material resource of great value to the region.

The beauty of the landscape is accompanied by a high mysticism that has been responsible for strengthening the place value all over the years.



Figure 2. Sagres Fortress (Wall)

Source: Authors

3. Management Model of Sagres Promontory

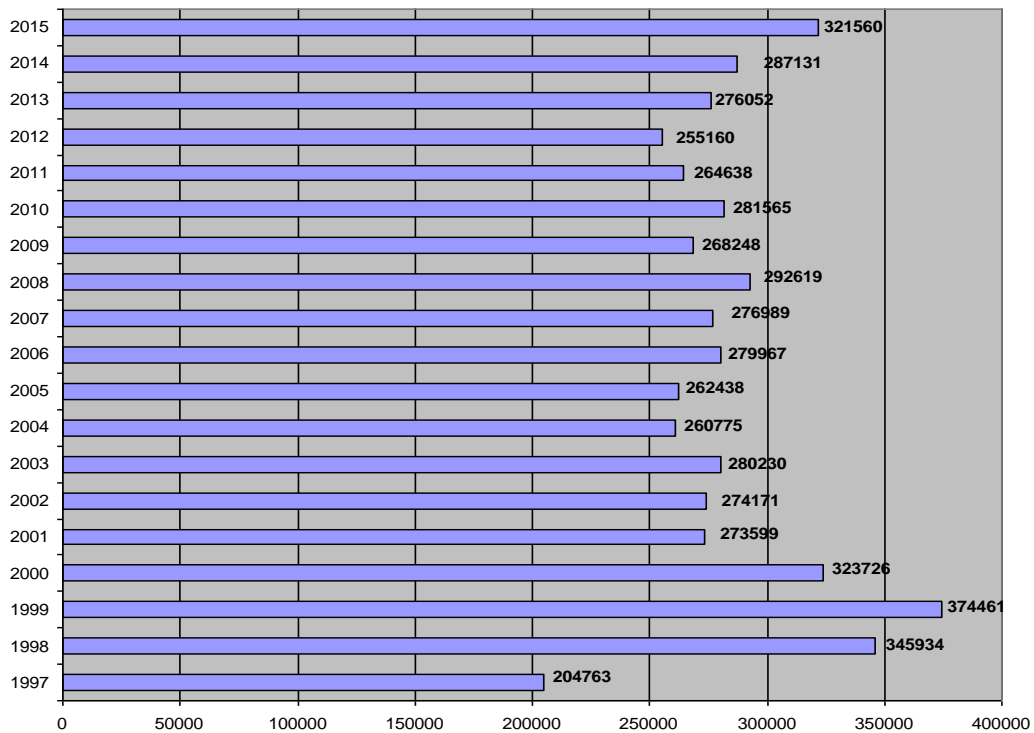
The visitors management can be a major contribution to heritage conservation. Improving the interaction with tourists and the general visitors are essential contributions to a tourism based on more sustainable cultural and heritage resources.

There is a lack of more research and knowledge on the profiles of visitors, their expectations and motivations. The visitor to the Fortress brings with him beliefs, convictions and other experiences that influences the visit to the place.

The proposal to create an interpretive centre and exhibition dedicated to the "Travel" will allow that visitors have an experience of greater interaction and will improve their understanding of the historical importance of Sagres in World history.

In 2015, all the monuments under the management of the Algarve Regional Direction of Culture received 350,945 visitors that represented an increase of 10.9% over the previous year.

The Fortress of Sagres had a total of 321,560 visitors in 2015, accounting for a growth of 11.99% compared to 2014. The month of August itself registered 62,873 visitors in total, which represents an average of over 2,000 visitors per day. The Fortress of Sagres had over 90% of the number of total visits of the monuments allocated to the Algarve Regional Direction of Culture. It passed more than 14 years since it was recorded such a high number of visitors in Sagres.



Graph 1: Evolution of the total number of visitors in Fortaleza de Sagres (2000-2015)

Source: Authors

The total of foreign visitors in 2015 accounted 79.25% of total visitors.

About 89% of the revenues generated in the Algarve monuments come from the ticket sales. The revenues generated at the monuments shops represent about 9% of the total. Other income comes from the vending, rents or concession areas, representing between 0.5% and 1.22% of the total revenue generated.

In the future we expect that the new equipment offers and the reorganisation of the services will bring a revenue increase.

The current monument management model has one only responsible that assumes both commercial and visitor orientated services. The principles underlying the applicability of that management model are:

- Management of a diverse and attractive heritage (cultural and natural)
- Specific and controlled location
- Scale and dimension that justifies permanent and qualified teams

- Maintenance and investment permanently required

The management model assumes a frame of principles based on business management characteristics, with a structure of qualified human resources and a system of management and maintenance of both the new facilities created by the Project Renewal and Enhancement of Sagres Promontory (PRVPS) and also including the other existing buildings and the public space, that pursues the sustainability of the investment.

The main aim is creating new value and revenues that enables financing the efforts of maintenance of the equipment and the generation of enough income to the safeguard and preservation of the monument.

The rent of spaces for events and the specialized offer created for some specific segments of visitors will be crucial to achieve a strong increase in revenues, along with community involvement and continuity of the strategy being developed.

A better understanding and knowledge of the tourists/visitors seasonality, in association with the effective use of their cultural and educational potential, will enable to better organise the supply and the necessary operational conditions.

The management model of Sagres Fortess should consider:

1. Entrance ticket - the value should be reviewed based on several elements: price elasticity of the demand for such heritage places; price segmentation depending on the type of visitors (eventually depending on the time of day and the time of year); always respecting the principle that everyone should pay, even if the cost is merely symbolic, as a way of valuing the public investment made.
2. Exhibition Centre - holds a long-term exhibition and a small additional area for temporary exhibitions; we will need to estimate the elasticity of demand price before defining a joint admission ticket to the monument or on the other way define two different tickets, one to the Fortress and another one to the Exhibition Centre.
3. Shop – The products sold in the shop need to be rethink and have a relation with the Promontory and with its new visual identity, produced under the PRVPS. This will greatly increase the revenue collection as well as assist in effect 'repeat visitors' and word of mouth advertising.
4. Grants - This is revenue that comes from the concession of commercial spaces to private enterprises at the Fortress of Sagres, including the bar-restaurant. In 2012, it accounted for about 3% of revenue collected. With the end of PRVPS we intend

to continue to grant concessions to private operators and we expect that with the new services offered, revenue will boost to 5% of the total revenue.

5. Sponsorships – it can be an important opportunity to the publicity of new brands, once the Promontory of Sagres is a well known heritage associated to values like: "courage", "knowledge", "innovation" and "discoveries".

6. Expenses – we will need to consider all fixed costs, because the usual day to day expenses will require an almost complete reinvestment of revenue, so there will be no profit generation. This is the example of the expenses with: requalification and promotion operations; human resources; maintenance; marketing and advertising; overheads management and operation.

The financial balance of the project and the institutional framework that will determine the principles of management and exploration of the monument and its equipments shall not forget the allocation of the revenues generated.

Since 2014, we began a new cultural programme at our monuments. That new programme was called DiVaM - Promotion and Enhancement of Monuments - , and includes lots of educational activities with the aim of attracting different groups of the community to revisit the monument. This is a programme that has partnerships with several cultural agents and Algarvian municipalities, offering a diverse range of activities that include music, theatre, street theatre performance, dance, performance and recreations, outdoor activities, and so on.

The Sagres Promontory has occupied a prominent place in this cultural programme over the first two editions. In 2016, the DiVaM has as central theme "The Spirit of the Place". It aims to boost this monument making known their uniqueness and inherent dimensions, strengthening its only relevance as an European heritage and making known its associated brand, developing educational activities that focus in the first process of world globalization, considering the trade, the evolution of scientific knowledge, the dissemination of new food products and the discovery of new people.

The construction of a new vision for the Promontory of Sagres should allow an added value to the Algarve offer in the segment of "Cultural Touring", thus promoting greater exploitation of regional resources.

It is considered important that the new vision of the Sagres Promontory reflects the uniqueness of this National Monument due to its geographical situation, historical background and intangible symbolism, referring to the natural environment, the role of the Discoveries and the ancestral religious significance of these stops.

The main mission of this place is to provide its visitors a unique experience, the opportunity of the monument contemplation, considering the natural environment in which it operates and the evocation of its history and immaterial meaning, conveying a temporal trajectory perspective of the place and the need to adopt a new and more sustainable lifestyle.

The social importance of the monument should stand out its role as exemplary and evocative site, allowing a practical way to bridge the gap between past and present.

Thus, for the fulfilment of its mission, it is imperative that the monument management reconciles two attitudes: on the one hand, to fulfil its public service role and to ensure that activities and initiatives emphasise and create learning opportunities related to the cultural, social, and educational aspects; on the other hand, to create a modern, dynamic and competent organisation, focused on the development of successful promotional and operational activities with a view centred on sustainability.



Figure 3. Sagres Fortress

Source: Authors, 2016

4. The European Heritage Label and "Places of Globalization"

The European Heritage Label (MPE) is a measure of the European Union which is based on an intergovernmental initiative launched in 2006. It was established by the European Commission.

Under the Regulation "The general objectives of the European Heritage Label (EHL) are to strengthen the sense of belonging to the European Union by European citizens, specially young people, based on shared european history, values and cultural heritage, seeking the national and regional diversity and reinforce intercultural dialogue. For this, this designation aims to highlight

the symbolic value and raise the profile of sites which have played a significant role in the history and culture of Europe and / or the building of the European Union.” (European Heritage Label, Decision N° 1194/2011/EU do Parlamento Europeu e do Conselho da Europa, Official Journal of the European Union from 22.11.2011).

The EHL selection and control procedures are strict and establish various stages of consideration. After a pre-selection of the Member States that sent to the panel of experts 18 candidates, the Promontory of Sagres was officially included in the list, together with eight other historical sites in Europe. The European Commission formally designated these sites in February, and in April 2016 was held a ceremony of awards in Brussels.

In the excerpt published by the European Union states that:

The Ponta de Sagres features a rich landscape of the historical and cultural point of view located in the southwest corner of the Iberian Peninsula. In it are significant archaeological remains, urban structures and monuments that attest to its strategic location and its importance over the centuries. Sagres Point became the headquarters of the Infante Dom Henrique to its maritime expansion project during the 15th century, a place of great importance to the period of the Discoveries, a period that marked the expansion of culture, science, exploration and European trade for both the Atlantic and the Mediterranean, paving the way for the affirmation and projection of European civilization that came to modulate the modern world (EHL, 2016).

This European recognition is important to the ongoing application of the “Places of Globalization” to the UNESCO World Heritage that also includes Sagres.

The Promontory of Sagres application to the EHL was presented by the Regional Board of Culture of the Algarve in 2015, considering the following supporting documents:

1. Raising awareness of the European significance of the site, through information actions (eg, signage, staff training, internet resources, etc...);
2. Organization of educational activities, specially towards children and young people, to improve the understanding of the common history of Europe and its heritage;
3. Promoting multilingualism;
4. Exchange of experience/participation in projects within networks of distinguished sites with the MPE;

5. Promoting the visibility and attractiveness of the site at an European level, in particular using new technologies and digital media, and exploring European synergies;
6. Organization of artistic and cultural activities that promote professional and European artists or strengthen the link between heritage and contemporary creation.

Upon completion of the current Project Renewal and Enhancement of the Promontory of Sagres (PRVPS) one of the main priorities of the Regional Board of Culture of the Algarve, will be guarantee that the funding from the Tourism of Portugal and Operational Programme Algarve 21 is well applied and keeping the management, supervision and monitoring tasks of this important Monument of exclusive public responsibility. Hence the eminently commercial services such as shop and restaurant, which fall outside the main mission of the monument and have commercial purposes, will be granted to private management.

Sagres Promontory in the framework of the European Heritage Label appeals to the uniqueness of this National Monument due to its geographical importance and historical context within the Epic of the Portuguese Discoveries. It will also enhance the cultural offer, tourism and leisure in the Algarve fostering greater exploitation of its resources, thus stimulating tourist demand.

This site is a symbol that imposed itself universally as the initial brand of the cultural tradition of European civilisation, in the context of the maritime expansion and the impact that created an irreversible universal change. The Promontory is beautiful and has exceptional natural phenomena. Interesting geological, biophysical and climatic characteristics can be found that may be associated with the development of terrestrial ecosystems (endogenous plants and migratory routes of birds) and specific communities of coastal shore species. It is a promontory associated with the Promunturium Sacrum described by the authors of Classic Greco-Roman Antiquity (such as Strabo, Artemidorus, Éforo, Avienus), a mythical place where Hercules was worshipped (greek designation of the Phoenician god Melqart) and that in Antiquity was considered to be the end of the known world.

The proposal to Promontory from 2016 following the conclusion of PRVPS intends to implement a sustainable management model covering all sites under the regional board management. Symbolic, historical and physical values of the Sagres Promontory meet the objective of the EHL, which is to give visibility to sites that celebrate and symbolize the integration, ideals and history of Europe.

4.1 The Algarve and the places of Globalization

The fifteenth-century "Portuguese maritime enterprise" that began at the Algarve led by Prince Henry represented the launch ('take off') of a global project in which European civilization thought to create new economic opportunities outside Europe, helping to set a "new world" at the dawn of modernity.

The asset values that are applying are:

- a) Places and heritage associated with the historic phase of *take off* of the globalization process (first long cycle globalization process or first stage of the Portuguese Expansion) correspond to the interaction network of various integrated places in the preparation and opening of new trade routes to the west coast of Africa, providing support points in North Africa and later occupation and colonization of the Atlantic islands and even the creation of the square-factory model in Arguin.
- b) fall into the following geographical areas:
 - Algarve: The Pier First (*the Quattrocento Pier*) mobilized for the discovery of new net roads in the Atlantic, and economically progressing with them, including: Lagos, Sagres and Guadalupe / Raposeira, Portimão / Alvor, Silves, Monchique, Tavira, Castro Marim.
 - Atlantic Islands: Madeira and the Azores, which were experimental platforms for new settlements and productions; Cape Verde - The first slave farm and the first tropical Christian churches (Order of Christ).
 - Arguin, the first slaves trading post.
 - Cities of North Africa: Ceuta (Spain), Alcacer Ceguer (Morocco). The first square of expansionist drift outside Europe.

The time frame considered for the application to the classification of World Heritage by UNESCO is 1415-1480. In terms of characterization of the first Globalization long cycle, we can highlight the following elements:

- a) Business Innovation: the birth of the leading sector of the "Golden Guinea", the main commodity of high value of the 15th century, plus the beginning of the black trade of African slaves to Europe, whose control was transferred from the Arabs to the Portuguese.

- b) Technological innovation: quadrant innovations, introduction of the caravel, the route of Mina or Guinea, the use of naval artillery (in caravels) - emergence of armed caravel and new cartography.
- c) Geostrategic innovations: first fortress creation (1445) at the island of Arguin, at the other side of the nowadays Mauritania. Papal Bull of 1455 given to Prince Henry and granting to him the imperial right over all lands "discovered" (known as the first bull of imperialism); the Treaty of Alcáçovas (1479), the first formal division of zones of influence between great powers; *Mare Clausum* (1455) - Legal regime of exclusivity in the maritime domain; the creation of turning centres in the Atlantic (the islands of Madeira, the Azores and Cape Verde); the creation of the first colonisation laboratory (Madeira) and the dissemination of these principles (the Azores and Cape Verde).
- d) Psychological break: dark and unknown sea - the Atlantic Ocean, south of Bojador, is achievable. The perception of new spaces and new contacts between peoples and cultures and early miscegenation; first writings and reports with ethnographic descriptions made by Alvise Cadamosto (1454 travel, 1455 and 1456).
- d) Cultural innovation: the new conception of the world space - Frau Mauro map (1459) and others. The appearance of Ballads, traditional poetic-narrative genre, associated with Sephardic peninsular residents at Ceuta and North of Africa, whose origins are attested and documented since 1421, is a literature genre that survives even today in the Algarve, Azores, Madeira.

The cultural heritage that was proposed to be included in the Indicative List, under the name of "Places of the First Globalization" comprises cultural objects that are reference points, material and immaterial, of that movement that generated the expansion of the world economy led by Europe, distributed in a geographic area that goes from the Algarve to the coast of Guinea and the Atlantic archipelagos of Macaronesia.

The application to the World Heritage classification integrates Continental Portugal and the islands, Spain, Cape Verde, Morocco and Mauritania (five countries) several monuments and places, individual and grouped, as symbols of the European and universal memory associated with the imaginary of the Portuguese Discoveries and with the beginning of major historical changes. It includes "places of memory" directly or tangibly associated with important events (Sagres, Guadalupe / Raposeira, Ceuta), works with architectural merit (fortress and ancient Cathedral of Silves), production devices (sugar mills of Silves and Machico), old urban centres

(Lagos, Silves, Funchal, Machico, Angra, Vila Franca do Campo, Ponta Delgada. old Town), "places of memory" of the slave trade (Valley Gafaria / Lagos, Arguin, Cape Verde) and various elements and structures of archaeological nature.

In summary, the history of the Promontory of Sagres is directly related to other cultural heritage sites located in the western end of the Algarve, and configures a "cluster" of particularly important sites of the European history: the Chapel of Our Lady of Guadalupe, that refers to the religious dimension of the Portuguese and Iberian discoveries and is a place of redemption of captives in this frontier of Christianity); the city of Lagos, main place of Henrique's commercial emporium, received the first black slaves brought to Europe from sub-Saharan Africa and there is located the building called "Market of Slaves" where slaves commerce took place, not far away from the Gafaria Valley, where were found important archaeological and anthropological traces that witness the relevance of the place and existence of slavery practices; in Lagos, also exists the first mid-sixteenth century bulwark built according to a new modern way, project signed by Miguel Arruda; the set of fortresses of Sagres territory (including the fortresses of S. Vicent Cape, Beliche and Balleeira); and a remarkable underwater cultural heritage (which includes the visitable remains of the ship *I 'Océan*, which witnesses an episode of the Seven Years War, that make Sagres a privileged destination of cultural diving in Europe).

João Paulo Oliveira e Costa recognises the precursor character of Prince Henry and supports in Alvise Cadamosto's chronic to describe innovation and revolution that the Portuguese Discoveries introduced from the western Algarve (Costa, 2015).

As already pointed out, we now know that tourism has costs in relation to the impacts it generates on heritage, but also has great potential associated with the conservation and preservation efforts. The management proposal should consider the following main aspects:

1. the value of heritage as cultural capital
2. the complexity of this heritage and its meanings
3. the concept of authenticity and its meaning applied to the site
4. the potential of cultural heritage to become a tourist attraction (regardless whether or not it is recognised as such).

It is important in this development process to know the dynamics of both the cultural landscape and tourism. We have to know how the built environment is shaped by cultural practices and heritage resources.

As we already recognised, there is an ongoing multi-year and phased intervention that will be responsible for a deep requalification of the Promontory of Sagres. We hope that in the end of

this operation, we will have a refreshed and renovated site with better visitor facilities, contributing to a better attractiveness of this place of memory.

In conclusion at this point, it becomes necessary to define a management model that would allow the sustainability of museological rooms and equipments in order to ensure that, contrary to what has happened in the past, the results of the intervention and the investments made will not have been in vain. Some of these assumptions will be discussed in the next item.

5. Analysis of the Opportunities, Threats, Strengths and Weaknesses to the development of the Promontory of Sagres

A SWOT analysis is presented as an important systematization of the several aspects to consider in the development of the Sagres Promontory and its future management model.

External Analysis

Opportunities

- Regional Airport and the highest tourist national attractiveness: mild weather, hospitality and security environment contributing to the tourist attractiveness.
- High rates of establishment of foreign residents that have cultural consumption habits.
- Positive rates of tourism international evolution due to economical and political troubles in the competing markets.
- Increased motivation in networking between different levels of government in different areas of public administration.
- Young and dynamic cultural groups despite the difficulties of support.
- Cross-border cooperation opportunities with Andalusia in joint heritage rehabilitation and valorisation projects co-financed.
- Set of equipments with good reception conditions for different events and activities.
- Joint strategy between education and culture being underlined in national terms, setting a cultural profile for the students throughout their school life.
- Defining joint national strategy between education and culture, setting the cultural profile

Threats

- Frequent changes contained in the public sector organization of culture.
- Financial difficulties of municipalities strangle the capacity to invest in partnerships.
- Support for arts and cultural development in the region has been reduced compared to the rest of the country and discontinued in some projects.
- Professional cultural sector weak and without opportunities of circulation in and out of the Algarve.
- Difficulties of organization and mobilization of citizen movements for voluntary support in these areas.
- Insufficient public investment to safeguard and preserve the cultural heritage classified in the region.
- Reduced reimbursement rate of European funds in the region which require a very high public investment effort.
- Total lack of interest and sponsorship of the regional enterprises to the arts, culture and heritage sector.
- Low acknowledgement and public recognition of the work developed by the cultural regional

of the students throughout their school life. board.

- Presence of University of the Algarve and development of research, studies and teaching in the fields of arts, heritage and culture.
- Collective memory of the Portuguese Discoveries reinforces the visit to the Fortress as must-see place.

Internal Analysis

Strengths

- European Heritage Label Distinction (European Commission)
- Interest from operators and travel agents to visit Sagres
- New promotional materials , new visual identity
- New supply of high quality - new exhibition center
- New website / Promontory platform
- Significant increase in total visitors
- qualified and motivated Team
- Creation of a regional discourse around the Portuguese discoveries with the involvement of several municipalities

Weaknesses

- The need for more qualified personnel for reception / surveillance , guided tours and educational activities
- Difficulty in investing in the street lighting renewal outside the Fortress
- Temporal delay of the rehabilitation works at the Fortress
- Lack of financial autonomy
- austere weather conditions most of the year
- Relief and morphology of the terrain that make the visit hard for disabled people and children
- Insufficient annual budget to meet the maintenance and the monument preservation needs

Table 1. External and internal analysis of opportunities and threats to Sagres Promontory

Source: Regional Board of Culture of the Algarve, Activities Plan, 2015

The intervention in progress must be accompanied by an effective site promotion strategy in order to increase the number of visitors and their satisfaction with the site visit. In the next paragraphs, we will address to some actions that are considered important to the success of the intervention, without prejudice to others that may be developed in another later stage:

1. New visual identity - already established under the ongoing Plan of Rehabilitation of Sagres. Leaflets and panels of interpretation have been translated in several idioms and the communication strategy respects the historical and environmental specificity of the monument. All 'merchandising' and other administrative supports will use the new brand of Sagres Promontory.
2. Marketing and communication - the marketing and communication strategy to adopt should be better targeted, including domestic tourism and foreign tourism and the educational project (focused on the nearest resident community). Some events by their importance and quality can be an important asset to the Promontory. These lines

should be achieved in a specific communication plan for the monument that takes into account:

- Internal tourism: its importance and uniqueness justify itself a prominent position in the promotional campaigns carried out by *Portuguese Tourism Office*.
 - External tourism: enhancing the projection of Promontory as a cultural resource in a perspective of creating a different tourism resource capable of attracting new segments (nature tourism, scientific tourism, cultural touring) in addition to sun-and-sea resort (identified as the main tourist resource of the Algarve). This is a way of developing the ability to generate new tourism products and experiences based on the unique characteristics of Promontory and enhance the potential to attract some international niche markets as nature, scientific and cultural tourism.
 - Dissemination of resource information and new activities at the hotels in the region and tourism offices: taking into account that there is an increasing number of tourists who organise their autonomous travel without strictly defined programme. In this sense, it should be created specific promotional materials for hotel units and tourism offices.
3. Themed ticket "Route of Discovery" - was the result of an application for European funds that created a territorial marketing strategy that is being strengthened with the creation and dissemination of the *Portal of Discoveries*. Lisbon and Algarve are the two main tourist destinations in Portugal and they were important spots of the Portuguese Discoveries. Some of that history is also connected with the southern Spain history and their conquering adventures (Province of Andalusia), so a Route was created taking some advantage of the synergies of the various places and monuments closely linked to history of Discoveries. In any of the monuments - such as the *Jeronimos Monastery*, the Tower of Belém, Sagres Fortress - a theme ticket can be sold (Route of Discovery or "Portugal of Discovery") - which will allow to entry in all of them. In this way, tourists will visit elements of a shared history, allowing strengthening a territorial marketing strategy, since most of the foreign tourists passing through Lisbon and the Algarve are on an only trip to Portugal.
 4. Educational programme - the new Promontory's operating model desires to enhance the educational message related to the past and historical development of the discoveries venture and guarantee the necessary future sustainability of human intervention in that territory. Study visits are very common by students of several levels of education. The new Exhibition Centre will include interactive and sensory

experiences and in particular the long-term expository content designed will strengthen the educational message, which will be followed by a campaign on the new attractiveness of Promontory among educational actors in the region.

The association with other kinds of events happening in the region is an opportunity to make known the "new" Promontory. Thus synergies will be created with the promoters of several events, generating opportunities to achieve a large number of potential users. Some protocols with business tourism and hospitality units boosted this approach, and a new dynamic promotion is being studied and developed.

6. Future dynamics and conclusion

In the first era of globalization, the Promontory of Sagres was the scene of geopolitical decisions of *Henry, the Navigator* that were responsible for changing the perception and knowledge of the World.

It was a strategic point for overseas expansion, enabling the territory protection and a better control of trade flows between the Mediterranean and the Atlantic. This place embodies the integration ideals and the history of Europe, which today is still in the process of integration between two realities - North and South. These were the foundations of the appliance to the European Heritage Label.

Sagres is associated with the beginning of the European expansionist movement that occurred during the 15th century in the Algarve; it is seen like "the first pier" at the origin of the global World created by the action of Europe in the following centuries.

The Sagres Pomontory is one of the physical places that Europe and universal memory associate to the epic imagery of the Portuguese Discoveries and the beginning of important historical changes, with the development of world trade and to the exchange of human values and technological developments, encompassing vast cultural areas of the world that from that moment began intercommunicating and sharing ideas and products.

It is the place of an exceptional mythical testimony, the designated "Sagres Henry the Navigator's school" that was invented outside the Portuguese ideological sphere, at an European level. This symbol was imposed universally as the initial mark of the cultural tradition of European civilization within the maritime expansion and generated the impact of an irreversible universal change. The Promontory offers great beauty and exceptional natural phenomena.

Prior to the definition of the European Union, Sagres was already a place of European collective memory and Henry, the Navigator was a central figure to the arrival of a new Europe. That justifies and explains why the Sagres Promontory is the most visited area of the Algarve and in the south of Portugal.

Sagres is a crossing route between the Mediterranean Sea and the Atlantic Ocean and a port of fishermen and traders from several nations, but once was an area plagued by bandits and pirates. The imposing Fortress of Sagres through the human action extended the natural rock cliffs, building new walls and transforming for centuries the fortress in the main square of war and a geostrategic maritime system of defence.

The policy of the Portuguese expansion in the 15th and 16th centuries led to the founding of *Vila do Infante*, therefore, the *Henry, the Navigator* and the village history are usually the same in the course of time.

The main strategy is to continue to promote the attractiveness of the site on a European and global scale, requalifying tourism and regional cultural offer and increasing the volume of visitors.

There is an ongoing project of development and enhancement of Sagres Promontory that will provide the monument with new facilities, in order to improve the cultural offer and with the aim of transforming this place a cultural centre of international significance.

The implementation of a sustainable management model includes activities that enhance and disseminate the knowledge about the site, emphasising its European dimension in four vectors: integration into the European Megalithic period; the connection to the historical legacy of Saint Vincent cult; the integration of Discoveries and commercial expansion and territorial cohesion, as a process of pre-World globalization.

This model will integrate various fields and different projects, such as: a research project promoting the knowledge about the residence of *Henry, the Navigator* at the site (including through archaeological excavations) and the study of the defensive devices of Sagres; an exhibition project, including temporary exhibitions, complementing the permanent exhibition contents; a communication project, with production of signage, interpretation panels, website, thematic guides, itineraries and video guides; training of reception staff; and an interpretation and an educational project of artistic creation and cultural tourism promotion in partnership with the Tourism of Portugal Office, the Algarve Tourism Board, Local Development Associations and Tour Operators.

Finally, only through joint efforts and networking between different regional and local partners, we can have a successful promotion and enlargement of the Discoveries and of the knowledge of the sites associated to its true international and European dimensions.

References

- AHC (2004), "Success tourism at heritage places – a guide for tourism operators", *Heritage manager and communities*, Australian, Heritage Commission.
- Ashworth, G. J. (1994), "From history to heritage-from heritage to identity. In search of concepts and models", in G.J. Ashworth and P.J. Larkham (eds.), *Building a new heritage. Tourism, culture and identity in Europe*, London, New York, Routledge, 13-30.
- Bell, J. (1989). *Doing your research project: a guide for the first-time researchers in education and social science*, Milton Keynes, England, Open University Press.
- Bellacasa, F. P. (1999), "Creación y promoción de productos turístico-culturales", In D. Casellas (ed.), *Cultura i Turisme*, Girona, Xarxa d'Escoles de Turismo, 27-53.
- Butler, B. (1999), "Problems and issues of integrating tourism development", In D. Pearce and R. Butler (eds.), *Contemporary issues in tourism development*, London, Routledge, 65-80.
- Costa, J. P. O. (2009), *Henrique, o Infante*, Lisboa, A Esfera dos Livros.
- Costa, J. P. O. (2015), *Henrique, o precursor da globalização*, Faro, Direção Regional de Cultura do Algarve.
- European Heritage Label (2011), "Decision No. 1194/2011/EU do Parlamento Europeu e do Conselho da Europa", *Official Journal of the European Union*, 22.11.2011.
- European Heritage Label (2016), *EHL, Sagres Promontory, Portugal, European Heritage Label 2015*, available at: https://ec.europa.eu/programmes/creative-europe/actions/heritage-label/sites/sagres_en, (consulted in: 06. 11. 2016).
- Garcia, J. M., Cunha, R.(2004), *Sagres*, Lisboa, RCL, Imagem e Comunicação.
- Garcia, J.M. (org.) (1990), *Documentação Henriquina*, Lisboa, CNCDP.
- Herbert, D. (1995), *Heritage, tourism and society*, London, Tourism, Leisure and Recreation Series.
- Nuryanti, W. (1996), "Heritage and post modern tourism", *Annals of Tourism Research*, 23(2), 249-260.

Chapter VIII

Bom Jesus do Monte:

From Sanctuary to the Dynamics of Religious Tourism

Bom Jesus do Monte: From Sanctuary to the Dynamics of Religious Tourism

EDUARDO GONÇALVES⁵³

VARICO PEREIRA⁵⁴

Abstract:

With regard to the study of a place of worship and symbolism – Bom Jesus do Monte (Braga, Portugal) or Good Jesus of the Mount, in English, part of the category of “*sacri monti*” – we intend to investigate the evolution of the ancient practices of pilgrimage that are today assimilated into a context of modern religious tourism. With religious heritage believed to be the apex of the religious tourism product and structure, our study discusses all the other tangible and intangible factors that develop around it. As well as its inherently spiritual characteristics, the site’s religious heritage includes architectural, artistic, historical, symbolic and scenic elements that make it an important tourist resource for the region. The study also deals with the evolution of visitors’ motivations which involve, at Bom Jesus, a seasonal desire for purification in the sense of breaking away from urban routine; visitors view it as a resort or a place for entertainment. In its current state as a holiday destination with accommodation, Bom Jesus do Monte clearly reflects a tourism and hotel business setting that this article aims to present by following a historical narrative over time.

Keywords: Pilgrimage Sites; Religious Tourism; Tourist Destinations; Resorts; History of the Hotel Business

Resumo:

A propósito do estudo de um lugar de culto e simbólico, o Bom Jesus do Monte (Braga), inscrito na categoria dos ‘Sacri-Monti’, propomos dilucidar sobre a evolução de antigas práticas de peregrinação assimiladas hoje num contexto de turismo religioso moderno. Considerando-se o património religioso enquanto componente nodal do produto de turismo religioso e da sua estruturação, o nosso estudo perpassa todos os outros fatores que se desenvolvem ao seu redor,

⁵³ University Institute of Maia – ISMAI, Coord. of GR1 – Tourism, Identities and Cultural Heritage (CETRAD – UID-04011/FCT), CEDTUR, egoncalves@ismai.pt

⁵⁴ University Institute of Maia, CEDTUR – CETRAD, Confraternity of Bom Jesus do Monte (Braga), varico@gmail.com

sejam eles materiais ou imateriais. O património religioso do Sítio, para lá da sua inerente dimensão espiritual, possui elementos arquitetónicos, artísticos, históricos, simbólicos e paisagísticos que o transformam num importante recurso turístico da região. O estudo incide igualmente sobre a evolução das motivações do visitante que significam no Monte o desejo sazonal de purificação no sentido de afastamento da rotina urbana e o assumem como espaço de entretenimento e vilegiatura. Prefigurando atualmente o estatuto de estância, o Bom Jesus do Monte revela com acuidade uma realidade turística e hoteleira que se pretende evidenciar aqui numa narrativa histórica diacrónica.

Palavras-chave: Lugares de Peregrinação; Turismo Religioso; Destinos Turísticos; Vilegiatura; História Hoteleira

Resumen:

En relación al estudio de un lugar de culto y simbólico, el *Bom Jesus do Monte* (Braga), registrado en la categoría de "Sacri-Monti", es centro de dilucidación sobre la evolución de las antiguas prácticas de peregrinación asimiladas hoy en día en un contexto de turismo religioso moderno. Teniendo en cuenta el patrimonio religioso como un componente nuclear del producto turístico religioso y de su estructura, nuestro estudio penetra en todos los demás factores que se desarrollan a su alrededor, ya sean tangibles o intangibles. El patrimonio religioso del Sítio, más allá de su dimensión espiritual inherente, tiene rasgos arquitectónicos, artísticos, históricos, simbólicos y paisajísticos que lo convierten en un importante centro turístico de la región. El presente trabajo, también incide en la evolución de las motivaciones del visitante que se dirige a el Monte. Estas significan principalmente, el deseo estacional de purificación con el fin de alejarse de la rutina urbana. Este espacio es asumido pues como lugar de entretenimiento y estancia vacacional. Actualmente, el *Bom Jesus do Monte* revela con exactitud una realidad turística y hotelera que se destaca aquí en una narrativa histórica diacrónica.

Palabras Clave: Lugares de Peregrinaje; Turismo Religioso; Destinos Turísticos; Estancia Vacacional; Historia Hotelera

1. Bom Jesus do Monte: a place of worship and symbolism

Located in the parish of Nogueiró-Tenões, in Braga, northeast Portugal, the sanctuary of Bom Jesus do Monte is part of a plot measuring 26.5 ha, at the top of a monumental staircase flanked by 19 chapels dedicated to the theme of the Passion of the Christ. The site also has hotels surrounding it, along with a conference centre, all within a lush wooded park with road access supplemented by a network of paths and a set of lakes and grottoes.

The sanctuary's origins take us back to the 14th century (Bezerra, 2002), although it only began to exhibit importance in the 17th century, when the Confraternity of Bom Jesus do Monte emerged (1629). The monumental nature of the religious buildings was only established at the end of the 18th century and the beginning of the 19th century, when the built structures were completed by a grandiose temple designed by the architect Carlos Amarante, from Braga. Considered by G. Bazin to be "*le sanctuaire le plus parfait qu'ait réalisé le christianisme*", and relevant for both its architecture and its sculptures, its influence can also be seen in the symbolisation of the spaces, in religious thought and in the patterns of popular piety (Almeida, 1990:69).

In line with several sacred mountains in Europe (Bazin, 1963), specially the Italian "prototypes", such as Santa Maria del Monte Sopra Varese (Barata, 1973) and the Sacri Monti de Piemonte e Lombardia, Bom Jesus was a place for rituals and worship framed in the "devotional acts of the Jerusalemites", as well as the devotional practices of the Stations of the Cross and the calvaries, the ceremonies of Lent and all the symbolism and religious mentality of the time.

The different authors of monographs on Bom Jesus, certainly thrilled by the place's wonders, concentrated on interpreting the reasons that led to the sanctuary's greatness, the reasons behind the works done there and the motivations for its dissemination throughout the Catholic world, above all in Latin; good examples of these monographs include those written by Diogo Pimentel (1861), Azevedo Coutinho (1905), Alberto Feio (1930) and Mónica Massara (1988). Bom Jesus do Monte, rightfully celebrated for the complexity of mankind's intervention in works of art or Nature (its noteworthy woods) is not limited then to the place where it stands. There are several sanctuaries in Portugal, Spain and Brazil whose creation or development have been partly or wholly inspired by it. But none has achieved its diversity and vastness.

This "asset" was recently included in an application to be considered "World Heritage" (Andresen, 2012; Oliveira, Gonçalves and Pereira, 2015) based on an argument that aims to show its unequivocal "outstanding value" by responding to some of the main criteria used to assess what makes something outstanding. Those criteria are:

- “To represent a masterpiece of human creative genius”;
- “To exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town-planning or landscape design”;
- “To bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared”;
- “To be an outstanding example of a type of building, architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history” (Andresen, 2012: 48; Unesco, 2011).

This process involved underlining the “integrity and authenticity of the asset”, its form and design which, despite the natural aesthetic diversity of each time period, presents itself as a “harmonious piece”. The process also highlights its formal structure, including its monumental Baroque staircase and the new church, which is linked to a dense religious narrative, and further underlines the existence of a range of harmoniously located hotel facilities that are well located around the site and the century-old funicular.

2. From sanctuary to resort

The concept of sanctuary is linked to the temple and/or the sanctity of a place as the “focal point for pilgrimages” and is generally devoted to the worship of relics, the veneration of iconography of saints or dedication to Mary or Christ (Penteado, 2000). Bom Jesus do Monte fits into this last type of sanctuary, within the structure of a relic sanctuary and one of the most representative Portuguese sanctuaries dedicated to Christ.



Figure 1. Sanctuary of Bom Jesus do Monte: Stairway

Source: Confraria do Bom Jesus do Monte



Figure 2. Sanctuary of Bom Jesus do Monte: interior detail

Source: Confraria do Bom Jesus do Monte

It is not easy, however, to establish a narrative on the origins of the site as a place of pilgrimage, primarily because its roots extend back a long way in time. The most relevant aspects are documentary evidence from the modern era that attempts to demonstrate the sanctity of the place and the choice that would have been made by divinity to show believers to whom they should provide material and spiritual assistance. Bom Jesus do Monte grew in importance throughout the 17th and 18th centuries, which coincided with the outbreak of Christ-centric sanctuaries that followed popular devotion to the crucifix in Portugal. Generally located outside settlements, these sites became locations of intense religious fervour, particularly around the time of the celebrations of the Passion which, for Bom Jesus, was reflected in high

visitor numbers. After 1721, several chapels depicting scenes from the Passion were introduced, along with fountains and stairs, a terrace and a portico, all accompanied by the construction of the main church, whose work had stretched into the 19th century. In the archdiocese of Braga, the efforts that led to the success of this sanctuary of the Way of the Cross owe a great deal to the commitment of several prelates, particularly Rodrigo Moura Telles (Penteado, 2000).

Furthermore, sacral objects are constantly sought by pilgrims – a nodal feature of popular Catholicism – and this is exactly what happened with Bom Jesus (Penteado, 2000). In a clear reference to the geography of sacred places, Ferreira de Almeida comments that “heights and wonderment at the landscape favour the numinous, facilitate the possibility of hierophanies and may create a predisposition towards the sacred” (Almeida, 1994: 24).

Throughout the 19th century, particularly in the latter half, the sanctuary began to add a tourist and recreational function to its attribute as a place of pilgrimage. The growing inflow of pilgrims, particularly on holy days and Sundays, led the Confraternity of Bom Jesus (CBJM) to provide “Houses” consigned to traders who sold “bread, wine and straw for beasts” there (Capela, 1992: 96). Alongside this, the Confraternity also set up “sheds” for pilgrims “to spend the night and places to store their coaches and animals” (Peixoto, 2011: 177). But at the end of the 18th century, as confirmed by documents in the CBJM’s archives, there were several hostleries to host pilgrims “who were not equipped with the necessary things for them to be able to inhabit and remain at the quarters”. The same was the case for the whole of the 19th century, although the confraternity continued to support the construction of new quarters. Over time, Bom Jesus also began to represent a seasonal desire for purification, in the sense of breaking away from urban routine, and it became viewed as a space for entertainment. In its position as a holiday destination, Bom Jesus do Monte clearly reflects a potential for tourism and hotel trade “that appeals, above all, to private customers” (Peixoto, 2011: 179).

Of the roughly 80 sanctuaries that can be found in the north of Portugal (Noland and Noland, 1992), only Bom Jesus do Monte (Braga), alongside São Bento da Porta Aberta (Terras do Bouro), Nossa Senhora do Sameiro (Braga) and Nossa Senhora da Penha (Guimarães) possess all the following characteristics, which distinguish them from the others: i) A constant, significant inflow of visitors throughout the year; ii) Accommodation/catering facilities and other types of support for leisure and tourism; iii) Architectural and scenic heritage of national and international interest; iv) Constant religious services.

The liturgical celebrations helped create cyclical inflows of pilgrims that established a set of routes that gradually “delineated the religious territories” surrounding the sanctuaries. At the present time, unlike pilgrimages on foot, Bom Jesus attracts higher and higher numbers of

visitors who use their own forms of transport or come in organised excursions. In fact, another trend is the clear reduction in seasonality and dependence on religious festivities. On 5th July, 2015, the sanctuary's religious importance was strengthened when it was classified as a basilica on the wishes of Pope Francis.

The Sanctuary of Bom Jesus do Monte gained further influence in Portugal when it was classified as a "property of public interest", in 1970. Currently visited by around a million people every year, it is a reference point for pilgrims, tourists and visitors from all over the world. The increase in demand for tourism has reduced its load capacity to receive visitors, particularly in summer, which led the confraternity to find new ways of managing visits to the site. Recently, in 2015, the confraternity made an investment of roughly two million euros to refurbish the site and improve visits. It has therefore further cemented its status as a tourist icon not just for the town but for the entire north region and even the country in terms of cultural and religious tourism. Moreover, its buildings and sculptures have turned it into a site of global relevance for Baroque art (Oliveira, Gonçalves and Pereira, 2013), so it should be promoted not only as a tourist destination but also as a place which has artistic content that improves knowledge about this considerable heritage value. The image of Bom Jesus with its staircases is, perhaps, the main image of the Braga brand and is reproduced in countless publications; it has even been used as the cover for international book editions, such as *The Grand Tour: Travelling the World with an Architect's Eye*, by Harry Seidler, for an edition published by Taschen, 2013.

Bom Jesus has established itself as one of the most mentioned places on the tourist trail in the north of Portugal. An analysis of tour operators' programmes and the individual tourists' movements show that Bom Jesus is usually included in the main tourist itineraries that run through Portugal and Spain, particularly those that connect Fátima to Santiago de Compostela and is included in the major tourist and cultural circuits of Europe.

3. Leisure infrastructure

3.1 From quarters to hotels

For a long time, as the number of pilgrims increased, structures were progressively made available to provide accommodation, initially known as "quarters", "confraternity houses", "hostels" or simply "sheds", which gave support for pilgrims and had already been in place since the 19th century. Gradually, the names and quality of the infrastructures evolved, passing through the form of inns, hostelries and lodges before the appearance of hotels. In the

emblematic *Traveller's Guide*, by Azevedo Coutinho, Bom Jesus do Monte is presented as an attraction for its picturesque and religious features, appealing to “worshippers and tourists” alike (Coutinho, 1905). In 1930, Alberto Feio described Bom Jesus as: “A sanctuary of miracles and miracles of Nature, a holiday destination among the most beautiful in Portugal” (Feio, 1984).

The first decades of the 20th century were marked by some restrictions to the development of tourism in Portugal, namely due to weak points in the hotel sector. Raúl Proença, in his *Guide to Portugal* (1924), paints a portrait of the tourist country, stating that outside the “thermal spas and seaside destinations and two or three resorts, nobody stays at Portuguese hotels unless absolutely necessary, such is the discomfort and lack of cleanliness that most of them offer”.

Even so, enhancement of the hotel facilities in the country was already visible in 1905, with the publication of the first draft law to grant tax benefits to companies that built accommodation establishments, although it was not widely applied. It was the Minister of Finance of the Republic government, Thomaz Cabreira, who took the initiative to propose the passage of a law that would establish considerable tax advantages for hotels to be built. It was, then, this legal regime, in force from 1914 to 1934, that was the context surrounding the increase in hotel facilities at Bom Jesus do Monte. Today, the site comprises four hotels – *Hotel Elevador*, *Hotel do Parque*, *Hotel do Templo* and *Hotel do Lago* – and a social, meeting and conference centre, the *Colunata de Eventos*. They have been managed since 1980 by the company *Sociedade Hotéis do Bom Jesus* (SHBJ), which is majority owned by the archdiocese of Braga and the Confraternity of Bom Jesus.

Looking back, from 1875 onwards, the main hotel at the resort was the *Hotel Elevador*, which underwent several transformations and changed name several times – *Grande Hotel*, *Hotel da Boavista* and *Hotel Higiénico* – and hosted the Portuguese royal family in the summer months. One of its operators, Manuel Joaquim Gomes, brought electricity to the site, along with other technological improvements. The Braga entrepreneur was a decisive figure in stimulating demand for Bom Jesus as a place for leisure and holidays, and the construction of the funicular, in 1882, a similarly relevant part of boosting tourism at Bom Jesus, is also linked to him. The transport infrastructure gave visitors in the 19th century an integrated transport system that connected Bom Jesus to Braga railway station.

Another good example of the connection between the site and the idea of a resort was the construction of the famous Chalet dos Benfeitores, a building that was initially connected to romantic, idyllic scenes in a rural and/or mountainous setting, but that began to be used frequently as accommodation at leisure and holiday spots. The structure was built in the last quarter of the 19th century, and was still in use during the first decades of the 20th century as a

support structure for the Hotel do Parque (Peixoto, 2011); it was a sign of the interest in the resort setting found in the many proposals submitted to the Confraternity to build and later run the other hotels at Bom Jesus. In this case, it was the joint-stock company *Hotéis Portugueses de Turismo*, which was founded in 1919 using capital from the Bank of Minho and several individuals, including Ernesto de Vilhena, Gomes e Matos, the count of Stucky de Quay and Estolano Dias Ribeiro.

Following the hotel's example, the others also began to carry out successive refurbishments and adaptations to the circumstances of the time; their management also passed through the hands of the Sopet Group before being taken up definitively by SHBJ. At the Sanctuary of Bom Jesus, primarily due to its foundation on a link to Christ, the transformations of the religious space were operated partly by the need to counterbalance the lack of a more pronounced worshipping tradition, as would normally be found at Marian sanctuaries. This explains CBJM's greater awareness of the need to maximise tourist resources at the site and further its (almost) inclusion in the perimeter of the town of Braga.

In 2009, SHBJ established a management partnership with the Convent of Tibães Hotel and, in 2014, with the Confraternity of Nossa Senhora do Sameiro, to run the Hotel João Paulo II. Throughout the Bom Jesus resort, there are approximately 200 rooms available, representing around 20% of all hotel rooms in Braga, and SHBJ is the largest hotel group in the district of Braga.

3.2 Funicular and access

Manuel Joaquim Gomes (1840-1894), a businessman who looked to the future and had an avant-garde spirit, was a decisive figure in the increased demand for Bom Jesus in the tourism sector. As mentioned above, as well as the operator of the Hotel do Elevador, he was the main driving force behind the construction of the funicular. Bom Jesus' location at the top of a hill, with lush natural surroundings, always made access difficult. Over the last three centuries, the Confraternity has undertaken several projects to improve access to the Sanctuary. The increase in tourism demand in the 19th century meant that, in 1872, Braga Municipal Council proposed the construction of a horse-drawn tram line from the railway station towards Bom Jesus do Monte, a proposal that was completed in 1877 (Peixoto, 2012).

Construction of the Bom Jesus do Monte funicular was part of a strategy to improve access in order to upgrade and make economic use of the resort and, in 1883, *Companhia Carris e Ascensor do Bom Jesus de Braga* was founded with the aim of operating the network of "horse-

drawn tram lines” and the funicular. The horse-drawn tram operated by Companhia Carris de Ferro de Braga connected the town to the portico of Bom Jesus do Monte (Peixoto, 2012). Before the funicular was built, roughly 5000 visitors were recorded every year, as Antonio Menici reports in his book *Braga Contemporânea*, but this number rose to 100,000 in the year the funicular opened and 200,000 the following year. Currently, the Bom Jesus funicular transports more than 300,000 passengers per year, and reaches the maximum load it can carry in May, June, July and August. The Confraternity continues to maintain this mean of transport as a living museum with the same characteristics as its early days.

3.3 Motivations for visiting

Some studies have been carried out recently to better understand the profile and motivations of those who visit Bom Jesus. According to Figueiredo da Silva (2011), we cannot draw a conclusion as to a visitor profile but can instead establish a set of heterogeneous characteristics. Even so, one of the conclusions that the study found was that 99% of those surveyed were Catholic and only 1% had another religion. Moreover, although the religious factor is an important motivation for visiting, leisure is responsible for the same percentage, and curiosity about the site, the buildings and participation in festivities or religious celebrations are also factors to be considered. Roughly 80% of visitors state that the trip lasted only one day. Around 6% say that their trip was longer than three days. Almost 90% travelled independently, while the others were part of trips in organised groups. Visits to other religious tourism sites were made by around half of visitors, particularly those around Bom Jesus, such as the sanctuaries of Sameiro and Penha.

Regarding the customers profile staying at hotels at Bom Jesus, according to the annual report for 2015, most guests are Portuguese (49%), although the domestic market has been getting smaller in recent years. Spanish was the second most common nationality (18%), followed by English (14%), French (12%), Polish (4%) and others (3%). The average stay is 1.8 nights, reflecting the need to create strategies to attract people to stay longer on site. The number of organised groups that arrive on pilgrimages and use the hotels at Bom Jesus for accommodation or meals has been growing. The presence of new Polish, South Korean, Irish and Italian groups, always accompanied by a religion’s member, has further strengthened the trend towards demand for cultural and religious tourism and Bom Jesus’ strategic location between Santiago de Compostela and Fátima. (Grupo Hotéis do Bom Jesus (2015), *Relatório Anual de Atividade*, Braga: s.e.).

4. Towards a tourist-religious development model

Religious tourism and the institutionalisation of tourism itself are deeply connected to pilgrimages (Stoddard, 1994). Over time and along the paths travelled by pilgrims, places to stay (lodges and hostels) and eat emerged so they could relax, spend the night and find food, drink and even supplies to continue their journey. The term religious tourism is today commonly accepted as a phenomenon that brings together religion and tourist activity (Guimont, 1997). Opening the space up to broader interpretation, the combination of motivations ends up contributing to resized transport and organised trips, a result of the evolution from pilgrimage to religious tourism, although motivation is confined to spiritual reasons here (Jackowski, 2000). Other authors connect the notion of religious tourism to two types of motivation: spiritual motivation and motivation related to a secular view of the destination (Vukonic, 1996). For others, religious tourism has “the same basic components as other types of tourism”. It stands out simply for the motivation behind it and is connected to a notion of cultural tourism (Solla *et al.*, 2008).

Nonetheless, for a very long time, pilgrimages have been characterised by the movement of people and the rituals that accompany them. Excursions and rituals evoke the relation with the sacred, and veneration and prayer in holy places are symbols of greater strength. Keeping promises, making offerings and requesting intervention from the holy in everyday life are more objective communication aspects since they take place in certain spaces. Two components usually correspond to a pilgrimage, one spiritual and one pragmatic. The former relates to a motivation that is the reason for the trip, the other is connected to the trip and the stay (Ambrósio, 2000). For most stakeholders who work at these destinations, religious tourism is viewed from an economic standpoint, as for most tourist products, which today have an impact on territory, on local and regional economies and on society. As a result, these religious tourism destinations are increasingly being studied, not only regarding their resources, but also in relation to their visitor flows, including the question of load capacity, together with special attention to the surrounding environmental area in order to achieve harmonious and sustainable development for the destination.

With the territorial component as a base, studies should consider, from the outset, the “origin and growth of religious destinations”, as well as their influence at local and regional levels (Ambrósio, 2014). They should also deal with variables connected to land planning (at municipal level), including infrastructure and facilities, but also the host community’s social formation, alongside major economic activities. These are the fundamental conditions for a study that

intends to deal with the “functional transformations” of those components and seeks to help develop a religious tourism destination. In fact, there are three major types of stakeholders who participate today in building these territories, specifically the Church, those involved in economic activities connected to tourism and the administration. As for the religious heritage itself, it is one of the product’s essential ingredients, since all the other aspects – tangible and intangible – develop around it. Religious heritage, which is the case for Bom Jesus, as well as the inherently spiritual dimension, includes architectural, artistic, historical, symbolic and scenic elements that transform it into an indisputable tourism resource at regional, national and even worldwide level (Pereira, 2006). For Bom Jesus in particular, the hotel business employs more than 100 people and has a significant real impact on local development.

We can say that religious tourism makes it possible to use religious heritage in two ways: for religious worship and for artistic worship, both using the same space and balanced as far as possible. We, therefore, favour the appreciation and use of religious monuments, which in the end benefits the different stakeholders involved and, above all, the diverse range of people who visit them. Religious heritage, when used and communicated better, can effectively be viewed from the perspective of the sacred or simply through a historical artistic vision, depending on the visitor’s choice.

5. Conclusion

Since early on, pilgrimages have been connected to the desire for travel itself. Pilgrimages ended up influencing the development of religious paths and destinations. And while, at first, it was spirituality and popular religiosity that determined the motivations for pilgrims, Bom Jesus gradually turned into a place for a resort and, later, a tourist product. It has been demonstrated that the sanctuary is not a “hermetically sealed space” but instead a place that brings together religion and leisure, tourists and pilgrims. Otherwise, visitors to the sanctuary demonstrate a certain eclecticism in light of the available offer. The evolution and changes in infrastructures and services provided to visitors and the management model itself are the result of actions adjusted to the needs and characteristics of demand in order to maintain the site’s ability to attract visitors.

It is, therefore, necessary to keep analysing and studying the site from several perspectives since the socio-economic impacts generated by tourism today, even when discussing religion and spirituality, still also signify manifestations that are highly cultural in nature.

References

- Almeida, C. A. F. (1990), "Em torno do Bom Jesus de Braga", in *Estudos de história contemporânea portuguesa*, Lisbon, Livros Horizonte, 69-81.
- Almeida, C. A. F. (1994), "Religiosidade popular e ermidas", *Estudos Contemporâneos*, 6, 75-83.
- Almeida, C. B. (2012), "Santuários de peregrinação do Entre Douro e Minho Barroco", in Oliveira, A., Gonçalves, E. and Pereira, V. (eds.), *O Barroco em Portugal e no Brasil*, Maia, Edições ISMAI and CEDTUR.
- Ambrósio, V. (2000), *Fátima: Território especializado na receção do turismo religioso*, Lisbon, Instituto Nacional de formação Turística.
- Ambrósio, V. (2014), "Turismo Religioso: contributos académicos", in Costa, C. et al. (eds.), *Produtos e competitividade do turismo na lusofonia*, Lisbon, Escolar Editora.
- Andresen, T. et al. (2012), *Bom Jesus do Monte. Candidatura a inscrição na lista do Património Mundial*, Porto, FC-UP, 2 vols.
- Bazin, G. (1963), *Aleijadinho et la sculpture baroque au Brésil*, Paris, Le Temps.
- Bezerra, J. (2002), *Subsídios para uma outra leitura do Bom Jesus do Monte – Santuário de peregrinação*, Braga, Edições Passionistas.
- Coutinho, A. (1905), *Guia do viajante em Braga. Traços históricos e descritivos*, Braga, Livraria Escolar Editores.
- Feio, A. (1930), *Bom Jesus do Monte*, Braga, Minerva.
- Guimont, D. (1997), "Quand les Lieux de Pelerinage s'Ouvrent au Tourism", *Teoros*, 16(2), 30-33.
- Jackowski, A. (2000), "Religious Tourism – Problems with Terminology", *Peregrinus Cracoviensis*, 10, 63-74.
- Massara, M. F. (1988), *O Santuário do Bom Jesus do Monte: Fenómeno Tardo Barroco em Portugal*, Braga, Confraria do Bom Jesus do Monte.
- Nolan, M., Nolan, S. (1992), "Religious Sites as Tourism Attractions in Europe", *Annals of Tourism Research*, 19, 68-78.
- Oliveira, A. de, Gonçalves, E., Pereira, V. (2015), *O Bom Jesus do Monte: vozes e contributos à candidatura a Património Mundial*, Maia, ISMAI and CEDTUR.
- Peixoto, J. and Carlos, G. (2011), *Bom Jesus do Monte*, Braga, CBJM.
- Penteado, P. (2000), "Santuários", in Azevedo, C. (dir.), *Dicionário de História religiosa de Portugal*, Lisbon, CHER/Círculo de Leitores, P-V, 164-178.
- Pereira, V. da C. (2006), *Turismo Cultural e Religioso em Braga e Santiago de Compostela: Proposta de criação de um produto conjunto*, Santiago de Compostela, Xunta de Galicia.

- Pimentel, D. (1861), *Memórias do Bom Jesus do Monte*, 2ª ed, Coimbra, Imprensa da Universidade.
- Proença, R. (1924), *Guia de Portugal*, Lisboa, Biblioteca Nacional.
- Silva, J. F. (2011), *O turismo religioso no Noroeste de Portugal: contributo para a compreensão do papel dos santuários no desenvolvimento do território*, Porto, FLUP.
- Stoddard, R. H. (1994), "Major Pilgrimage Places of the World", in Brardwaj, S.M., Teixeira, Francisco G. (1926), *Santuários de montanha: impressões de viagens*, Lisbon, Livraria Clássica.
- UNESCO (2011), *Orientações técnicas para a aplicação da convenção do Património Mundial*, Centro do Património Mundial.
- Vukonic, B. (1996), *Tourism and religion*, Wiltshire, Pergamon.

Chapter IX

Comparative Study on (Dis)use of Heritage in Ouro Preto-Br and Oporto-Pt

Comparative Study on (Dis)use of Heritage in Ouro Preto-Br and Oporto-Pt

RODRIGO BURKOWSKI⁵⁵

CARLOS RODRIGUES⁵⁶

JUCA VILLASCHI⁵⁷

Abstract:

Appropriation arrangements of a particular territory expose the contradictions inherent in life in society. Those contradictions, in turn, do not depend on the existence of laws and regulations, setting up the materialization of different evolutionary processes. For this investigation, urban dynamics are influenced and compelled to respond to the particular pressures of capitalism, a late capitalism in the case of Ouro Preto, in which patrimonialization incurs break hegemonic models of space uses and reuses. The state apparatus appears plastering latent transformations and confirms the role of the 'heritage-person' as a potential heritage aggressor. This research's main objective is to compare the dynamics of the heritage's appropriation and use in Ouro Preto, Minas Gerais, Brazil and Oporto, Portugal. More specifically, it searches to understand the historical perspective of historic centre appropriation, its heritage value and its value for the tourism; to compare the heritage conservation legislation in both cities; and to study the problems of public equipment rehabilitation. This article presents the first step results of comparisons between the legislation on the urban rights (real estate assets) in Portugal and Brazil. It also presents the statistical comparison of types of infringement and their penalties applied by the historic centres rehabilitation programmes in Oporto and Ouro Preto. Through a systematic survey, the researchers diagnosed the main infringements committed to heritage assets. The use of records allowed to understand and to classify the types of offenses. These data for both cities will be compared, as well as each country's or international guidelines regarding urban rehabilitation.

Keywords: Historic Centre; Infringement; Heritage; Tourism; Urbanism

⁵⁵ Federal University of Ouro Preto, MG – Brazil, burkowski.rodrigo@gmail.com

⁵⁶ University Portucalense Infante D. Henrique, Porto – Portugal, crodrigues@upt.pt

⁵⁷ Federal University of Ouro Preto, MG – Brazil, jucavillaschi@gmail.com

Resumo:

As modalidades de apropriação de um determinado território expõem as diversas contradições inerentes à vida em sociedade. Essas, por sua vez, independem da existência de leis e regulamentos, configurando a materialização de processos evolutivos distintos. No caso que se propõe investigar, essa dinâmica é influenciada e compelida a responder às pressões próprias do capitalismo, tardio no caso de Ouro Preto-MG, no qual a patrimonialização incorre em ruptura com modelos hegemônicos de usos e reusos do espaço. O aparato estatal manifesta-se engessando transformações latentes, corroborando para que o sujeito-patrimônio passe a ser visto como potencial agressor ao patrimônio. O objetivo principal dessa pesquisa é comparar as dinâmicas de apropriação e uso do patrimônio em Ouro Preto-MG-Brasil e Porto-Portugal e, mais especificamente, compreender as perspectivas históricas de apropriação do centro histórico, seu valor patrimonial e para o turismo; comparar a legislação dessas cidades, no que se refere à preservação do patrimônio; estudar o patrimônio imobiliário e as problemáticas da reabilitação de equipamentos relacionados com a hotelaria. No caso desse artigo, apresenta-se os resultados da primeira etapa, que foi a comparação entre a legislação que regula a área do direito do urbanismo (patrimônio imobiliário) em Portugal e no Brasil e a comparação estatística sobre o tipo de infrações e as respectivas sanções aplicadas pelas reabilitações dos Centros Históricos das cidades do Porto e de Ouro Preto. Para essa etapa, os pesquisadores, por meio de um levantamento sistematizado, diagnosticaram as principais infrações cometidas pelos estabelecimentos hoteleiros da cidade no que se refere ao patrimônio. Para tanto, utilizaram fichas que permitiram compreender e classificar os tipos de infração. Esses dados serão comparados entre si (Porto e Ouro Preto) e com alguma diretriz (específica de cada país ou internacional) no que se refere à reabilitação de equipamentos hoteleiros.

Palavras-chave: Centro Histórico; Infração; Patrimônio; Turismo; Urbanismo

Resumen:

Las modalidades de apropiación de un determinado territorio exponen las diversas contradicciones inherentes a la vida en sociedad. Esas, a su vez, dependen de la existencia de leyes y reglamentos, configurando la materialización de procesos evolutivos diferentes. En el caso que nos proponemos investigar, esa dinámica está influida y obligada a responder a las presiones propias del capitalismo tardío en el caso de Ouro Preto-MG, en el que la capitalización incurre en la ruptura con modelos hegemónicos de usos y reutilizaciones del espacio. El aparato estatal se manifiesta sacando a relucir transformaciones latentes, donde el sujeto-patrimonio

pasa a ser visto como potencial agresor al patrimonio. El objetivo principal de esta investigación es comparar las dinámicas de apropiación y uso del patrimonio en Ouro Preto-MG-Brasil y Porto-Portugal. Y, más específicamente, comprender las perspectivas históricas de apropiación del centro histórico, su valor patrimonial y turístico. Comparar la legislación de esas ciudades, -en lo que se refiere a la preservación del patrimonio- y, estudiar en el patrimonio inmobiliario las problemáticas de rehabilitación de equipos relacionados con la hostelería. En el caso de este artículo, se presentan los resultados de la primera etapa en la que se realizó la comparación entre la legislación que regula el área del derecho urbanístico -patrimonio inmobiliario- en Portugal y Brasil. Así como la comparación estadística sobre el tipo de infracciones y las respectivas sanciones aplicadas a las rehabilitaciones de los centros históricos de las ciudades de Porto y Ouro Preto. Los investigadores por medio de un levantamiento sistematizado, diagnosticaron las principales infracciones cometidas por los establecimientos de hostelería de la ciudad en lo referente al patrimonio. Para ello, utilizaron fichas que permitan comprender y clasificar los tipos de infracción. Esos datos serán comparados entre sí (Porto y Ouro Preto) y con alguna directriz (específica de cada país o internacional) en lo que se refiere a la rehabilitación de equipamientos de hostelería.

Palabras Clave: Centro Histórico; Infracción; Património; Turismo; Urbanismo

1. Introduction

The heritage's appropriation by the tourism market is not an isolated or spontaneous process. As result of international efforts to sensitize communities on the importance of cultural preservation, a number of international documents have been prepared on this subject. The Venice Charter (1964) is the starting landmark of the *global patrimonialization process* (Costa, 2011). That charter cements a comprehensive notion of "cultural asset" more linked to the historical field. It also proposes stricter and modern legal protection standards. The UNESCO's Natural, Cultural and World Protection Convention (1972), the Nairobi Recommendation (1976), the Washington Charter (1987) and the Vienna Memorandum (2005), among other culture heritage charters, define a global understanding over this subject. These documents and its guidelines affect national and subnational levels, producing public policies, legislation and renewal of asset management models. Among formal documents it is to stand out the Brazilian 1988 Magna Carta and the Portuguese 107/2001 Decree.

Ouro Preto, one of the most important so-called Brazilian "historic cities", was the first one to be declared a National Monument in 1933. In 1937, after the establishment of the Historical and Artistic National Heritage Service, Ouro Preto was protected by a federal inheritance protection law and, in 1980, it was recognised as a Humanity Cultural Heritage City by UNESCO.

In Portugal, the Historic Centre of Oporto was included in the UNESCO's Indicative List of World Heritages Sites, in 1996.⁵⁸ This fact, as well as it was for Ouro Preto, has boosted an increasing promotion of that portion of the city of Oporto. As pointed out by Costa (2011:31), "there is a real world racing of urban governances and of the States for the inclusion of medium and small towns as cultural assets around the planet in the international tourism network." The culmination of this process is the international seal as World Cultural Heritage by UNESCO, which both cities possess.

This reality leads us to question if the urbanistic recovery dynamics caused a larger trend to infringe urbanistic laws on the resident population, in the numerous branches participating companies and, specially, on the urban recovery agents. These dynamics have also brought great influence of domestic and international tourism activities to those areas.

The analysis of this trend towards the infringement of the urbanistic legislation takes into account the facts shed statistically in administrative offense processes especially between 2012 and 2015 in the Portuguese case, and between 1999 and 2013 in the Brazilian case.

For a better understanding of this possible development, it was carried out a bibliographic research and a brief incursion on the statistical figures of the resident population, on the integrated business dynamics in those historic centres, on the evolution of the real estate business involving the buildings in this part of the polis, on the recovery works licenses issued and finally on the infringement that resulted in administrative offense processes.

We call the attention of all readers that this article is a factual analysis, not wishing us, here and now, to deepen scientific and legal analysis of the conceptualization, the evolution and the dynamics of the Administrative Law science.

⁵⁸ Available at: <http://whc.unesco.org/en/list/755>, consulted on 2016-02-01. The bases to integrate the Historic Centre of Oporto in the UNESCO's World Heritage Sites List is concerned to the fact that it was considered by that international organization as a place able "(...) to be an outstanding example of a type of building, architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history(...)".

2. A brief look at the legislation

In Brazil, as shown by Villaschi (2014) and Costa (2011), the heritage defense movement is elitist, and has been gained push from the times of the Brazilian Old Republic (1889-1930). To Rabelo (2014:5), it was "in this period of time that emerged demonstrations on the need of laws by the state entity over the situation of its heritage, reiterating the importance of developing specific legislation"

In Portugal, the idea of preserving the antique and the concern to maintain the original structure of the properties were already experienced since its formation as a country, dated around 1093 AD, during the Middle Ages, although not so frequent. During the Renaissance, when rescuing the classical heritage, we can observe the beginning of concern for the heritage preservation, and the assets that comprised are called, according to Antonieta Vera de Sousa (2010, online) as "antiquilhas". At the same period of time, it was designed what is considered as the first document on state intervention in preservationist field, the decree of August 20, 1721, proclaimed by Dom João V. (Rabelo, 2004: 6)

In Portugal, there are currently two heritage protection levels, both under the 107/2001 Law. One of them is the asset's classification applied to movable and immovable cultural assets. Both may be included in one of the three levels of interest over the heritage protection: national, public or municipal asset. The other one is the inventory that, according to Rabelo (2014) and to the Article 19, I, is a systematic and updated survey that tends to be exhaustive, concerning cultural heritage in national, public or private levels, movable or immovable, viewing their identification.

Either the assets classified or being classified shall be compulsorily inventoried, regardless the outcome of the administrative procedure in its classification. Only in exceptional cases, a private property not yet classified will be inventoried without the consent of its owner. In Brazil, there is an urbanistic instrument named "*Tombamento*" - a preservation order. It's an institute of Cultural Rights which aims to recognise the cultural value of an asset using technical-scientific criteria for granting value emanating from the competent authority. It interferes in one or more elements of the property rights (Filho and Telles, 2007).

According to Pires (1994) and Rabelo (2014) both countries had foreseen the rights to culture as fundamental rights in their Constitutions, bestowing to the state the duty to ensure it through interventionist actions. In Portugal, the Law 13/85 established the classification, later on

overruled by Law 107/2001. In Brazil, the Decree-Law 25/1937 regulates the listing of heritage assets of public interest and had conceptual advances and clarifications in the 1988 Constitution, in particular Articles 215 and 216.

Constitute Brazilian cultural heritage assets of material and immaterial nature, taken individually or together, that are reference carriers to the identity, the action and the memory of the various groups of Brazilian society, which include: the forms of expression; the ways of creating, making and living; the scientific, artistic and technological creations; the works, objects, documents, buildings and other spaces intended for artistic and cultural events; the urban complexes and sites of historical, natural, artistic, archaeological, paleontological, ecological and scientific value. (Art. 216).

Although the classification in Portugal was created later than the Brazilian Institute of "Tombamento", it presents a considerably larger amount of assets classified than Brazil. The Lusitanian law is relatively more current compared to the Brazilian inventorying rules and it needs to be interpreted and matched to the diverse Brazilian reality, which often creates doubts regarding to its application (Rabelo, 2014).

Rabelo (2014) shows that one of the conflicting points between the Brazilian "Tombamento" and the Portuguese classification is the no using by the Brazilian preservation order of the protection gradation encountered in the Lusitanian legislation. This gradation can help to increase the number of protected assets because, if one takes into account its intrinsic characteristics, the degree of protection can be adjusted, balancing asset's preservation, use and re(use).

3. A glance at Oporto

The renewal of the Historic Centre of Porto has been managed and carried out by PORTO VIVO, SRU - Sociedade de Reabilitação Urbana da Baixa Portuense S.A (Urban Rehabilitation Society), a public stock corporation, whose stakeholders are the State, represented by IHRU - Instituto da Habitação e da Reabilitação Urbana, (Housing and Urban Rehabilitation Institute), and Oporto City Council.⁵⁹ Since 2012 that SRU acts in that area with powers delegated by

⁵⁹ According to the information on the company's website - <http://www.portovivosru.pt/pt/porto-vivo-sru/apresentacao> – consulted on 2016-01-11 here transcribed: PORTO VIVO, SRU, - Sociedade de Reabilitação Urbana (Urban

Oporto's Municipal Assembly, assigning to PORTO VIVO the following skills: licensing and admission to prior notice of urban planning and use permission; adoption of protection measures of urban legality; forced lease; levying charges; demolition of buildings; right of first refusal; single project; expropriation; imposition of the obligation to renew and coercive works; inspections and surveys; receipt of due concessions or compensation; restructuring of the property; easements; forced sale.

The Urban Renewal Area of Oporto Historic Centre has been approved by its City Council, at an ordinary meeting on June 4th, 2012, and published in the Official Gazette by own instrument.⁶⁰ The embracing area is included in that publication, with defined configuration.⁶¹

3.1 The Assessment Special Comitee

The intervention and connection that must necessarily be made between PORTO VIVO and the Direção Regional de Cultura do Norte (Regional Northern Culture Management) - DRCN⁶² -

Rehabilitation Society) of Baixa Portuense S.A., (...) incorporated under and pursuant to Decree 104/2004 of May 7th, which aims to promote urban renewal of the critical area of recovery and urban redevelopment of the City of Oporto.

Incorporated on November 27th, 2004, PORTO VIVO, SRU, has the role of promoting the renewal of the respective area of intervention and, in particular, to guide the process, draw up the intervention strategy and act as mediator between owners and investors, owners and tenants and, if necessary, take over the renewal operation with the legal means available.

The performance of Porto Vivo, Urban Renewal of Baixa Portuense, until December 23, 2009, was formed legally by Decree-Law 104/2004, of May 7th.

On December 23rd, 2009, entered into force Decree-Law 307/2009, establishing the new regime of urban renewal that becomes promoted through the delimitation of those areas. This decree-law was amended and republished by Law 32/2012, of August 14th.

The areas of urban renewal correspond to urban areas that, due to the insufficiency, deterioration or obsolescence of buildings, urban infrastructure, equipment and urban and green spaces for collective use, justify an integrated intervention.

For the intervention areas of urban rehabilitation societies (SRU), established under Decree 104/2004 of May 7th, the same companies act as quality management companies and renewal continues to be framed by programming tools and execution approved in accordance with the Decree-Law 104/2004, May 7th.

Intervention units with strategic document approved under the Decree 104/2004 of May 7th, are also regarded as intervention units regulated by Decree-Law 307/2009 of October 23rd (...)

The Municipal Assembly of Oporto approved the demarcation of Urban Renewal Area of Oporto's Historic Centre in Own Instrument, published in the Official Gazette on July 12th, 2012, under which PORTO VIVO, SRU is named manager of the same, having been delegated the powers referred to in the previous paragraph

⁶⁰ See Notice No. 9562/2012, Porto Municipality, Official Gazette, 2nd Series - No. 134 - July 12th, 2012, page 24702, available at: file:///C:/Users/Utilizador/Documents/UNIVERSIDADE%20PORTUCALENSE/ISABEL%20-%20PROF%20TURISMO/REGULAMENTOS%20-%20CENTRO%20HISTORICO%20DO%20PORTO/Public_ARU_DR.pdf (consulted on: 01.22.2011)

⁶¹ The boundaries of the urban renewal area of the Historic Centre of Oporto are: Rua do Dr. António de Sousa Macedo, Campo dos Mártires da Pátria, Rua S. Filipe de Nery, Rua dos Clérigos, Praça da Liberdade and Rua de 31 de Janeiro (North); Praça da Batalha, Rua de Augusto Rosa, Muralha Fernandina and Ponte Luís I (East); Rio Douro (South); Escadas do Caminho Novo, Rua de Francisco da Rocha Soares and Passeio das Virtudes (West).

for assessment and analysis of urban intervention projects, led those two entities to work together, integrating the Comissão Especial de Avaliação (Special Committee on Assessment) - CEA - since 2012. By 2014 it gathered and produced 441 meetings records as follows: 58 in 2012, 168 in 2013 and 215 in 2014. This CEA is also in charge of the assessment and archaeological intervention in that area through the DRCN representatives. 1754 is the total number of intervention portions of PORTO VIVO, SRU, in CHPPM in 2014. A total of 110 public and private buildings were renewed between the years 2012 and 2014. It also shows that the intervention area represents 49455.09m² after those three years, in a range of 245.18% in 2013 compared to 2012, and 137.16% in 2014 compared to 2013.

3.2 Administrative procedures for offenses committed under urban renewal

The question we posed from the beginning and which answer we seek, is deeply related to the dynamics of urban renewal that CHPPM has being targeted for many years and it has been growing in a cycle of augmentative and sustained gradation. We wanted to know if this dynamic resulted in an increase of violations of legal regulations governing the execution of works.⁶³ It may happen either by attempting to its implementation without authorization, or by the infringement of the specific licenses that have been granted, regardless been authorized by the Municipal Council of Oporto or by PORTO VIVO, SRU.

Among all the necessary dynamics to renewal projects only after 2012⁶⁴ PORTO VIVO, SRU took sole responsibility to supervise, to inspect and to establish administrative processes arising from any detected faults. Until that year, those skills were exclusive of the Inspection Services of Oporto City Council. So, at first, we will analyse the performance of those local authority

⁶² To have a sense of the competences that has the Direção Regional de Cultura do Norte (Regional Northern Culture Management) we visit their website, from where we got the following text that aims to identify them, stating that it "...develops its activity aiming to protect, preserve, restore and communicate - to different kinds of audience - the values of tangible and intangible culture existing in the region. A work in conjunction with the different actors of the territory, such as the central government institutions existing in the region, local authorities, ecclesiastical institutions, educational institutions, associations, among others...". Available at: <http://www.culturanorte.pt/pt/drcn/apresentacao/#sthash.bStzcjMc.dpuf> (consulted on: 01.22.2016).

⁶³ The administrative offense penalty applied is governed by Articles 98 and 99 of the Legal Regime of Urbanization and Construction, published by Decree-Law No. 555/99, of December 16th, the last update was made by Decree Law No. 214-G / 2015, 02/10.

⁶⁴ About the exclusive competence of PORTO VIVO, SRU, see the following statement taken from the site of this entity - Available at: <http://www.portovivosru.pt/pt/area-de-atuacao/enquadramento> - (consulted on: 01.22.2016) "With the approval of the Delimitation of the Renewal of Historic Centre of Oporto Urban Area (ARUCHP) by the Municipal Assembly in June 4th, 2012, and the subsequent publication in the Official Gazette on July 12th, 2012, Porto Vivo, SRU has become the managing body of urban renewal process conducted in the first urban Renewal Area established under Decree-Law 307/2009, October 23rd".

services, but only since 2011. In a second moment we will do a deeper scan of administrative processes arising from the supervision and the inspection of PORTO VIVO, SRU.

3.3 Administrative processes caused by infringements detected by the Inspection Services of Oporto City Council

The following table informs about the administrative offense processes of "Municipal Division of Fiscal Executions and Contraventions of Oporto City Council," caused by infringements verified by this city's Inspection Services. The offenses committed by "natural person" or by the "society" are caused by works that change classified buildings or in process of classification, without administrative leave. It includes transformation of windows to doors, changing the aluminum frames for wood and works within the building without permit. The offenses committed by "natural person" or "society" are caused by modifications either on works of buildings classified or being classified, without administrative leave, or transformation of windows to doors, or changing the aluminum frames for wood or works within the building without charter.

Year	Processes	Natural Person	Society	Instruction	Condemnatory Decision	Filed
2011	3	2	1	-	2	1
2012	4	2	2	-	-	4
2013	1	1	-	-	-	1
2015	1	-	1	1	-	1
TOTAL	9	6	3	1	2	7

Table 1. Summary of Offenses in Oporto – DME

Source: Municipal Division of Tax Enforcement and Administrative Infractions of Oporto City Council – Adapted by Rodrigues, 2016

Table no 1 only shows three administrative processes in 2011 with two condemnatory decisions, both with fines very close to the legal minimum. It also shows a closure decision for having detected the illegitimacy of the offender. If we analyse processes in 2012, out of the four started administrative processes, all of them were filed, confirming the fact that the filing has been decided as a rule based on the incompetence of the supervising agent. Watch out that the

same happened in the years 2013 and 2015, that is in both years one process was started and ended up been filed. Only the proceedings against individuals thrived.

3.4 Administrative processes caused by infringements detected by PORTO VIVO, SRU's Supervision Services

As we have mentioned, the PORTO VIVO, SRU among other skills has exclusive supervision and inspection of the CHPPM rehabilitation works. Table 2 below reflects the number of administrative offense processes that ran terms in that urban rehabilitation company. After been well informed those processes had a final conclusion at the Oporto City Council "Municipal Division of Tax Enforcement and Infringements".⁶⁵ They were usually filed without any condemnatory decision.

Year	Processes	Natural Person	Society	Instruction	Minimum and Maximum Fines	Condemnatory Decision	Fine	Filed
2012	0	-	-	-	-	-	-	-
2013	2	2	-	-	€ 500,00 to €200.000,00	1	652,50 €	1
2014	2	2	-	-	-	-	-	2
2015	5	2	3	1	-	-	-	4
TOTAL	9	6	3	1	-	1	-	7

Table 2. Summary of PORTO VIVO Offenses

Source: Municipal Division of Tax Enforcement and Administrative Infractions of Oporto City Council – Adapted by Rodrigues, 2016

Be aware that this table shows only nine administrative processes with sole and only one condemnatory decision that set a fine on the legal minimum threshold. All other decisions have resulted in the filing of the case because it has detected the illegitimacy of the transgressor. These two tables of the processes that ran under the exclusive performance of PORTO VIVO, SRU, show how the interconnection between public and private entities can achieve in a climate of security for all and without mutual fears.

⁶⁵ Pursuant to Paragraph 10, Article 98 of the Legal Regime of Urbanization and Construction, "the power to determine the establishment of administrative offense cases, to designate the instructor and to apply the fines belongs to the mayor, and may be delegated to any of its members." (Emphasis added)

4. A look at Ouro Preto

The relation between the heritage managers at the local level, the civil society and UNESCO represents a *dialectical process of destructive construction*. According to Costa (2011:43) this concept concerns "the prevailing contradiction between preservation and commercialization, the pursuit of democratization and elitism of urban heritage." For the sites that "accept" the title of World Heritage, this relationship goes beyond national borders, subjecting these spaces to the interests of transnational capital.

The year 2003 is emblematic for Ouro Preto. After a series of complaints about the heritage neglect, UNESCO recognises the situation and produces a document named *Motion de preservation d'Ouro Preto* (Motion for Ouro Preto's preservation)" (Costa, 2011). After this action a mission of ICOMOS - International Council on Monuments and Sites - pointed a number of institutional difficulties concerning the management of the historic centre. UNESCO (2003) says that:

The historic centre has kept its homogeneity; however, certain interventions on historical buildings have transformed the original inside space organization. The suburbs urbanization is more problematic, particularly the development found on the hills surrounding the centre, which deforms the original urban landscape, which justifies the enrolment of Ouro Preto on the World Heritage List.

Adds to this situation the fire on Hotel Pilão, located in the central square of Ouro Preto, Praça Tiradentes, occurred on April 15th, 2003, two days after ICOMOS mission have left the city.

According to IPHAN⁶⁶ (2014), 11.5% of Ouro Preto's properties are located in the coverage area of the protected site, which is equivalent to 1,900 properties. For the institution, 17% of the city's population lives in this area. View Figure 2 of Ouro Preto's Inventoried Perimeter.

One must consider that although Ouro Preto was the first Brazilian city to be inventoried back in 1938, it still stands as a challenge to preserve the integrity of its heritage, due to the population's diffuse understanding about the very concept of heritage.

⁶⁶ National and Artistic Heritage Institute

Not even understanding the meaning of the new concept of heritage, the resident proceeded to confuse it with the regulator agent and not with its subject. That is, "heritage" (read IPHAN and its employees) is responsible for not allowing environmental well-being and quality improvements of housing life. Inaccurate and incomprehensible criteria, especially the aesthetic ones, generate regular conflicts between residents and the institutions, exacerbating the challenges of preservation-development dialectics (Villaschi, 2014: 289).

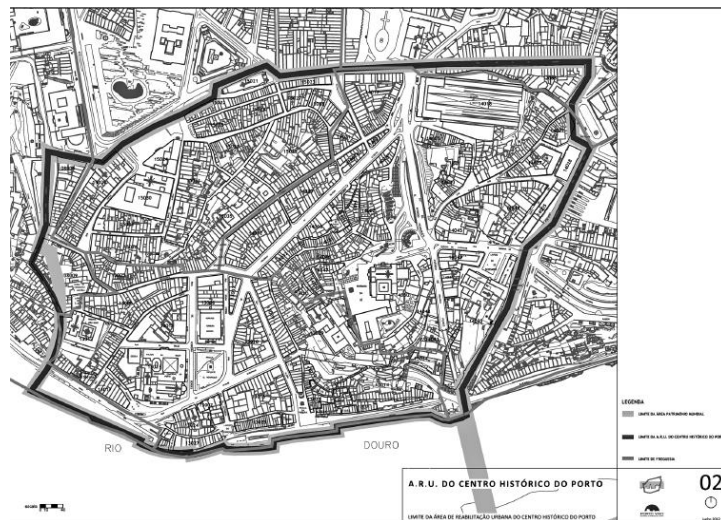


Figure 1. Oporto’s Preserved Perimeter

Source: Oporto Municipality

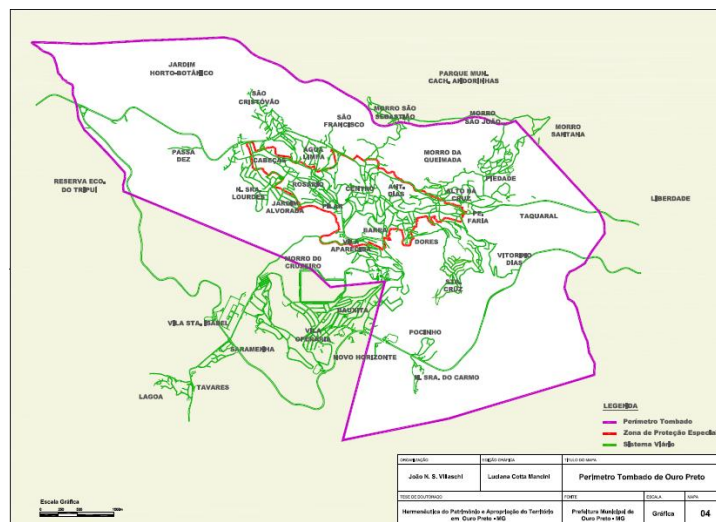


Figure 2. Ouro Preto’s Protected Perimeter

Source: Villaschi, 2014

4.1 The MONUMENTA-BID Programme

One of the main interventions that took place in Ouro Preto from 2003 to 2012 was the MONUMENTA-BID programme, designed by the federal government in the late 1990s, in order to streamline the process of preservation of the historical heritage at the Brazilian urban centres under federal protection. Its activities should integrate the restoration of monuments to the training of skilled workers. That programme sought to generate local development conditions and to ensure the maintenance and continuity of actions by local actors themselves. The structure of the actions for each city contemplated was based on the implementation of activities related to cultural tourism, considered the main viable alternative to combine local development and heritage preservation (IPHAN, 2009).

R\$9,997,760.42 (BRL) was invested and distributed in 30 projects (CGU, 2015)⁶⁷. The amount allocated to Ouro Preto was R\$15,100,000.00 (BRL) (IPHAN, 2009). Another 34 private properties have also received programme resources (Costa, 2011). The largest investment was made in Parque Horto dos Contos (Horto dos Contos Park), approximate cost of R\$4,116,978.38 (BRL). With projection of snack bars and amphitheaters constructions, among other facilities, this would be a driving force of tourism activities in Ouro Preto, connecting the bus station to Pilar Minster. The Horto dos Contos Park (or dos Contos Valley) is a green area in the central region of Ouro Preto, considered the largest urban park among historical towns in Brazil. It reveals the most beautiful and unique city views. It would be an Ouro Preto tourist attraction but much of the park is closed for visitors and the open part has many shortcomings for its use as a touristic resource.

In a recent publication, the National General Controllershship Office states that, from the sample set for evaluation, 23.7% of integrated investments were not fully preserved, showing signs of deterioration or lack of maintenance. Among the stated problems, deterioration and structural damage stand out, such as leaks, loss of plaster, destruction of facilities and engineering infrastructure works, as well as damages to the restorations. Furthermore, it was found in 18.42% of the projects evaluated in the sample, that the preservation of the historical heritage benefited by the Monumenta Programme were not carried out according to the technical specifications and/or were not completed within the agreed time. In consequence, risks were detected to the investments already made as well as the enhancement of works and engineering services, which is compromising the effectiveness of the Programme (CGU, 2015).

⁶⁷ National General Controllershship Office

Many tourist facilities have benefited from resources of this programme but no direct investment in the hotel sector was identified.

4.2 Offenses to Ouro Preto's heritage

The data used for the analysis of violations in Ouro Preto is based on the doctoral research conducted in 2013 by Professor Juca Villaschi. These data are the result of a systematic surveying at the IPHAN Regional Office in Ouro Preto. A broader and deeper analysis is in his thesis "Hermenêutica do Patrimônio e Apropriação do Território em Ouro Preto - MG" (Heritage's Hermeneutics and Territory Appropriation in Ouro Preto - MG).⁶⁸

It is worth mentioning that IPHAN, as pointed out by a CGU report, had presented problems that the penalties imposed (fines) were actually paid. To CGU (2007), Articles 13, 15, 16, 17, 18, 19 and 20 of Decree-Law 25/1937 provide application of fines to those who commit the acts described in the standards and are considered offensive to the national heritage. Articles 62 to 65 of Law 9.605/1998, which provides for criminal and administrative sanctions derived from conduct and activities harmful to the environment. In addition to imprisonment or detention it culminates in a fine for those who practise specific law offenses. Moreover, Article 70 of Law 9.605/1998 considers environmental administrative violation "any action or omission that violates the legal rules of use, enjoyment, promotion, protection and restoration of the environment". It can be punished with simple or a daily fine as well as other sanctions (Article 72, sections II and III).

However, because it was published more than 70 years ago, the Decree-Law 25/1937 does not explicitly determined that IPHAN's servers could levy and collect fines contained therein (emphasis added). The Law 9.605/1998 in its Article 70, §1, states that only officials of the Sistema Nacional de Meio Ambiente - SISNAMA (National Environmental System) and port authorities have assignment to draw up notices of environmental violations.

That situation was corrected with the edition of Decree 187/2010, June 11th which sets forth the procedures for calculation of administrative offenses by conduct and activities harmful to the cultural heritage buildings, the imposition of sanctions, the means of defense, the appeal system and the form of collection of debts arising from infringements. Thus, it is believed that almost all of the offenses applied before 2010 were canceled.

⁶⁸ Document available at: <http://www.teses.usp.br/teses/disponiveis/8/8136/tde-07112014-184004/>

Year	Processes	Residential	Commercial	Instruction	Enforceable Judgement	Filed
1999	20	16	4	-	-	-
2000	25	11	14	-	-	-
2001	25	21	4	-	-	-
2002	11	9	2	-	-	-
2003	12	6	6	-	-	-
2004	4	4	1	-	-	-
2005	5	3	2	-	-	-
2006	3	1	2	-	-	-
2007	3	2	1	-	-	-
2008	1	1	0	-	-	-
2009	0	0	0	-	-	-
2010	2	1	1	-	-	-
2011	0	0	0	-	-	-
2012	1	1	0	-	-	-
2013	1	1	0	-	-	-
TOTAL	123	86	37	-	-	-

Table 3. Infraction Notices Issued by IPHAN

Source: Villaschi, 2014 – Adapted by Burkowski, 2016

Table 3 above shows a significant decrease in the number of offenses reported by IPHAN to the public prosecutor. It was not possible to identify the number of requests for intervention in that period, but some hypotheses can be raised for future studies. The first one is the population perception regarding the police power assigned to IPHAN. As a result of Decree 187/2010, mentioned above, the data suggests that the population has become more attentive and apprehensive concerning the sanctions imposed by the heritage managers. Another hypothesis points that technical guidance and, above all, educational activities developed by IPHAN and other institutions linked to the cultural heritage, could be producing changes in the relationship state x society concerning reforms and new buildings inside the extensive protected territory. Finally, a third hypothesis is that IPHAN's insufficient human and financial resources compromises its capacity to monitor the various urban interventions.

5. Final Considerations

This comparative study allows us to consider that Portugal and Brazil have developed a legislation and have structured public entities to protect the integrity of their cultural heritage. These initiatives by the state maintain the World Heritage title awarded by UNESCO to Oporto's historic centre and to the city of Ouro Preto, thus ensuring the permanence of the historical urban landscape. Both countries have integrated their legislation in order to control the changes in buildings of historical value, and have also set penalties for offenses that may be committed. 48 years separate the issue of specific legislation in Brazil and Portugal, to protect their historical sites. However it did not mean adequate control over the mischaracterization of the Brazilian cultural asset. One hypothesis is about the delay for the heritage matter to become relevant and for its public policy to be proposed in Brazil. In any case, the laws of both countries set the right to culture as a fundamental citizens' right, which attaches to the state the duty to guarantee it.

The sample obtained from Portugal's public authorities has concluded that the CHPPM have rehabilitated 110 buildings between 2012 and 2014. In Brazil it was not possible to obtain data on the interventions in Ouro Preto's properties, which reveals a certain opacity of the public power. For the control of the offenses occurred in both countries, PORTO VIVO, SRU, has processed nine administrative offense cases between the years 2012-2015. Over those processes only one fine of the legal minimum was imposed, which shows a state performance of prevention rather than repression. In turn, in Brazil IPHAN has considerably reduced the number of administrative offense cases from 1999 to 2011, but all infractions were canceled. Both in 2012 as in 2013 IPHAN started only one process, which it was not possible to detect the outcome.

This comparative study shows that public authorities responsible for safeguarding the two countries assets work close the population and strive to ensure the maintenance of both cities World Heritage title. However there are important differences to consider. The largest PORTO VIVO, SRU's proximity to the CHPPM than the Regional Office of IPHAN to Ouro Preto city, for instance, shows different level of effectiveness. The differences of performance scales are also significant. Another point to consider is the limited IPHAN's acting capacity, given the reduced number of its staff and financial resources, only offset by continued educational activities for the community. It's also very important to consider the superficial knowledge about Ouro Preto's history among the population, especially natives, and therefore the non-recognition of its heritage value. In the case of Ouro Preto, new social demands and the lack of clear criteria for approval of architectural and urban interventions projects, stimulate residents to act as a potential heritage's predator.

Beyond the rigor of the law, the types of coping contradictions between economic development, tourism climb and heritage preservation, strongly incited by globalization processes, set the materialization of different evolutionary processes in both countries.

This article did not specifically compare the modalities of appropriation and use of Ouro Preto's and Oporto's territory which should occur in future studies.

References

- CGU (2015), *Relatório de Avaliação da Execução de Programas de Governo*, Nº 37, Preservação do Patrimônio Histórico Urbano, available at: sistemas2.cgu.gov.br/relats/uploads/6967_%20RAv%2037.pdf.
- Costa, E. B. da (2011), *Totalidade urbana e totalidade-mundo. As cidades coloniais barrocas face à patrimonialização global*, Tese de Doutorado em Geografia Humana, Faculdade de Filosofia, Letras e Ciências Humanas, Universidade de São Paulo, São Paulo, available at: <http://www.teses.usp.br/teses/disponiveis/8/8136/tde-14032011-104656/>, (consulted on: 2016.02.15).
- Porto Vivo – Sociedade de Reabilitação Urbana (2005), *Revitalização urbana e social da Baixa Portuense*, Porto, Master Plan – Síntese Executiva.
- Porto Vivo, SRU, available at: <http://www.portovivosru.pt/pt/porto-vivo-sru/apresentacao> (consulted on: 2016.01.11)
- Queirós, J. (2013), "Precariedade habitacional, vida quotidiana e relação com o estado no Centro Histórico do Porto na transição da ditadura para a democracia", in *Análise Social*, nº 106.
- Rabelo, C. N. (2014), *A proteção do património cultural arquitetónico: um estudo comparado entre o tombamento e o instituto análogo presente na legislação portuguesa*, in Cunha Filho, Francisco Humberto.
- Ramos, C. (2010), *Turismo urbano: paisagem cultural no Porto*. Coimbra, Universidade de Coimbra.
- Relatórios de Monitorização (2010), available at: <http://www.portovivosru.pt/pt/centro-historico/monitorizacao-plano-de-gestao>, Porto Vivo, SRU. (consulted on: 2016.02.02)
- Relatórios de Monitorização (2011), available at: <http://www.portovivosru.pt/pt/centro-historico/monitorizacao-plano-de-gestao>, Porto Vivo, SRU (consulted on: 2016.02.02)
- Relatórios de Monitorização (2012), available at: <http://www.portovivosru.pt/pt/centro-historico/monitorizacao-plano-de-gestao>, Porto Vivo, SRU (consulted on: 2016.02.02)

UNESCO (2014) *Relatório Periódico. Segundo Ciclo*, available at: <http://www.portovivosru.pt/pt/centro-historico/monitorizacao-plano-de-gestao>, Porto Vivo, SRU (consulted on: 2016.02.02)

Villaschi, J. N. S. (2014), *Hermenêutica do patrimônio e apropriação do território em Ouro Preto – MG*, Tese de Doutorado em Geografia Humana - Faculdade de Filosofia, Letras e Ciências Humanas, Universidade de São Paulo, São Paulo, available at: <http://www.teses.usp.br/teses/disponiveis/8/8136/tde-07112014-184004/> (consulted on: 2016.02.15).

Chapter X

The World Heritage Convention and its Effects on the Tourism Public Policies in Olinda (Pernambuco, Brazil)

The World Heritage Convention and its Effects on the Tourism Public Policies in Olinda (Pernambuco, Brazil)

GLORIA MARIA WIDMER⁶⁹

FERNANDA ABREU DOS SANTOS⁷⁰

ANA JULIA DE SOUZA MELO⁷¹

MARIA HELENA CAVALCANTI DA SILVA BELCHIOR^{72 73}

Abstract:

The Historic Centre of the Town of Olinda is one of the 20 World Heritage sites currently existing in Brazil. Entitled for its cultural-historic characteristics, Olinda is considered an important testimony of the American colonization period and presents meaningful touristic activity, based primarily in the visitation of its historical buildings and the interaction with its effervescent and diversified range of artists and cultural manifestations. Although primarily aimed to protect from destruction natural and cultural sites of world interest and importance, the World Heritage Convention, international document responsible for the registering of the Historic Centre of the Town of Olinda in the World Heritage List, it end up protecting sites that, under touristic perspective, are seen as elements of a large degree of attractiveness. Therefore, through its operational mechanisms, the Convention produces a sort of worldwide inventory which, besides indicating the important sites for humanity from the perspective of protection, also offers sites of relevance to tourism under the perspective of market principles and business opportunities. In this sense, this study aims to understand the effects generated by the World Heritage Convention on the tourism public policies in Olinda and is guided by procedures related

⁶⁹ Department of Hospitality and Tourism, Applied Social Sciences Centre, Federal University of Pernambuco, Brazil, gmwidmer@uol.com.br

⁷⁰ Department of Hospitality and Tourism, Applied Social Sciences Centre, Federal University of Pernambuco, Brazil, abreufernanda27@gmail.com

⁷¹ Department of Hospitality and Tourism, Applied Social Sciences Centre, Federal University of Pernambuco, Brazil, anjutur@gmail.com

⁷² Department of Hospitality and Tourism, Applied Social Sciences Centre, Federal University of Pernambuco, Brazil, mhcavalcanti@gmail.com

⁷³ We would like to thank to Ms. Juliana Rezende, current Tourism Director of the Municipal Secretary of Tourism, Economic Development and Technology of Olinda (SETUR-Olinda) and to Ms Sandra Spinelli, current Director of Heritage Projects of the Municipal Secretary of Heritage and Culture of Olinda (SEPAC-Olinda) for their interviews, which were essential to the success of this research.

to exploratory research. The results achieved made explicit the existent harmony between the adopted initiatives to protect this heritage, governmental actions related to the implementation of tourism policies in Olinda and the World Heritage Convention and, in addition, also being used to identify a form of public administration based on partnership between entities to achieve their goals.

Keywords: Olinda; Tourism; Public Policies; World Heritage

Resumo:

O Centro Histórico de Olinda é um dos 20 sítios do Patrimônio Mundial atualmente existentes no Brasil. Titulado por suas características histórico-culturais, é considerado importante testemunho do período de colonização das Américas e apresenta significativa atividade turística, baseada principalmente na visitação às construções de época e na interação com sua efervescente e diversificada gama de artistas e manifestações culturais. Embora tenha como principal objetivo proteger da destruição sítios naturais e culturais de interesse e importância mundiais, a Convenção do Patrimônio Mundial, documento internacional responsável pela inscrição do Centro Histórico de Olinda na Lista do Patrimônio Mundial, acaba por tutelar bens que, sob a ótica turística, são entendidos como elementos de grande grau de atratividade. Assim, por intermédio de seus mecanismos de funcionamento, a Convenção termina por gerar uma espécie de inventário mundial que, além de estabelecer os bens de importância para a humanidade sob a ótica da proteção, também apresenta bens de interesse para o turismo sob a ótica dos princípios de mercado e das oportunidades de negócios. Nessa perspectiva, este trabalho objetiva conhecer os efeitos gerados pela Convenção do Patrimônio Mundial sobre as políticas públicas de turismo em Olinda, pautando-se por procedimentos pertinentes à pesquisa exploratória. Os resultados alcançados deixam explícita a sintonia existente entre as iniciativas adotadas para proteger este patrimônio, as ações governamentais ligadas à execução das políticas de turismo em Olinda e a Convenção do Patrimônio Mundial e vão além, também servindo para identificar uma forma de gestão pública baseada na parceria entre órgãos para o alcance de seus objetivos.

Palavras-chave: Olinda; Turismo; Políticas Públicas; Patrimônio Mundial

Resumen:

El Centro Histórico de Olinda es uno de los 20 lugares de Patrimonio Mundial que actualmente existen en Brasil. Obtuvo el nombramiento por sus características histórico culturales y actualmente, es considerado un importante testigo del período de la colonización de las Américas; presentando una significativa actividad turística, basada principalmente en las visitas a las construcciones de época y en la interacción con la efervescente y diversificada gama de manifestaciones culturales y artista que posee el centro histórico. La Convención para la protección del Patrimonio Mundial, Cultural y Natural, – a pesar de tener como principal objetivo la protección frente a la destrucción sitios naturales y culturales de interés e importancia mundiales- contribuyó con documentos internacionales a la inscripción del Centro Histórico de Olinda en la lista del Patrimonio Mundial. Estos bienes recién tutelados, se comprenden como elementos de alto grado atractivo bajo la óptica turística. Así, a través de sus mecanismos de funcionamiento, la Convención ha generado una especie de inventario mundial que, además de establecer los bienes de importancia para la humanidad bajo la óptica de la protección, también presenta bienes de interés para el turismo bajo la óptica de los principios de mercado y de las oportunidades de negocios. En esta perspectiva, esta investigación pretende dar a conocer las repercusiones de la Convención del Patrimonio Mundial sobre las políticas públicas de turismo para Olinda, pautándose en procedimientos pertinentes a la investigación exploratoria. Los resultados obtenidos dejan claras la sintonía existente entre las iniciativas adoptadas por varios agentes para proteger este patrimonio. Nos referimos a las acciones de gobierno relacionadas con la gerencia de las políticas de turismo en Olinda y la Convención del Patrimonio Mundial entre otras. Concluimos con la reflexión de que estas acciones también sirven para identificar una forma de gestión pública basada en la asociación entre órganos para el alcance de sus objetivos.

Palabras Clave: Olinda; Turismo; Políticas Públicas; Patrimonio Mundial

1. Introduction

The “Convention concerning the Protection of the World Cultural and Natural Heritage” is an international normative instrument created by the United Nations Educational, Scientific and Cultural Organization – UNESCO, in 1972, with the primary purpose to establish an efficient system of protection of property considered unique, irreplaceable and of outstanding value for humankind. Therefore, it is also responsible for the creation of the World Heritage List, where

currently contains 1052 sites, which 20 are Brazilian, one of them being the Historic Centre of the Town of Olinda, in Pernambuco (UNESCO, 2016).

Olinda deserved an application in the World Heritage List as a cultural site, based on its representativeness in Brazil's history and the American continent, as a city that witnessed the sugar cane cycle in Brazil, and for holding, in its slopes and hills, a set of the oldest and most ancient houses and churches in America (Magalhães, 1981).

Although the Convention responsible for the application of Olinda in the World Heritage List seems to propose goals without direct connections with tourism, it has demonstrated evidences of interference in touristic activities of the locations it holds, especially in the case of appreciation of the attractiveness of these properties (Widmer and Pires, 2008; Widmer and Melo, 2015).

Considering, therefore, the protectionist goals of the mentioned International Convention; the fact that its text was ratified by Brazilian Government through the Decree no. 80.978, at December 12 of 1977, which validated it in Brazil; and the existence of expressive touristic activity in Olinda, it was verified the importance and the opportunity to accomplish the study that embraced the connections between the World Heritage Convention and the development of tourism public policies in Olinda.

In this sense, the Convention is characterized as one of the norms that may contribute to the framework, the planning and the development of touristic activity in worldwide sites (Widmer, 2007) and understanding the public policies as a collection of projects and governmental action plans oriented to intervention in social domain, through which are traced the instructions and goals to be promoted by the state (Cristóvam, 2005; Beni, 2006), it is believed that the Convention, as a valid norm in national territory, must be considered during the process of preparing tourism public policies for Olinda.

According to previously considerations shown, the present study has the general objective of knowing the effects made by the World Heritage Convention about the developed and current tourism public policies in Olinda. To achieve this objective, specific goals were listed, i.e.: to know the content and operation of the Convention on the World Cultural Heritage; to identify the criteria responsible for the titration of Olinda as World Cultural Heritage; to identify plans, programmes and/or other documents that translate representative initiatives of current tourism public policies in Olinda; and analyse the correlations of documents identified to the World Heritage Convention.

To achieve the proposed goals, this work was based on methods and techniques relevant to exploratory research of qualitative nature. It is fitting to consider that the exploratory research “is characterized for having a flexible planning, including in general bibliographical survey, interviews with experienced people and analysis of similar examples” (Dencker, 2007:151). In this sense, the work used predominantly bibliographical and documental research and interviews with members from local public administration.

The procedures of bibliographical and documental research assisted the theoretical study foundation, as well as the knowledge of documents, procedures and criteria responsible for the titration of sites of World Heritage in general, and especially, for the titration of the Historic Centre of the Town of Olinda. Such procedures were also used in the identification of plans, programmes and other documents related to tourism in Olinda.

As for the interviews, held in February of 2016 with the Directors of Tourism and Heritage Projects of the city, summed to analysis procedures of its contents, helped in the finding of the influence that the title of Olinda’s Historic Centre has on the tourism public policies in that city.

In this regard, the present work, structured in sections and subsections, initially presents the World Heritage Convention and details its content and functioning about the World Cultural Heritage. The second section presents Olinda’s city, its historical and cultural aspects and the reasons why the Historical Centre was included in the World Heritage List. The third section focused on the description of national and local rules used for the protection of the Historic Centre of the Town Olinda, while the fourth section identifies the plans and representative governmental projects of tourism public policies in Olinda and its correlations with the World Heritage Convention. In conclusion, the work offers the final considerations on the effects that the World Heritage Convention has on the tourism public policies in Olinda.

2. The World Heritage Convention

The Convention concerning the Protection of the World Cultural and Natural Heritage was established during the 17th session of The General Conference of the United Nations Educational, Scientific and Cultural Organization, from October 17 to October 21 of 1972, in Paris, France. It is composed by 38 articles that can be divided as follows: heritage definition in relation to the Convention; international organizations connected to the Convention; and ways to protect the world heritage.

Although the Convention contemplates natural and cultural properties of world interest and importance, taking into account the titration of Olinda as World Cultural Heritage, the following analysis will only be about the topics related to cultural properties, in order to allow the following approach: definition of World Cultural Heritage in relation to the Convention; international organizations connected to the World Cultural Heritage; and ways to protect the World Cultural Heritage.

2.1 Definition of the World Cultural Heritage referred to the Convention

The Convention defines, in its first article, the cultural properties that can be framed in its arrangements:

Article 1 – For the purpose of this Convention, the following shall be considered as "cultural heritage":

- monuments: architectural works, works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features, which are of outstanding universal value from the point of view of history, art or science;
- groups of buildings: groups of separate or connected buildings which, because of their architecture, their homogeneity or their place in the landscape, are of outstanding universal value from the point of view of history, art or science;
- sites: works of man or the combined works of nature and man, and areas including archaeological sites which are of outstanding universal value from the historical, aesthetic, ethnological or anthropological point of view. (UNESCO, 1972: 2).

The article allows understanding that the Convention covers only the cultural material properties, as sculptures, paintings, areas that possess exceptional value, etc.

It can also be observed that the first two items (monuments and groups of buildings) refer to exclusive achievements of human action, such as the Acropolis of Athens, in Greece, for the first item and the Old City of Jerusalem and its Walls, for the second item.

Now the sites can be understood as spaces or landscapes that gather achievements from man or nature. This creates a category of properties that are not classified neither as natural heritage, nor as cultural heritage: these are mixed sites, such as the Historic Sanctuary of Machu Picchu, in Peru, located amid Andes' slopes tropical forests and considered one of the most important creations of the Inca civilization.

2.2 International Organizations connected to the World Cultural Heritage

The Convention also predicts in its text the international bodies responsible for its execution in the sphere of the World Cultural Heritage. They are: the World Heritage Committee, the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM) and the International Council of Monuments and Sites (ICOMOS).

It is fit to the World Heritage Committee organise, update and make public the World Heritage List and the List of World Heritage in Danger, as well as deliberate about the inclusion of a property in any of those lists, fitting the criteria that has established for this purpose. These criteria are established in a document called "Operational Guidelines for the Implementation of the World Heritage Convention" (UNESCO, 2015). The formulation of these guidelines grants the World Heritage Committee the role of main body in the relevant tasks to the World Heritage, since it attributes the role of creating means to put the text of the Convention into practice.

Accordingly with the "Operational Guidelines", to claim the title of World Cultural Heritage, a cultural property shall meet one or more of the following criteria:

- I. represent a masterpiece of human creative genius;
- II. exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town-planning or landscape design;
- III. bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared;
- IV. be an outstanding example of a type of building, architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history;
- V. be an outstanding example of a traditional human settlement, land-use, or sea-use which is representative of a culture (or cultures), or human interaction with the environment especially when it has become vulnerable under the impact of irreversible change;
- VI. be directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance (the Committee considers that this criterion should preferably be used in conjunction with other criteria) (UNESCO, 2015: 16).

As for ICCROM, its main tasks are: gathering, study and disclosure of documents concerning the technical and scientific problems of the conservation and restoration of cultural properties; the coordination, the incentive and the establishment of researches in the fields of conservation

and restoration; the formulation of advices and recommendations fitting the problems of conservation and restoration of cultural properties; the assistance to States Parties to the Convention in the training of researchers and technicians, promoting models of restoration work of cultural properties (UNESCO, 1972).

The ICOMOS has as main task deliberate about the request of registration of a cultural property in the World Heritage List through technical reports. Upon request, the ICOMOS can also point out protective measures that must be taken by the state responsible for the registration of a cultural property in the World Heritage List (UNESCO, 1972).

2.3 Protective Ways to the World Cultural Heritage

The ways of international protection distributed by the Convention consist in financial aid, technical assistance and educational assistance.

As for financial aid, it may occur by low-interest or interest-free loans, which might be repayable on a long-term basis, fitting the article 22, item 'e', or by non-repayable subsidies, according to article 22, item 'f'. The financial aid is provided with resources of the World Heritage Fund, whose functioning is described by articles 15 to 18 of the Convention.

The technical assistance corresponds to the support to applications of aid made by the States Parties to the Convention, concerning projects designed to maintain properties that intend to register, or that are registered in the World Heritage List. In general, this type of assistance takes on the means of achieving studies, or of availability of technicians, according to article 22 of the Convention.

As for educational assistance, is characterized for the aid in the development of specialists by intermediate of aid to national or regional centres of development in any level, in the areas related to protection, appreciation, or rehabilitation of the heritage, based on article 22, item 'c' and article 23 of the Convention.

It is fitting consider, however, that the Convention understands that the State Party to the Convention has predominantly the role to protect the representative property of World Heritage existing in its territory, and the international collectively shall aid it in this task, however in such a way that its aid doesn't replace the action of the State Party to the Convention, in other words, in order to only contemplate. Under this perspective, the Convention establishes in article 4 the actions of protection that understands being responsibility of the States Parties to the Convention: to identify, to delimit, to conserve, to value and to transmit to future generations

the heritage present in its territory. The means of national protection taken for the World Heritage of Olinda are described in item 3 of this work.

3. Olinda and its Titration as World Cultural Heritage

Olinda is located in the metropolitan region of the State of Pernambuco, in the northeast of Brazil, at 08°01'48" of latitude and 34°51'42" of longitude, at west of Greenwich. It ends to the north with the town of Paulista, to the south and west with Recife, capital of the State, and to the east with the Atlantic Ocean. It has tropical hot and humid climate, with average annual temperature of 27°C. With territorial extension of 43,55 km² and population of 389.494 inhabitants, currently is an eminently urban city (IBGE, 2016). Economically, it stands out for the service industry, especially tourism. The notoriety in tourism is related mainly to the classic buildings, carried with strong historical symbolism and with the diversity of artists, pieces and cultural manifestations that describe the strong local culture in its most popular meaning.

Its Historic Centre covers an area of 1,2 km² and about 1.500 properties, that testify distinct architectural styles: colonial buildings of the 16th century harmonizing with facades of tiles from the 18th and 19th centuries, with neoclassical pieces from the beginning of the 20th century and with the characteristic urban outline of Portuguese villages of medieval origin (IPHAN, 2016).

Founded in 1535 by the Portuguese donee Duarte Coelho to be the headquarter of the Captaincy of Pernambuco, the formerly Olinda Village developed in narrow relation with the cultivation of the sugar section in the fruitful lands of the Captaincy, becoming a testimony city of the sugar cane cycle in Brazil, according to the dossier presented by the Brazilian government to instruct its application to the World Heritage Committee (Magalhães, 1981).

Despite the Dutch invasion, in 1630, and the fire destruction caused by invaders, in 1631, Olinda still possess in its slopes and hills of its Historic Centre important testimonies of the Brazilian colonial period. Are samples of this period the Jesuit compound of School, Nossa Senhora da Graça Church and the São Francisco Convent (all from the 16th century), the Nossa Senhora do Carmo Church (from the 17th century), among others constructions that certify the representation of Olinda in the history of Brazil and American continent, for housing a group of some of the most ancient houses and churches in America (IPHAN, 2016).



Figure 1. Nossa Senhora do Carmo Church

Source: Ana Julia de Souza Melo, 2016

On the basis of previously presented attributes, on 17th December 1982, the World Heritage Committee formalized the application of the Historic Centre of the Town of Olinda in the World Cultural Heritage List. The titration was given based by the criteria II and IV of “Operational Guidelines” (UNESCO, 2015), presented in item 1.2 of the present work.

The criteria used for the application of the Historic Centre of the Town of Olinda in the World Heritage List allows to clearly understand its exceptional value for mankind, based on its representative as an example of significant period of the human history on the planet: the colonization of the Americas, whose testimonies are present in the architecture, in the monuments, in the buildings, in the urban outline and Olinda’s landscape.

In this regard, it is fitting to reflect that the Convention and its listing mechanisms, as registering a property in the World Heritage List, that seeks to legitimize, through a kind of international approval, the extraordinary value of this property. Taking into account all the listed properties, the Convention ends up creating a kind of world inventory of properties that possess high value for humanity and, therefore, needs to be protected and maintained for this same humanity.

Applying this reflection to the Historic Centre of the Town of Olinda, its application in the World Heritage List can be understood as an international certificate that it possesses exceptional value for the world community; it is an odd testimony of history and culture of mankind in the planet; and it must be protected and maintained for the present and future generations.

4. Ways of National Protection to the World Cultural Heritage of Olinda

Brazil did not have major difficulties in adapting to the World Heritage Convention, realizing that beyond possessing some of the established requirements as a State Party responsibility referring to protection, it also ended up expanding or updating after the endorsement of the text of that international norm, in December 1977.

Therefore, with the necessary measures of protection, it is fitting to consider that Brazil already had, in 1977, organizations related with the protection of national cultural heritage, as an example of the Service of National Artistic and Historical Heritage (SPHAN)⁷⁴, created by Federal Law no. 378, from 01/13/1937, for the protection of cultural properties. In addition, it also possessed some measures of protection for cultural properties, such as tumbling, set by Decree-Law no. 25, from 11/30/1937.

Subsequently to the Convention, new legal measures in federal scope were adopted. Among them, it stands out:

- the Brazilian Federal Constitution of 1988, that dismiss attention to Cultural Heritage by intermediate of the articles 23, 24, 215 and 216, which covers the protection of cultural properties that are historical, artistic, landscaped, architectural, archaeological, among others;
- the Federal Law no. 8313/91, known as the Incentive to Culture Law, or Rouanet Law, responsible for the institution of the National Support to Culture Programme (PRONAC), whereby are established fiscal incentives to individuals and legal entities that contribute to the protection and promotion of Brazilian culture;
- the Federal Law no. 9605/98, known as Environmental Crimes Law and responsible for specify the main criminal conducts against the environment, considered in its cultural and natural aspects, beyond establishing severe sentences for the offenders, as fines that can reach R\$ 50 million by the practice of one single crime (currently approximately US\$ 14,5 million), repairing damage caused sentences and freedom privative sentences.

Beyond the federal mechanisms of protection, common to all the World Cultural Heritages present in Brazil, Olinda went beyond, adopting a series of municipal measures for the protection of its Historic Centre, among them, stands out:

⁷⁴ Presently, since 1970, National Institute of Historic and Artistic Heritage - IPHAN.

- the Municipal Law no. 4849/92, known as Urban Legislation for the Historical Sites, responsible for institute the Historical Site of Olinda as Special Zone of Cultural and Landscape Protection 1 (ZEPC 1), aiming the protection and appreciation of the cultural, architectural and urban properties, beyond the life quality improvement of the residents. It is considered the most important rule about the subject and the responsible for maintenance of the physical and cultural characteristics of the Historic Centre of the Town of Olinda, by defining urban standards, normalize the allowed and not allowed uses, as well as the activities allowed in each sector of the Historical Site;
- the Supplementary Law no. 013/2002 that establishes the Code of Works and Buildings of Olinda Town, defining rules for elaboration of projects and execution of works in relation to technical, structural and functional aspects;
- the Supplementary Law no. 026/2004 that establishes the Director Plan of the Town of Olinda, instrument responsible for guiding the performance of the public administration and the private initiative, in order to ensure the ordained development of the social duties of the city.

It should be noted that all the measures listed here, being them federal or municipal, present consensus with the protection goals established in the World Heritage Convention.

Particularly about the measures adopted by Olinda (of municipal scope and, therefore, more specific about the reality of its Historic Centre), it can be said that they demonstrate total compliance with the article 4 of the Convention, which establishes the protection initiatives that is a task for the State Parties to the Convention: to identify, to delimit, to conserve, to value and transmit to future generations the present heritage in its territory.

In this regard, the municipal measures here listed identify and delimit the area covered by the Historic Centre, as much as aid in the planning, orientation and organization of works and activities permitted in this space, contributing for its conservation and, consequently, for transmitting to future generations, the cultural heritage present in its territory. Finally, all this conservation effort brings, in an essential way, the idea of value. After all, why conserve something that has no value?

It is understood that the titration as well as the national protection initiatives legitimize the value of the Historic Centre of the Town of Olinda. Not only the cultural value of this heritage, but also its value as a factor that must be maintained, to be known and admired for the present and future generations.

Under this approach, it can be stated that the Convention and its national protection initiatives indirectly emphasise the aptitude of a World Heritage site as a provider of tourist activity, and that this tourist activity is desirable, as a way to contribute for its own appreciation of the World Heritage. After all, how to appreciate something you do not know? How to admire the World Heritage only in a theoretical and intuitive way? Why protect these sites for the humanity and consider them interest for all if we do not let this same humanity the possibility of contact with this places and consequently existential experience about the reasons for why they are so important?

As properly explained by Morel (1999), the World Heritage Convention never aimed that a property considered World Heritage becomes a touristic resource, in a tourist attraction matter. However, the own characteristics of these properties, associated to the conservation strategies, end up by highlighting its importance and beauty, that can interfere in the planning and/or development of tourism in these locations, what will be observed, specifically for Olinda, in the next item.

5. Governmental Plans and Projects related to Tourism in Olinda

Many are the definitions found for tourism policy. In agreement with Beni:

The tourism policy is the backbone of the 'formulate' (planning), of 'thinking' (plan), of 'doing' (projects, programmes), of 'executing' (preservation, conservation, utility and the redefinition of natural and cultural heritages and its sustainability), of 'reprogramming' (strategy) and of 'fostering' (investments and sales) the tourism development of a country or of a region and its final products (Beni, 2007: 177).

As for Goeldner, Ritchie and McIntosh (2002: 294), the tourism policy "is a group of goals and strategies of development and promotion that supplies a structure in which collective and individual decisions are taken that directly affects the tourism development and the daily activities in a destination".

Still according to Hofling (2001, *apud* Barreto, Burgos and Frenkel, 2003: 33), public policy "is the state implementing a governmental proposal, through programmes and actions targeted for specific sectors of the society".

About the definitions previously exposed, it is understandable that plans, programmes and projects are mechanisms through which strategies are observed and the practical actions related to tourism public policies are executed.

Tourism policy can be understood as “a group of actions from governmental entities, many times in partnership with others entities, with the goal of changing the financial and social environment” (Lopes, Tinôco and Souza, 2011: 616). Vieira also underlines:

The tourism policy must be understood in its complex totality, aggregating all its components, after all the activity presents a great diversity of actions and policies, it is worth highlighting, present itself inter-sectored, fitting to the state the obligation of protection actions of the environment, heritage preservation and of the social well-being (Vieira, 211: 21).

In this way, it is verified that the tourism policies are complex elements, assisting its own complexity, dynamic and diversity of the activity. It involves not only the touristic practice itself, but also the relations with a series of elements, as some examples, the environment, the culture and the society in which the touristic practice is developed. In this regard, the tourism public policies may involve efforts and partnerships of several governmental entities and not only those, which are specifically connected to tourism.

Taking into account such considerations, are set out in sequence the current governmental plans and projects that are related to tourism in Olinda.

5.1 Strategic Plan of Tourism in Pernambuco 2008-2020

In general, cities of Pernambuco follow the guidelines contained in the document entitled “Strategic Plan of Tourism in Pernambuco 2008-2020” (Pernambuco, 2007) for the development of its tourism public policies. Composed by 199 pages, it presents the guidelines for the development of tourism in Pernambuco, as well as the programmes responsible for its execution. It presents Recife, Olinda, Porto de Galinhas and Fernando de Noronha as consolidated tourism destinations in the state, without stopping supporting the others emerging destinations.

Specifically for Olinda, the document identifies its Historic Centre as a strong point of tourism in Pernambuco and priority for the development of actions in short and medium term, in a way that continues to exercise its role of a spotlight. It also lists actions that understands being

priority for the city, such as: tourism information signs, in a way to ensure easy access to the tourist attraction, equipment and services; training of local labour, aiming better service to tourists; and structure of the built heritage for tourism, without the loss of its original characteristics (Pernambuco, 2007).

5.2 Projects

From consulting the websites of Olinda's City Hall (Olinda, 2015; 2016) and IPHAN (2016b), were identified references to seventeen current projects related to tourism in Olinda. Of those, three are executed by the Municipal Secretary of Tourism, Economic Development and Technology of Olinda (SETUR-Olinda) and fourteen by the Municipal Secretary of Heritage and Culture of Olinda (SEPAC-Olinda).

As for the projects developed by SETUR-Olinda, they are:

- The dissemination of Olinda's touristic attractions: SETUR-Olinda develops and publishes informative and promotional material about the cultural and natural elements present in its territory, that are interesting for tourism, such as churches, museums, monasteries and other historical buildings, monuments, artists, handicraft, cultural manifestations, beaches, among others.
- This dissemination proceeds by various means, such as folders, pamphlets, maps, guides, videos, websites, newspapers and magazines reports, among others. The furtherance, promotion and publicity of touristic data from Olinda are some of the many attribution of SETUR-Olinda. Thereby, this project is developed continuously.
- Capacitating and awareness raising of local conductors: in partnership with Non-Governmental Organizations and Associations, are offered courses in the field of quality customer service, hospitality, tourism, cultural heritage, among others, to local conductors of Olinda. Despite the existence of initiatives in the capacitating and awareness rising before, the project was legalized in 2009, from the partnership with the Association of Native Conductors of Olinda (ACNO) and its actions are still running.
- Touristic signalling of the Historical Site in Olinda and other areas of the city: the project began in 2014, with the implantation of sixty-six indicative and 43 interpretative signboards of monuments in the historical site area of Olinda. Its second stage, which began in 2015, aims the implantation of touristic signalling in other areas of the city and is already 50% completed. (Olinda, 2016)

As for the 14 projects under the responsibility of the SEPAC-Olinda, they can be classified as structuration projects of the heritage buildings and aims the preservation, the reuse and/or the appreciation of those buildings. All of them, proposed back in 2013, stimulated by the credit line provided by the Growth Acceleration Programme (PAC), from the Federal Government. Known by the name "PAC-Historic Cities", the credit line is designated exclusively to historic urban sites supported by the National Institute of Historic and Artistic Heritage (IPHAN), as an example, the Historic Centre of the Town of Olinda. The credit line covered all of the 14 projects with the amount of BR\$ 61.7 million, approximately US\$ 17.9 million (IPHAN, 2016c). Briefly, they are:

- Restoration of the historical building Hermann Lundgren, with the implantation of the Olinda's Memory Centre: restoration and preservation to the implantation of Olinda's Memory Centre, which will accommodate rooms for permanent and temporary exhibitions, auditorium, multipurpose room, reception and sanitary facilities.
- Restoration of the Cine Theatre Duarte Coelho - implantation of the Cine Animation School: is about the restoration of the building and the enlargement of its area to the introduction of a new use, the theatre and cinema school.
- Restoration of the Fort of San Francisco: the building site includes the restoration of the building and implantation of the stage lightning.



Figure 2. Fort of San Francisco

Source: Ana Julia de Souza Melo, 2016

- Complementation of the requalification of the Fort's site: the proposal contains a new building, being constructed in three adjacent lots, to the introduction of a new fish and crustacean market.

- Restoration of the Governors Palace: structural repairs in the building to preserve its original characteristics.



Figure 3. Governors Palace

Source: Gloria Maria Widmer, 2016

- Rehabilitation of the Amparo Square and Saint John Square: intervention for the maintenance and improvement of the physical structure (lightning, pavement, accessibility).



Figure 4. Amparo Square and Saint John Square

Source: Ana Julia de Souza Melo, 2016

- Rehabilitation of the Churchyard and Square of Our Lady of the Mount Church: intervention for the maintenance and improvement of the physical structure (lightning, pavement, accessibility, parking).
- Restoration of the Municipal Public Archive Antônio Guimarães building: structural recovery of the building and landscaping of the outside area.
- Rehabilitation of the Square of Contemporary Art Museum: contains the square recovery and landscape treatment of the surrounding area.



Figure 5. Square of Contemporary Art Museum

Source: Ana Julia de Souza Melo, 2016

- Restoration of the Olinda Fountains: execution of a water treatment and drinkability system.
- Restoration of the Bonfim Church: implantation of accessibility and structural reinforcement of the Church.



Figure 6. Bonfim Church

Source: Ana Julia de Souza Melo, 2016

- Restoration of Saint Peter Church: implantation of accessibility and structural reinforcement of the Church.



Figure 7. Saint Peter's Church

Source: Ana Julia de Souza Melo, 2016

- Restoration of Saint Benedict Monastery: structural recovery, with repair of the movable properties.



Figure 8. Saint Benedict's Monastery

Source: Gloria Maria Widmer, 2016

- Rehabilitation of the Franciscan Convent Churchyard: intervention for the maintenance and improvement of the physical structure (lightning, pavement, accessibility, urban furniture).



Figure 9. The Franciscan Convent's Churchyard

Source: Gloria Maria Widmer, 2016

The Table 1, entitled "Governmental Projects related to Tourism in Olinda", systematizes the information of previously presented projects.

No	Project	Purpose	Executing Entity	Beginning	Status
1.	Dissemination of Olinda's touristic attractions	Dissemination	SETUR-Olinda	Continuous	In progress
2.	Capacitating and awareness raising of local conductors	Capacitation	SETUR-Olinda	2009	In progress
3.	Touristic signalling of the Historic Site in Olinda and other areas of the city	Identification/ Dissemination	SETUR-Olinda	2014	In progress
4.	Restoration of the historical building Hermann Lundgren, with the implantation of the Olinda's Memory Centre	Preservation/ Reuse/ Appreciation	SEPAC-Olinda	2013	In progress
5.	Restoration of the Cine Theatre Duarte Coelho - implantation of the Cine Animation School	Preservation/ Reuse/ Appreciation	SEPAC-Olinda	2013	In progress
6.	Restoration of the Fort of San Francisco	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress
7.	Complementation of the requalification of the Fort site	Preservation/ Reuse/ Appreciation	SEPAC-Olinda	2013	In progress
8.	Restoration of the Governors Palace	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress
9.	Rehabilitation of the Amparo Square and Saint John Square	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress
10.	Rehabilitation of the Churchyard and Square of Our Lady of the Mount Church	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress
11.	Restoration of the Municipal Public Archive António Guimarães building	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress
12.	Rehabilitation of the Square of Contemporary Art Museum	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress

13.	Restoration of the Olinda Fountains	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress
14.	Restoration of the Bonfim Church	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress
15.	Restoration of Saint Peter Church	Preservation/ Appreciation	SEPAC-Olinda	2013	In progress
16.	Restoration of Saint Benedict Monastery	Preservation/ Appreciation	IPHAN	2013	In progress
17.	Rehabilitation of the Franciscan Convent Churchyard	Preservation/ Appreciation	IPHAN	2013	In progress

Table 1. Governmental Projects related to Tourism in Olinda

Source: IPHAN, 2016. Elaborated by the authors

Theoretically, the 17 projects seemed to present total consonance with the States-party position about the protection initiatives, as provided for in article no. 4 of the World Heritage Convention. In this sense, the listed projects illustrate actions of identification, preservation and appreciation of Olinda's cultural heritage. In addition, the dissemination, reuse and capacitating initiatives contribute to the communication of that heritage, both at present, as to the future generations.

It is also possible to verify the strict correlation of the listed projects with the guidelines and actions provided by the Pernambuco's Strategic Plan of Tourism. Still, most of the projects is being executed by the SEPAC-Olinda.

To a better understanding of the situation, it was held an interview with Ms. Juliana Rezende, current Tourism Director of the SETUR-Olinda, in February 2016. On the attributions of the SETUR-Olinda and its relation to cultural heritage, the interviewee believes that:

SETUR-Olinda has as one of its primary objectives to foster and develop the city's tourism. Thus, SETUR-Olinda executes projects related mainly to the dissemination and promotion of Olinda's tourism, in accordance with Pernambuco's Strategic Plan of Tourism. On the cultural heritage, we are aware of the importance of Olinda's World Heritage title and its other cultural riches, fitted to us to promote and disseminate the existence of all these attractions, so important to tourism. This can happened through marketing campaigns, signalling efforts, development of informative material to the tourist, etc. Now the interventions in the buildings shall be responsibility of the SEPAC-Olinda.

On the division of the activities related to the cultural heritage built between SETUR-Olinda and SEPAC-Olinda, the interviewee announced that:

The division of activities occurs due to the specific attributions of each Secretariat. We take care of the dissemination and promotion of the historic-cultural tourism and the SEPAC-Olinda takes care, among other things, of the protection and maintenance of the building heritage. However, this division does not lead to isolation between the two entities. On the contrary, they need to meet and work its actions together and that happens frequently, benefiting the tourism as much as the heritage.

The information provided by Rezende contributed to sustain that the projects being executed by the SETUR-Olinda are aligned with Pernambuco's Strategy Plan of Tourism.

With regard to cultural heritage, the projects developed relates primarily with signalling (identification), promotion and dissemination of properties as touristic attractions, being the responsibility of the SEPAC-Olinda the intervention projects in this heritage buildings (restoration, infrastructure, new application, etc). It does not mean, however, that the two entities work isolated. On contrary, the situation is seen as a partnership, in which there are only division of activities, and the results, summed up, benefit the tourism as much as the cultural heritage in Olinda.

On the occasion, Rezende also clarified that the adopted promotion and dissemination take into account Olinda's Historic Centre titration, which is considered important to tourism development, both at city, as state level, being responsible, including, for the arrival of many tourists with historic-cultural interests.

On February 2016 was also held the interview with the current Director of Heritage Projects of SEPAC-Olinda, Ms Sandra Spinelli. The interviewee contributes to confirm the information from the first interview. Accordingly to the interviewee:

Among other responsibilities, it is also up to the Municipal Secretary of Heritage and Culture of Olinda to propose intervention projects connected to the historic-cultural heritage of the city. In the preparation of the projects to the historic centre, its importance to the World Cultural Heritage is always highlighted. The title also helps to prioritize a project and obtain resources.

Also questioned about the division of attributions related to the cultural heritage buildings between SETUR-Olinda and SEPAC-Olinda, the interviewee claimed:

It should not be understood as a division, but as a distribution of activities. Each secretariat works within their technical area and all in favour of a bigger purpose of improvements to the community, doing it in partnership. The work held at the Municipal Secretary of Heritage and Culture of Olinda and at the Municipal Secretary of Tourism, Economic Development and Technology of Olinda add up, complement and contribute to the protection, maintenance and propagation of this heritage for the national and international community.

Therefore, it can be declared that the intervention projects on the cultural heritage of the city are the responsibility of SEPAC-Olinda. It is also verified that the elaboration of the projects related to the Historic City Centre are sustained for its World Heritage *status* and this title contributes to privilege the projects in obtaining public resources, as an example, the credit line known as PAC-Historic Cities.

The interviewee also believes that the work of SEPAC-Olinda and SETUR-Olinda related to Olinda's cultural heritage are complementary pieces that, together, contribute to the maintenance and recognition of this heritage, by the national and international community.

Confronting the information disposed by the two interviews, it can be noticed alignment and convergence between the two speeches. Likewise, it is not noticed the divergence of opinions, neither competence conflicts between the works performed by the two entities on behalf of cultural heritage and tourism. On the contrary, the analysis of information demonstrates the existence of a complementary work, collaborative at times, but always in consonance with protection orientation, established by the World Heritage Convention and the orientations on the sustainable touristic development, established by Pernambuco's Strategic Plan of Tourism.

In this sense, the work performed has led to the elaboration and execution of projects. These projects represent the practices of tourism's public policies and protection of Olinda's cultural heritage, aiming to contribute to the safeguarding and dissemination of the World Heritage located in Olinda to the present and future generations of humankind.

6. Final Considerations

By registering a site in the World Heritage List, the Convention and its functioning mechanisms certify globally that this site possess unique and irreplaceable characteristics of an exceptional value to mankind, needing, therefore, be protected, to be known and admired by the present and future generations.

Possessing mainly protective purposes, the Convention never aimed a World Heritage being converted in a tourist attraction. However, it can also be noticed that the specific characteristics of a site, allied to its titration and its respective protection imperatives, works as elements that express and reinforce the importance and singularity of the site and may end reflecting in the planning and/or the development of Tourism in its territory.

Particularly in relation to the Historic Centre of the Town of Olinda, titrated as World Cultural Heritage in 1982, by its significant historical and cultural representativeness as a testimony of the colonization period of the Americas, it is possible to observe that is about a place that the Convention doesn't have merely specific or rhetorical effect. In this case, the communion between the international norm and the titrated site has proven to be continuous and strong over time and it is translated by the existence of various national protection initiatives, as well as governmental actions that allow the effective transmission of this legacy to the present and future generations.

In relation to identified national protection initiatives, they are all in direct consonance with the ideals of the Convention, exercising conservation functions about Olinda, recognizing and valuing its historical and cultural importance and, indirectly, encourage its aptitude towards tourism.

With regard to tourism, if planned and organised properly, it is an opportune way to knowledge of these sites, and therefore, to transmitting their values to the present and future generations.

As to planning and organization of the tourist activity in its territory, Olinda stands out by the adopted public policies, translated by municipal projects that: demonstrate a clear alignment with the Pernambuco's Strategic Plan of Tourism; involve their municipal offices in a synergetic public management system, based on mutual cooperation to the achievement of the proposed goals; and presents influence and, consequentially, consonance with the World Heritage Convention.

All this considered, it is believed that the contributions exposed here are not limited to just knowing the effects of the World Heritage Convention on the tourism public policies in Olinda, but also points up an inspiring way of public management, based on the partnership that can contribute as an example for futures researches that relate the tourism and the World Heritage Convention.

Lastly, it is fitting to clarify that the research conducted did not seek to close the discussions about the theme. The study about the World Heritage Convention and its effects on tourism, in general, is a stimulating and complex theme, however almost unexplored in Brazil, as well as other countries.

In this way, those who decide to undertake efforts in this area will find difficulties, as an example, lack of systematized data, lack of knowledge about the subject, compensated, on the other hand, by countless possibilities of investigation that the theme offers, such as: studies about tourist visitations to World Heritage sites; studies about impact of tourism in the titrated properties; studies about tourism as an allied in the protection of World Heritage; studies about use of the title as a marketing element for tourism, among others, that will certainly contribute for greater knowledge of the existing relations between tourism and the World Heritage.

References

- _____ (1937), *Decreto-Lei nº 25, de 30 de novembro de 1937*, available at: http://www.planalto.gov.br/ccivil_03/decreto-lei/Deloo25.htm (consulted on: 02.05.2016).
- _____ (1937), *Lei nº 378, de 13 de janeiro de 1937*, available at: http://www.planalto.gov.br/ccivil_03/leis/1930-1949/L0378.htm (consulted on: 02.02.2016).
- _____ (1972), *Convention concerning the protection of the World Cultural and Natural Heritage*, available at: <http://whc.unesco.org/archive/convention-en.pdf> (consulted on: 12.04.2015).
- _____ (1988), *Constituição da República Federativa do Brasil de 1988*, available at: http://www.planalto.gov.br/ccivil_03/constituicao/constituicao.htm (consulted on: 02.10.2016).
- _____ (1991), *Lei nº 8313, de 23 de dezembro de 1991*, available at: https://www.planalto.gov.br/ccivil_03/leis/l8313cons.htm (consulted on: 02.05.2016).
- _____ (1992), *Lei nº 4849/92*, available at: <http://www.ceci-br.org/consevar/legislacao.html> (consulted on: 02.05.2016).
- _____ (2002), *Lei Complementar nº 013/2002*, available at: <http://www.ceci-br.org/consevar/legislacao.html> (consulted on: 02.02.2016).

- _____ (2004), *Lei Complementar nº 026/2004*, available at: <http://www.cecib.org/conservar/legislacao.html> (consulted on: 02.02.2016).
- _____ (2006), *Política e planejamento de turismo no Brasil*, São Paulo, Aleph.
- _____ (2015), *Olinda é referência nacional na preservação do patrimônio histórico*, available at: <http://www.olinda.pe.gov.br/patrimonio/olinda-e-referencia-nacional-na-preservacao-do-patrimonio-historico/#.VsB8D7lrLIU> (consulted on: 02.01.2016).
- _____ (2015), *Operational guidelines for the implementation of the World Heritage Convention*, available at: <http://whc.unesco.org/en/guidelines/> (consulted on: 12.05.2015).
- _____ (2016b), *PAC Cidades Históricas: ações selecionadas*, available at: <http://portal.iphan.gov.br/uploads/ckfinder/arquivos/A%C3%A7%C3%B5es%20selecionadas.pdf> (consulted on: 02.01.2016).
- _____ (2016c), *PAC Cidades Históricas: resumo por cidade/UF*, available at: <http://portal.iphan.gov.br/uploads/ckfinder/arquivos/Investimentos%20por%20cidade.pdf> (consulted on: 02.01.2016).
- Barretto, M., Burgos, R., Frenkel, D. (2003), *Turismo, políticas públicas e relações internacionais*, Campinas, Papirus.
- Beni, M. C. (2007), *Análise estrutural do turismo*, 12.ed., São Paulo, SENAC.
- Brasil (1998), *Lei nº 9605, de 12 de fevereiro de 1998*, available at: http://www.planalto.gov.br/ccivil_03/leis/L9605.htm (consulted on: 02.05.2016).
- Cristóvam, J. S. da S. (2005), *Breves considerações sobre o conceito de políticas públicas e seu controle jurisdicional*, available at: <https://jus.com.br/artigos/7254/breves-consideracoes-sobre-o-conceito-de-politicas-publicas-e-seu-controle-jurisdicional> (consulted on: 12.12.2015).
- Dencker, A. de F. M. (2007), *Pesquisa em turismo: planejamento, métodos e técnicas*, São Paulo, Futura.
- Goeldner, C. R., Ritchie, J. R. Brent, McIntosh, R. W. (2002), *Turismo: princípios, práticas e filosofias*, 8.ed., Porto Alegre, Bookman.
- Instituto Brasileiro de Geografia e Estatística (IBGE) (2016), *Olinda*, available at: <http://cidades.ibge.gov.br/xtras/perfil.php?lang=&codmun=260960&search=pernambuco|olinda> (consulted on: 02.10.2016).
- Instituto do Patrimônio Histórico e Artístico Nacional (IPHAN) (2016a), *Olinda*, available at: <http://portal.iphan.gov.br/pagina/detalhes/351/> (consulted on: 02.01.2016).
- Lopes, A. O. B., Tinôco, D. dos S., Souza, L. M. de (2011), "Avaliação de políticas públicas de turismo: uma análise bibliométrica dos periódicos de turismo", *Revista Turismo em Análise*,

- 22 (3), 614-631, available at: <http://www.revistas.usp.br/rta/article/view/14266/16084> (consulted on: 01.20.2016).
- Magalhães, A. (1981), *Proposta de inscrição na Lista do Patrimônio Mundial apresentada pelo Brasil: Centro Histórico da Cidade de Olinda*, available at: http://portal.iphan.gov.br/uploads/ckfinder/arquivos/Dossie%20de%20OLINDA%20anexo%201_pt.pdf (consulted on: 01.30.2016).
- Morel, J. B. (1999), "O Patrimônio da Humanidade", in Yázigi, E., Carlos, A. F. A., Cruz, R. de C. A. da (Orgs), *Turismo: espaço, paisagem e cultura*, 2.ed., São Paulo, Hucitec, 83-91.
- Olinda (2016), *Turismo*, available at: <http://www.turismo.olinda.pe.gov.br> (consulted on: 02.10.2016).
- Pernambuco (2007), *Plano estratégico do turismo de Pernambuco 2008-2020*, available at: http://aprender.ead.unb.br/pluginfile.php/63182/mod_resource/content/0/Pernambuco%20-%202008%20-%202020.pdf (consulted on: 02.10.2016).
- United Nations Educational, Scientific and Cultural Organization (UNESCO) (2016), *World Heritage List*, available at: <http://whc.unesco.org/en/list/> (consulted on: 07.22.2016).
- Vieira, A. R. M. (2011), *Planejamento e políticas públicas de turismo: análise dos módulos operacionais do Programa de Regionalização do Turismo no Polo São Luís-MA*, Dissertação de Mestrado, Universidade de Brasília, Brasília.
- Widmer, G. M. (2007), *O título de patrimônio da humanidade e seus efeitos sobre o turismo em Fernando de Noronha*. Tese de Doutorado, Universidade de São Paulo, São Paulo.
- Widmer, G. M., Melo, A. J. de S. (2015), "O turismo como fator de contribuição para a proteção e função social do patrimônio natural da humanidade", in Figueiredo, S. L., Azevedo, F. F. de, Nobrega, W. R. de M. (Orgs.), *Perspectivas contemporâneas de análise em turismo*, Belém, NAEA, 273-287, available at: <http://www.naea.ufpa.br/naea/novosite/index.php?action=Publicacao.arquivo&id=570> (consulted on: 01.20.2016).
- Widmer, G. M., Pires, M. J. (2008), "A Convenção do Patrimônio Mundial, Cultural e Natural, como possível elemento indutor de atividade turística", *Revista Hospitalidade*, year V, 2, 52-64, available at: <https://www.rev Hosp.org/hospitalidade/article/download/152/177> (consulted on: 01.20.2016).
- Widmer, G. M., Santos, F. A. Dos, Melo, A. J. de Souza, Belchior, M. H. C. da S., Paes, E. K. R. L. (2016), "Repercussões da Convenção do Patrimônio Mundial sobre as políticas públicas de turismo para Olinda", in *II Conferência Internacional Turismo & História*, Algarve/Caxias do Sul (paper presented on: March 11, 2016).

Chapter XI

Ruins of the Jesuit - Guaranis Missions of São Miguel Arcanjo: An Overview on the UNESCO World Heritage in Brazil

Ruins of the Jesuit - Guaranis Missions of São Miguel Arcanjo: An Overview on the UNESCO World Heritage in Brazil

PEDRO DE ALCÂNTARA BITTENCOURT CÉSAR⁷⁵

BRUNA TRONCA^{76 77}

Abstract:

The study deals with the Jesuit-Guarani Missions of São Miguel Arcanjo, located in Brazil, more precisely in the Rio Grande do Sul state, as National Heritage protected by the National Historical and Artistic Heritage Institute (IPHAN) and recognised as World Heritage by the United Nations Educational, Scientific and Cultural Organization (UNESCO), its relation with the others Jesuit reductions in the region and also as a tourist attraction. Initially, the dimensions of a site are contextualised as heritage of humanity, as a tangible property built or natural, linking it to others items related in the World Heritage List that are located in the Brazilian scene. Subsequently, it is offered a clipping about the Jesuit Missions on the continent, whose existence is usually estimated at 30 missions. These indigenous reductions, presented as an achievement of Jesuit missionaries in the context of the Catholic Church's Counter-Reformation, happen at Spanish America territory, although social and architecturally materialise in places that currently belong to the countries of Paraguay, Argentina and Brazil. The research unfolds specifically on the missions located in Brazil, in the study of documents with asset recognition and bibliographic theoretical references. However, an analysis *in loco* enables recognition as a tourist attraction. The objective in research is to strengthen the intention of appropriation of an identity as reference of the *gaúcho* people and of the Brazilian nation itself.

Keywords: World Heritage; Cultural Heritage; Jesuit Missions; São Miguel Arcanjo

Resumo:

O estudo trata das Missões Jesuíta - Guaraníticas de São Miguel Arcanjo, situado no Brasil, mais precisamente no estado do Rio Grande do Sul, como Patrimônio Nacional (IPHAN), e

⁷⁵ University of Caxias do Sul/Brazil, pabcesar@ucs.br

⁷⁶ University of Caxias do Sul/Brazil, btronca@ucs.br

⁷⁷ Part of this chapter is based on first author's other publications with co-authoring of Beatriz Stigliano.

Mundial reconhecido pela Organização das Nações Unidas para a Educação, a Ciência e a Cultura (UNESCO), sua relação com as demais reduções jesuítas na região e ainda como atrativo turístico. Inicialmente, contextualiza-se a dimensão de um local como patrimônio da humanidade, seja como bem material construído ou natural, relacionando-o com outros itens presentes na Lista do Patrimônio Mundial, situados no cenário brasileiro. Deste modo, faz-se posteriormente, um recorte acerca das Missões Jesuíticas no continente, cuja existência é estimada geralmente em trinta missões. Estas reduções indígenas, apresentadas como uma realização de missionários jesuítas, no contexto da Contrarreforma da Igreja Católica, acontecem em solo da América espanhola, embora materializem-se social e arquitetonicamente em territórios que atualmente pertencem aos países de Paraguai, Argentina e Brasil. A pesquisa desdobra-se especificamente sobre as missões localizadas no Brasil, no estudo de documentos com reconhecimento patrimonial, e referenciais teóricos bibliográficos. Entretanto, a análise *in loco* possibilita o reconhecimento como atrativo turístico. Objetiva-se na pesquisa, reforçar a intenção da apropriação de uma identidade que seja fruto da América espanhola como referência identitária do povo gaúcho brasileiro, e da própria nação brasileira.

Palavras-chave: Patrimônio Mundial; Patrimônio Cultural; Missões Jesuítas; São Miguel das Missões

Resumen:

Este estudio trata sobre las Misiones Jesuíticas - Guaraníticas de San Miguel Arcángel, situadas en Brasil, más precisamente en el estado de Rio Grande do Sul, cómo Patrimonio Nacional (IPHAN) y mundial reconocido por las Naciones Unidas para la Educación, la Ciencia y la cultura (UNESCO), por su relación con las demás localizaciones jesuíticas de la región y también como una atracción turística.

Inicialmente, se contextualiza la dimensión de un sitio cómo Patrimonio de la Humanidad, - sea material construido o natural -, relacionándolo con otros elementos en la lista del Patrimonio Mundial que se encuentra en la escena brasileña. Seguidamente, se hace un recorte de las misiones jesuitas en el continente, cuya existencia por lo general se estima en treinta misiones.

Estas localizaciones indígenas que se presentan como un logro de los misioneros jesuitas en el contexto de la Contrarreforma de la Iglesia Católica, se llevan a cabo en territorio de la América española, aunque social y arquitectónicamente se materialicen en los territorios que actualmente pertenecen a los países de Paraguay, Argentina y Brasil.

La investigación se desarrolla específicamente en las misiones ubicadas en Brasil, en el estudio de documentos con reconocimiento patrimonial y marcos teóricos bibliográficos. Sin embargo, el análisis permite el reconocimiento como una atracción turística.

El objetivo de la investigación es fortalecer la intención de apropiación de una identidad -que sea resultado de la América española-, como una referencia de la identidad del gaucho de Brasil y de la propia nación brasileña.

Palabras Clave: Patrimonio Mundial; Patrimonio Cultural; Misiones Jesuíticas; San Miguel de las Misiones

1. Introduction

This research aims to present some general points about the heritage of São Miguel Arcanjo, the ruins located in the National Historical Park of the Missions, in Brazil. Its initial formation refers to Spanish America and paradoxically to the creation of a specific territory of the Jesuit priests, resultant of a subsequent geopolitical project of the Catholic Church's Counter-Reformation. It can be said that, over time, these ruins of an old building held by indigenous labor have become values of an imaginary identity of Brazil and they also have contributed to others from neighbouring nations.

Nowadays, the tourist attraction has the effort and the organization of policies from various countries to present it as a Cultural Route. However, several other structural actions, that will not be approached here, inhibit the achievement of specific cultural tourism itineraries with these tourism attractions and resources located in Brazil, Argentina and Paraguay. The presented text is a synthesis of this condition.

The research is based on several references in terms of its methodology. As method, an effort is made for the recognition of contrasting conditions, always looking for a relation to different wholes. To this common adoption in using genetic history in terms of "observation guided by experience and look informed by theory, in order to capture the real from the visible" (Cunha, Canuto, Linhares and Monte-Mor, 2003: 72), it is presupposed even for small considerations. It's expected to contribute to the understanding of the contradictions that emerge from the historical process and, more than that, the ability to understand them as mismatch of times, of unrealised virtualities (Cunha, Canuto, Linhares and Monte-Mor, 2003: 72). More specifically, the look adopted portrays the spatial dimension, which closer to the deployments of this method as History-Space (Harvey, 2004).

In the framework of this research were used some methodological procedures. Initially, it is carried out an exploratory study about the Heritage with UNESCO protection in Brazil. At this study, stands out the direct observation in the object: the ruins of São Miguel as well as the recognition of their surroundings. To it, it is added to operational difficulty in developing it as a transnational circuit. Therefore, the research is restricted to Brazil, where social actors in/from the site directly or indirectly involved with its development were interviewed.

The interviews were informal, without a previous script to be followed, which allowed observing a wealth of information from several people who have in memory some contextualization about that space. With this research is expected to reflect about the possibilities of more real, current and social Policies towards Cultural Heritage.

2. Heritage of Humanity panorama in Brazil

The heritage can be portrayed as a synthesis of the legacy left by a process of the past; a historical, artistic, architectural or natural heritage that identifies memorable values. It relates to a resource that must be conserved in the present and transmitted to future generations as a common good for all people around the world, regardless of their geographical position. But symbolic values determine its recognition by various dimensions (Riegl, 2008), and several hierarchical qualifications, from the understanding of the local community, to national and international levels.

Therefore, from 1959, the United Nations Educational, Scientific and Cultural Organization (UNESCO) develops international campaigns for the recognition and preservation of historical sites. In order to strengthen these campaigns in the international community, this institution, together with the International Council on Monuments and Sites (ICOMOS), starts, among others projects, the elaboration of a convention on the protection of heritage, establishing a framework of assumptions to the subject. So takes place in Paris, in 1972, the Convention on the protection of World Heritage which provides that Member States undertake to support the identification, protection, conservation and the enhancement of cultural and natural heritage of their territory. The sites registered and declared at the UNESCO World Heritage List constitute a universal heritage, with whose protection the entire international community has a duty to cooperate (UNESCO, 2016).

To be elected as World Heritage, the property must present recognizable value from some criteria defined in the Paris Convention. Among these criteria, the declared goods with verified authenticity must testify the exchange of values and significant periods of human history,

providing unique or exceptional testimony to a particular culture, or representing ecological and biological phenomena or natural beauty.

Thus, according to the United Nations, the heritage can be classified into two groups: cultural or natural. The category of properties recognised as Natural Heritage consists of monuments or natural sites, geological and physiographic formations and precisely delineated animal and plant threatened species' habitat areas which are of outstanding universal value whether by the scientific feature, by the conservation or by their natural beauty (IPHAN, 2008: 10).

The properties determined as cultural heritage are characterized as monuments – architectural works, monumental sculpture and paintings or structures of an archeological character; sites – works of Man or combined works of Man and Nature; and sets of buildings whose architecture, unity and integration to the landscape are of outstanding universal value, from the historical, aesthetic, ethnological or anthropological points of view. The assets can also be considered as mixed cultural and natural heritage, if their characteristics refer entirely or partially to both definitions of natural and cultural heritage (IPHAN, 2008: 11).

In 2003, the international community also adopted a list of intangible properties (forms and means) as World Cultural Heritage. Therefore, it established a Convention for safeguarding this kind of heritage. This is a more vulnerable relation since it is in constant change but of great importance for the protection of cultural manifestations, traditions and memories, people's culture's constituent factors. In this chapter, however, the clipping is about the material heritage present in South America, specifically in Brazil.

According to UNESCO, by the year 2015, the World Heritage List included 1.031 properties, 802 of these as cultural heritage, 197 natural and 32 mixed properties, distributed among 163 Member States. Italy is currently the country that houses the largest number of sites related in the list. Brazil, also one of the Member States of the Convention, currently has 12 properties recognised as World Cultural Heritage and seven reserves of Natural Heritage (UNESCO, 2016). Of these properties, two are located in the southern region of Brazil, five in the southeast region, four in the midwest, six in the northeast and one in the northern region of the country (Figure 1).



Figure 1. Map representing the World Heritage in Brazil

Source: Authors

In 1980, the historic city of Ouro Preto, located in the state of Minas Gerais (MG), was the Brazil's first site to be declared by UNESCO as cultural heritage. Other country's properties recognised in this category are:

North – the Olinda historic centre (PE); the historic centre of Salvador (BA);

Midwest – the Pilot Plan of Brasília (DF); the historic centre of the city of Goiás (GO);

Northeast – the Serra da Capivara National Park (PI); the historic centre of São Luiz do Maranhão (MA); the Diamantina historic centre (MG);

Southeast – the Sanctuary of Bom Jesus de Matosinhos (MG); the São Francisco Square (SE); and the city of Rio de Janeiro (RJ), for its landscapes between the city and the sea;

Southern – the Jesuit- Guarani Missions, ruins of São Miguel Arcanjo (RS).

Can be portrayed that the Olindas historic centre, the ruins of São Miguel Arcanjo, the historic centre of Salvador, the Sanctuary of Bom Jesus de Matosinhos, the Serra da Capivara National Park, the historic centre of São Luiz do Maranhão and the Diamantina historic centre

stand out as attractions and formers of the tourism offer in their respective localities. The Pilot Plan of Brasília, proposed by the architect and urban planner Lúcio Costa and built in the late 1950s to host the federal capital, has its own specificity for recognition and visitation, and the other properties contribute to the development and differentiation of primary offering. However, it is known that the choice of Rio de Janeiro city to host the 2016 Olympics was associated with its landscapes values.

In 1986, the first natural heritage to be recognised in Brazil by UNESCO was the National Park of Iguazu, located between the state of Paraná and the province of Misiones in Argentina. Later, beyond this, were declared as World Heritage in Brazil: the Atlantic Forest reserves in the southeast region; the coast of Discovery, between the states of Bahia and Espírito Santo; the protected areas complex of Central Amazonia (AM), of Pantanal (MT), of the Cerrado at the Chapada dos Veadeiros and the Emas National Park (GO); and the reserves of the Brazilian Atlantic Islands of Fernando de Noronha and Atol das Rocas (UNESCO, 2016).

It can be said that Brazil, due to its territorial dimension – its extension in the earth's surface amounts to over 1/20 of its land area (Brazil, 2016), and to its cultural and geographical diversity could house more properties internationally recognised as World Heritage if compared to the list of properties located in Europe, despite its “recent” territorial and historical formation if associated with the Occident (from the “discovery” of America by Europeans and the colonization of its lands). The heterogeneity of landscapes and natural beauties, the arts, the architecture and the urban centres constitute sets of properties in the country whose conservation and protection are recognised by the National Historical and Artistic Heritage Institute (IPHAN), institution associated to the Ministry of Culture of the Federal Government that deals with this issue.

However, the recognition and appreciation of historical property in Brazil can be considered late. The thematic of preservation and heritage becomes evident after the 1922 Modern Art Week, in which these terms figured in the modernist appointments (Camargo, 2002: 75). The sense of brazilianess and national identity, strategy that served the ‘New State’ reorganization purposes in the 1930s, also made the historical past valued as cultural heritage and no longer considered as the country's delay symbol. Before this period, the process of “civilization” of the cities converged to the demolition of the colonial buildings, the Portuguese and Jesuit legacies (Camargo, 2002: 76).

Note that, by a Lusitanian tradition, the properties recognised by Brazilian government authorities, whether federal, state or municipal, stand out as heritage and are registered in a

“book”⁷⁸, except for the intangible heritage. This way, the Iphan’s registered heritage are divided into four books: Book of Fine Arts, Book of Historic Register, Book of Applied Arts and Book of Archeological, Ethnographic and Landscape Register, regulated by Decree Law No. 25 of November 30, 1937 (Brazil, 1937).

In the first are subscribed the arts with non-utilitarian feature, according to their artistic value. In the second are related the cultural properties or buildings with historical value, linked to relevant factors in the Brazil’s history. The third book records the cultural properties of artistic value associated with their utilitarian function. Finally, in the fourth book are associated the cultural heritage related to historical traces of human occupation and to ethnographic and landscape values including both spaces created by Man as natural areas (IPHAN, 2016).

For research and the detailing of the historical and cultural formation, it is established as a clipping in this chapter the presentation of the Mission of São Miguel Arcanjo and its ruins as World Heritage, also recognised as National Heritage by IPHAN. In essence, the indigenous reductions were an achievement of Jesuit missionaries in the context of the Catholic Church’s Counter-Reformation that materialised social and architecturally in territories that currently belong to Paraguay, Argentina and Brazil. It also works to with their relationship as a tourist attraction, and as an identity reference gaucho and Brazilian nation itself.

3. The development of the Jesuit Missions

The Jesuit-Guarani missions of America are characterized, for years, such as recognition and national and international tourist destination demand. Altogether, it is estimated generally that there were 30 missions on the continent. In the Brazilian state of Rio Grande do Sul, these sites are known as ‘the seven people of the missions’ formed by the reductions of São Francisco de Borja, São Nicolau, São João Batista, Santo Ângelo Custódio, São Luiz Gonzaga, São Lourenço Mártir e São Miguel Arcanjo (Figure 2), and the latter stands out by its legacy of archeological and architectural value recognised as World Heritage site.

⁷⁸ In Brazil, the properties declared as heritage, whether national, state or municipal, are registered in a book called ‘Livro-Tombo’.



Figure 2. Map of the Jesuit Missions in South America

Source: Authors

The configuration of the Jesuit Missions originated in 1609, as an ideological proposal for expansion of Catholicism through indoctrination and politicization of the Guarani people that lived in the region. The reductions - villages for catechesis, control and defense of indigenous (Tavares and Dalto, 1999), are defined by a justified logic of the Counter-Reformation and the "Europeanization" of the South American Indian. These settlements refer to the reproduction of architectural forms and to urban formation with unique characteristics that reinforce their degree of socio-economic development. According to Custódio:

The Society of Jesus was created in the context of the Counter-Reformation in which the Catholic Church also used the architecture, urbanism and the arts as scenarios and apparatus for conversion process. It was due to the spirit of the Baroque that social practices in reductions, corresponding to the scenic and theatrical spirit of this movement, gained greater dynamics and value of representation (Custódio, 2007: 72).

The location of the Missions occurs in places of great landscape value. It is observed that are located in the heights at some plateau overlooking a wide horizon. It is emphasised that:

The choice of the location of each reduction was carefully studied taking into account the climate, soil fertility, the surrounding landscape and the advantages for its defense. Generally held in dominant points of streams or navigable rivers, 21 miles from each other (Lugon, 2010: 51).

Initially, the Missions can be considered as an ideal form of society with which is associated the utopia of an egalitarian society where each person had a profession of interest to the common life (Telles, 2008: 73). However, the own Jesuit reduction can only be seen as a form of captivity (Ribeiro, 1995: 103). In this condition, the Guarani were at the disposal of social interests and of the governing for each and every task of interest of the urban administrator, performing functions such as opening roads, urbanise the site and build churches.

In Spanish America, the urban formations distributed in rectilinear grid were presented for defining the order. In it, the pathways culminate in a central square – Plaza Mayor or Plaza de Armas – which distributes the buildings of spiritual and temporal powers (Marx, 1980: 29). Such spatial formation can be easily observed in the Jesuit Missions, even giving little value to the civil administration (Figure 3).

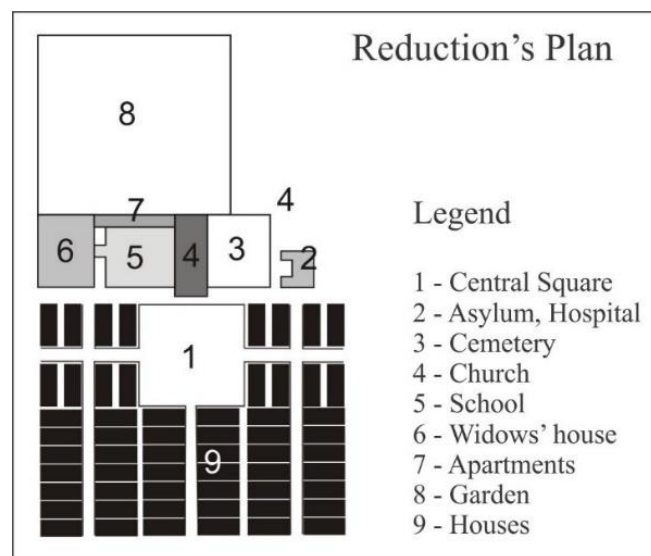


Figure 3. Schematic layout of the Jesuit-Guarani Missions

Source: Authors

To the architecture is aggregated the direct understanding of European matrices. However, the architecture of the new continent must be understood as synthesis of a socio-spatial formation. Many religious orders come with the aim to reduce the Protestant expansion. In this sense, the Society of Jesus defines its forms in a new proposed style. In their churches, for example, they adapt the Latin Crosses to the new requirements. Therefore, the architectural heritage found in the region of the missions can be classified as Jesuitical style.

For this purpose, the constructions should be solid, using materials that perpetuate them. Commonly in South America, was used the rammed earth, stone and lime (Costa, 1978: 21). Its use was associated with available materials that allowed achieving stability in the construction. The Catholic Church not only created temples, rectories and schools. Its ideological imposition reinforced the formation of urban plans and consequently of cities. The Brazilian territory is a mosaic of these spatial forms.

For the local architecture, the Jesuit buildings had the unconditional labor force of the Guarani. The São Miguel Arcanjo church (Figure 4), that was located in front of the central square, involved, for decades, the effort of the indigenous workers. Conceived by the plans of European Jesuits, its erection demanded the removal of tons of sandstone rocks from the Santa Barbara stream, performed by hundreds of people, with hard work, creating an urban set of reference. Telles (2008: 74) describes its construction:

The church was built in the period of 1735-1744, according to the assigned project, with safety, to the Jesuit architect Gian Batista Primoli, Italian who also was its builder. Its architectonic section had three naves separated by arches that end in the transept, where there were two altars and in the end, the chancel.



Figure 4. Church ruins in São Miguel Arcanjo

Source: Pedro Alcântara Bittencourt César, 2011



Figure 5. Angelopolitana Cathedral and the excavated ruins in Santo Ângelo

Source: Pedro Alcântara Bittencourt César, 2011



Figure 6. Museum of the Missions

Source: Pedro Alcântara Bittencourt César, 2011

The decay process of the missionary history was occurred in the mid-18th century, due to the expulsion of the Jesuits and the administrative exchanges between the colonies of Portugal and Spain, through treaties. This process culminated in Guarani's wars. The Indians, interested in defending their land, were defeated and forced to leave the reductions. The destruction generated by the confrontations characterises what is now known as one of the heritages of humanity: the ruins of the archeological site of São Miguel Arcanjo.

4. Missions as Heritage

In Rio Grande do Sul, currently there are still traces of four reductions: São Miguel Arcanjo, São Lourenço Mártir, São João Batista and São Nicolau. The other three Jesuit Missions established in the state were destroyed with the passage of time and with the development of

new towns and urban agglomerations. Cities of São Miguel and Santo Ângelo have greater representation: the first for its reference as Heritage of Humanity, as cultural tourism attraction for its ruins and social relations and as the seat of IPHAN's office; and the second one by its administrative regional centrality. The others remaining archaeological sites are located in the vicinity of these locations and are characterised as complementary attractions.

In Santo Ângelo is concentrated the greater offer of equipments and services for the visitor. This city is positioned as headquarter of that Rio Grande do Sul region, hosting a large university and many public and private services. Historically, it is the youngest of the seven indigenous reductions located in Brazil, but little remains of the original buildings, nowadays. Through the excavations and the "archaeological windows" (excavated spaces covered with transparent glass) surrounding the Angelopolitana Cathedral (Figure 5) built in the mid-20th century, it is possible to observe parts of the foundation of the missionary chapel that once existed on the site. The set, complete with the square, the City Hall and the Municipal Museum, composes the main attraction related to the missions in the city.

The archaeological site of the Jesuit Mission of São Miguel, dating from the year of 1687, is recognised as a historic place. For this condition, the Regulation of Rio Grande do Sul Lands, established in 1922, determines to be kept in the public domain and properly maintained the places remarkable by facts related to the evolution of the state. In 1937, with the creation of the Historical and Artistic National Service (SPHAN) and with the report of the architect Lúcio Costa, the ruins of São Miguel were included in this category. And in 1983, to this condition is added the recognition by UNESCO as World Heritage along with the others missionary reductions of Argentina.

Lúcio Costa, federal employee involved in the preservation of national heritage, achieves operations on the site of the Missions in the late 1930s. Adopting a logic of reconstitution of new elements, he raised a museum with remains material of the ruins (figure 6), that was inaugurated in 1941. Its composition helps to define a new spatial distribution in the square, opposing in distant axes, visually, the ruins and the preservation of heritage institutions. Its construction techniques are the first example in Brazil of the use of current techniques and materials complementing a building of historical character (Telles, 2008: 75). Contrast of ruins, memories and recognition of architecture that once existed. While trail or 'shard' of what existed, the ruins have the metonymic character of, through the part that is exposed, allowing to see and imagine the whole of what there was once (Pesavento, 2007: 55).

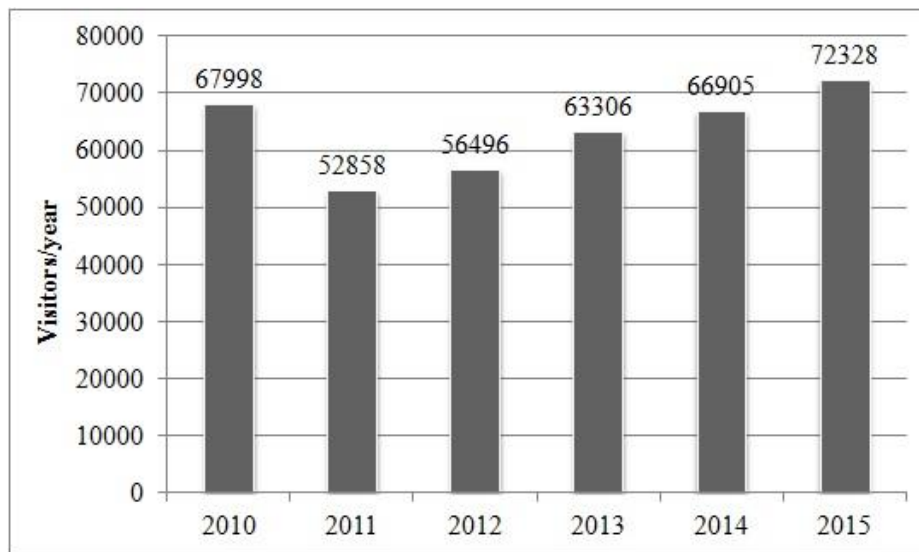
In the museum, parts of the missionary collection are kept, which refer both to the archaeological artifacts and to the environmental and cultural diversity that are related to the

Jesuit reductions (Brazil, 2015). As depository, adds value of a new museology such as the regional. This is a process in which new symbolic constructions are made, as Custodio described (2007: 76) highlighting the Museum of the Missions in São Miguel and its symbolic constructions:

The collection of Missionaries images were scattered in farms and chapels in the region, where they still performed duties linked to the sacred. With their transfer to the museum, they acquire a new representation function: artistic-documentary. Tensions and ruptures. New situations.

The initiatives in the National Historical Park of the Missions can be considered pioneers as route of Heritage Interpretation of the cultural legacy, and attract thousands of tourists every year. The Sound and Light Show stands out a touristic attraction. The event presentations in Portuguese occur daily, if the weather conditions are favorable, since it is held outdoors. This project performed since 1978 received updates and new technologies in the first half of 2016, to arouse more the society's attention, usually middle-class and well-educated. In addition, it sets up a great potential in relation to tourist exploitation, since it is the main achievement of Mission's Heritage Interpretation in Brazil.

With regard to demand, the period between the 1960s and 1970s is characterised by the visits of large school groups, bus tours and excursions that stimulated the economic activities related to tourism. Recently, according to data collected by IPHAN at the Missions National Historical Park, between the years 2010 and 2011 there was a decrease of approximately 28,5% in the number of visitors. In the last five years it is clear that the number of visits has increased gradually until 2015, last annual record available, as shown in the graphic below.



Graph 1. Visitors at Missions National Historical Park (2010 – 2015)

Source: IPHAN, 2016

Therefore, since the 1950s, the locality elaborates a tourism product with historical and educational appeal, related to the architectural and archaeological collection, portraying a clear communication and thematization between the missionary utopia and the formation of the Guarani people. Tourism is based on multidisciplinary dimensions in which various areas of knowledge are involved. Approaching the heritage and its interpretation, through an interactive process, aggregates revelation sources based on imaginary: myths, rituals, archetypes, symbols, icons, allegories, routine and location (Farias, 2002: 59). In this context, the declaration of a property as Heritage of Humanity creates an image in the international scope that attracts visitors with diverse interests that may be of a scientific intent or purely related to leisure (Nogueira, 2007: 110).

In the case analysed, the heritage constitutes a great potentiality for the regional tourism development (Nogueira, 2007: 111). For this purpose, it was established in 1995, through a joint proposal between the governments of Argentina, Brazil, Paraguay and Uruguay, the International Circuit of the Jesuit Missions which added the statement of practical actions related to the recognition of the sites as World Heritage. However, spatially, the location is drafted as a tour corridor, according to the theory of the Touristic Space (Boullón, 1994), and the attraction and the visitors have little integration to the current social and urban contexts.

In addition, according to Nogueira (2007: 120) the circuit implementation did not meet the expectations of the regional community because the distances are large between the major centres from Argentina, Brazil, Paraguay and Uruguay. The sites' infrastructure is still

precarious, the roads are compromised by the lack of maintenance and the hotels and restaurants do not offer many conditions to serve a large number of visitors. These problems aggregated to the lack of information and communication at the locals may distance the tourism product as an intra and international offer.

5. Final Considerations

When it comes to the recognition of a heritage by the UNESCO as World Heritage always confronts complex issues and often ambiguous in its many social, cultural, artistic positions, etc.

Another contentious issue is to portray if the idea of something for everyone (from humanity) is not taking off the conquest and the local relation, leading to consider it as something impersonal. Therefore, back to the analysis field: in the study of the Missions of São Miguel Arcanjo there are ruins as well as are found in others ancient missions created by the Guarani people in this region. It is known that the ruins operate as past operation. The ruin is not only materiality, it is also image, is the presence of an absence (Pesavento, 2007: 55).

In this context, can be portrayed the disregard of the hegemonic forces for the indigenous civilizing process, practically not recognising it by its cultural values and civility. It is also denied a large project formulated by the Catholic Church, probably because it confronts the mercantilist logic that enables the conquest of the Americas and the implementation of an emerging capitalist production relation.

Today, the site, with its successes and failures keeps present historical values, not memorable. Initially, this symbolic elaboration is related to the formation of a national identity, developed from the 1920s to portray the construction of a brazilianness that is based mainly in the following decade, project very questioned nowadays. On the other side, the Heritage Interpretation plan leaves much to be desired of a broader proposal for Education, although the chosen thematic have mainly crucial values for the elaborated period.

In the current situation there are still many other reflections (looks and epistemological constructions) about this marginal place: peripheral by being in Latin America, by its contrast to capitalism, by its indigenous array from emerging people, among others conditions. Although these are present in the imaginary, it is expected that the current direction walks along with cultural policies.

It is known by the diversity of interpretations, that locations that once represented production, modernity and progress were revitalized as recreation places under the perspective

of new interpretations of history, opening up possibilities for other uses and new perspectives to these ancient practices (Maia, 2010: 406). UNESCO, by expounding and highlighting about World Heritage, is closer to the local interests and their social recognition. It is expected to local counterpoint protrudes increasingly its own duty to strengthen the heritage dimensions.

References

- Boullón, R. C. (1994), *Planificación del espacio turístico*, Mexico, Trilla.
- Brazil (n/d), *Instituto Brasileiro de Geografia e Estatística. Área territorial brasileira*, available at: http://ibge.gov.br/home/geociencias/cartografia/default_territ_area.shtm (consulted on: 8.07.2016).
- Brazil. Instituto Brasileiro de Museus (2015), *Museu das Missões*, André Amud Botelho, Diego Vivian, Laerson Bruxel. Brasília, DF. Ibram.
- Camargo, H. L. de (2002), *Patrimônio histórico e cultural*, Aleph, São Paulo, 72-93.
- César, P. A. B., Stigliano, B. V. (2011), "Definição dos valores de uma localidade turística cultural – Estudo das Missões Jesuítico-Guarani Orientais da América", in *International Conference on Tourism & Management Studies*, Algarve.
- Costa, L. (1978), *A arquitetura jesuítica no Brasil. A arquitetura religiosa*, São Paulo, FauUsp, 9-98.
- Cunha, A. M., Canuto, F., Linhares, L. R. F., Monte-Mór, R. L. de M. (2003), "O terror superposto: uma leitura lefebvriana do conceito de terrorismo e suas relações com o mundo contemporâneo", in *Caderno de Resumos do X Encontro Nacional da ANPUR*, Belo Horizonte, São Paulo, ANPUR.
- Custódio, L. A. B. (2007), "Missões: patrimônio e território", in Meira, A. L. B., Pesavento, S. J. (eds), *Fronteiras do mundo ibérico: patrimônio, território e memória das missões*, EdUFRGS, Porto Alegre, 65-79.
- Farias, E. K. V. (2002), "A construção de Atrativo Turístico com a Comunidade", in Murta, S. M., Albano, C. (Eds.), *Interpretar o patrimônio: um exercício do olhar*, EdUFMG and Território Brasilis, Belo Horizonte, 59-74.
- Harvey, D. (2004), *Espaço de esperança*, São Paulo, Loyola.
- IPHAN (2008), *Patrimônio mundial: fundamentos para seu conhecimento – A convenção sobre proteção do patrimônio mundial, cultural e natural, de 1972: para saber o essencial*, Brasília, DF, IPHAN.
- IPHAN (2014), *Bens Tombados*, available at: <http://portal.iphan.gov.br/pagina/detalhes/126> (consulted on: 29.03.2016).
- Lugon, C. (2010), *A república Guarani*, São Paulo, Expressão popular.

- Maia, L. R. G., Dias, R. (2010), "Turismo y patrimonio ferroviario: Un estudio sobre el Trem da Vale (MG) – Brasil", *Estudios y Perspectivas en Turismo*, Buenos Aires, 19(3), 395-408.
- Marx, M. (1980), *Cidade brasileira*, São Paulo, Edusp, 1980.
- Nogueira, C. R. D. (2007), *O turismo, o reencontro e a redescoberta da região das Missões*, Dissertação de Doutorado em Geografia Humana, Universidade de São Paulo, São Paulo.
- Pesavento, S. J. (2007), "Missões, um espaço no tempo: paisagem e memória", in Meira, A. L. B., Pesavento, S. J. (eds), *Fronteiras do mundo ibérico: patrimônio, território e memória das missões*, Porto Alegre, EdUFRGS, 51-63.
- Ribeiro, D. (1995), *O povo brasileiro e o sentido do Brasil*, São Paulo, Companhia das Letras.
- Riegl, A. (2008), *El culto moderno a los monumentos*, Madrid, A. Machado Libros.
- Tavares, E., Dalto, R. (1999), *Missões Jesuítico Guaranis*, São Leopoldo, Unisinos.
- Telles, A. C. S. (2008), Ocupação do litoral, entradas para o interior do continente e definições de fronteira, in Bicca, B. E., Bicca, P. R. S. (eds.) *A arquitetura na formação do Brasil*, 2ed, Brasília, UNESCO, IPHAN, 16-77.
- UNESCO (n/d), *Patrimônio Mundial no Brasil*, available at: www.unesco.org/new/pt/brasil/culture/world-heritage/ (consulted on: 22.03.2016).
- Brazil (1937), *Decree Law No. 25 of November 30*, available at: http://www.planalto.gov.br/ccivil_03/Decreto-Lei/Deloo25.htm (consulted on: 29.03.2016).

Chapter XII

From Ruins to Heritage of Humanity:

Interfaces between Preservationist and Tourism Policies in *São*

Miguel das Missões (RS)

From Ruins to Heritage of Humanity: Interfaces between Preservationist and Tourism Policies in *São Miguel das Missões* (RS)

DARLAN DE MAMMAN MARCHI⁷⁹

LUCIANA DE CASTRO NEVES COSTA⁸⁰

Abstract:

This paper aims to discuss the relations established between heritage and tourism policies in the city of *São Miguel das Missões*, in northwestern Rio Grande do Sul (RS), Brazil. *São Miguel* developed on the sidelines of the 20th century, in the surroundings of the architectural remains of the Jesuit-Guarani village of *São Miguel Arcanjo* – ruins dating back to the 17th century and recognised as a World Heritage site in 1983. In the city, heritage policies were introduced since the decade of 1920, with Rio Grande do Sul government taking preservation actions, and also in the 1930s, with the National Department for Historical and National Artistic Heritage working within nationalist political contexts. Broadening the understanding on cultural heritage influenced the heritage policies adopted in the region. It resulted both in the recognition of the site as intangible Brazilian heritage, due to its ancestral importance to *M'byá-Guarani* indigenous groups, and in the development of the Project for the Enhancement of the Cultural Landscape of *Missões* National Park, bringing an integrative notion of cultural landscape to the framework of heritage policies. Such policies would also outline initiatives in favor of tourism. In this regard, the *Missões* ruins became the main attraction not only because of the materiality of its reductions (considering its historical and architectural aspects), but also because of the tourist and imaginary senses recreated in actions like the show *Som e Luz (Sound and Light)* and other recent projects intended to be discussed in this paper.

Keywords: Tourism; Cultural Heritage; Public Policies; *São Miguel das Missões* (RS)

⁷⁹ Institute of Human Sciences, Postgraduate Programme in Social Memory and Cultural Heritage, Federal University of Pelotas (Brazil), darlanmarchi@gmail.com

⁸⁰ Institute of Human Sciences, Postgraduate Programme in Social Memory and Cultural Heritage, Federal University of Pelotas (Brazil), lux.castroneves@gmail.com

Founding for this research has been provided by the Commission of Improvement of Personnel of Superior Level (Comissão de Aperfeiçoamento de Pessoal de Nível Superior - Capes) and National Counsel of Technological and Scientific Development (Conselho Nacional de Desenvolvimento Científico e Tecnológico - CNPq).

Resumo:

O presente artigo visa debater articulações estabelecidas entre as políticas patrimoniais e turísticas no município de São Miguel das Missões, no noroeste do Rio Grande do Sul (RS), Brasil. São Miguel desenvolveu-se ao largo do século XX, no entorno dos remanescentes arquitetônicos do povoado jesuítico-guarani de São Miguel Arcanjo, ruínas datadas do século XVII e reconhecidas como patrimônio mundial em 1983. Em São Miguel as políticas patrimoniais iniciaram-se ainda na década de 1920, com ações de preservação do governo do Rio Grande do Sul e na década de 1930, com o Serviço do Patrimônio Histórico e Artístico Nacional dentro de contextos políticos nacionalistas. O alargamento do entendimento de patrimônio cultural refletiu nas políticas patrimoniais adotadas na região, com o reconhecimento do sítio como patrimônio imaterial brasileiro pela sua importância ancestral para os indígenas *M'byá-Guarani*; e com o desenvolvimento de um Projeto para a Valorização da Paisagem Cultural do Parque Nacional das Missões, inserindo no quadro das políticas patrimoniais a noção integradora de paisagem cultural. Tais políticas delinearão, também, iniciativas em favor do turismo, tendo nas ruínas missioneiras o principal eixo de atratividade tanto pela materialidade das reduções, em seus aspectos históricos e arquitetônicos, quanto pelos sentidos e imaginários turísticos recriados em ações como o espetáculo Som e Luz e outros projetos recentes, ações que este artigo pretende discutir.

Palavras-chave: Turismo; Patrimônio Cultural; Políticas Públicas; São Miguel das Missões (RS)

Resumen:

Este artículo tiene como objetivo discutir articulaciones establecidas entre las políticas patrimoniales y de turismo del municipio de *São Miguel das Missões*, en el noroeste del Estado de Rio Grande do Sul (RS), Brasil. São Miguel se desarrolló durante el siglo XX, en el entorno de los restos arquitectónicos del pueblo jesuitico-guaraní de San Miguel Arcángel, posee ruinas del siglo XVII que fueron reconocidas como Patrimonio Mundial en el año 1983. En *São Miguel* las políticas de patrimonio se iniciaron en la década de 1920, por medio de acciones de preservación llevadas a cabo por el gobierno de Rio Grande do Sul. En la década de 1930, le siguió el Servicio de Patrimonio Histórico y Artístico Nacional dentro de contextos políticos nacionalistas. La ampliación del concepto de patrimonio cultural se refleja en las políticas patrimoniales adoptadas en la región, con el reconocimiento del lugar como patrimonio inmaterial brasileño por su importancia ancestral para los indígenas *M'bya-guaraní*; y el desarrollo de un Proyecto para la Apreciación del Paisaje Cultural del Parque Nacional de las Misiones, que inscribe en el

marco de las políticas patrimoniales la noción integradora de paisaje cultural. Estas políticas esbozarían, también, iniciativas para el turismo, teniendo en las ruinas misioneras el eje principal del atractivo, tanto por la materialidad de las reducciones en sus aspectos históricos y arquitectónicos, como por los sentidos e imaginarios turísticos recreados en acciones como el espectáculo de *Som e Luz* (Sonido y Luz) y entre otros proyectos recientes, acciones que en este artículo se pretende discutir.

Palabras Clave: Turismo; Patrimonio Cultural; Políticas Públicas; São Miguel das Missões (RS)

1. Introduction

The relation between tourism and cultural heritage is not recent and there are many forms of its manifestations and consequences. Although it has continuously changed, it has always kept at its core the knowledge of the other and their cultural references, be they material or intangible. Tourism is understood as a social practice based on the "strangeness", establishing dislocations to different times and spaces of everyday life of which can be both concrete and symbolic in nature (Gastal and Moesch, 2007: 11). It is, therefore, a leisure activity that contrasts with the everyday experience, and part of this experience is based on the matter of difference, of knowing and visiting new places, other cultures, other landscapes. This experience is mediated by the senses in general, though sight is the one to be highlighted.

As stated by Urry (1996), the tourist's gaze is attracted to the features of the place visited that separate him from everyday experiences, with greater emphasis on the visual landscape elements that contrast with our everyday lives. This same point of view is built through a series of non-tourist activities, such as film, television, literature, magazines, in addition to the symbolic constructions made around cultural heritage. This is because the issue of heritage engenders the notion of identity, and the difference sought by the tourist experience is manifested in the forms of assimilating places. In this regard, assets take great importance as tourist attractions by becoming elements that participate in both the past and present (even being reframed according to the very dynamics that make up cultural heritage).

The recognition of an asset as cultural heritage engenders a set of knowledge, values and meaning systems that guide the discourse built around certain institutionalised cultural references legitimised as heritage (Poulot, 2009). Such assets undergo a number of heritage activation processes that sacralise discourses around national, regional and local identities based on referents that, in turn, go through a selection, sorting and interpretation process, leading to

the formation of heritage discourses traditionally intended to sustain and sacralise ideological versions of identities that promote emotional adhesions in the face of the referents' symbolic effectiveness (Prats, 2003).

The ruins of *São Miguel Arcanjo* (Figure 1), located in downtown of *São Miguel das Missões* in the northwestern part of the Brazilian state of Rio Grande do Sul, are the object of this discursive construction around identities. The contemporary city developed on the sidelines of the 20th century, in the surroundings of the architectural remains of the Jesuit-Guaraní village of *São Miguel Arcanjo*. It received both national and international importance when it became a Heritage-Listed Site in 1938, within the nationalist political context of the New State, and a World Heritage Site, in 1983.

São Miguel dates back to the first catechising experiences of native peoples in the South American continent, resulting from the formation of small urban centres. In the 17th and 18th centuries, religious leaders belonging to the Society of Jesus undertook a project to evangelise the indigenous people in that area under the consent of the Spanish Crown, which saw the establishment of these settlements as a way to ensure their domain against the Portuguese advance (Bruxel, 1987). *São Miguel Arcanjo* was one of the 30 missionary peoples of the former Province of Paraguay, seven of them located in the eastern territory of Uruguay River, today part of Brazilian territory. The town, founded in 1687 by the Jesuit religious order, managed to bring together about 6 thousand indigenous people (Sepp, 1980: 198), specially from the *Guarani* ethnic group, which demonstrates the extent of their representation among the other reductions in the Eastern side of the Uruguay River.

The Treaty of Boundaries or Treaty of Madrid, signed in 1750, established the boundaries of the Portuguese and Spanish territories over the lands of the New World. Among the clauses of the agreement was the trading of the Spanish region known as Seven Peoples for the Colony of Sacramento, a territory further south that belonged to Portugal. The refusal of the *Guarani* indigenous people and the Jesuit to leave the territory to migrate to the western side of the Uruguay River led to the Guarani War (a confrontation between indigenous people and the officers sent by Portugal and Spain to draw the borders), since the crowns believed the Jesuit intended to create an autonomous state (Golin, 2010).

With the war and subsequent expulsion of the Jesuit, the Society of Jesus project was over. The attempt to bring other religious orders to the reductions and the poor management of the administrators sent by the crowns caused the settlements to suffer demographic decline and abandonment during the second half of the 18th century (Santos, 2009), which extended throughout the 19th century. In the 150 years during which the mission experience developed,

the intercultural encounter that took place through conflicts and the coexistence negotiated between the European and the indigenous, as well as the war process and border establishment, are the basis of the history that now gives meaning to the heritage preserved in the region. The narratives related to this period are those that populated the collective imagination and brought myths and legends to life.

Nowadays, *São Miguel das Missões* has a population of 7,742 and an economy based on agriculture (grains production) and cattle farming⁸¹. The intense immigration of Europeans and European descendants in the late 19th and early 20th centuries promoted the development of an agricultural economic matrix mainly centred in grain crops. The tourism sector was the subject of some initiatives in the field between 1960-1970, benefiting from the inclusion of the site on the UNESCO list, in view of what such recognition as a World Heritage site symbolises. New tourist pathways are to be expected, due to the favorable conjuncture of valuing cultural landscapes and based on a territorial approach that promotes and manages the territory along with its cultural references. However, the activity is still considered underdeveloped in a local economy context, specially when compared to the financial weight of agribusiness.

Taking into account the historical and social aspects of the place, this paper aims to discuss the relations established between heritage and tourism policies in the city of *São Miguel das Missões* (RS). To this end, this paper is based on a case study from the convergence of two ongoing research works carried out in the Graduate Programme in Social Memory and Cultural Heritage at the Federal University of Pelotas (Brazil): the first work analyses the processes of heritage protection developed in *São Miguel das Missões* and the uses of the missionary past in each recognition period; the second aims to discuss the asset category Cultural Landscape and how it has been discussed and implemented in Brazil. The convergence point lies in the adoption of the concept to propose the study and management of the Jesuit Missions National Park and Cultural Landscape. Literature on heritage, history and tourism supports the discussion. Documentary research, backed by official documents collected in local archives collections and at IPHAN (National Historic and Artistic Heritage Institute), is the main methodological tool employed.

⁸¹ Population data refer to a 2016 IBGE estimate (Brazilian Institute of Geography and Statistics). According to the Institute, in 2014 the city had an area of 1229,620 km², of which 102,995 hectares are rural properties. Of this total, 69,500 hectares were planted with soybeans and 27,000 hectares with wheat, in addition to a herd of 52,000 head of cattle. (Data available at: <<http://cidades.ibge.gov.br/painel/painel.php?codmun=431915>> (consulted on: 09.07.2016).

2. History of heritage policies in *São Miguel das Missões*

São Miguel das Missões became the object of the first heritage preservation policies at state and federal levels, due to its conservation status and also for still having, in its interior, decayed but important ruins to the understanding of the missionary experience, and, consequently, to its representation in the national identity narrative built upon its physical cultural assets.

The urban mesh of a Jesuit reduction consisted of a pre-established plan, but that could vary depending on the location and demands of each village. There was a central square with a church in front and that was the main building of the village. The square was a place of movement and harmony and the place where processions and religious and military festivals took place. The indigenous population's houses would border the square. A cloister was beside the church, where one would also find some teaching and workshop spaces as well as the cemetery and the *cotiguaçu* (from the Guarani language: big house): the building where widows and orphan girls lived. On the other side of the square was the *cabildo*, the office for administration and public threat prevention. In addition, behind the church there was a farm where vegetables and fruit trees were grown. This was the structure of the urban area in a reduction. However, each village had extensive ranches with fields for cattle breeding and plantations, the so-called dairy and crop places that stretched over a wide territory of what is now the state of Rio Grande do Sul (Kern, 1994).

The architectural vestiges of the structures from the seven villages were the assets preserved by heritage policies in the 20th century in Rio Grande do Sul, particularly *São Miguel das Missões*. In the second half of the 19th century, with the territory already under the Brazilian imperial government, the lands were occupied by an elite group of Lusitanian origin, who later went on to organise the towns surrounding these reduction remains. The slow development of *São Miguel* (which continued to be a district of Santo Ângelo until 1988) allowed maintaining the integrity of the architectural remains, specially of the former missionary temple structure. In the cities of *São Nicolau*, *São Borja*, *Santo Ângelo* and *São Luiz Gonzaga*, stones and demolition waste from ruined buildings were reused to build new homes in the late 19th century and early 20th century⁸².

The ruins of *São Miguel Arcanjo* earned the title of National Heritage in 1938 by the former National Historical and Artistic Heritage Department (SPHAN), and in 1983 they were included

⁸² The ruins of *São João Batista* and *São Lourenço*, located in the rural areas of the cities *Entre-Ijuís* and *São Luiz Gonzaga*, and the ruins of *São Nicolau*, nowadays located in the central square of the city, have national protection provided by IPHAN (Meira, 2008).

on the UNESCO World Heritage List. The town has become emblematic in the heritage field of Rio Grande do Sul as it is one of the first assets recognised as a National Heritage site and the only cultural asset recognised by UNESCO in southern Brazil to date.



Figure 1. São Miguel Arcanjo site

Source: IPHAN⁸³



Figure 2. Building of the current São Miguel das Missões Tourism Office.

Picture taken in the 1980s, when it housed a restaurant

Source: São Miguel das Missões Tourism Office Collection

⁸³ Available at: <<http://portal.iphan.gov.br/pagina/detalhes/39>> (consulted on: 23.12.2015).



Figure 3. Indigenous *Ocas* (typical indigenous housing)

Source: Collection *Noronha Santos* file. IPHAN. Rio de Janeiro



Figure 4. *Show Som e Luz* (Sound and Light Show)

Source: São Miguel das Missões City Hall⁸⁴

Notwithstanding, the actions taken by public authorities to preserve the heritage of *São Miguel das Missões* began in 1920 on the initiative of the state government⁸⁵. The republican governor Antônio Borges de Medeiros promoted some changes in land regulations in Rio Grande do Sul, in 1922. Among them, registered by Decree No. 3004 of August 10th of that year, the

⁸⁴ Available at: < <http://www.saomiguel-rs.com.br/VisualizaNoticia.aspx?ID=9221> > (consulted on: 23.12.2015)

⁸⁵ Report by the Regional Department of Public Works in September 1926 (regarding the period of 1925). Memorial da Assembleia Legislativa do Rio Grande do Sul, 448.

section “Historical Places” in chapter VII defined, in article 24, that “the places known by facts marking the evolution of the state should be kept under public domain”.

Also in 1925, the Board of Land was “authorised to provide custody and conservation of the ruins of the majestic Temple of *São Miguel*, one of the Seven Peoples of the Missions⁸⁶”. In the Land Commission's reports that followed between 1926 and 1928, one can find images and descriptions recording the restoration work undertaken to rebuild the frontage, the portico, the tower and inner parts of the temple. Such registered intervention shows that it was possible to reassemble the walls by using stanches and railway tracks to consolidate the structures. Furthermore, both the temple and ruins were fenced and had a guard hired for preservation purposes. According to Stello (2005), at that time there were no international prerogatives recommending restoration activities yet (the first document in this regard would be the Letter of Atenas, in 1931), but the restoration work performed in *São Miguel* met many of the requirements that would later come to be defined.

The ruins of *São Miguel* witnessed the first preservation actions promoted by SPHAN, which were registered in the Fine Arts Book of Heritage Listed Buildings⁸⁷. A survey and inventory made by the modernist writer Augusto Meyer at the request of Rodrigo Melo Franco de Andrade, another modernist scholar who headed heritage policies in the New State period, included *São Miguel* in the institutionalization process of a discourse asserting national values born from the representative assets of a colonial past.

In this sense, such remains take on a second degree speech, since a specific heritage value is added to the functions and meanings of certain assets, causing them to be resignified and changed in their value system (Fonseca, 2005).

The listing does more than assisting in the physical preservation of the asset itself. As a preserving instrument, it also connects to its very immaterial aspect. It is precisely here that one will find the values that link such immateriality to the community: the values that are either invested or attributed to the cultural asset (Sant'Ana, 2001).

The technical visit performed by the architect Lúcio Costa in 1937 gave rise to a report that provided a record of the situation regarding the remaining assets of the Seven Peoples of the Missions. The modernist architect proposed a number of measures to be taken in order to

⁸⁶ Idem.

⁸⁷ Registration mechanism for Brazilian cultural material assets. Through Law Decree No. 25 of 1937, which established the conservation law of Brazilian heritage, four heritage-listing books were created to register cultural assets. In addition to the Book of Fine Arts, the Archaeological, Ethnographic and Landscape, History and Applied Arts Book also came into existence.

preserve the ruins and build a museum for the safekeeping of the images carved in wood by the indigenous people and that had been kept in private homes in the area (Meira, 2008).

The Missions Museum, as designed by Lúcio Costa and built under the supervision of the architect Lucas Mayerhofer, was opened in 1940, housing the *Guarani* statues collection that was gathered in the region by the museum caretaker Hugo Machado. In the survey report to the Missions, the architect listed a series of measures to be taken. In what concerned the museum itself, he also advised how objects, map exhibitions and plants should be displayed" (...) so that visitors, usually little or poorly informed, could better 'understand' the deep meaning behind the ruins, sensing that there had been life within them once." (Costa, 1937, 13-14).

There was, at the time the museum was being structured, some concern with the information to be provided to visitors. The information was not aimed specifically to increase the flow of tourists to the place, but instead the understanding of the site in the relation between museum and monument. To Chuva,

the creation of museums linked to SPHAN in the New State period had a structural purpose with regards to the concepts and practices that were being developed. It was sought to define a museological dimension for Sphan that could combine the spatial representations that would be attributed to the museum headquarters with the collections that would be exhibited there. (Chuva, 2009: 181)

Thus, the former Jesuit-Guarani village's ruins established themselves in the local landscape as representative official monuments of the Brazilian nation. The ruins were then considered as a remembering device used symbolically to reinforce the speech of race integration on the formation of the national scenery. The Missions were neither the typical representation of the Portuguese baroque nor the style of the colonial society chosen by the modernists, but somehow they referred to this period of cultural confluences that depicted such an affirming official identity. According to Pereira (2013), including the Jesuit missions in the list of cultural assets to be preserved, fit the dominant context of the first working decades of SPHAN, since the projected image of the Brazilian nation was based on the recognition of the value of sacred art (missionary and Minas Gerais Baroque). Also according to the author, the image of a modern Brazil linked to its colonial past prevailed in the initial period of the preservation policies, giving centrality to the movable and immovable assets, to the historical monuments and the remaining architectural manifestations of the Iberian colonization period in the country.

In 1983, *São Miguel's* architectural remains were declared a World Heritage site by UNESCO, along with other sites of the Jesuit-Guarani missions in Argentina. The application documents highlight the church ruins and the consolidation work done, emphasising the integrity of the façade in comparison to the other missionary villages in Brazil, Argentina and Paraguay⁸⁸. To Bo (2003: 127-128), "the prestige of belonging to the World Heritage list produces political and economic dividends, besides strengthening the self-esteem of the population." The UNESCO recognition was celebrated by the people from *Santo Ângelo*, the city that called itself the "Capital of the Missions." However, the title was equally important in strengthening the emancipation ideals of the town of *São Miguel*, which became independent from *Santo Ângelo* some years later, in 1988⁸⁹.

In the 19th century, travelers like Saint-Hilaire (2002) and Hail Lallemand (1980), for example, emphasised the monumentality of *São Miguel temple* in ruins amid the vegetation. The appreciation of the cultural asset within the romantic aspect of thought can be observed in the pictorial and written records of these travelers. Thus, the genius, the history and nature are the factors highlighted by Prats (1998) as elements of a triangulation that influences the patrimonial activation of a cultural element. Prats discusses other factors needed to the understanding of the processes that result from such activation: the political and scientific construction of the asset as well as its commercial and tourism uses. The next section of the article will focus on the latter factor.

3. History of tourism initiatives in the Missions region and its interface with the unfolding of contemporary heritage policies

As we have seen, the first actions towards assets preservation address issues regarding the affirmation of nationality, and the development of tourism occurring in the second half of the 20th century onwards. Based on official documents exchanged between local and national authorities, this chapter highlights the initiatives portraying the attempts to consolidate tourism activities in the Missions region. Among these, we stress the places to host and receive tourists constructed around the ruins by the government of *Santo Ângelo*, which was then responsible

⁸⁸ Dossier UNESCO (1982), Application of *São Miguel das Missões*, Available at: http://portal.iphan.gov.br/uploads/ckfinder/arquivos/Dossie%20MISSOES%20Sao%20Miguel%20rev%20js%20janeiro%202014_pt.pdf. (consulted on: 04.05.2015).

⁸⁹ Interview with Mário Simon, Secretary of *Santo Ângelo's* Tourism Office at the time of UNESCO'S recognition, given to the author on 15th February 2015.

for the locale, and also the creation of the show *Som e Luz* (Sound and Light) by the state government of Rio Grande do Sul.

Since 1962, correspondence exchanged between the mayor of Santo Ângelo at the time and Rodrigo Melo Franco de Andrade, director of SPHAN, reported the need to establish some infrastructure to host visitors in *São Miguel*. However, it was in correspondence addressed to the Superintendent of the West Frontier that the mayor Odão Felipe Pippi requested the body to intervene in tandem with SPHAN to put such a project into practice. In that document, the local representative stressed that the administration was "deeply interested in carrying out a tourism plan to take full advantage of *São Miguel ruins* and the Federal Museum of the Missions" because, even though these two attractions were "semi-abandoned", they "received a surprising and high public visitation from different and distant parts of the state and the country, sometimes even from abroad (Argentina and Uruguay)." Also according to the letter, the local hotel chain would not be able to provide for a "major increase in tourists". Other challenges to be faced would be the distance between São Miguel and major centres, access roads, as well as "the tourists' preference for the mountains (...) or the water stations." In short, São Miguel did not offer visitors "the least comfort" in view of its financial resources lack. Therefore, it would be necessary to request funds from the Superintendence to build roadside bars "that would make it dramatically easier to encourage tourism activities in the area that has some of the last missionary architecture and art from that period"⁹⁰.

Another significant correspondence about tourism is a letter of 17th July 1962, addressed to the President of the Republic João Goulart, through which the mayor called for the release of funds by appealing to the missionary origins of the president:

(...) *That said, Mr President and honorable fellow countryman, we ask Your Excellency, as a gaucho and son of these lands, to determine with the competent bodies the release of funds provisioned for such an important, cultural and artistic improvement for this region of our state*⁹¹.

The financial support was only granted in 1965, possibly due to the political-institutional framework of instability that comprised the period and that led to the military coup. The political actions towards the lodge construction in the surroundings of São Miguel ruins followed along

⁹⁰ Correspondence from the Mayor of *Santo Ângelo*, Odão F. Pippi, to Emilio Laydanar Zuñeda, an officer from the Southwest Frontier Superintendency. *Santo Ângelo*, June 28, 1962. *Santo Ângelo's Historical Archive - Tourism Section*.

⁹¹ Correspondence from the Mayor of *Santo Ângelo*, Odão F. Pippi, to the President of the Republic João Goulart. *Santo Ângelo*, July 17, 1962. *Santo Ângelo's Historical Archive - Tourism Section*.

with the new municipal administration, which was in line with the military government. Soon after that, SPHAN sent to *Santo Ângelo* an architect to take responsibility for the project.

Construction started on the building that was to serve as lodge between 1966 and 1967. However, after visiting the site in person, SPHAN's architect Sabino Barroso could not help expressing his annoyance when he sent to Rodrigo M. F. de Andrade a technical inspection report informing him of his dissatisfaction with the "errors committed by the city hall" and "the regrettable aspect of the work."⁹² Aware of the lack of funds to keep the work in progress, he then suggests that the department should only allow the City Hall to profit from the built part of the lodge after committing to the constructed project. The building that was constructed turned out to be signed, over by contract, to private owners for the opening of a restaurant, and it is currently used as the headquarters of São Miguel Tourism Office and tourist information centre (Figure 2).

Another project carried out by *Santo Ângelo* City Hall to face resistance from IPHAN occurred in the 1970s, when structures made of reinforced concrete and shaped like the typical housing of indigenous people (Figure 3) were built at the entrance gate that leads to the ruins to host visitors. IPHAN requested the halt of the works and the demolition of those that had already been built. Mayor José de Oliveira Alcibiades then appealed to Senator Jarbas Passarinho, who, in turn, wrote to IPHAN's architect Renato Soeiro, questioning: "Why interrupt the construction works if they are happening on land that is not listed? The mayor thinks that the indigenous-shaped housing design will help make money and do not conflict with the landscape setting."⁹³ It can often be seen, as in this case, that this matter of difference that encourages tourist dislocation and that is built from signs reproduced in pictures, television, literature (Urry, 1996), and even upon heritage activation, leads to initiatives that exacerbate the representation of identity as a way to reinforce certain consolidated tourist gaze by exploring the image of "typical" or stereotype.

After the 1960s, the tourism demand and economic use of heritage began to be felt in *São Miguel das Missões*. This is also the time in which the public institutional tourism structure begins to form in Brazil. With the creation of Embratur through Decree-Law No. 55 of 18th November, 1966, a National Tourism Policy is defined. And the tourism, hitherto considered marginal, is perceived as part of the production system (Beni, 2006). However, the conciliation of nationalist

⁹² Architect Sabino Barroso's report to Rodrigo M. F. de Andrade - SPHAN. Rio de Janeiro, December 20, 1967. *Noronha Santos* file. Rio de Janeiro.

⁹³ Correspondence from the Senator Jarbas Passarinho to the architect Renato Soeiro IPHAN. Brasília, 07th August 1975. *Noronha Santos* file. Rio de Janeiro.

and heritage interest with economic interest didn't occur without conflicts of interest. This process occurs in a period that heritage repertoires and assets were activated due to the development of this symbolic consumption of heritage, "when identity adhesions were blended with tourist interests in a remarkably tangled way", according to Prats (1998: 71).

Similarly, these conflicts in *São Miguel* are examples that demonstrate some of the political and bureaucratic obstacles relating to the local tourism during a time of ongoing changes in regards to the handling of National Heritage. Along with IPHAN, Rodrigo M. F. Andrade's modernist era was over, and "the ideology of developmentalism coupled with nationalism to the values of modernization", corresponding to the industrial growth and intense occupation of urban places, which brought major social and economic challenges to the field of heritage (Fonseca, 2005: 141). In this new time, Aloisio Magalhães would take over, in the late 1980s, SPHAN's national presidency. From this moment on, he started to include cultural heritage into the context of economic development, also linked to the conception of expansion that began to encompass the assets of immaterial nature⁹⁴.

Another tourist initiative of great impact was the realization of a sound and light event next to the ruins at the end of the 1970s. The project was conceived by the State Tourism Department and sought to create a tourist attraction that could boost the local economy. *São Miguel's Som e Luz* show revolves around the use of space (architectural remains and natural resources such as trees, lawn, starry sky), sound (with a poetic text recorded in the voice of national renowned actors), and light (which moves through space changing colours according to the sound and character (Figure 4). The land and the ruins, converted into narrating characters of the show, tell the present spectators (tourists) the drama lived in the Missions.

In this regard, the materiality of the ruins draws near its representation through a narrative form, consolidating the tourist experience linked to heritage. As shown by Mantero (2003), proposing the heritage experience implies a process of "let the stones speak," giving rise to sensations, stimulating concerns and, from this point onwards, transmitting the desired message through the communication option deemed most appropriate, which, in this case, focuses on the sound and light show. The projection made is not solely that of an audiovisual

⁹⁴ Aloisio Magalhães promoted the creation of the National Pro-Memory Foundation, incorporating the Historical Cities Programme (PCH) and the National Centre for Cultural references (CNRC), where he was the general coordinator. Aloisio took the office at SPHAN calling attention to the Brazilian cultural diversity and stressing the importance of everyday production. The traditional knowledge, popular culture and various social groups' everyday practices that make up the country, until then not seen as Brazilian cultural references, start to be recognised as cultural heritage, that is, as cultural assets. In this sense, the need of a direct contact between technical workers and the local population begins to be stressed in the official discourse, establishing new guidelines for the cultural policy in the country (Fonseca, 2005).

narrative on the architectural remains, but also the one of imagined things that evoke a version of historical facts related to the construction, peak and decline of the Jesuit-Guarani missions period, going back to the tourist experience of displacement that is not only physical but also symbolic - a time shift stimulated by immersion in the show.

Presented every day since its opening, the show has been established as a landmark of tourism in the region, and turned out to be incorporated into the environment of the historic park and into the community's surrounding life. People living in *São Miguel* have heard the same sound every night for 38 years, just like the regional community has learned to see the show as an element that is already part of the region's heritage which goes much beyond its tourist attraction character. It has become a mechanism to show the material assets through a dramatised version of the story, a story that began to make sense of the place and heritage, strengthening the ties of identity.

Since 2014, the show has been undergoing a requalification process thanks to a federal investment coming from the National Development Bank (BNDES). The project, presented by the Institute *Iguassu Misiones* and formed by entrepreneurs and bodies linked to the tourism sector covering the missionary region in Brazil, Argentina and Paraguay, sought to modernise the sound and lighting system as well as translate the text of the show into other languages. In April 2016, the show was reopened, but maintaining the integrity of the original narration, widely recognised and narrated by the voices of great names from the national dramaturgy and that represent the characters of the past: the Jesuits, the Portuguese, the Spanish and the indigenous people, with special emphasis on *Sepé Tiaraju*⁹⁵, the local hero and symbol of resistance.

Over the last decades, there have been initiatives coming from MERCOSUR and the missionary's countries governments to combine tourism and development with the preservation of the missionary cultural heritage. Some of them are the International Circuit of the Jesuit Missions, created in 1995 and covering Argentina, Brazil, Paraguay and Uruguay⁹⁶; the Road to the Missions, created in 2001 and named after the *Road to Santiago de Compostela*, which

⁹⁵ *Sepé Tiaraju* was the indigenous chief who, in 1750, led the uprising of the Indians against the Portuguese and Spanish officers sent to draw the boundaries. The event is known as the Guarani War and *Sepé* was killed in battle in 1756. Before he died, *Sepé* would have said "This land has an owner", sentence that became a symbol and that is heard in the show *Som e Luz*, marking the climax of the show. *Sepé Tiaraju* became a mythical figure, a popular hero, who, connected to the missionary past, has become a "kaleidoscope" of meaning and an element of reflection to local identities in the present. (BRUM, 2006: 85). The Indian was also recognised as a national hero, written in the book of the Homeland Heroes by Federal Law No. 12,032 / 2009.

⁹⁶ Uruguay was brought into the circuit with the site of *Colonia do Sacramento* as an attempt to include countries belonging to MERCOSUR.

features the ancient Seven Peoples of the Missions and the walking trails that connected the ancient reductions, houses, missionary mills and the quarry where the stones to build São Miguel church were taken from; and the Route to the Missions, created in 2003 to become the axis of integration of the Missions region in Rio Grande do Sul in the sectors of tourism, crafts and agribusiness through the promotion of local production systems (Nogueira and Burkhard, 2008).

While a regional perspective on tourism was adopted taking into account the missionary heritage, new meanings and scales began to be attributed to the cultural heritage of *São Miguel das Missões*, which may complement and add value to tourism at local and regional levels. Within this context, new initiatives have become effective in expanding the concept of cultural heritage. One of them was the inclusion, in 2014, of the *Tava* (a place of reference for the Guarani Indians) in the Recording Places Book (*Livro de Registro dos Lugares*). According to IPHAN⁹⁷, "its asset value lies in its feature to inform on temporality, spatiality, identities and elements of the indigenous culture spiked in Brazilian history." This initiative came from a study conducted in 2009 that sought to raise other possible meanings associated to the missionary heritage, specially the *Guarani-Mbyá*, as a result of the changes seen in the discourse on heritage policies that had always left them behind when dealing with their relevance in the reductions, with the Jesuit being much more valued. For the *Guarani-Mbyá*, the value of the ruins is experienced in the present, and its importance is explained by the fact that they have the bodies of their ancestors, who became immortal (IPHAN, 2007). In addition, through the *Tava*, the historical event *Missions* is interpreted, as it has been incorporated into their reports reworked according to the logic of their cosmology, thus triggering feelings of belonging and identity.

Another local and regional reaching initiative refers to the creation of the Missions National Historical Park in 2009 through Decree No. 6.844, connecting the archaeological sites of *São Miguel Arcanjo*, *São Lourenço Mártir* (in *São Luiz Gonzaga*), *São Nicolau* (in *São Nicolau*), and *São João Batista* (in *Entre-Ijuís*). Created in 2014, the project *Valorização da Paisagem Cultural e do Parque Histórico Nacional das Missões Jesuíticas dos Guaranis* (Cultural Landscape and the Guarani's Jesuit Missions National Historic Park Appreciation project) is a result from this experience. Funded by IPHAN, it had the technical partnership of UNESCO Office in Brazil and monitoring of the Brazilian Agency Cooperation (ABC), with assistance from the Andalusian Institute of Historical Heritage (IAPH).

⁹⁷ More information about the site and the recognition of its intangible heritage are available at IPHAN page at: <<http://portal.iphan.gov.br/pagina/detalhes/507/>> (consulted on: 14.10.2015).

The project aims to promote knowledge on the cultural landscape of the *Guaranis'* Missions and provide support for the development of management tools that can aid in the process of installation of the Missions Historical Park. It seeks to popularise its value as a national and world asset by promulgating its social, cultural and environmental diversity as well as its potential to boost sustainable development in local and regional levels.

The notion of cultural landscape takes a territorial management approach, covering the cultural references associated to the missionary cultural universe based on its materiality and immateriality. It also covers its cultural and environmental dimensions, in an integrated approach with the other sites that make up the region, based on the cultural elements from the Jesuit-Guaraní period and its subsequent developments. The concept of cultural landscape was adopted by UNESCO in 1992 as a good asset typology and by IPHAN in 2009. In general terms, it is understood as sites that represent the process of interaction between groups and the environment by means of their physical traits and the value associated to them (Ribeiro, 2007). Such understanding promoted a diversification of the assets represented as world and Brazilian heritage. It is seen as a land management tool with great potential to combine preservation and development, implying some concern with the quality of life and sustainability since it is bound to the affective and identity dimensions within the landscape. Moreover, it involves traditional practices of land use (UNESCO, 2009).

According to Fowler (2003: 17), by recognising cultural landscapes, we have the opportunity to recognise sites that create monuments to the "faceless ones" (i.e., anonymous or underrepresented within the heritage perspective value system), people who lived and died with no records except that of the landscape that subconsciously and collectively changed their work. The landscape, thus, is changed into a memorial. This new concept attributed to São Miguel's heritage solidifies as a way of conceiving the heritage's dynamic character, being widely reported in tourism. To Gastal (2002: 125), it is "through action and the cultural assets that make it concrete that visitors and visited assets will build their exchanges." It is therefore necessary that the culture cease to be presented exclusively as something finished, as a product to be consumed, but rather as a process, so that even the monuments and architectural settings can be visited and enjoyed as symbols of a certain time in a given community, continuing to be alive for them.

In this regard, it is clear that there is an ongoing attempt to make *São Miguel das Missões* advance towards higher goals in terms of cultural heritage. The activation of cultural assets continues to evolve based on new discourses and external actions of political, economic,

scientific and social nature that are the result of the current time and the latest concepts around heritage.

4. Final Conclusions

As pointed by Mantero (2003), traveling implies not only a dislocation in space, but also a metaphorical dislocation in time, an access to the past, where the trace or testimony of another time can be socially valued and become touristically interesting. In *São Miguel das Missões*, the heritage policies that consolidated the ruins of the reductional period influenced their touristic use. Such policies envisaged tourism as a way to trade those assets and add economic value to the place, sought for a historic representation that was built discursively in the process of patrimonial activation established back in the 1920s.

Over time, the preservation actions met with projects born from the interest of exploring the heritage touristically, however not always in agreement. One example was during the construction of the *ocas* (typical indigenous housing), approaching the dangerous sphere of stereotyping and spectacularization that sometimes characterises initiatives of tourist development based on the heightened emphasis of the "typical" but which, at other times, were complementary in the foundation of the discourse and representativeness of the missionary heritage. That was the case with the show *Som e Luz* (Sound and Light). Despite keeping an essentially dramatic line of this missionary identity representation, following a romanticised version of events, the show still manages to stimulate an affective understanding based on the narrative, stimulating a symbolic interaction between visitors and the ruins in a new presentation of the local heritage.

The new approaches adopted in relation to *São Miguel*, such as the stronger recognition of the *Guaranis'* intangible references and the territorial management approach offered by the notion of a cultural landscape, can, in a long run, be established as new and complementary to tourism fostering elements in the narrative constructions linked to the site. They focus back on the community and its recognition, going beyond the ruins and the official heritage themselves. The reason for this, in Meneses's view (2006), thinking the cultural heritage of a society is to think the society itself, questioning its existence and form of participation in life.

References

- Avé-Lallemant, R. 1812-1884 (1980), *Viagem pela Província do Rio Grande do Sul (1858)*, Tradução Teodoro Cabral, Belo Horizonte, Ed. Itatiaia, São Paulo, Editora da USP.
- Bo, J. B. L. (2003), *Proteção do patrimônio na UNESCO: ações e significados*, Brasília, UNESCO.
- BRASIL (2007), *Ministério da Cultura. Instituto do Patrimônio Histórico e Artístico Nacional*, Tava Miri São Miguel Arcanjo, Sagrada Aldeia de Pedra, os Mbyá Guarani nas Missões, Porto Alegre, IPHAN.
- Brum, C. K. (2006), "O Mito de Sepé Tiaraju: etnografia de uma comemoração", in Pesavento, Sandra Jatahy (org.), *Sepé Tiaraju: muito além da lenda*, Porto Alegre, Comunicação impressa, 67-88.
- Bruxel, A. (1987), *Os trinta povos Guaranis*, 2ª ed, Porto Alegre, EST, Nova Dimensão, 1987.
- Chuva, M. (2009), *Sociogênese das práticas de preservação do patrimônio cultural no Brasil (anos 1930-1940)*, Rio de Janeiro, UFRJ.
- Fonseca, M. (2005), *O Patrimônio em Processo: trajetória da política federal de preservação no Brasil*, Rio de Janeiro, Editora UFRJ/Minc-IPHAN.
- Fowler, P. (2003), "World Heritage Cultural Landscapes: 1992-2002", in UNESCO, World Heritage Papers nº 6. Paris, França, available at: <<http://whc.unesco.org/en/series/6/>> (consulted on: 28.07.2014).
- Gastal, S. (2002), "Turismo & Cultura: por uma relação sem diletantismos", in Gastal, S., *Turismo: 9 propostas para um saber-fazer*, 3ª ed, Porto Alegre, EDIPUCRS, 117-130.
- Gastal, S., Moesch, M. (2007), *Turismo, Políticas Públicas e Cidadania*, São Paulo, Aleph.
- Golin, T. (2010), "A destruição do espaço missionário", in Possamai, Paulo César (org.), *Gente de guerra e fronteira: estudos de história militar do Rio Grande do Sul*, Pelotas, EdUFPelm 53-65.
- Kern, A. (1982), *Missões: uma utopia política*, Porto Alegre, Mercado Aberto.
- Mantero, J. C. (2003), "Ambiente, Patrimonio y Turismo", in *Aportes y Transferencias*, año 7, v. 01, Universidad Nacional de Mar del Plata, Argentina, 11-28, available at: <<http://www.redalyc.org/pdf/276/27600702.pdf>> (consulte don: 07.09.2015).
- Meira, A. L. G. (2008), *O patrimônio histórico e artístico nacional no Rio Grande do Sul no século XX: atribuição de valores e critérios de intervenção*, Tese de Doutorado, PROPUR, UFRGS.
- Meneses, J. N. (2006), *História e Turismo Cultural*, Editora Autêntica.
- Nogueira, C. R. D., Burkhardt, D. (2008), "Políticas Públicas de Turismo para o Desenvolvimento Local/Regional das Missões Jesuítico-Guarani" in *Revista Eletrônica de Turismo Cultural*, 02(02), 2º semestre de 2008, available at:

- <http://www.eca.usp.br/turismocultural/Retco4_arquivos/Carmen_Missoes.pdf> (consulted on: 17.11.2015).
- Pereira, W. (2013), "Patrimônio Cultural e Memória Social das Missões Jesuíticas Guarani - Ruínas de São Miguel: Ação Patrimonial e Identidade Ameríndia na Região Platina da América do Sul", in *Revista Sures*, nº 02, available at: <<https://revistas.unila.edu.br/index.php/sures/article/view/72>> (consulted on: 05.01.2016).
- Poulot, D. (2009), *Uma história do patrimônio no Ocidente, séculos XVIII-XXI: do monumento aos valores*, Tradução João de Freitas Teixeira, São Paulo, Estação Liberdade.
- Prats, L. (1988), "El concepto de patrimonio cultural", in *Política y Sociedad*, 27, Madrid, 63-76. available at: <<http://www.antropologiasocial.org/contenidos/publicaciones/otautores/prats%20el%20concepto%20de%20patrimonio%20cultural.pdf>> (consulted on: 14.09.2014).
- Prats, L. (2003), "La mercantilización del patrimonio: entre la economía turística y las representaciones identitarias", in *PH Boletín del Instituto Andaluz del Patrimonio Histórico*, 58(mayo 2006), 72-80, available at: <http://www.iaph.es/revistaph/index.php/revistaph/article/view/2176> (consulted on: 06.09.2014).
- Ribeiro, R. W. (2007), *Paisagem Cultural e Patrimônio*, Rio de Janeiro, IPHAN/COPEDOC.
- Saint-Hilaire, A. de (2002) 1779-1853. *Viagem ao Rio Grande do Sul*, Tradução de Adroaldo Mesquita da Costa, Brasília, Senado Federal, Conselho Editorial. (Coleção "O Brasil visto por estrangeiros").
- Santos, M. C. dos (2009), "O Começo da ruína: administradores e indígenas na segunda metade do século XVIII", in Baptista, J., Santos, M. C. dos, *As Ruínas: a crise entre o temporal e o eterno*, São Miguel das Missões, Museu das Missões-IBRAM, Dossiê Missões, III, Parte I, 23-111.
- Sepp, S. J. (1980), *Viagem às missões Jesuíticas e trabalhos apostólicos*, Belo Horizonte, Ed. Itatiaia, São Paulo, Ed. da Universidade de São Paulo.
- Stello, V. F. (2005), *Sítio arqueológico de São Miguel Arcanjo: avaliação conceitual das intervenções 1925-1927 e 1938-1940*. Dissertação de Mestrado, Universidade Federal do Rio Grande do Sul, Programa de Pós-Graduação em Engenharia Civil, Porto Alegre.
- UNESCO (2009), *World Heritage Cultural Landscapes, a Handbook for Conservation and Management*, França, UNESCO, World Heritage Papers, 26, available at: <<http://whc.unesco.org/en/series/26/>> (consulted on: 05.10.2013).
- Urry, J. (1996), *O Olhar do Turista: lazer e viagens nas sociedades contemporâneas*, Tradução Carlos Eugênio Marcondes de Moura, São Paulo, Studio Nobel.

Chapter XIII

Salvador, Capital City, City Heritage

Salvador, Capital City, City Heritage

MARIA ESTELA LAGE SANTOS⁹⁸

HELOÍSA HELENA FERNANDES GONÇALVES DA COSTA⁹⁹

Abstract:

This article is the result of a scientific research carried out at GREMM - Study Group in Museology, Museums and Monuments/UFBA - about the city of Salvador, which was the first capital of Brazil and Lusitanian heart in the Americas. Since 1985, its old centre has been considered World Heritage by UNESCO. As a consequence of these characteristics, GREMM created the blog Salvador City Capital-Heritage City and the fanpage Salvador city heritage, both communication mechanisms that have led many people, including locals and tourists, to exchange experiences of local and historical/heritage tours with the group.

As a result, this article calls attention to the relevance of scientific research to study the areas of heritage cities and the importance of spreading the results to leave a good impression on tourists, residents and others interested in cultural tourism. It is expected that these actions can stimulate the creation of social actions responsibility aiming the preservation and awareness of cultural heritage of the Heritage Cities.

Keywords: Salvador; History; Heritage City; Monuments; Tourism

Resumo:

Esse estudo tem o intuito de divulgação dos resultados da pesquisa científica realizada no âmbito do GREMM - Grupo de Estudos em Museologia, Museus e Monumentos/UFBA -, sobre a cidade de Salvador, que foi a 1ª capital do Brasil e coração lusitano nas Américas; desde 1985, seu centro antigo é considerado patrimônio da humanidade pela UNESCO. Em razão dessas características, o GREMM criou o blog Salvador Cidade Capital- Cidade Patrimônio e a fanpage Salvador cidade patrimônio, mecanismos de comunicação que tem levado muitas pessoas, entre

⁹⁸ Department of Museology, Faculty of Philosophy and Human Sciences FFCH, Federal University of Bahia Estrada de São Lazaro s/n Federação, Salvador BA CEP. 4021030, estela.lage1@gmail.com

⁹⁹ Department of Museology, Faculty of Philosophy and Human Sciences FFCH, Federal University of Bahia Estrada de São Lazaro s/n Federação, Salvador BA CEP. 4021030, helocosta773@gmail.com

moradores e turistas, a trocar experiências de locais e de roteiros históricos/patrimoniais com o grupo.

Assim, este estudo vem falar da relevância de se pesquisar cientificamente os espaços das cidades patrimoniais e da importância de divulgar os resultados da pesquisa para sensibilizar turistas, moradores e demais interessados em turismo cultural. Espera-se que essas ações possam estimular a realização de ações de cidadania responsável visando à preservação e conhecimento do patrimônio cultural das cidades patrimônio.

Palavras-chave: Salvador; História; Cidade-Patrimônio; Monumentos; Turismo

Resumen:

Este estudio está destinado a la divulgación de los resultados de la investigación científica llevada a cabo bajo el GREMM - Grupo de estudio en Museología, museos y monumentos / UFBA - en la ciudad de Salvador. Ciudad que fue la primera capital de Brasil y corazón lusitano en las Américas. Desde el año 1985 su casco antiguo es considerado Patrimonio de la Humanidad por la UNESCO. Debido a estas características, el GREMM a creado el blog 'Salvador Cidade Capital-Cidade Patrimônio y la 'fanpage' 'Salvador Cidade patrimônio', mecanismos de comunicación que han llevado a muchas personas, entre locales y turistas, a intercambiar experiencias de viajes / patrimonio histórico local y con grupo.

Este estudio trata de la importancia de la investigación científica en las áreas de las ciudades con patrimonio y de la necesidad de dar difusión a los resultados de la investigación. Con la finalidad de sensibilizar a los turistas, residentes y a todas las personas interesadas en el turismo cultural.

Se espera que estas acciones pueden estimular la realización de futuras acciones dirigidas a la ciudadanía y al visitante, responsables en última instancia, de la preservación y el conocimiento del patrimonio cultural de las ciudades.

Palabras Clave: Salvador; GREMM - Grupo de estudio en Museología, Museos y Monumentos / UFBA; TICs Aplicadas al Turismo

1. Introduction

The Study Group in Museology, Museums and Monuments/GREMM was established in 2005, at the Department of Museum Studies in the Faculty of Philosophy and Human Sciences of the

Federal University of Bahia, led by the researcher Heloisa Helena F. Gonçalves da Costa. Since 2012, GREMM has begun an exhaustive research of the city of Salvador, which in its first stage of study addressed the preservation and identification of local cultural heritage, the development of teaching materials to support elementary school teachers on patrimonial education and the interaction of the academy with the local community. Cultural heritage education is believed to be the means for awareness and identification of the local heritage, thus it is expected to encourage more conscious citizens' attitude towards the city. This group research was created after the perception of the range of knowledge of the local community about the heritage of the city, and the fact that the city of Salvador is considered World Heritage since 1985.

In the classes taught by the author and coordinator of this project, specially at the one about the History and Bahia Heritage, at the Museology Course of Federal University of Bahia, the museology students were able to know the history of Bahia through the museums, monuments and oral stories narrated at the city streets. In this course, the students have been encouraged to make heritage walks, a class model in places where cultural heritage is best shown in the eyes of enthusiasts. In this sense, the walks may occur in the streets and historical parks, inside museums, public buildings and in squares where dialogues happen with public of different ages.

Then, it is observed the monuments' level of preservation, buildings, urban spaces (streets, parks, squares) and the broadcasting of historical knowledge, these places, both official and historical, and also the perception that the population has on the history, the memory and the means of preservation of various types of cultural heritage in Salvador.

It was a great surprise for the researchers to notice that the students themselves did not know that the city of Salvador was a Lusitanian city in its cultural repertoire, and therefore keeps from that experience a large and diverse historical and cultural heritage that is considered a world inheritance.

To briefly analyse all the issues that motivated this research group through the complex world of cultural heritage, this article is divided into five stages: Introduction, in which the research theme, the objective, and the work structure at GREMM are presented; the second stage called "Cultural heritage education as preservation tool" shows this kind of education as a useful tool to reduce the gap between the population and the cultural heritage. The third stage is called "Communication methodology" and presents the creation of the blog, the fan page and other GREMM products; the fourth, called "The Case of Salvador" illustrates the city of Salvador, brings a brief history, shows the reasons it has received the nomination of World Cultural Heritage, and demonstrates that people have the right to know their heritage and how it has

been offered. The fifth topic, the Final Considerations, deals with what has been observed, analysed, understood and apprehended by our brief reflection.



Figure 1. A screenshot of GREMM blog site

Source: Authors

2. Cultural heritage education as preservation tool

One of the four pillars of education,¹⁰⁰ according to UNESCO, is knowledge. This statement is not unfounded, it is based on the knowledge and perception of our memories, in which cultural identities are built. Disseminate the historical and cultural knowledge of Salvador origins, recreating tourist routes in the city to offer more knowledge to its citizens about their living space and cohabitation may enable them not only access to their right to know where they live, but also to acquire and reinforce a better cultural health¹⁰¹.

The concept of Cultural Health was developed and conceived by the researcher Heloisa Helena Fernandes Gonçalves da Costa from her experiences with education, heritage, history and memory. It states that cultural health has a key role in the composition of individuals' global

¹⁰⁰ The education foundation concepts are in the report submitted to UNESCO by the International Commission on Education for the 21st Century, chaired by Jacques Delors, published in book form with the title "Education: The Treasure Within" (1999). The four pillars of education, according to this report, are learning to know, learning to do, learning to live with others, learning to be.

¹⁰¹ Cultural health is characterised by increased quality of life, regardless of age, gender, level of education or any other variable; it is based on affective memory and high self-esteem.

health, to the point that without this component from the affective memory no one can get a healthy living condition.

Costa (2010) defines the concept of Cultural Health as:

CULTURAL HEALTH is the ability that a person acquires, through perception of the affective value of cultural patrimony that compose its heritage, to overcome complex questions of existence and improve their quality of life in which the catalyst affection, affective memory and high self-esteem are basic foundations to achieve the full health.

Believing that raising this concept can contribute to implement actions in favor of preservation of the cultural heritage, this research project within the GREMM acts to encourage citizens to (re) know their own city or, in baudelairean sense, rediscover their city. By learning more about their city, citizens begin to understand how the various cultural heritage were created; this understanding may help them to know the historical, political and cultural reasons for the choice of creation of certain types of patrimonies; sometimes, the notion of identity is present and creates a link between the patrimonial objects and citizens. Conscious of their cultural history, the citizens can take action and promote actions to preserve what is around them and therefore having the power of choice. This hypothesis comes from the fact that few people know their city; there is small participation from readers in readers' sessions on local newspapers and small citizen participation in public hearings to making decisions about the use of the city; and also they do not feel compelled to talk to municipal managers and debate on the uses of the city of Salvador. Thus, we affirm that it is necessary to recognise before learning to preserve and to know you have to ask, seek and disseminate this knowledge. That's a big question that arises for GREMM: how to teach citizens to seek for learning?

Salvador was the first capital of Brazil. It was founded in 1549 and on Thomé de Souza management, the first general governor of the Colony, it was the centre of the Portuguese empire in the New World, remaining the capital until 1763. It was built according to the projects brought by Master Luiz Dias, establishing a replica of parts of the cities of Lisbon and Oporto, the two largest urban centres of Portugal.

The city of Salvador is a large open air museum¹⁰². The cultural heritage of Salvador is considered the largest colonial architecture in Latin America. It was listed by UNESCO in 1985

¹⁰² City Museum that we refer is the city as a place of contemplation and knowledge construction (Costa, 2014)

with nearly 3,000 buildings of the 17th, 18th and 19th centuries. It is a living document of the history of colonial Brazil. According to the report made to UNESCO by its consultant Michel Parent, Salvador is the first art city of Brazil (Parent, 2008). Being aware of these facts, Salvador should be treated as a history book where each square, each bust, each listed building explains the past and consequently the present, showing what it is as a city and the creation of its people citizenship.

According to Riegl, a monument is conventionally called a building that is designed to serve as a memory, made to be remembered and can be intentional or unintentional. In any case, the monument is connected to the official memory, the one that is institutional and that produces elements on the urban landscape to serve as symbolic marks. In most cases, this official memory is not recognised by the whole population, which immediately forgets that monument ends up being used by birds and vandalized. And also, the political authorities of future generations will not worry about those monuments, similar to what occurs with the majestic equestrian statues around the XV square in Rio de Janeiro, and it just exemplifies what happens in countless other cities (Costa, 2008: 122).

We know that the sense of belonging is the citizen identification to its cultural heritage. We are also aware that this identification cannot be fabricated or imposed. Thus, we also state that an individual cannot have a sense of belonging to something if it is unknown to him. So that possible relation is the result of deliberate knowledge on a topic, through Heritage Education. This pedagogical methodology, when properly used, will enable the public to (re) know its city and see in it the values linked to their culture, increasing their esteem, seeing it with new eyes. Then we come to the concept of healthy city as stated by Costa:

We seek to understand, too, the concept of healthy city, in which the characteristic is to emphasise the health of citizens on the enlarged perspective of quality of life, and that includes the right to culture, knowledge and use of cultural heritage of a community. In most cases, managers and leaders do not know exactly what to do with the element 'culture' in their municipalities, they think it is superfluous and focus on health and education, which are within the traditional concepts and it does not promote a holistic and transdisciplinary look at them (Costa, 2010: 39).

The cultural action¹⁰³, part of the heritage education, works as an agent to enable the individual, giving him the power to participate because it culturally educates him. Once the taboo is broken and understanding that underground memories can invade the public space, multiple and difficult predictable claims are united to this memory contest (Pollak, 1989: 5). Aware of the need for inclusion of this knowledge, we agree that this education cannot be provided, regardless, as Hugues de Varine explains:

For me, heritage education is a global action, aimed at a population and its territory, using institutions like schools or museums, but without relating to any of them in particular. Its goal is clearly the local development and not a mere acquisition of knowledge about the heritage or cultural activities. The proposal aims to bring the greatest possible number of community members. The action is part of the project and the general programme of development of the territory that it accompanies, eventually evolving by the needs of this development (Varine, 2013: 137).

Additionally, Varine points out about how he truly believes that heritage education must be configured and its importance in the exchange of knowledge:

The heritage education is often based on the method of knowledge exchange: teachers or agents of development or even researchers usually know less about the local heritage, material and immaterial, of a given group of local people than an elderly people or even a child. Thus, one can share information between oral traditions, knowledge not formalised, practices inherited from one side and scholar knowledge and references, all theoretical contributions from people of the outside and more shaped, on the other side. (Varine, 2013: 140).

This exchange of knowledge should be encouraged to use the urban spaces and monuments within as tools, so people can understand the importance of them. The monuments also explain the inhabitants' diversity, power relations, compulsory memories. Thus, we also state that an individual cannot have a sense of belonging to something if it is unknown to him by communities or groups, and even the forgotten memories; ultimately, who they are and the importance of their city in the construction of their history as a nation. Awareness of who they are can be

¹⁰³ According to Carasso (2012), cultural action is to, at the same time, sign up for a horizontal dimension that demand on one side, awareness, education; and on the other side, regular and diversified sight visits to the works, viewer's, reader's or listener's works. In this sense, culture is always a work as much as a pleasure, a distant effort of easy pleasures of cultural consumption, an attitude of curiosity and openness, tolerance as critical spirit, in short, a slow and persevering construction of the individual by even when he is confronted with the most complex works of the spirit.

acquired by knowing their past and, as consequence, responsible citizens who focus on the present but with future consciousness can be molded, thus a healthier and more humanised city could be built. As stated on the Letter of Venice¹⁰⁴:

Spiritual message carriers from the past, the monumental works of each people linger in the present as a living testimony of its secular traditions. Humanity, increasingly aware of humane values, consider them a common heritage and, towards future generations, recognises itself as responsible for their preservation, imposing on itself the duty to transmit them on full authenticity (Venice Charter, 1964).

It is noted an insufficient training on cultural heritage and it is truly difficult to access cultural goods. These often go unnoticed by the inhabitants of historical towns producing what Costa will call cultural unhealthiness:

Without the content training and cultural awareness, the population suffers from the most serious disease: cultural unhealthiness. A society without cultural health is doomed to die of multiple organ failure, on institutions and on human beings. As we currently see, the widespread and rapid unplanned urbanization process with emphasis on the human scale, the cities are rapidly moving from cities to megacities. Citizens without exception are 'normotics' and hostages of the misleading notion of power, in which the attribution of value of the tangible and intangible heritage goes far from the identity built on dialogue and memory as an indispensable companion of history (Costa, 2008: 129).

Salvador needs citizens with cultural, social, economic and urbanistic responsibility to redirect us to possible paths to be followed, identify deviations, route accidents, the successes and mistakes. This is the route that now we tread. It is important to keep an eye on the past in order not to travel through failed paths in the present; it is relevant to form the bases for the future, the part of the route that it is the responsibility of next generations.

Therefore, GREMM established the city of Salvador as the object of study, a heritage city of mankind. Nowadays, the city has very obvious signs of degradation of its rich cultural heritage,

¹⁰⁴ The Patrimonial Letters are expressed on the Venice Charter, which is the result of the debate at the Second International Congress of Architects and Technical Historical Monuments and at ICOMOS - International Council on Monuments and Historical Sites, which occurred in May 1964 in the city with the same name.

either in physical form or in intangible references, defined as living heritage by this study. Citizens are unable to recognise the history and collective memory in cultural landmarks due the high level of decay of the monuments in the city that once was the capital of Brazil for 214 years and, in 1985, received the World Heritage nomination because of references, traces and ruins that still exist on the historic centre area, now known as the old centre. GREMM, using research and studies in the areas of Museology, Architecture, Urbanism and History of Art, aims to encourage the citizens of Salvador to know their own history by recognising the necessity to produce readings and interpretation, in an accessible language, on historic cultural heritage of Salvador.

On the first stage of the research (the historical period of 1549/1763) that took place from 2013 to 2014, by studying the cultural heritage of Salvador that is recorded on the urban layout, monuments and museums, we also intended to produce academic material to simplify the local community's accessibility to the existing cultural wealth at the city.

The recognition that the symbolism and history of the city needed to be translated so that the large population would have access to their right to know happened when we realise the flaws regarding the formulation of supporting material for teachers and the dissemination of local history; the same happens with the various touristic attractions of the city that are commonly regarded as dangerous and with inadequate infrastructure. In public and private schools, monuments, public spaces with memory of Salvador and its museums are still not well used as a source of information and research. Hence, the motivation for researchers at GREMM to produce clear and objective academic texts and learning objects for the educators who perform the role of disseminators of this knowledge.

Studying this city and talking about it for all citizens is a duty, a constitutional requirement, as set out in Articles 215 and 216 of the Federal Constitution¹⁰⁵, the Federative Republic of Brazil.

Other legal documents that legislate on listing and preservation of urban cultural heritage in Brazil also support this historical, educational and communicational action and throughout the research will be presented and explained. It is also GREMM's intention to investigate the contribution levels that history and memory impact on the choices of what means cultural heritage of a nation, a region or a community and this study group seeks to deepen the criteria analysis, strategies and identities of training methods, including the museums in this context. Conceptually analyse the type of memory and its instruments has been a constant activity.

¹⁰⁵ Brazilian Federal Constitution of 1988.

The idea to use social media emerged from the necessity to identify the content of the cultural, historical and artistic itineraries, indicating monuments (including sources) of the city of Salvador, capital city and city heritage of Brazil, mostly because it is a more affordable and attractive way to disseminate and exchange knowledge about the city. While some members research the historicity of sacred and civil monuments, the streets with their names and characters, the other part of the team is gathering all synopses and building new routes and itineraries to be visited, in person and on line.

The main purpose is to make people aware of the beauty and cultural richness of their city, and hence encourage them to adopt attitudes of respect and protection from vandalism, violence, theft and abandonment towards the city.



Figure 2. A screenshot of the group's fan page

Source: Authors

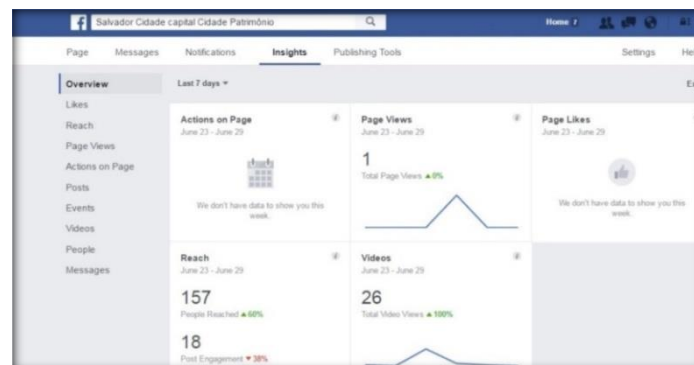


Figure 3: A screenshot of the group's fan page. Statistics

Source: Authors

3. Communication Methodology

Engaged in researching, in producing results, in publishing them to the academy, and also creating learning means to support the educational work of elementary school teachers, the GREMM team believes that the quickest way to communicate with the general public and to reach various layers of society is at school environment.

We emphasise that, while developing the research, GREMM team felt the need to share the acquired contents and to diffuse them in a fast and interactive way, because the group knows that the community environment, which is often a cultural producer, has broad technological knowledge; thus, it is up to the research group, as a representative of the academy, to act as propagator and intermediate on the process of cultural exchange. Then, after a unanimous decision, a blog, in which copyright texts written by members of GREMM are published, was created. Texts are written by undergraduate and graduate researchers, and are also published news related to the city of Salvador.

Then, in November 2013, the 'Salvador Cidade Capital-Cidade Patrimônio' (Salvador City Capital-City heritage) blog received its first publication, a letter to the newly elected mayor of Salvador, António Carlos Peixoto de Magalhães Neto.

Other forms of contribution and research publishing are being used. Through background review, this project aims to create not only academic productions related to the results obtained from the research, but also to promote direct aid to local community through educational material formulation to support teachers of elementary school, for example, a visitor's guide to museums where it is highlighted the historical and socio-cultural importance of the city of Salvador. GREMM working methodology aims to:

- a) Provide a view of the city of Salvador with tactical objective, which is to encourage city inhabitants to support the development of urban organization;
- b) Encourage interested parties to discuss the situation of the tangible and intangible of local cultural heritage, its history and its preservation through collective work activities;
- c) Encourage self-esteem and sense of leadership throughout group debates and acquisition of knowledge and skills;
- d) Encourage the exchange of information aiming to reinforce actions in each community;

The formulation of the above goals came from observation in public places and places of registered monuments; analysis and interpretation of data; background review; treatment of pictures; editing videographic records and scanning of material to be filed and then subsequently distributed by social media of the research group. The activities were developed continuously following the schedule for the study of the artistic and historical heritage of Salvador (August 2013 - July 2014) at the noteworthy sites for the first stage of the research, which covers the period 1549 to 1763, when the city of Salvador was the capital of Brazil and a city reference in the New World.

Consequently, the group created the blog/project site, the Fan Page on Facebook, Twitter and Flickr accounts, to broadcast activities of the group via statements and posters. Another aim is to continue and spread photographic and video recordings of cultural tours in Salvador, in addition to maintain group pictures at specific sites: Flickr, Vimeo and Youtube.

Academic papers written by the group are published online both on the blog/official website of the project - www.salvadorcidadepatrimonio.wordpress.com, and on the Fanpage on the social network Facebook (<https://www.facebook.com/Salvadorcidadepatrimonio/>).

The public's visit to the products created by the group has been increasing (average of 776 people following the posts since creation in 2014) and the exchange of content with groups with same interest, like the Fanpages: 'Bahia ...terra do já-teve' (Bahia... Land of the 'have-had'); 'Guia do soteropobretano's (Soteropobretano Survival's Guide); 'Instituto do Patrimônio Artístico e Cultural' (Institute of Artistic and Cultural Patrimony of Bahia)/Ipac-Ba and 'Eu amo a História de Salvador-Bahia by Louti Bahia' (I love the history of Salvador-Bahia by Louti Bahia). All this has strengthened the dynamics and interactions with the local community and this interaction has been slowly increasing.

Lastly, using the basic principles of heritage education and based on scientific research on the use and appropriation of city spaces, (remembering that cities are an important and significant cultural heritage), the GREMM team seeks to spread the results of this research to inform tourists, residents and others interested in cultural tourism. It also aims to encourage the population of the most traditional, historical and/or old neighborhoods to promote the awareness of responsible citizenship actions, so that a great number of contributors acquire historical, cultural and technical knowledge as well as good heritage preservation habits in Salvador.



Figure 4. Old medical school, historic centre, Salvador Bahia

Source: Research product



Figure 5. Barra lighthouse

Source: Research product

4. The case of Salvador city

Cities are great artifacts of socialization and, therefore, culture. They grow or decay, hence, they are always changing.

Politicians, planners, historians, tourist specialist, architects, sociologists, curators and general population, each is responsible for the (for better or worse, with greater or lesser intensity) the change process and layout of cities. This was not different in the city of São Salvador of Bahia.

Consequently, while studying the city of Salvador as Cultural Heritage, we first revisit the project of Salvador planned by the Portuguese Empire. The expansion of Portuguese domain in

the Americas left a collection of building and ruins of this period that forms the historic centre/old town. António Risério, anthropologist and historian, shows the idiosyncrasies of the Iberian plans for its overseas territories:

By the time Portugal and Spain decided to build urban centres in the New World, Lisbon and Spanish authorities had at their disposal two city models. From on side, the real city. From the other, the ideal city. The city as it really existed in the lands of Iberia - peninsular city of physiognomy and Islamic medieval character. And the city as thought or imagined from the writings of Vitruvius and the Renaissance architects and urban planners. Between the real and ideal cities, Lusitanian and Spanish crowns made their choice for the latter (Risério, 2013: 67).

That way, Salvador was conceived. The city was planned to be the first capital of the Portuguese expansion in the Americas "Salvador was fully defined and designed as Lisbon in 'traits and samples' whose execution was entrusted to Luís Dias" (Risério, 2013: 67), with an idealised stroke. However, this symmetrical design, the Renaissance metropolis idea was only in its core base, the Old Centre, because without explicit municipal determinations coming from the Portuguese crown, the Portuguese colonizer made all decisions by himself that seemed drawn by irregularity, because even before the desired symmetry in the Renaissance plan submitted by the Portuguese government, people sought comfort (Risério, 2013). The Brazilian geographer Milton Santos also noted that: "Salvador, one can say, in a way, was born to be a metropolis" (Santos 1956: 190).

Salvador became a port city of great importance as the capital of Brazil, for 214 years, accumulating on its repertory a variety of richness, including the rich architecture of the houses from the imperial time and modernist vanguard architecture, a fact that leaves it with increasing cosmopolitan air. Milton Santos emphasised the historical importance of the city of Salvador and its situation in 1959, when his book was written:

It was, for three centuries, the most important urban agglomeration and populous in Brazil; its port was the main port of the country. Today, however, due to the shift to the southern axis of the Brazilian economy, lost the post which had previously: it is only the fourth city in the country, the population, although, the current period, reveals slightly dynamism. (Santos, 1959: 35).

To preserve the history richness described in ancient Salvador centre for new generations, UNESCO recognises and declares the historic/old centre of Salvador as a World Heritage.

The Historic Centre of Salvador, Bahia, deserves its recognition for various reasons. It is a place that has many baroque buildings of historical importance, above all churches and monuments. With an urban aspect similar to some European cities, Salvador is divided between the upper city and the lower city, and it is next to the sea. Its recognition is also due to its historical relevance, Salvador was the first capital of Brazil between the 16th and the 18th century. With a strong, diverse presence of cultures, such as African, Indigenous and European, it retains many urban characteristics of the colonial city and cultural well-preserved traditions. (Bottalo, Piffer and Von Poser, 2014).

Since December 2015, Salvador also participates the UNESCO's Creative Cities Network on the category of "City of Music". By joining the network, as it happens to other cities as well elected in this network, Salvador is committed to establish partnerships to promote cultural industries, sharing best practices, encouraging popular participation and integrate culture in economic and social development strategies.

For these mentioned matters, sharing and diffusion of acquired knowledge must be passed on to the population in order to allow that, in a more democratic way, everyone can interact with their heritage.

5. Final considerations

The research work of GREMM, seeking interactions with population of Salvador by using social networks and broadcasting via web, has been successful in its intention to achieve and pass on information about the city of Salvador as heritage capital and its relevance. The intercultural dialogue is established and tends to grow.

Although not a pioneer in using social networks such as broadcasting tool and dissemination of cultural activities, GREMM has had a very positive result in relation to what has been developed. The interaction with other sites and fan pages promotes a wide diffusion and access to the research addressees quite effectively. The language used leaves the far-fetched academic language and approaches the public without becoming low-level and meaningless. Therefore, people have shown interest in getting closer and learn more, appropriating and understanding

more and more of their history, establishing a sense of belonging, whose absence bothered and encouraged us to pursue the construction of this project. We believe that there is still too much to do, we hope to gain many positive points so we can move forward with it, and that way many other aspects may arise from the results of this work.

Being aware that the tools used in GREMM are appropriate to the research work being done and the subsequent disclosure of results, we are trying to expand this relationship with electronic media by coaching the team for knowledge of the new media possibilities and establishing a partnership with other researchers also interested in associating academic knowledge to new technologies of information and communication.

Consequently, GREMM advances in time and space, making its actions visible and transparent, in order to better contribute for the training of researchers and citizens.

The team feels affected by the results of media dialogues. As soon as pictures of monuments, sculptures, streets and even historical figures were posted, comments would soon emerge; but they are not dispersed conversations or just qualifying the subject in question; they are insightful conversations that stimulate debates, and therefore, the formation of synapses with songs, poems, essays, other facts and/or historical personalities, new photos and even testimonials. It has really been a very constructive dialogue connection.

Each semester, part of the GREMM team is renewed. However, those who complete their qualifications, undergraduate or master's degree, do not think about leaving the group, but to continue with research projects, sharing knowledge, solidarity and working methods, consequently creating a knowledge network. And all actions pass through the bias of sensitive perception in the eternal quest to integrate the systemic world to the living world, according Jorgen Habermas.

Utopias are part of people whose wisdom comes from simplicity. They are the dream that want to become true, intended to be active, alive, renovating.

Information and communication technologies are the newest order, tool, equipment and are increasingly evolving more quickly. They are and always will be means; will never be an end in themselves. Because living beings and not machines are and always will be the end, the target, the highest goal of all researches. Technological innovations are used to improve the quality of life of these beings, that way, the fastest tools that enable better dialogue, in order to obtain more effective results, more efficient and more effective information processing are chosen. GREMM is always vigilant to know what is the most interesting development of these technologies, realizing the great contribution they can bring to research activities, such as data

collection, analysis of digital files, distribution and also to the establishment of educational, scientific, literary and cultural exchanges.

At the end, the true heritage comes from people that are capable of creating, through their talents, the cultural heritage that is intended to protect. And it is for them that we work, for the benefit of preserving the cultural heritage from generation to generation, so that great part of people (if not all) can obtain the Cultural Health.

References

- Bottalo, M. L., Piffer, M., Von Poser, P. (2014), *Patrimônio da humanidade no Brasil: riquezas culturais e naturais/ Hiterage of humanity in Brazil: its cultural and natural riches*, UNESCO, Publishing Editora brasileira.
- Carasso J.-G. (2012), *Ação Cultural, ação Artística. Se há duas palavras... Há duas coisas!*, Sala preta PPGAC, 01(12), available at: <http://www.revistas.usp.br/salapreta/article/view/57543/60579> (consulted on: 15.01.2015).
- Costa, H. H. F. G. da (2010), "Museus, pontes entre gerações", *Revista Museu*, available at: www.revistamuseu.com.br/18demaio/artigos.asp?id=5985 (consulted on: 11.04.2012).
- Costa, H. H. F. G. da (2010), *Patrimônio como ferramenta para a pedagogia social da inclusão*, I Fórum do Patrimônio Cultural – IPHAN, Ouro Preto.
- Costa, H. H. F. G. da (2011), "Ação social, desenvolvimento e museus", *Revista Museu*, available at: www.revistamuseu.com.br/18demaio/artigos.asp?id=16576 (consulted on: 29.05.2015).
- Costa, H. H. F. G. da (2012), "Museologia e patrimônio nas cidades contemporâneas: uma tese sobre gestão de cidades sob a ótica da preservação da cultura e da memória", in *Boletim do Museu Paraense Emílio Goeldi, Ciências Humanas*, 7(1), v.il., 87-102.
- Habermas, J. (1990), *Teoria da Ação Comunicativa*, São Paulo, Editora UNESP.
- Habermas, J. (1990), *Teoria da Ação Comunicativa*, São Paulo, Editora UNESP, 1990.
- Parent, M. (2008), in Leal, C. F. B. (org.), *As missões da Unesco no Brasil*, Michael Parent, Rio de Janeiro, IPHAN.
- Pollak, M (1989), "Memória, esquecimento e silêncio", *Revista Estudos Históricos*, 2(3), 03-15. Centro de Pesquisa e Documentação de História Contemporânea do Brasil - CPDOC/FGV, Rio de Janeiro.
- Risério, A. (2013), *A cidade no Brasil*, São Paulo, Editora 34.
- Varine, H. de (2013), *As raízes do futuro. O patrimônio a serviço do desenvolvimento local*, Porto Alegre, Medianiz.

Chapter XIV

The World Heritage Brand and Tourism: An Approach to the Historic Centre of São Luís, Brazil - Heritage Tourism Marketing

The World Heritage Brand and Tourism: An Approach to the Historic Centre of São Luís, Brazil - Heritage Tourism Marketing

MIRIAM MOTA¹⁰⁶

MANUELA GUERREIRO¹⁰⁷

PATRÍCIA PINTO¹⁰⁸

Abstract:

This study considers the relationship between tourism and historic centres highlighting UNESCO World Heritage Sites. It points out that despite the acronym, WHS (World Heritage Site) was not created with the aim of promoting tourism, it emerged as a highly desired brand with which countries could position themselves in the tourist market. The purpose of this paper is to deepen the discussion of a common vision that world heritage status increases patterns of demand and tourist flow, contextualising the analysis from the reality of a developing country. The empirical reference is the historic centre of São Luís, an island destination in northeast Brazil, whose Portuguese influence in terms of colonial buildings gave it the title of World Heritage Site in 1997. In order to see whether the World Heritage label has had significant influence on the site as a destiny choice, this research develops an analysis of tourist flows in the years 2010 and 2015 that is based on secondary data. It investigates the origin, motivation and influence of national and international travel that occurred in these periods. The results indicate that despite the tag, there were no remarkable changes in variables. These data are especially relevant when discussing marketing issues, the promotion of destinations linked to major brands, and their potential for attracting tourist flows.

Keywords: Historic Centres; Tourism; Development; Marketing; World Heritage

¹⁰⁶ University of Algarve, CIEO - Research Centre for Spatial and Organizational Dynamics, miriam_raquell@hotmail.com

¹⁰⁷ University of Algarve, CIEO - Research Centre for Spatial and Organizational Dynamics, Faculty of Economics, mmguerre@ualg.pt

¹⁰⁸ University of Algarve, CIEO - Research Centre for Spatial and Organizational Dynamics, Faculty of Economics, pvalle@ualg.pt

Resumo:

Este estudo considera a relação entre turismo e centros históricos enfatizando os patrimónios mundiais da UNESCO. Destaca que apesar da sigla WHS (World Heritage Site) não ter sido criada com objetivo de promoção do turismo, ela emergiu como uma marca altamente desejada pelos países para se posicionarem no mercado turístico. O objetivo do trabalho é aprofundar a discussão de uma visão comum de que o status de património mundial aumenta os padrões de procura e fluxo turístico, contextualizando a análise na realidade de um país em desenvolvimento. A referência empírica é o centro histórico de São Luís, um destino insular na região nordeste do Brasil, cuja influência portuguesa de suas construções coloniais lhe conferiu o título de património mundial em 1997. A fim de verificar se a marca património mundial teve influência na escolha do sítio como destino, esta pesquisa desenvolve uma análise do fluxo turístico nos anos de 2010 e 2015 baseada em dados secundários. Ele investiga a origem, motivação e a influência das viagens nacionais e internacionais nestes dois períodos. Os resultados indicam que apesar da marca, não se verificaram mudanças assinaláveis nas variáveis analisadas. Estes dados são especialmente relevantes quando se discutem as questões de marketing e promoção de destinos vinculados a grandes marcas e ao seu potencial de atração de fluxos turísticos.

Palavras-chave: Centros Históricos; Turismo; Desenvolvimento; Marketing; Património Mundial

Resumen:

Este estudio considera la relación entre el turismo y los centros históricos realizando los Lugares declarados Patrimonio de la Humanidad por la UNESCO. Señala que a pesar de que el acrónimo WHS (World Heritage Site) no fue creado con el objetivo de promover el turismo, éste ha emergido como una marca altamente deseada por países que quieren posicionarse en el mercado del turismo. El objetivo de este artículo es profundizar una discusión sobre una visión común de que el estatus del patrimonio mundial aumenta los patrones de demanda y el flujo turístico, centralizando el análisis en la realidad de un país emergente. La referencia empírica es el centro histórico de San Luis, un destino turístico isleño en el noreste de Brasil cuya influencia portuguesa en términos de construcciones coloniales le permitió obtener el título de Patrimonio Mundial en el año 1997. Con el objetivo de comprobar si hubo una influencia significativa de la denominación Patrimonio Mundial en la selección del destino, el estudio desarrolla un análisis del flujo turístico del año 2010 al año 2015 basado en datos secundarios. Dicho estudio investiga

el origen, la motivación y la influencia de viajes nacionales e internacionales que han tenido lugar durante este período de tiempo. Los resultados indican que, a pesar de la denominación, no hubo cambios destacables en las variables. Estos datos son especialmente relevantes cuando se discuten asuntos relacionados con el marketing y la promoción de los destinos ligados a marcas principales y sus potenciales para atraer flujos turísticos.

Palabras Clave: Centros Históricos; Turismo; Desarrollo; Marketing; Patrimonio Mundial

1. Introduction

Discussions of tourism in cities and historic centres undoubtedly involves talking about a period of economic wealth, decline and revitalization, where tourism has the potential to meet the overall objective of heritage conservation, economic and social development and improvement in the living conditions of the population. It is this type of development of the old urban centres that can realise the kind of relationship with tourism industry. This baseline is intended to provide an appropriate context into which some World Heritage sites are inserted, and whose position in the rankings have been increasing worldwide. Currently, the list of UNESCO World Heritage sites consists of 1,031 properties, of which 802 are classified as cultural properties. In the Ibero-American countries, approximately 30 properties are listed as inheritances in the categories of centre, neighbourhood, district or historical city, of which six are in Brazil (UNESCO, 2015a). These data allow us to discuss approaches and practices in the context of countries with similar historical and cultural roots, thus intending to contribute to the solution of urgent problems — often with many dimensions — in areas that the tourism phenomenon reaches. In this sense this study focuses on the debate about the tourist reality of the named “historic centres”, whose expression only makes sense due to the expansion of new spaces in cities (Peixoto, 2003) and the consequent abandonment and degradation of urban central areas.

It is important to note that although the Convention Concerning the Protection of the World Cultural and Natural Heritage, adopted in 1972, has focused on the encouragement, identification, protection and preservation of cultural and natural heritage (UNESCO, 1972), the label of World Heritage Site (WHS) has been widely used as a way to stimulate socio-economic development (Jha, 2005). Thus, to contribute to the planning and management of tourism, particularly in the marketing and promotion of destinations, this research discusses the issue raised in some studies that refers to the potential of the UNESCO classification to increase the

number of tourists. As such, it facilitates further discussion about the case of São Luís, whose historic centre was classified as a World Heritage Site in 1997. To this end, this paper uses secondary data to show the tourism performance of the city following the UNESCO classification. The methodology employs an analysis of tourism flows for the years 2010 and 2015 and extends this debate by presenting the results of the development of tourism in this destination.

Located in the northeast of Brazil, the city of São Luís, the capital of the Maranhão State, has a population of 1,014,837 inhabitants, according to Brazilian Institute of Geography and Tourism (IBGE, 2010). In addition to the capital of Maranhão, the island also includes the municipal districts of São José de Ribamar, Paço do Lumiar and Raposa. Its economy is based on the aluminium processing industry, food, tourism and services. Its French foundation, the Dutch occupation, and Portuguese rule resulted in a city with a historical centre covering a preserved area of 250 ha caused by the urban expansion into the neighbourhood of Praia Grande. This original core of the city dates from the early 17th century and it integrates the area recognised by UNESCO along with other adjacent neighbourhoods. The maritime trade and port functions are the basis of the city's development. The entire heritage collection, mostly civil architecture, was built when the State of Maranhão played an important role in the economic production of the country during the 18th and 19th centuries. The city of São Luís was recognised as the fourth most prosperous area after Rio de Janeiro, Salvador, and Recife (Spix and Martius, 1828 cited in Silva, 2010). However, the 20th century began with a long period of economic stagnation that somehow preserved the rectangular design of its streets and the Pombaline structures of its architecture. These details led UNESCO to consider São Luís "an excellent example of Iberian colonial city" (UNESCO, 2015b).

The study is divided into six sections. The first concentrates on the origins of the central concepts of the historical city, the process of evolution, further economic decline, and the potential for regeneration through tourism, and emphasises the creation and aims of the World Heritage Convention in 1972. The second section discusses competitiveness in tourism, the reasons for inclusion in the World Heritage List, and presents an overview of the state of the art on WHS status and the number of tourists. The third section presents some challenges related to the development of tourism in these locations and summarises the major problems in São Luís. The fourth presents the methodological aspects of the study, and the fifth refers to the empirical results. Finally, the sixth and last section presents the main conclusions.

2. The idea of the historical centre and city

To understand the relation between tourism and the centres or historical cities, and the context in which the two concepts and their current perspectives are formed, it is necessary to make some initial observations. The city centre, as the word suggests, usually has a central location in relation to the inhabited areas or the existing facilities. It also has defined and visible geographical boundaries and has a concentration of important shops, significant trading stores, and companies and civic administration seats. It is a main place for meetings, exchanges and information, which gives it a geographical, economic and social centrality (Salgueiro, 2005 cited in Sebastião, 2010). It is characterised by the density and quality of its functions and is therefore a concept that expresses content rather than shape (Freire Chico, 2008).

Given the large expansion of cities, scholars have broadened the concept of the centre to include larger spaces or has replaced the concept by using expressions such as old area or consolidated space (Fernandes, 2011). Other designations, such as old urban centre, old downtown areas, historic core or traditional centre, are used in the representation of these areas. According to Peixoto (2003: 213) the expression *historic centre*, “only makes sense given the prominence and centrality of new urban spaces”. In an attempt to define the concept of “historic”, the CHARTER OF WASHINGTON (1986) states that all cities are historical, leading to what is seen as “a concept in crisis” (Fernandes, 2011: 13), the use of which should be discontinued despite the fact that in 2011 the UNESCO General Conference adopted the term “historic urban landscape”, thus reinforcing the use of the word (UNESCO, 2011).

As for the space that is conventionally referred to as the historical city, this mostly only contains its old core foundation, recognised as a historic centre, that is, the oldest area that as a consequence of successive urban expansions has become the centre of the modern city. To better distinguish the two, many researchers have used the term “historical city” — as opposed to the contemporary city. As stated by Ashworth and Tunbridge (2000, cited in Peixoto, 2003: 217) (...) the dominant *ethos* of the city is historical in nature as opposed to modern. Its historic centre (...) “refers to a circumscribed and limited area where are located the sources of this *ethos* and festive manifestations, aesthetic and emblematic of his statement”. Figure 1 highlights the urban expansion of the historic centre of the São Luís.



Figure 1. Historic centre of São Luís and the urban expansion

Source: SETUR, 2015

2.1 The decline of the historic centres, tourism and the World Heritage Convention

In the second half of the 20th century the development of decentralisation forces profoundly altered the composition and functions of the historical areas of cities. From the 1950s, what had once been the landmarks of the city were changed by the explosion of suburbanisation (Sebastião, 2010). However, the decline of the historical areas of cities has become more pronounced since the 1970s with advances in transport and communications technology. Substantial changes have been observed in economic and social organisation and, therefore, in the modes of production and land use. At the same time, manifest problems have arisen with the displacement of the population to the periphery and the consequent desertification of public space, the degradation of built-up sites, the use of housing for social strata with lower purchasing power, and residential use being replaced by administrative activities and the proliferation of night-time entertainment. There has also been an increase of areas with obsolete or incompatible activities, inadequate urban fabric for car use, parking difficulties and the creation of pedestrian zones, urban interventions in dissonance with the environment, and the discontinuity of urban policies. Consequently, we have witnessed the loss of competitiveness in the central areas due to new services, specialised trade, and modern accessibility in peripheral areas (Freire Chico, 2008; Salgueiro, 1998; Sebastião, 2010). As a result of these factors, the old zones have ceased to be the commercial, financial and political centres of the city (Gil, 2011), and as the importance of these centres decreases, public and private investment in them also reduces. Thus, there a degradation of heritage and identity has occurred in these centres (Queirós, 2007).

All these factors have led to the loss of hegemony and the decline of the ancient historic centres. One of the most visible manifestations of the problems is their physical and functional obsolescence (NORMS OF QUITO, 1977), with the consequent decentralisation of capital and new investments and developments in suburban areas. These ancient areas find themselves confronted with a huge lack of versatility to allow improvements in the quality of services for both citizens and businesses (Freire Chico, 2008). However, although they have lost some of their attractiveness in terms of functional, economic, and social change, and have also become less accessible than other areas, the historic centres will always be seen as the old town, and this explains the most striking element of the historic centre: its symbolic image (Cavém, 2007). As Peixoto explains (2003: 212–213), “the more accentuated are the changes, and more visible are the effects of urbanization, greater the sense of loss and the temptation to imagine a harmonious past that supposedly would have happened in the historic centres”. He adds that, “any heritage consciousness manifests itself from a rupture trauma. It is a reaction against the risk of disappearance, but that brings with it the goal of promoting regeneration”. One begins to accept the idea of protecting the past and safeguarding acquired knowledge (Bessière, 2013), and it is no wonder that the policies of heritage conservation in Brazil had more visibility during the Modern Art Week in full modernist movement of 1922 (Silva, 2010).

Parallel to these changes, we have attested to the need to reverse the trend of abandonment of the historic centres. Interventions in the central urban areas have intensified in order to retrieve the urban centre, to gain visibility, to attract people and investments. Driven by its economic value, its social, cultural and symbolic function, heritage becomes the centre of public policies and development projects (Gil, 2011). The central areas begin to attract the interests of capital again, either via the existing infrastructure, or by the strategic positioning of the urban fabric, or even the possibility of adding economic value to the architectural heritage, that was often preserved by the very abandonment or go to live on the margins the most progressive views of the city (Luchiari, 2005). There is now a return to the city centre, and the government has become the main catalyst in this process (Díaz-Parra, 2015). New functions and services are encouraged, and tourism appears as an agent of change in terms of heritage conservation, economic and social development, and the creation of identities (Bandyopadhyay, Morais and Chick, 2008; Nadj, Ismail, Yunos and Maulan, 2015). Figure 2 shows the dense concentration of typical buildings in Giz Street and some of them were revitalized.



Figure 2. Typical buildings in Giz Street

Source: SETUR/MA, 2015

It is in this scenario of the decline of historic urban centres and urban regeneration initiatives that in 1972 UNESCO established the Convention Concerning the Protection of World Cultural and Natural Heritage. Significant losses in the context of post-World War II stimulated concern with safeguarding the urban heritage. However, the triggering of this Convention is linked to the Aswan Dam, whose construction by the government of Egypt in 1959 would flood a valley with treasures of the ancient civilization. UNESCO launched a world campaign culminating in the removal of the Abu Simbel temples. In 1965 the idea of a World Heritage was first proposed during a conference at the White House in the US, where the term was coined (Allais, 2013, cited in Meskell, Liuzza, Bertacchini and Saccone, 2015). The idea of the Convention is that there are places of exceptional universal value — the main evaluation parameter that justifies inclusion on the World Heritage List — that, once they have met the conditions of integrity and authenticity, are integrated into a protection system and are subject to proper management. They must also meet at least one of the ten proposed assessment criteria. Criteria I to VI are related to cultural goods. São Luís was awarded three of the criteria, outnumbering other cultural sites in the country. The fifth criterion states that the site must (...) be an outstanding example of traditional human settlement (...) especially when it becomes vulnerable under the impact of irreversible change (UNESCO, 2015c).

2.2 Competitiveness in tourism and the world heritage brand

Consumption has become an integral part of cities and this has been reflected in the changes that have taken place. In this context, the cultural heritage has been used as a strategic element in the competition between places. The historic centres have become special places that relate to the origins of cities and are transformed into scenarios for consumption and for the leisure needs of contemporary society (Silva and Silva, 2010). However, it is not only the functional aspect that needs to be explored, but also the psychological dimension of the place (Echtner and Ritchie, 1991, 1993).

Competitiveness in the tourism sector has been generally understood as the ability of a destination to attract and satisfy tourists (Enright and Newton, 2004), leading to the positioning of cities in consumer markets, usually from the perspective of increasing the number of visitors. Within this approach, the components that determine the competitiveness of the places must be carefully designed. In this respect, the extent of tourism and the diversity on offer seem to compromise the evolution and the competitiveness of tourism destinations.

Driven by the need for competition, the urban centres are investing in imaging processes and branding. Planners have struggled to promote locations by highlighting well-known icons and landmarks (Richards and Wilson, 2006). As a symbolic resource, the brand has been used to differentiate cities through marketing policies and management cultural tourism flows (Guerreiro, 2008). In the case of the historic centres, the "time dimension tends to be used as a strategic element in promoting the site, particularly its patrimonial, historical and monumental resources" (Cavém, 2007:33). In this context Ryan and Silvanto (2011:306) posit that the WHS designation "has emerged as a highly valued brand used by countries in their efforts to market themselves as tourist destinations". Yet, in spite of not being created with the objective of promoting tourism, the acronym WHS has been widely used in national marketing campaigns (Yang, Lin and Han, 2010). According Ekern, Logan, Sauge and Sinding-Larsen (2012), the brand is highly marketable, and "it serves as a substitute for missing knowledge by attesting that the WHS is the real thing" (Ryan and Silvanto, 2011: 308-309).

There are several reasons for the inclusion of properties on the World Heritage List. Some World Heritage sites emerge as a celebration of well-preserved culture. Some have used the title as a branding or marketing strategy to attract visitors to historical sites, and others use the designation as an alarm for a heritage at risk. Finally, the label is used as "placemaking" or catalyst for socio-economic development, where the valued heritage contributes to enhancing and developing identities of place and/or actions for desired changes (Rebanks Consulting Ltd,

2009 cited in Kaltenborn, Thomassen, Wold, Linnell and Skar, 2013). According to information in the nomination dossier to UNESCO, in São Luís the interest has focused on the conservation of architectural heritage, despite the intensive use of the World Heritage designation in promoting tourism (Silva, Costa and Ferreira, 2015) and small investment in housing.

In the relationship between tourism and World Heritage, the emphasis on the WHS designation can bring prestige and international visibility, socio-economic development, job creation, pride and local identity. The designation can attract visitors and especially stimulate the development of tourism as a way to resolve these same issues, and this has aroused interest in the world heritage status in many countries. However, although this is a subject that attracts attention, with a range of studies based on this theme, there is limited research on the number of visitors who frequent these places (Frey and Steiner, 2011). In their study, Tucker and Emge (2010) found an increase in domestic and international visitors. Other studies point to an increase in domestic visitors (Jimura, 2011; Prentice cited in Evans, 2002) or refer to the positive influence of the arrival of international tourists in a large number of countries (Su and Lin, 2014), or even in a specific country (Yang, Lin and Han, 2010). There are also studies that discuss the real extent of this relationship and associate it with several factors that characterise the different contexts, and the absence or insufficiency of data in research (Buckley, 2004; Tisdell and Wilson, 2001). The purpose of this work is to continue this debate in the context of a developing country where the challenges of heritage preservation and tourism development are more pronounced.

2.2.1 Challenges of tourism management in historic centres and World Heritage Sites

All the opportunities for tourism in historical sites are not exempt from problems. One of the main problems faced by planners is the tension between the need to preserve the physical fabric of the city and the search for activities that can take place in these spaces, which implies the adaptation of old urban functions to new needs (Oliveira, 2010; Vinuesa and Torralba, 2010). These new activities are often incompatible with the spatial configuration of the centre and may lead to changes to the buildings and their surroundings to “expand infrastructure to accommodate increasing tourist flows” (Harril, 2004:257). Also observed is increased traffic and pollution, reduced security levels, and changes to the social structure. Another concern revolves around the maintenance of the distinctive character of the place (Human, 2008), which gives it the potential for differentiation in the tourism market. In addition, there are also challenges posed by the use of the UNESCO title. These consist of the restrictions in the economic activities and social habits of the residents, as well as the need for heritage conservation (Yan, 2015).

Furthermore, there are reports of many conflicts surrounding the growth of tourism at these sites, particularly those related to asset management for tourism (Zhang, Fyall and Zheng, 2015).

The greatest challenges in the historic centre of São Luís, which interfere directly with the image of the site, are the heritage degradation, the re-functionalization of buildings and urban infrastructure issues and services. Silva (2010) reports the transformation in 2008 of private parking in 50 homes, attested by National Artistical and Historical Patrimony Institute (IPHAN). In 2009, a civil defence survey indicated the imminent risk of collapse of 33 buildings. The functional change is directed more to attractions for tourist use, such as bars, restaurants, hotels, museums and public administration, and has little focus on residential use. The heritage preservation policies arising from the 1970s, which came into effect in the 1980s and 1990s, and some specific actions in later years were insufficient to cover the full range of issues and to promote a return to the city centre. The situation continues to endanger the safety of residents, the UNESCO title itself, the commercial activities in the area, and the viability of credible marketing campaigns (Silva, 2010). In figure 4, there is an old building that collapsed and is being rebuilt to be a museum.



Figure 3. Ruin in Estrela Street

Source: Mota, 2008

3. Methodology

This study analyses secondary data obtained from the Research Receptive Tourism of the São Luís Municipal Secretary of Tourism (SETUR). It includes the years 2010 and 2015 and aims to identify the main destinations of domestic and international tourists, the motivating factors for travel and their influence. Survey data were grouped by SETUR, highlighting the states/destinations of tourists in Brazil. The surveys were applied for three to four days in each of those years. The analysis of tourism demand included two periods of high season that corresponded to the months of January and July, and two periods of low season, covering the months of May and November. The average of each time period was used in order to simplify the data analysis. The reason for the selection of these two years was due to the absence of complete data in other years.

The work focused on the eight states of the country with a higher frequency in the issuance of tourists in the two years under review, 2010 and 2015. For the analysis of the international flow we calculated the frequency of visits to each country in the four periods of each year. Thus, from the total of 22 countries, ten were considered for individual analysis as emitting countries of tourists to São Luís. It was also found that the greatest diversity of countries was in 2010.

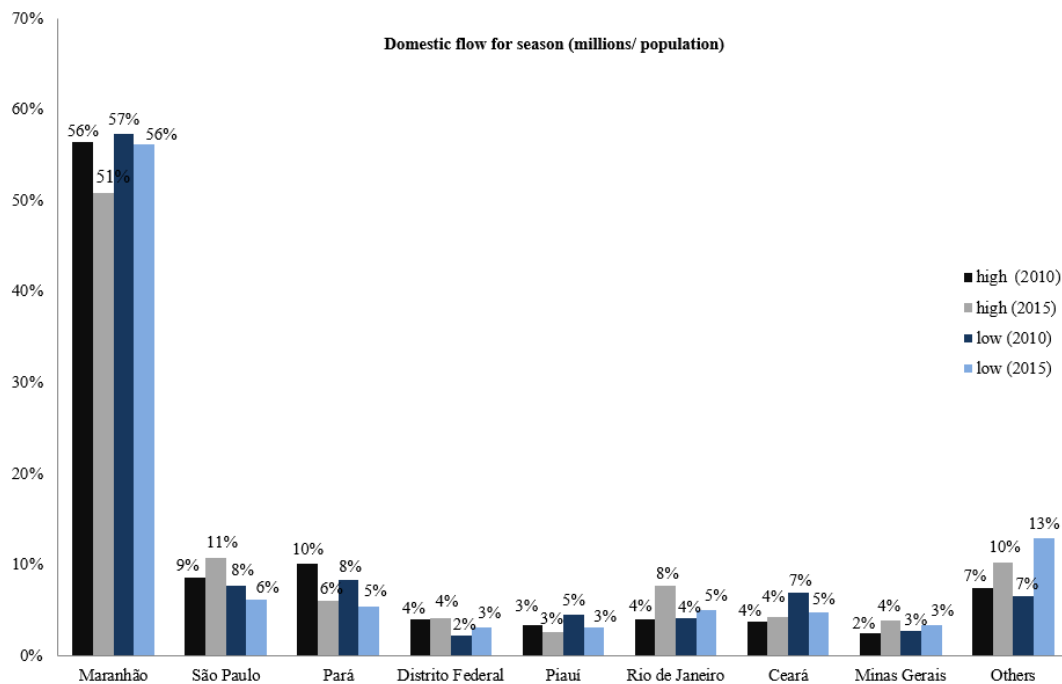
The study of SETUR includes questions that allow us to analyse the main reasons for travel, particularly business and study, leisure, visiting relatives and/or friends, health, sports, events and others. The second section explores the motivations of flows when the decision for the trip is linked to leisure, and in the third part we examine the vehicles of influence in the decision to travel to São Luís.

4. Results and discussion

4.1 Analysis of domestic tourist arrivals

In the two years analysed it can be seen that the tourist flow in São Luís is predominantly regional with the highest number of visitors coming from the state of Maranhão. The overall results, shown in Graph 1, indicate that the highest frequency of tourists to São Luís came from São Paulo, Pará, Rio de Janeiro, Ceará, Piauí, Distrito Federal and Minas Gerais. In 2010, the highest percentages of tourists during the high season came from Pará and São Paulo with 10% and 9% of the total flow of visitors. During the low season, these two locations also have the two best indices with equal percentages around 8%. Therefore, one can infer that there was a small

percentage increase in the number of visitors between these two main destinations during the high season. In the low season of 2015, São Paulo and Pará again assume the best rates with 6% and 5% respectively of the total sample. In the high season, while São Paulo was ranked highest with 11%, Rio de Janeiro appeared as the second place of origin with 8%, and Pará took third position with 6%. Therefore, the analysis shows a change in the origin of visitors in 2015. In this particular case, two more distant destinations and two major Brazilian business centres represent the main source of tourists.



Graph 1. Domestic flow for season in 2010 and 2015

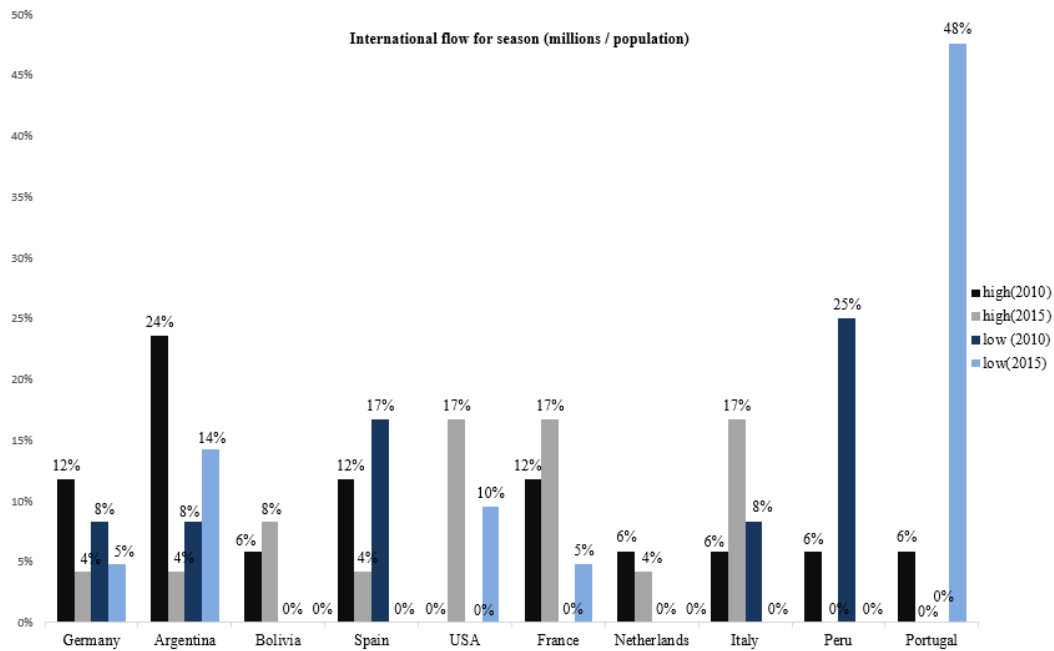
Source: Adapted from SETUR

The results in São Luís are similar to those found in several studies in other countries. In fact, despite being a phenomenon with an international dimension, most research has focused on the domestic flows. This is likely to continue to be the case given the current economic and political crisis, the latter with serious implications for international tourism in many places. Winter (2010, cited in Ekern et al., 2012) sees the tourist and the tourism development entrepreneur in Asia as domestic or regional. Turker (2013) describes how in 2012, Safranbolu in Turkey had close to 600,000 visitors, of which 183,000 were domestic and 38,000 were foreigners, indicating the regional character of the flow (although the author has not made any mention of tourism demand on a regional scale). Another source that confirms the domestic character of tourism

can be found in a recent Consumer Survey by the Ministry of Tourism - Mtur in Brazil, where 77.6% of Brazilians intend to take a national tour (MTur, 2015). There is no doubt that these questions relate to the interpretation of different realities. For example, the fact that Brazil covers a large territory increases the number of its attractions and therefore encourages national tourism. Another point is related to the average income of Brazilians, which is considered low when compared to other countries, leading to a reduction in international travel for Brazilians. Exchange rates and the devaluation of the Brazilian currency are also determining factors in the decision to travel within the country.

4.2 Analysis of international tourist arrivals

In respect of international flow, shown in Graph 2, in 2015 the largest number of visitors come from Portugal in the low season and accounted for 48% of the flow. This was followed by Argentina in the high season in 2010, with 24%. Italy, France and Spain accounted for equal percentages of visitors in the high season, with 17%. According to the results it is possible to establish that the two highest frequencies occur for Germany and Argentina with flows in the four periods analysed. In an analysis of national and international flows it can be seen that the latter is residual, reaching the highest rates slightly above 2%. Light and Prentice (1994) report in their study at 12 sites in Wales that overseas visitors are minority, so that heritage sites are clearly dependent on the British market.



Graph 2. International flow for season 2010 and 2015

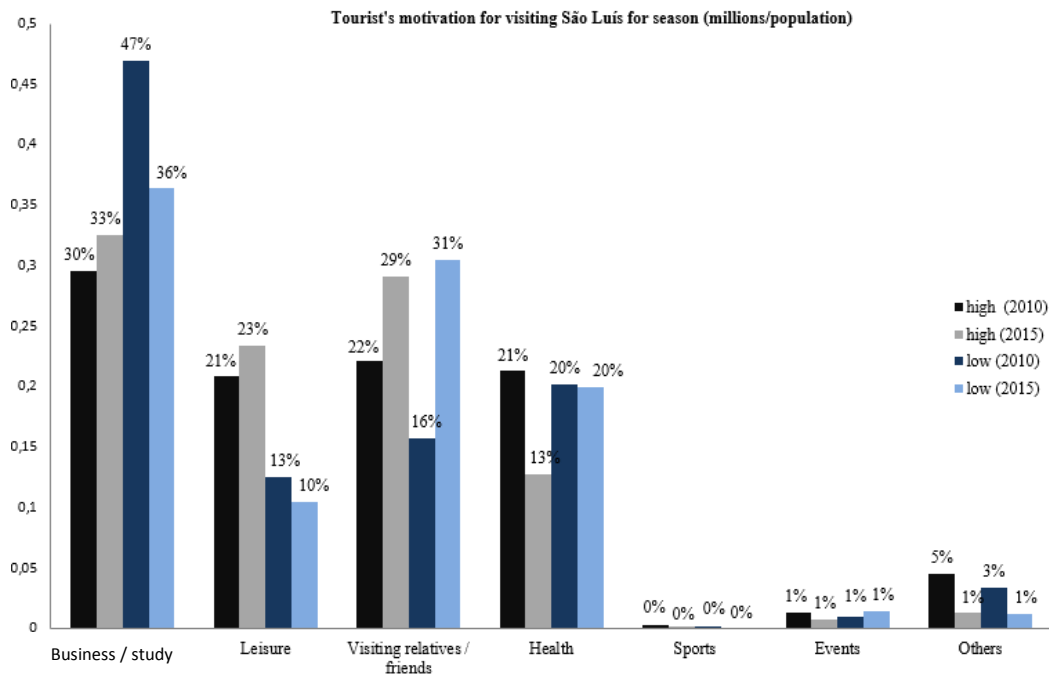
Source: Adapted from SETUR

The ability to attract international visitors by using the World Heritage brand has been the object of analysis in some countries. In the evaluation of how the World Heritage brand must affect tourism in developing countries, Ryan and Silvanto (2011) argue that the economic returns tend to be higher because of the distance from many visitors' country of origin. This results in higher expenses for longer trips and stays, implying major tourist spending. However, the level of development in the host country can affect the site's appeal to tourists, such as the transport infrastructure and hosting. It is considered, however, that the variable of geographical distance can be a limiting factor in the decision to travel due to long distances, which impacts on the total volume of travel and the benefits generated, especially in island destinations that exacerbate this difficulty because of restrictions to access. São Luís, for example, has a single access by land. This variable can justify low inbound tourism from other, more distant regions of the country where it takes into account the cost of transport and the time factor of travel. In assessing flows it perceived that nearby destinations, such as Pará, Ceará and Piauí, have the facility for sending tourists because of the smaller geographic distances. As Light and Prentice (1994) claim, growth of flows is influenced by physical proximity, which explains the presence in São Luís of visitors from neighbouring states and that the highest percentage of international visitors come from countries in South America and Western Europe. Research by Yang et al (2010) on the analysis of

international tourists in China, also reveals that the largest number of visitors between 2000 and 2005 came from their Asian neighbours, mainly Japan, Korea and Singapore.

4.3 Analysis of tourist’s motivations for visiting São Luís

According to the results of the study, for the years under analysis the main reasons for travel to São Luís were related to business and/or study. The highest percentage is reached in 2010 during the low season, with 47% of the total flow of visitors (Graph 3).



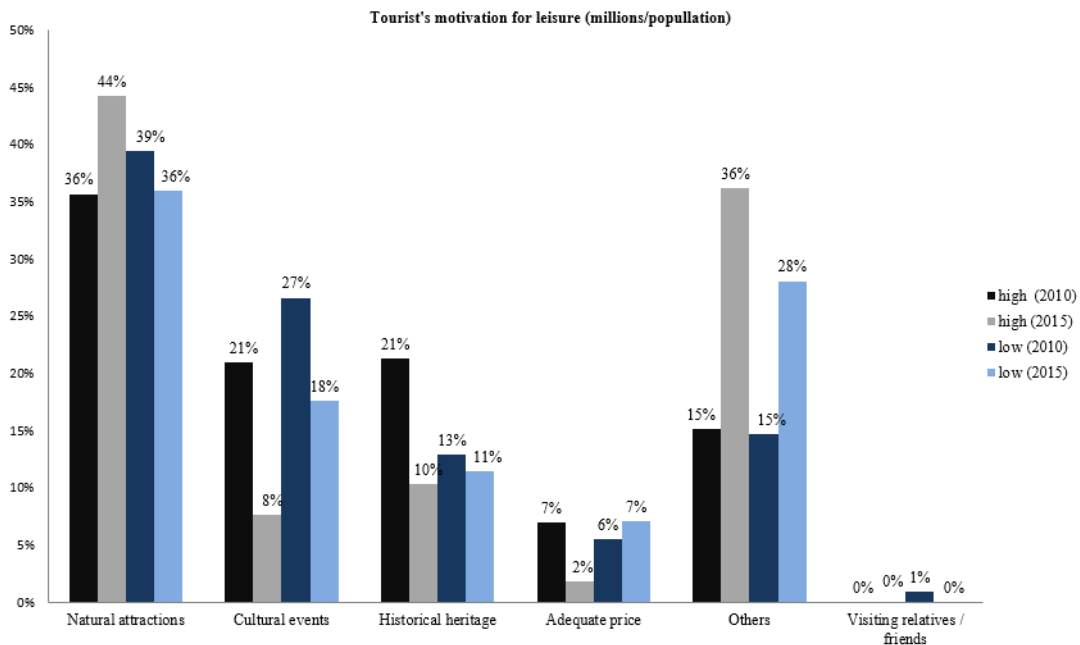
Graph 3. Tourist’s motivation for visiting São Luís in 2010 and 2015

Source: Adapted from SETUR

Two other variables that cause the flows are visits to relatives and/or friends and leisure. The variable *visiting relatives and/or friends* takes the second highest values in the two years, reaching an overall percentage of 98% with better performance in low season of 2015. With a total rate of 31% lower than the variable *visiting relatives and/or friends*, leisure had its best representation in the high season of 2015 with 23% of the flow of visitors. The health variable was maintained in the analysis by the regional character of the tourist flow in the city. With respect to this variable, the data show that in 2010 this accounted for almost the same percentage of visitors in the high and low seasons, with 21% and 20%, respectively. However, in

2015 there was a decrease in the high season, indicating a reduction in the health variable as a motive for travel. The other variables, sports and events, although they are considered important for the development of tourism in many destinations, had unsatisfactory results, especially the first, with zero rates. In order to expand the leisure activities and streamline other tourist sectors, attention should be given to the two sectors of business and study, which characterise the largest flow into the city. With respect to the events category, it is important to point out that São Luís hosted the Brazilian Capital of Culture (CBC) in 2009.

In the analysis of tourism that is motivated by leisure, SETUR selected a set of variables to better define this category, as shown in Graph 4. in their study at 12 sites in Wales that when the flow is motivated by leisure it was the natural attractions that performed best with the best percentage obtained in the 2015 high season. This was followed by cultural events that presented the best rates in 2010, but experienced a significant reduction in 2015. Next was the historical heritage, which showed smaller percentage rates in 2015 with better representation in the high season of 2010. Price has lower percentage compared to other categories, from which we can infer that it has little influence as a limiting factor on the flows. Finally, the visiting relatives and/or friends variable remained inexpressive.



Graph 4. Tourists' motivation for leisure in 2010 and 2015

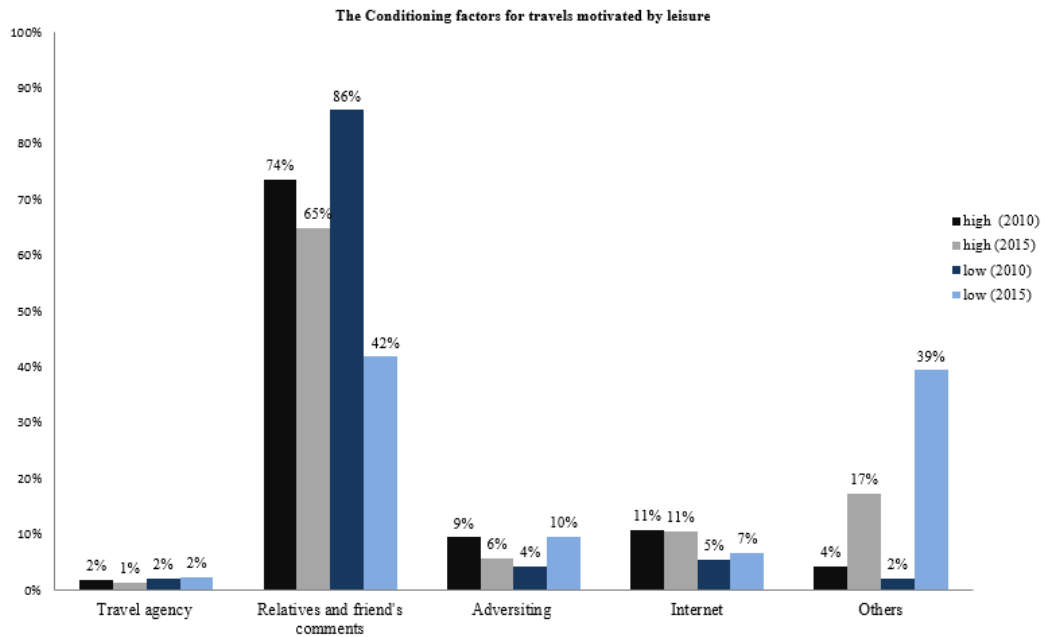
Source: Adapted from SETUR

When visitors' preference for the natural attractions is perceived as being detrimental to the heritage product, we tried to establish a relation with other realities. According to Presenza, Del Chiappa and Sheehan (2013:23), "the analysis of the Italian tourism system shows that it is almost exclusively organised around the model (3S), sun, sea and sand, despite a rich diversity of other tourist products". This has resulted in "a concentration of tourist demand in the summer and a predominance of the domestic market" (OECD, 2011, cited in Presenza et al., 2013:23). It is important to emphasise here that Italy is the country with the highest number of sites on the UNESCO list.

As noted by Buckley (2004) in his discussion about the contribution of the brand for tourism, World Heritage status often leads to an increase in the number of visitors, but the designation is just one of the factors that influences the visit. The author considers that there are still significant data limitations on the number of visitors, demographics and expenditure, which raise many questions for the attempt to discover the real contribution of the brand. The Municipal Research Report of São Luís Tourism confirms data deficiency. For example, from a total of 83 registered hotels in São Luís, only 23 submit their data monthly (SETUR, 2011). The research by Tisdell and Wilson (2001) was based only on data of international tourists because the time series data for national visitors was not available. The authors state that research on the number of visitors has many shortcomings with respect to estimating the demand for visits.

4.4 Determinants of travel for leisure

The analysis of factors that influence leisure related travel, and travel to visit relatives and/or friends reveals quite significant values with high percentages in all periods (Graph 5). Advertising increased by 5% in the high season in 2010 and decreased by 4% in the high season in 2015. The analysis thus shows 29% of flows. The Internet performs best in low seasons, with the same percentage reaching 10% rates.



Graph 5. Leisure influence in 2010 and 2015

Source: Adapted from SETUR

5. Conclusion

This study has addressed the issue of tourism in World Heritage Sites, especially in historic centres. The goal was to continue the debate on the effects of major brands in the development of tourism destinations, including the effect of the WHS designation and the widespread issue of the potential increase in tourist flow as a consequence of the visibility provided by UNESCO titration. From the perspective of the contribution of this brand, one can only infer that despite the fact that the city has World Heritage status, the designation has not contributed to an increase in national and international flows.

The main motivation to travel to São Luís is not related to the presence of a historical heritage in the city but is focused on business and/or study. These results indicate that most planned travel is of a commercial or educational nature. The advantage of business travel is the great expenditure of the tourists and the extension of these benefits to other sectors. On the other hand, this travel demands great initial expenditure on infrastructure. With regard to the natural attractions in São Luís, these are configured as the second product destination. When associated with leisure the influence of travel is strongly affected by comments from relatives and/or friends. This can be attributed to the predominantly regional tourist flow, and to serious deficiencies in the marketing campaigns. For example, we found that the variable “advertising”

presented low rates in attracting tourist flows, probably because it was designed to target sectors that had no interest in heritage products or because the cultural attractions are not integrated as complementary products to the business and studies sectors. In all likelihood, managers are focusing on heritage as the main product for promoting the destination, whereas they should invest in the business and studies sectors and boost the same with attractions and activities that connected to cultural heritage. The strong appeal of the rich architecture of the Portuguese colonial heritage and emphasis on the diversity of cultural expressions are widely used to promote the destination.

Indeed, there is optimism in relation to tourism in these locations and certain benefits are expected, mainly due to the government's belief that brands will attract visitors and their spending. However, some factors exist that may mean that tourism does not meet expectations, despite using an internationally renowned brand. As might be expected, tourism cannot attract enough visitors and this is a consequence of high competitiveness in the tourism sector, inequality in local resources, and the inefficiency of marketing policies.

There is no doubt that local contexts influence the performance when using the WHS designation as a catalyst and to streamline tourist flows. Regional characteristics, mainly related to heritage degradation and the lower quality of infrastructure and services, in addition to issues related to security and crime, affect many poor regions of developing countries such as São Luís and, consequently, impact on its attraction to visitors. A further factor that may impact on tourist demand in the city of São Luís is that similar attractions are offered in other national destinations, or even in the same region of northeast Brazil, such as Salvador and Olinda, some of whom also holding the same WHS status.

In terms of suggestions for further research, it is important to develop local case studies similar to that conducted in this study. For example, the analysis of tourist arrivals from various countries to a particular country does not reflect individual realities. In these cases, it is observed the compensating effect of a region or city to another. Moreover, the deficiency in the methodologies used, or even the lack of data, calls into question the actual contribution of the UNESCO brand to the promotion of tourism. In the case of São Luís, we recommend a separate analysis of regional, national, and international visitors in order to gain an accurate assessment of the flow of visitors and the benefits they bring. A further consideration is related to the lack of regularity in research that affects tourism planning and the development of strategies and actions and it came to be the main limitation of this study.

References

- Bandyopadhyay, R., Morais, D. B., Chick, G. (2008), "Religion and identity in India's heritage tourism", *Annals of Tourism Research*, 35 (3), 790-808.
- Bessi ere, J. (2013), "Heritagisation, a challenge for tourism promotion and regional development: an example of food heritage", *Journal of Heritage Tourism*, 8 (4), 275-291.
- Buckley, R. (2004), "The Effects of World Heritage Listing on Tourism to Australian National Parks", *Journal of Sustainable Tourism*, 12 (1), 70-84.
- Cav em, M. (2007), *Centros Hist ricos Contempor neos: mudan as de perspectiva na gest o. Caso de estudo de Lisboa e Bruxelas*, Disserta o de Mestrado, Faculdade de Letras, Universidade de Lisboa.
- Charter of Washington (1986), available at: <http://portal.iphan.gov.br/pagina/detalhes/226> (consulted on: 10.02.2016).
- D az-Parra, I. (2015), "A back to the city movement by local government action: gentrification in Spain and Latin America", *International Journal of Urban Sciences*, 19(3), 1-21.
- Echtner, C. M., Ritchie, J. R. B (1991), "The Meaning and Measurement of Destination Image", *Journal of Tourism Studies*, 2(2), 2-12.
- Echtner, C. M., Ritchie, J. R. B. (1993), "The Meaning and Measurement of Destination Image, An Empirical Assessment", *Journal of Travel Research*, 31(Spring), 3-13.
- Ekern, S., Logan, W., Sauge, B., Sinding-Larsen, A. (2012), "Human rights and World Heritage: preserving our common dignity through rights-based approaches to site management", *International Journal of Heritage Studies*, 18(3), 213-225.
- Enright, M. J., Newton, J. (2004), "Tourism destination competitiveness: a quantitative approach", *Tourism Management*, 25, 777-778.
- Fernandes, J. A. R. (2011), "Centro hist rico e urbanismo: quest es, reflex es e inquieta es, a prop sito do Porto", *Actas do Semin rio Centros Hist ricos: Passado e Presente*, Universidade do Porto, 12-25.
- Freire Chico, F. (2008), "Boas pr ticas em Gest o de Centros Urbanos. Projecto Gestor do Centro Urbano", *Confedera o do Com rcio e Servi os de Portugal*, 1^a edi o, Abril.
- Frey, B., Steiner, L. (2011), "World Heritage List: does it make sense?", *International Journal of Cultural Policy*, 17(5), 555-573.
- Gil, P. F. (2011), "Twenty-five of transformations in the historic center of Havana: A case study of the Plaza Vieja", *Facilities*, 29(7/8), 303-312.

- Guerreiro, M. (2008), "O papel da cultura na Gestão das Marca das Cidades", *VI Congresso Português de Sociologia. Mundos sociais: saberes e práticas*, Universidade Nova de Lisboa, Faculdade de Ciências Sociais e Humanas.
- Harril, R. (2004), "Residents' Attitudes toward Tourism Development: a Literature Review with Implications for Tourism Planning", *Journal of Planning Literature*, 18(3), 250-266.
- Human, B. (2008), *Historic Towns and Tourism Insights*, available at: <http://www.insights.org.uk/aboutus.aspx> (consulted on: 20.09.2012).
- Human, B. (2008), *Historic Towns and Tourism Insights*, available at: <http://www.insights.org.uk/aboutus.aspx> (consulted on: 20.09.2016).
- IBGE (2010), *Instituto Brasileiro de Geografia e Estatística*, available at: <http://www.censo2010.ibge.gov.br/sinopse/index.php?dados=8> (consulted on: 04.02.2016).
- Jha, S. (2005), "Can Natural World Heritage Sites promote development and social harmony?", *Biodiversity and Conservation*, 14, 981-991.
- Jimura, T. (2011), "The impact of world heritage site designation on local communities. A case study of Ogimachi, Shirakawa-mura", *Tourism Management*, 32, 288-296.
- Kaltenborn, B, P., Thomassen, J., Wold, L, C., Linnell, J. D.C., Skar, B, (2013), "World Heritage status as a foundation for building local futures? A case study from Vega in Central Norway", *Journal of Sustainable Tourism*, 21(1), 99-116.
- Light, D., Prentice, R. (1994), "Market-based product development in heritage tourism", *Tourism Management*, 15(1), 27-36.
- Luchiar, M. T. D. P. (2005), "A reinvenção do patrimônio arquitetônico no consumo das cidades", *GEOUSP- Espaço e Tempo*, São Paulo, 17, 95- 105.
- MTur (2015), *Índice de competitividade do turismo nacional: relatório Brasil, 2015*, Brasília, DF, available at: <http://www.dadosefatos.turismo.gov.br/indice-de-competitividade-do-turismo-nacional.html> (consulted on: 17.02.2016).
- Nadj, M. D., Ismail, N. A., Yunos, M. Y. M., Maulan (2015), "Historic Urban Areas in Heritage Tourism: Kuala Lumpur Historic City Centre, a Potential Asset", *Applied Mechanics and Materials*, 747, 93-96.
- Norms of Quito (1967), available at: <http://portal.iphan.gov.br/pagina/detalhes/226> (consulted on: 04.02.2016).
- Oliveira, F. V. (2010), *Capacidade de carga em cidades históricas*, available at: <https://rbtur.org.br/rbtur/article/view/319> (consulted on: 15.05.2014).
- Peixoto, P. (2003), *Centros históricos e sustentabilidade cultural das cidades*, available at: <http://ler.letras.up.pt/uploads/ficheiros/artigo8511.pdf> (consulted on: 04.02.2016).

- Prentice, R. (1993), "Tourism and heritage attractions", in Evans, G. (2002), "Living in a World Heritage City: stakeholders in the dialectic of the universal and particular", *International Journal of Heritage Studies*, 8(2), 117-135.
- Presenza, A., del Chiappa, G., Sheehan, L. (2013), "Resident's engagement and local tourism governance in maturing beach destinations. Evidence from an Italian case study", *Journal of Destination Marketing & Management*, 2, 22 -30.
- Queirós, F. G. (2007), *Reabilitação de Centros Históricos*, available at: <http://www4.fe.uc.pt/fontes/trabalhos/2007007.pdf> (consulted on: 17.01.2016).
- Richards, G., Wilson, J. (2006), "Developing creativity in tourist experiences: A solution to the serial reproduction of culture?", *Tourism Management*, 27(6), 1209-1223.
- Ryan, J., Silvanto, S (2011), "A brand for all the nations", *The development of the World Heritage Brand in emerging markets, Marketing Intelligence & Planning*, 29(3), 305-318.
- Salgueiro, T. B. (1998), "Cidade pós-moderna: espaço fragmentado", *Revista Território*, III(4), Jan/jun.
- Sebastião, A. S. C. (2010), *Planeamento estratégico para o Centro Histórico de Torres Vedras*, Mestrado em Geografia, Gestão do Território e Urbanismo, Universidade de Lisboa.
- SETUR (2010), *Secretaria Municipal de Turismo. Sinopse: Pesquisa de Turismo Receptivo – Alta Estação Janeiro de 2010*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.
- SETUR (2010), *Secretaria Municipal de Turismo. Sinopse: Pesquisa de Turismo Receptivo – Alta Estação Julho de 2010*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.
- SETUR (2010), *Secretaria Municipal de Turismo. Sinopse: Pesquisa de Turismo Receptivo – Baixa Estação Maio de 2010*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.
- SETUR (2010), *Secretaria Municipal de Turismo. Sinopse: Pesquisa de Turismo Receptivo – Baixa Estação Novembro de 2010*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.
- SETUR (2011), *Secretaria Municipal de Turismo. Relatório do Fluxo Turístico*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.
- SETUR (2015), *Secretaria Municipal de Turismo. Sinopse: Pesquisa de Turismo Receptivo – Alta Estação Janeiro de 2015*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.

- SETUR (2015), *Secretaria Municipal de Turismo. Sinopse: Pesquisa de Turismo Receptivo – Alta Estação Julho de 2015*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.
- SETUR (2015), *Secretaria Municipal de Turismo. Sinopse: Pesquisa de Turismo Receptivo – Baixa Estação Maio de 2015*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.
- SETUR (2015), *Secretaria Municipal de Turismo. Sinopse: Pesquisa de Turismo Receptivo – Baixa Estação Novembro de 2015*, Coordenação de Análise Mercadológica, Prefeitura de São Luís, São Luís.
- Silva, G. P. da (2010), *De volta à Praia Grande: o "velho" centro com o "novo" discurso*, Programa de Pós-Graduação em Políticas Públicas, Universidade Federal do Maranhão, Tese de doutorado, São Luís.
- Silva, G.P. da., Silva, E. L. S. (2010), "A utilização do patrimônio como cenário para o consumo e a fruição turística: estratégias de produção de imagem do bairro Praia Grande – MA", *Cuadernos de Vivienda y Urbanismo*, 3(5), 90-105.
- Silva, W., Costa, S., Ferreira, Jr. (2015), "O Centro Histórico de São Luís e seu uso na Comunicação Midiática para a promoção do Turismo local", *INTERCOM- Sociedade Brasileira de Estudos Interdisciplinares de Comunicação XXXVIII Congresso Brasileiro de Ciências da Comunicação*, Rio de Janeiro, 4 a 7/9/15.
- Su, Y., -W., Lin, H., -L., Li (2014), "Analysis of international tourist arrivals worldwide: The role of world heritage sites", *Tourism Management*, 40, 46-58.
- Tisdell, C., Wilson, C. (2001), "World Heritage Listing of Australian Natural Sites: Tourism Stimulus and its Economic Value", *Working paper on Economics, Ecology and The Environment*, The University of Queensland.
- Tucker, H., Emge, A. (2010), "Managing a World Heritage Site: The Case of Cappadoci, Anatolia", *An International Journal of Tourism and Hospitality Research*, 21(1), 41-54.
- Turker, N. (2013), "Host community Perceptions of Tourism Impacts: A case Study on the World Heritage Site of Safranbolu, Turkey", *Revista de Cercetare și Intervenție Socială*, 43, 115-141.
- UNESCO (1972), *Convention Concerning the Protection of the World Cultural and Natural Heritage*, available at: <http://whc.unesco.org/en/conventiontext/> (consulted on: 10.02.2016).
- UNESCO (2011), *Recomendação sobre a Paisagem Histórica Urbana, incluindo um glossário de definições*, available at: http://psamlisboa.pt/wp-content/uploads/2014/03/UNESCO_RECOMENDACAO.pdf (consulted on: 10.02.2016).
- UNESCO (2015a), *World Heritage Centre. World Heritage List*, available at: <http://whc.unesco.org/en/list/> (consulted on: 10.02.2015).

- UNESCO (2015b), *World Heritage Centre. Historic Centre of São Luís*, available at: <http://whc.unesco.org/en/list/821> (consulted on: 10.02.2015).
- UNESCO (2015c), *World Heritage Centre. The Criteria for Selection*, available at: <http://whc.unesco.org/en/criteria/> (consulted on: 10.02.2015).
- Vinuesa, M. A. T., Torralba, L. T. (2010), "Historic Cities and Tourism: Functional Dynamics and Urban Policy", *Journal of Urban Studies*, 3(47), 57-97.
- Yan, H. (2015), "World Heritage as discourse: knowledge, discipline and dissonance in Fujian Tulou sites", *International Journal of Heritage Studies*, 21(1), 65-80.
- Yang, C.-H., Lin, H.-L., Han, C.-C. (2010), "Analysis of international tourist arrivals in China. The role of World Heritage Site", *Tourism Management*, 31, 827-837.
- Zhang, C., Fyall, A., Zheng (2015), "Heritage and tourism conflict within world heritage site in China: a longitudinal study", *Current in Tourism*, 18(2), 110-136.

Chapter XV

**Importance of Heritage and its Accessibility for Tourism in
Diamantina MG: Cultural Heritage of Humanity/ UNESCO**

Importance of Heritage and its Accessibility for Tourism in Diamantina MG: Cultural Heritage of Humanity/ UNESCO

ELCIONE LUCIANA DA SILVA¹⁰⁹

Abstract:

Tourism is considered a major economic power and today's one of the most dynamic activities. It is noteworthy that, in addition to generating economic benefits, the activity also contributes to the enhancement of cultural and environmental aspects of the recognised tourist destinations. Among heritage charters that guided conservation policies worldwide, the Norms of Quito were the ones that gave more importance to the touristic use of heritage. A meeting held by the Organization of American States (1976), concrete proposals for using the heritage sites were presented, considering as a landscape the transformation of areas with limited economic resources in Latin America. Thus, tourism was considered an essential component in bringing value to natural and cultural monuments, as well as enhancing the importance and significance of heritage sites to the nation. In this context, it is important to understand that in addition to owning monuments of historical and artistic interest, destinations must seek a better use of these monuments by tourism, as well as create strategies to enable cultural tourism while paying attention not banalize its meaning. Tourism, therefore, should fulfill its role of intermediary element that allows the encounter between people and cultural heritage. This article has as object of study the city of Diamantina, declared a UNESCO World Cultural Heritage Site in 1999. There, cultural tourism is an economic alternative. However, the city is struggling with irresponsible use of heritage buildings for tourist visits, poor accessibility of its monuments and the lack of the perceived value in actions taken. The aim of this paper is to present how the city promotes its monuments for tourist visits; describe the major existing projects to improve accessibility to cultural heritage through tourism; suggest possibilities for enhancing the intangible heritage with tourism; and discuss the contribution of tourism to the valuation of the city's world-renowned heritage sites.

Keywords: World Heritage; Diamantina/MG Brazil; Tourism; Accessibility; Preservation

¹⁰⁹ Department of Tourism – Interdisciplinary Faculty of Humanidades, Federal University of Vales do Jequitinhonha and Mucuri, elcioneluciana@yahoo.com.br

Resumo:

O turismo é considerado uma força econômica importante e uma das atividades mais dinâmicas da atualidade. Vale ressaltar que além de gerar benefícios econômicos, a atividade contribui ainda para a valorização dos aspectos culturais e ambientais dos destinos reconhecidos, evidenciando a relação intrínseca entre o turismo e o patrimônio. Dentre cartas patrimoniais que orientaram as políticas de preservação em nível mundial, as Normas de Quito, foi umas de que mais se atentou ao uso turístico do patrimônio. Em reunião (1976), sobre a conservação e utilização de monumentos e lugares de interesse histórico e artístico, realizado pela Organização dos Estados Americanos, acirra-se o interesse sobre o patrimônio cultural na utilização turística. São apresentadas propostas concretas para a utilização do patrimônio, tendo em vista o panorama de transformação de áreas de poucos recursos econômicos dos países da América Latina. Assim, o turismo foi considerado elemento essencial para a valorização dos monumentos naturais e culturais mundiais e para a consciência de sua importância e significado para a nação. Neste contexto, é importante compreendermos que além de possuir monumentos de interesse histórico e artístico, os destinos devem buscar uma melhor utilização do monumento pelo turismo, além de criar estratégias que pudessem viabilizar o turismo cultural, atentando ainda para a utilização do patrimônio pelo turismo de forma a não banalizar seu significado. O turismo, portanto, deve cumprir seu importante papel de elemento intermediador que permite o encontro entre as pessoas e o patrimônio cultural, contribuindo assim para a valorização dos sítios históricos reconhecidos mundialmente, por meio das trocas culturais, pelo respeito pela diversidade, pelo sentimento de pertencimento identitário, pelas vivências e experiências entre as diversas culturas. O presente artigo tem como objeto de estudo, a cidade de Diamantina, declarada patrimônio cultural da Humanidade pela UNESCO em 1999. Diamantina foi considerada o maior centro de extração de diamantes do mundo no século XVIII. Possui o turismo cultural como alternativa econômica. O objetivo deste artigo é avaliar como a cidade dispõe seus monumentos para a visitação turística, apresentar os principais projetos existentes para acessibilidade do patrimônio cultural para o turismo, sugerir possibilidades para a valorização do patrimônio intangível pelo turismo e discutir qual a contribuição do turismo para a valorização do patrimônio da cidade que é mundialmente reconhecido.

Palavras-chave: Patrimônio Mundial; Diamantina/MG Brasil; Turismo; Acessibilidade; Preservação

Resumen:

El Turismo es considerado actualmente como un elemento importante de generación de poder económico y una de las actividades humanas más dinámicas. Es de destacar que, además de generar beneficios económicos, la actividad también contribuye a la mejora de los aspectos culturales y ambientales de los destinos reconocidos, destacando la relación intrínseca entre turismo y patrimonio. Entre las cartas internacionales del patrimonio que han guiado las políticas de conservación en todo el mundo, destacamos *Las Normas de Quito*, que estuvieron especialmente dirigidas al uso turístico del patrimonio. La reunión (1976) relativa a la conservación y al uso de los monumentos y lugares de interés histórico y artístico, realizado por la Organización de los Estados Americanos, suscita el interés sobre el patrimonio cultural en el uso turístico. En lo concerniente a propuestas concretas del uso de la equidad, se presentan la gestión del paisaje como una transformación de las zonas de escasos recursos económicos de América Latina. Por lo tanto, el turismo se considera esencial para la mejora de los monumentos del mundo natural y cultural, y se toma conciencia de su importancia y significado para la nación. En este contexto, es importante entender que además de tener monumentos de interés histórico y artístico, los destinos deben buscar un mejor uso del monumento por el turismo, y crear estrategias que puedan permitir el turismo cultural. Prestando atención, incluso al uso de la herencia por el turismo a fin de no trivializar su importancia. El turismo, por lo tanto, debe cumplir su papel de elemento intermedio que permite el encuentro entre las personas y el patrimonio cultural, contribuyendo así a la mejora de los sitios históricos reconocidos en todo el mundo. A través de los intercambios culturales, el respeto a la diversidad, a la sensación de identidad de pertenencia, a las vivencias y experiencias entre las diferentes culturas. Este artículo tiene como objeto de estudio, la ciudad de Diamantina, declarada por la UNESCO patrimonio cultural en 1999. Diamantina fue considerada como el más grande centro de la extracción mundial de diamantes en el siglo XVIII. Tiene el turismo cultural como una alternativa económica. La finalidad de esta investigación es evaluar cómo la ciudad gestiona sus monumentos para las visitas turísticas, presentando los principales proyectos existentes para la accesibilidad del patrimonio cultural para el turismo, sugiriendo posibilidades para la valoración del patrimonio inmaterial para el turismo y, así poder discutir cuál es la contribución del turismo a la apreciación del patrimonio de la ciudad que es reconocida en todo el mundo.

Palabras Clave: Patrimonio Mundial; Diamantina / MG Brasil; Turismo; Accesibilidad; Preservación

1. Introduction

Tourism is an activity of paramount importance to the socio-cultural promotion and economic development of a location with tourism potential. However, it is important that there are actions, public policies and projects that can make these cities competitive, as well as make better use of the attractions that the destination offers. In this article, I will describe the use of cultural attractions at world-renowned sites, studying the city of Diamantina, located northeast of Minas Gerais/Brazil.

Diamantina was declared Cultural Heritage of Humanity by the United Nations Organization for Education, Science and Culture (UNESCO) in 1999. The historical and cultural legacy acquired by the city, since the colonial period, now presents itself as its main tourist motivation, and therefore the study of the relation between tourism and heritage is of great importance to understand the role of actions that improve the heritage's value and the accessibility to it. Although the relation between travel and heritage exists since the 18th century, it was only in 1976, at a meeting on the conservation and use of monuments and places of historical and artistic interest held by the Organization of American States, that the interest on cultural heritage for touristic usage escalated worldwide. On this occasion, proposals were presented for the usage of heritage by tourism. Tourism is presented as an important element that allows the encounter between people and cultural heritage, thereby contributing to the enhancement of world-renowned historic sites through cultural exchanges, respect for diversity, the sense of identity and belonging, the experiences and interactions between different cultures.

In this case study, we will see how the international recognition awarded to the city of Diamantina was important to increase its tourism competitiveness. The aim of this paper is to present how the city promotes its monuments for tourist visits; describe the major existing projects to improve accessibility to cultural heritage through tourism; suggest possibilities for enhancing the intangible heritage with tourism; and discuss the contribution of tourism to the valuation of the city's world-renowned heritage sites.

2. Methodology

In order to achieve the research objectives, the author used bibliography related to tourism development and appreciation of heritage to create a *theoretical corpus* and thus be able to establish the relation between the two themes. Also, used secondary sources, such as Research on Tourism Demand, developed by the Federal University of Vale do Jequitinhonha –

Department of Tourism to identify the tourists' profile visiting the city and to prove that heritage is a major motivator for visiting the city. The author conducted research at local offices and institutional bodies such as heritage departments, Department of Culture – Tourism Sector, Tourism and Heritage of Diamantina (Secretaria de Cultura, Turismo e Patrimônio de Diamantina), among other institutions linked to local tourism, to identify actions that supported the development of tourism and appreciation of heritage. In order to identify the support the tourist receives when visiting the historical monuments of the city, the researcher conducted systematic observatory visits between the months of December 2015 and February 2016. On this occasion, the accessibility to the monument, hours of operation and services rendered at the monuments were considered in the analysis.

3. Historical Background: Study of the City Diamantina

Diamantina is located in the Northeast region of Minas Gerais state (Brazil), mesoregion of Jequitinhonha (upper Jequitinhonha), distant 297 km from the state capital. Similar to other cities in Minas Gerais of the 18th century, its history is linked to the exploitation of precious stones.

Expeditions in the region began in the second half of the 16th century, with explorers coming from the coast of Bahia and Espírito Santo. The entries become more and more frequent. Despite the constant "visits", the exploratory activities did not fixate residence, since the regions were considered inhospitable and wild (Costa, 2001).

In the 17th century, life in the colony was agitated by the constant presence of the 'bandeiras', missions led by adventurers with exclusively economic interests seeking to get rich. With the discovery of the first gold nuggets and precious stones, the visits became more frequent and people began to settle.

In the 17th century, appeared the first settlements in the territory now called Minas (Mines), at strategic locations for the missions and bandeiras, around the most common stops near rivers and gold mines. These paths gradually turned into camps and later became the first towns and cities (Costa, 2001).

The formation of city of Diamantina is directly related to the diamonds exploitation. The bandeira from São Paulo region called Gerônimo Gouveia came from Serro Frio, in 1713, following the course of the Jequitinhonha River, finding a great amount of gold in Rio Piruruca

and Rio Grande. In this area, started the gold mining. Following Rio Grande, he found a brook and a vast swamp that was called Tijuco, indigenous word for mud (Costa, 2001).

Felício dos Santos (1976) reports the fame of the Diamond District that was very well known in Portugal for its wealth, and where many adventurers and immigrants came to settle in the hopes of fast enrichment. According to Santos (1976), "notable change suffered the people's customs, isolated in this corner of Brazil. With the coming of different people, started imitating the customs and fashions of the metropolis, which in turn sought to imitate what they saw in France".

Gradually, the number of residents and density of the city increased. Diamantina became one of the most important urban centres for supplies in the region. It became the home of important families and authorities sent by the Crown to oversee mining (Prado, J.R., 2000).

Even before being recognised by the Portuguese Crown, the diamond was already present in the Diamond District's residents' lives. Mawe (1944) reports that the mineral was used in card games, unaware of its value. He also reports that adventurers and pioneers had already searched for gold in the Diamond District region, unsuccessfully. Only a few years later, the existence of diamond was verified in the region, leading the Portuguese Crown to impose the so-called Demarcation Diamantina.

From 1729 on, the official diamond mining turned the political and administrative framework of the colony more complex, requiring the creation of Diamond District. Connected directly to Lisbon, the large diamond-producing region was isolated from the rest of its Captaincy, staying under close and active surveillance, with many cases of violence.

Submitted to a particular administration not only to foreigners, but also to national, the Diamond District forms some sort of separate state in the middle of the vast empire of Brazil (Saint- Hilaire, 1974: 13).

The laws are so severe that anyone found outside the main road is subject to being detained as a suspect and subjected to examinations and interrogations, which may often cause embarrassments and delays (Mawe, 1944: 209).

Until the middle of the 18th century, with the stabilization of settlements, urban life was established. The cultural formation of Diamantina gets closely linked to the exploitation of precious stones and the arrival of people from different cultures, as quoted by Mawe:

(...) Stores are crammed with English goods, as well as ham, cheese, butter and other consumer products. (...) The sums paid by the government for the rental of the black (slaves), officers' salaries (...) this, and the expenses of the surrounding city dwellers move a large trade. (...) The officers are well paid and live with a level of comfort that foreigners would hardly imagine possible in such a distant place (Mawe, 1996: 69).

Saint Hilaire (1976) gives a description of the high cultural level of Diamantina, despite being so far apart from the rest of the country.

There reigns an air of abundance that I could not observe in any part of the province. (...) And we can even say that bums are even rarer than in Vila Rica and Vila do Príncipe. (...) In this place, I found more education than in the rest of Brazil, more taste for literature and a livelier desire to learn. (...) The shops in this village are provided with (...) large quantities of luxury items, (...) these goods are mostly of English manufacture (...) (Saint-Hilaire, 1976: 33).

In Diamantina, an enlightened elite was born. In the 1750s, the Arraial do Tijuco got its own Opera House. The various churches also hired musicians to write pieces for the masses and celebrations such as Holy Week, Ash Wednesday, the Lord of Passos, Corpus Christi. The mulatto José Joaquim Emerico Lobo de Mesquita stood out among the 120 musicians who performed at Tijuco during the 18th century, becoming a renowned composer (Furtado, 2008).

After the stagnation of diamond exploration, mid-19th century, agriculture became an alternative to the economic crisis. The growth generated by the former progress was not able to overcome the isolation of the region. For the city, to develop a better communication with other urban centres was necessary, which was difficult because of the precarity of the roads (Martins, 2000).

The arrival of electricity and Brazil's Central Railway changed this scenario and decreased the distances between cities and major trade centres. The implementation of the railway has brought many benefits to the region, including an increase in number of factories and growth in urban infrastructure. However, after a few decades, economic expansion of the city ceased, and many industries stopped their activities. With the expansion of highways, many of Diamantina's

satellite cities now started looking towards companies in Rio de Janeiro and São Paulo (Martins, 2000).

Despite the isolation from major urban centres having hindered the economic development of Diamantina, we consider that such distancing also contributed to the preservation of its colonial houses, since the expansion of industries in the city did not compromise the secular houses. The preservation of the colonial houses helped assure Diamantina its recognition as national heritage by the Institute for National Historical and Artistic Heritage in 1938 and decades later, in 1999, its recognition as a World Cultural Heritage by UNESCO. In the following chapters, it will be pointed out the important relation between tourism and heritage and discuss the importance of the preservation of Diamantina's heritage for the development of local tourism.

4. Tourism and Heritage

The importance of tourism to heritage has been discussed more frequently in recent years, especially in relation to its economic benefits. Undoubtedly, the activity is very important, economically - for the maintenance and preservation of heritage - as well as for bringing cultures together, facilitating the encounter between people and restoring our ancestor's memories. According to Camargo (2004), the term 'heritage' arises with the French Revolution. The concept was generated as heritage to prevent the destruction of property during the Revolution. It was necessary to protect and catalog the remaining properties, since many had been destroyed, many others were sold. Although the term Heritage was coined during the French Revolution, cultural trips already existed since the Renaissance, motivated by study and experience. Britain supported this type of trip and the Crown funded part of it, especially for future diplomats and occupants of positions in the kingdom (Yasoshima and Oliveira, 2002).

During this period, German, Polish, Danish, Dutch and English travelled to France, around 1672, taking flyers similar to our current tour guides with information that led to cities and famous places. They were proposed two tours: the petit tour, Paris and southwest France; and the grand tour, south, southwest and the Bourgogne. It was from these that came the expression "to the grand tour" that began to be used in England in the 17th and 18th centuries (Yasoshima and Oliveira, 2002: 38), mainly to complement the education of noblemen. Tourism appears inextricably linked to heritage as an element that underpins the economic value of the latter.

With the French Revolution, revolutionaries believed that the visits of French monuments could attract foreigners and provide considerable gains similar to what happened in Italy, especially in Rome. According to Camargo (2004), the French observed the inflow of European travelers heading to Italy, making them wonder about the huge direct and indirect benefits the historical monuments and other heritage assets could bring to their country.

Tourism, historically outlined as an aristocratic practice, presenting as fundamental attraction the cultural products from the past, became a habit disseminated bourgeoisie and then, at the end of the 20th century, a mass phenomenon, part of the cultural industry (Camargo, 2004).

According to the Ministry of Tourism: "Cultural Tourism includes touristic activities related to experiencing the set of significant elements of the historical and cultural heritage; and cultural events, enhancing and promoting the tangible and intangible assets of culture" (MTUR, 2009).

To Ruschmann (2006), there are cultural elements that motivate the visitation, such as: crafts, arts, traditions, cuisine, regional history, architecture, religious events, etc. The author points out unfavorable aspects related to the cultural impact that appears in places where mass tourism occurs, which may compromise the authenticity and spontaneity of cultural events. In addition, we can include the loss of character of handcrafts; vulgarization of traditional events; cultural arrogance; destruction of historical heritage.

As for the favorable cultural aspects, Ruschmann (2006) highlights the increase in value of local crafts; higher appeal towards cultural inheritance; ethnic pride; appreciation and preservation of historical heritage.

Tourism is considered an important economic power and one of the most dynamic activities of today. The activity can generate economic benefits and contribute to the enhancement of cultural and environmental aspects of the renown destinations.

It is important to emphasise that the sites considered World Heritage Sites are selected for their uniqueness and importance to all people. The preservation of these sites is essential to ensure the testimony of other civilizations over time, important events that have marked humanity; so tourism should be committed to also ensure its preservation. The importance of tourism is closely linked to the economic development of the sites, since it is able to allow the encounter of people with heritage that belongs to all. The role of tourism for the preservation of world heritage is mentioned in some heritage charters that guided preservation policies worldwide. Among these stand out the Norms of Quito, the ones that focused most on touristic use of heritage.

A meeting held by the Organization of American States (1976) on the conservation and use of monuments and places of historical and artistic interest, stirred up concern about the cultural heritage for touristic usage. Concrete proposals for using the heritage sites were presented, considering as a landscape the transformation of areas with limited economic resources in Latin America.

According to Carvalho e Silva (2010), cultural heritage, as a testimony of the various experiences of social groups, is presented in various hues, considering the tangible and spiritual aspects that create meaning and significance to the cultural legacy passed down from generation to generation.

In this context, it is important to understand that in addition to owning monuments of historical and artistic interest, destinations must seek a better use of these monuments by tourism, as well as create strategies to enable cultural tourism while paying attention not to banalize its meaning. Tourism, therefore, should fulfill its role of intermediary element that allows the encounter between people and cultural heritage, thereby contributing to the enhancement of world-renowned historic sites through cultural exchanges, respect for diversity, the feeling of identity and belonging, the experiences and interactions between different cultures.

Diamantina was chosen by the Ministry of Tourism as a tourism-inducing destination in the Diamonds' Region. When speaking of tourism in the city, its world-renowned heritage sites cannot be ignored. Its architectural complex and history are the main motivating factors attracting tourists to the region. In the next section, we will describe how essential is heritage to tourism in Diamantina and how the city presents its monuments for visitation.

5. Tourism in Diamantina - Cultural Heritage of Humanity

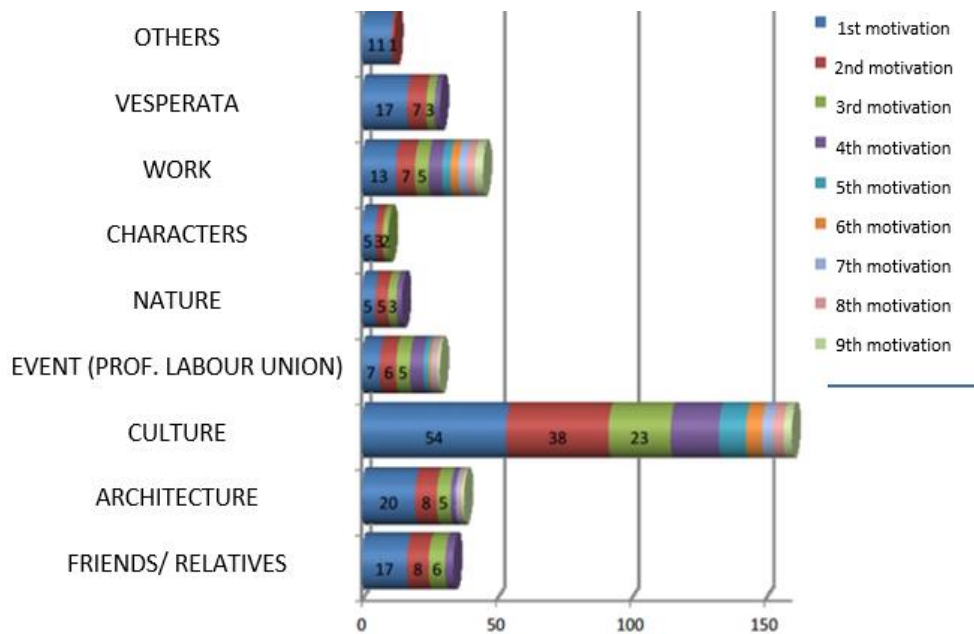
Diamantina is located in the Espinhaço ridge, considered the seventh biosphere of Humanity by the United Nations. Its origin is linked to the exploitation of precious stones and is witness of an important period of the region's cultural development. It was considered one of the largest diamond producers in the world. The city has managed to preserve many of the elements that refer to this period, through the grandiosity of their houses, existing cultural events in the city and religiousness.

The importance of Diamantina, its history within the national context and the need to preserve its colonial houses made the SPHAN – National Historical and Artistic Heritage Service

(currently IPHAN) declare its architectural ensemble a protected site in 1938. Diamantina is one of the first six Brazilian cities listed as historic monuments in 1938 by IPHAN. The city is surrounded by the Cristais ("Crystals") Ridge, a major geological formation that stands out in the landscape and is fully integrated into the urban architectural ensemble. The city is an authentic example of the efforts made by man to seek their fortune in inhospitable places (UNESCO, 1998). Diamantina shows how the explorers of Brazil, adventurers in search for diamonds and representatives of the Portuguese Crown were able to adapt European models to the tropics in the 18th century. Its architecture was considered one of the most sober of Minas Gerais / Brazil (UNESCO, 1998).

After being listed as a protected heritage site in 1938, the city of Diamantina acquired great status in the national tourist landscape. Despite the listing, at this time it was still responsibility of the state to preserve the Brazilian memory and identity, without necessarily incentivizing tourism. It is noteworthy that after the title of UNESCO World Heritage Site granted in 1999, Diamantina emerged in the international tourism scene and became the stage for the expansion of tourist enterprises and institutional strength in the city. In addition, the city gained great responsibility having to invest in cultural events and strengthen the cultural traits that motivated the tourist visitation.

Analysing a research conducted by UFVJM's Department of Tourism (2012) on the motivations for visiting the city of Diamantina, we realise that Culture is at the top of the list, followed by Architecture. Therefore, the cultural attractions and the architectural ensemble recognised as a World Heritage Site are primarily responsible for attracting tourists to the city (Graph 1).



Graph 1. Tourist motivation research

Source: Department of Tourism/UFVJM, 2012

Diamantina is included in one of the major tourist routes in Brazil, the Royal Road, which joins the various paths built during Brazil’s colonial era to transport the riches of Brazil to the coast of Rio de Janeiro, and from there to the Portuguese metropolis. Initially, the road connected the old Villa Rica (now called Ouro Preto) to the port of Paraty. However, the need for a safer and faster route to the port of Rio de Janeiro led to the open a "new pathway". With the discovery of precious stones in the region of Serro, the road was extended all the way to Arraial do Tijuco (now Diamantina).

Diamantina plays an important role in Minas Gerais’ tourism scenario. It has satisfactory hospitality and service structure, and counts with the presence of institutions working for the local integrated development, such as the State Forestry Institute (IEF), Diamonds’ Region Tourist Association, National Commercial Education Service (Senac), Estrada Real Institute (IER), the National Historic and Artistic Heritage Institute (IPHAN), the Brazilian Small and Medium Enterprises Support Service (Sebrae), Federal University of Vales do Jequitinhonha and Mucurí (UFVJM).

Thanks to the prestige achieved, largely due to the preservation of its heritage, Diamantina has a favorable environment for economic development through tourism. Besides having a favorable framework for the development of the activity, the city organises many events that attract tourists throughout the year, such as Vesperata (Figure 1). In addition, its residents are

very devout and maintain important traditions in the city such as Semana Santa (Figure 2) and Corpus Christi (Figure 3) embellishing the streets with colored sawdust and sand, marking the paths for the processions; a great example of intangible heritage that can be used for tourism.



Figure 1. Vesperata

Source: Saint Germain



Figure 2. Holy Week

Source: Rodrigo Cavalcanti



Figure 3. Corpus Christi

Source: SECTUR/ Diamantina

Another intangible heritage that is well used as a strategy to attract tourists is musicality. In addition to Vesperata, Diamantina uses the musicality on other occasions such as concerts in churches. Recently, the city has restored the Igreja do Carmo's pipe organ, one of the few in Minas Gerais, and is creating new tourism products such as the Historic Organ Concert Almeida e Silva / Lobo de Mesquita. In addition, there is a commitment to projects that value the practice of the Seresta (Figure 4) tradition in the city.



Figure 4. Seresta

Source: Aguinaldo Souza

Many districts and villages in Diamantina still keep important cultural traditions. Some of these have been certified as 'quilombos' by the Palmares Foundation, and represent a living testimony of the slavery period and precious stones exploitation. Although the city did not develop many actions aimed at cultural tourism in these villages, these could be included in projects related to ethnic tourism, which could offer a unique exchange between tourists and these communities that still own the knowledge and memory of a very important period for Diamantina, which are nevertheless left aside of local tourism. These communities have some cultural events, such as: Folia de Reis, Dança Chula, the Banto language and knowledge passed on by ancestors, descendants of slaves, verbally.

Another important factor is that the title acquired by the city as a World Heritage contributes to justify the importance of resources for various projects and activities related to tourism, so the possibility of fundraising and partnerships to carry out projects is increased, such as the Diamantina Gourmet Food Festival promoted by the Diamantina's Association of Companies Related to Tourism and the City of Diamantina; sporting events like Diamantina Adventure, which has regional partners; preparation of marketing plan developed in partnership with SEBRAE (Serviço de Apoio às Micro e Pequenas Empresas de Minas Gerais - Brazilian Micro and Small Business Support Service; among other actions and events. It's important to note that Diamantina is one of the 65 tourism-inducing destinations in the country and receives incentives from State and city governments for tourism development and direct actions of the State Department of Tourism and Ministry of Tourism (*Secretaria de Estado de Turismo e Ministério do Turismo*).

It is important to highlight that in a city recognised as a Heritage Site of Humanity, there should be not only protection and preservation, but also a responsible management of tourism. According to MTUR (Ministério do Turismo, 2015), Diamantina was one of the municipalities that most advanced in terms of public policies for tourism in Brazil, in 2015. The city now occupies the 29th position in the level of competitiveness ranking. Therefore, improvement in tourism management involved a collective effort between the City Hall, the Municipal Tourism Council - COMTUR, institutional partners, local businesses and the community. However, the same study reveals the importance of the body of the local government, not only to encourage further development of culture, but also to create a municipal plan of Culture, that could also help maintain and official calendar of cultural events that take place in the city.

It is important to stress that some events, despite being in the local calendar, are often sporadic, some occur only once a year and are still conditioned by the release of public funds,

sponsorships and fundraising projects. Therefore, when working with culture, tourism managers are also conditioned by the priorities given by the local government.

It is a great challenge to the city to implement actions and establish partnerships for the opening of monuments for tourist visits. Currently, SECTUR (*Secretaria de Cultura, Turismo e Patrimônio de Diamantina*) has the project called: Visit Diamantina: Religious Monuments, a partnership between the City, the parishes and brotherhoods and UFVJM (Universidade Federal dos Vales do Jequitinhonha e Mucuri - Federal University of Valley of the Jequitinhonha and Mucuri), which ensured the opening of a few number of monuments for visitation. In this project, the city gives scholarships to students who welcome tourists in the monuments and provide information about them. In some cases, they participate in refresher courses or have Embratur-certified guides coaching them (SECTUR, 2016).

It is important to consider that cultural tourism has more demanding enthusiasts, usually people with high cultural levels, therefore requiring receptionists to have a high level of commitment to the heritage and to search for information, in order to provide the tourist a pleasurable and knowledgeable visitation to the attraction. Currently, only two churches have the support of the scholarship students, though SECTUR has a proposal to increase it to four churches, with an authorized officer accompanied by the students (SECTUR, 2016). It is necessary to think about the site security, considering that students do not have the support of security personnel in times when working on the project, in addition to creating memorial spaces in each religious monument that improve the communication about the protected site to the tourist.

The tourist who visits the city is seeking for a unique experience with this heritage, and needs tools that can facilitate communication. Therefore, even though the SECTUR project is important to the accessibility to monuments, it is also important to consider how the tourist's contact with this heritage takes place.



It is important to emphasize the need for materials containing information about the city and the cultural monument visited, such as audiovisual resources about the local memory and identity, descriptive and promotional material about the city and about the historic and religious monuments, etc, considering the existing collection and interactive tools. Monuments such as the House of Chica da Silva has no furniture that could help tourists to feel as if in the past. The mansion, home to the IPHAN only has portraits of Chica da Silva painted by local artists. Recently, there were excavations in the house's yard to get time utensils that could be displayed at the museum, however, it is impossible to confirm if those were the ones used at the time of the former slave. Therefore, there is no visual support to the interpretation of the heritage, "the

process of adding value to the visitor’s experience, by providing information and representations that enhance the history and the cultural and environmental characteristics of a place.” (Goodey, 2002: 13).


Another example is the Old Market, the former stop for troops that supplied the main villages in the region. Despite being one of the few still preserved in the region, the market does not have an exhibition space that reveals relevant information about that era. It is noteworthy that this space hosts important events that attract people to the public asset, however, the interpretation of the heritage is important for cultural tourism and brings support to the tourist.

Only recently, the House of Glory, the city’s landmark chosen by the campaign for World Heritage installed an interactive totem and opened a multimedia room containing the history of the building, which became an important communication tool between the cultural asset and the tourist (Table 1).

Regarding the visitation of the monuments, it is important to emphasise that the city has a very hilly terrain, which that hampers the movement and accessibility of the elderly tourists visiting the attractions. Another important factor that hinders access to the monuments is the lack of accessibility projects for people with reduced mobility in the interior of the monuments.

Monuments	History and use by tourism
 <p data-bbox="392 1435 592 1458">Chica da Silva's House</p>	<p data-bbox="751 1272 1342 1400">Sobrado known to have been the slave Chica da Silva’s residence between the years 1763 and 1771, it is currently the headquarters of IPHAN. Opens every day, but has a very small collection and furniture. It is known to host some exhibitions, however unrelated to Chica da Silva’s story.</p>
 <p data-bbox="408 1720 576 1742">Intendant's House</p>	<p data-bbox="751 1563 1342 1659">Colonial house. The building was the Quartermaster’s House in the 18th century. Currently, it serves as Diamantina’s City Hall, public office and has no visitors’ infrastructure.</p>

 <p>Municipal Market</p>	<p>Municipal Market. It was the former drovers' ranch, erected in 1835, houses the Municipal Market, where, nowadays, a food and handcrafts fair is held on weekends.</p> <p>Without space interaction facilities. (Despite there is no space for interaction between the asset and the tourist who, despite experiencing the events that occurring there, cannot find tools that help him to understand the market's history).</p>
 <p>JK House</p>	<p>JK House. President JK's former house. A humble house where the former President of Brazil, JK, spent his childhood. It was turned into a museum. The rooms hold a library, personal objects, photos and guitars used by the politician to participate in serenades.</p> <p>It is open to visitors from Tuesday to Sunday.</p>
 <p>Crystals Ridge</p>	<p>Crystals ridge. Important rock formation that surrounds the city of Diamantina.</p> <p>Declared a Natural Heritage Site by IEPHA / MG. Great place for hiking, contemplating the city from the observation spots. Easily accessible, however, does not offer security for tourists.</p>
 <p>Bomfim church</p>	<p>Bomfim church. The church, funded by the military, was inaugurated in 1771. Among the attractions are the altar with gold carvings and the bell tower. It has no guided tours.</p>
 <p>Our Lady of Mount Carmel Church</p>	<p>Our Lady of Mount Carmel Church. Erected between 1760 and 1784, the church has an odd feature – the tower is located at the back of the building. It has an organ with 549 pipes, one of the only still functional in Minas Gerais.</p> <p>Recently, there has been concerts with the church organ, which became a new attraction in the city. There are no guided tours.</p>
 <p>San Francisco Church</p>	<p>San Francisco Church. The predominant style in San Francisco's Church, 1775, is the Rococo – the beautiful carvings of altars combine wood and gold.</p> <p>There are no guided tours.</p>

 <p>Luz Church</p>	<p>Luz Church. The Church of the 19th century had its origin because of an earthquake in Lisbon, in 1755. A devout made a promise to Our Lady of Light, asking for protection for her and her family, building the church in her honor at Arraial do Tijuco.</p> <p>Not open to visitors.</p>
 <p>Rosario Church</p>	<p>Rosario Church. Built in 1731 by the Brotherhood of Our Lady of the Rosary, it is one of the oldest temples in Diamantina.</p> <p>There are no guided tours.</p>
 <p>Teatro Santa Izabel</p>	<p>Teatro Santa Isabel. The old Teatro Santa Izabel was opened to the public around 1840.</p> <p>There were plays, balls, public conferences. The economic depression in the 19th century made the theater close its doors. In 2010, the theater reopened its doors.</p> <p>There are no guided tours.</p>
 <p>St. Anthony Cathedral</p>	<p>St. Anthony Cathedral. The current Diamantina Matrix was built between 1933 and 1940, replacing the old church of St. Anthony of Tejuco.</p> <p>There are no guided tours.</p>
 <p>House of Glory</p>	<p>House of Glory. Construction from the 18th century brings two houses together by a connecting walkway over the street.</p> <p>Headquarters of UFMG's Geology Centre, the houses are opened to visitors and presents geological maps, photographs, quartz and diamonds. A totem was recently installed at the reception, and an audio and video room, where is told the history of the mansion, was opened.</p> <p>There are self-guided tours.</p>


 <p>The Diamond Museum</p>	<p>The Diamond Museum. The Museum opened in the 50s occupies a large house from 1749.</p> <p>The collection includes objects from the 17th to 19th century, as tools used in diamond mining, hassocks, weapons, dishes, artwork and furniture. It is open from Tuesday to Sunday and has a guided tour. There are some cultural events with no fixed dates.</p>
---	---

Table 1. List of Monuments and touristic use

Source: Elcione Silva

6. Considerations

Tourism is an invaluable ally to the economic development of a destination. When it comes to locations declared World Heritage Sites, we must pay attention to the real contribution of tourism and its intermediary role between the heritage and the tourist. We should care about this relationship, which can bring benefits such as better appreciation of heritage, cultural transformation of people, sense of belonging, experience sharing, knowledge of the culture; however, we must also be careful with its negative impacts such as acculturation, depredation of sites, trivializing of culture, etc. Diamantina stands out in the national tourism scene, undoubtedly thanks to its heritage, preserved and internationally recognised as a World Heritage Site. However, with this title comes many challenges, the need for responsible tourism management actions and heritage protection; and therefore the city should be prepared to develop high quality cultural tourism, contributing not only to keep the tourists close, but also overcoming their expectations and thus enabling a real experience with cultural heritage. Diamantina is in a prominent position in regards to tourism in Minas Gerais, with favorable tourism infrastructure and presence of important institutions that support local tourism in an integrated manner. However, actions to improve accessibility to monuments, effective projects for the opening of historical and religious monuments, as well as improvement and investment in translation tools, interactivity and communication between the heritage and the tourist, are all of great importance so that cultural tourism is better seized in the city.

References

- Ministério do Turismo, Secretaria Nacional de Políticas de Turismo, (2009), *Turismo Cultural: Orientações Básicas*, Ministério do Turismo, Departamento de Estruturação, Articulação e Ordenamento Turístico. Coordenação-Geral de Segmentação, available at: http://www.turismo.gov.br/sites/default/turismo/o_ministerio/publicacoes/downloads_publicacoes/Turismo_Cultural_Versxo_Final_IMPRESSxO_.pdf (consulted on: 01.2016).
- Ministério do Turismo, (2015), *Índice de Competitividade do Turismo Nacional RELATÓRIO BRASIL 2015*, available at: http://www.turismo.gov.br/sites/default/turismo/o_ministerio/publicacoes/downloads_publicacoes/Relatorio_Brasil_2015_WEB.pdf (consulted on: 01.2016).
- Camargo, H.L. (2004), "Patrimônio e Turismo, uma longa relação: história, discurso e práticas", *Revista lazer e turismo - Revista eletrônica COEAE*, Unisantos - Universidade católica de Santos, available at: <http://www.unisantos.br/pos/revistapatrimonio/artigosdc19.html?cod=33>, (consulted on: 01.2016).
- Carvalho, K.D., Silva, R.E. (2010), "Turismo Étnico em comunidades quilombolas: perspectiva para o etnodesenvolvimento em Filipa (Maranhão, Brasil)", *Turismo & Sociedade*, Curitiba, 3(2).
- Costa, T.P. (2001), *Bens tombados de Diamantina*, Instituto do Patrimônio Histórico e Artístico Nacional, Belo Horizonte, artes Gráficas Formato.
- Furtado, J.F. (1996), *O livro da capa verde: o regimento diamantino de 1771 e a vida no distrito diamantino no período da real extração*, São Paulo, Annablume.
- Furtado, J.F. (2008), "Capital da Cobiça", *Revista de História*, available at: <http://www.revistadehistoria.com.br/secao/artigos/capital-da-cobica> (consulted on: 19.01.2016).
- Goodey, B. (2002), "A interpretação do Sítio Turístico: desenho e atividade", in Albano, C.; Murta, S.M. (orgs), *Interpretar o patrimônio: um exercício do olhar*, Belo Horizonte, Edufmg. Território Brasilis.
- Martins, M.L. (2016), "A Presença da Fábrica no Grande Empório do Norte: Surto Industrial em Diamantina entre 1870 e 1930", in *Anais IX Seminário sobre a Economia Mineira*. Diamantina, CEDEPLAR/UFMG, 2000, 2, available at: <http://cedeplar.ufmg.br/diamantina2000/2000/MARTINS.pdf> (consulted on: 01.2016).
- Mawe, J. (1944), *Viagens ao interior do Brasil, principalmente aos distritos do ouro e dos diamantes*, Tradução de Solena Benevides Viana, Rio de Janeiro.

- Mawe, J. (1996), *Livro da capa verde: o regimento diamantino de 1771 e a vida no distrito diamantino no período da real extração*, São Paulo, Annablume.
- Ministério do Turismo (2016), *Diamantina competitividade turística*, available at: <http://www.turismo.gov.br/%C3%BAltimas-not%C3%ADcias/5764-diamantina-%C3%A9-premiada-pela-evolu%C3%A7%C3%A3o-em-pol%C3%ADticas-p%C3%ABlicas-relacionadas-ao-turismo,-revela-estudo.html>, (consulted on: 20.01.2016).
- NORMS OF QUITO (1967), available at: <http://www.iphan.gov.br/baixaFcdAnexo.do?id=4677> (consulted on: 14.01.2016).
- Prado Júnior, C. (2000), *Formação do Brasil contemporâneo*, Colônia, São Paulo, Brasiliense, Publifolha.
- Ruschmann, D.V.M. (2006), *Turismo e Planejamento Sustentável: a proteção do meio ambiente*. 13ª ed., Campinas, São Paulo, Papirus.
- Saint-Hilaire, A. (1974), *Viagem pelo Distrito dos Diamantes e litoral do Brasil*, Tradução de Leonam de Azevedo Penna, Belo Horizonte, Itatiaia, São Paulo, Universidade de São Paulo.
- Saint-Hilaire, A. (1976), *Viagem pelo distrito dos diamantes e litoral do Brasil*, Itatiaia.
- Santos, J. F. (1976), *Memórias do distrito diamantino*, São Paulo, Itatiaia, 4.ª ed.
- UFVJM (Universidade Federal dos Vales do Jequitinhonha e Mucuri) (2012), Departamento de Turismo, *Relatório de pesquisa de demanda turística*, Diamantina.
- UNESCO (1998), *Dossiê de candidatura de Diamantina Patrimônio Cultural da Humanidade*, UNESCO.
- Yasoshima, J.R., Oliveira, N.S. (2002), "Capítulo: Antecedentes das Viagens e do Turismo", in Miriam Rejowski (org), *Turismo no Percurso do Tempo*, São Paulo, Aleph.

Chapter XVI

New Technologies and Heritage Tourism:

Making Cultural Itineraries with GIS at São Cristóvão/SE - Brazil

New Technologies and Heritage Tourism: Making Cultural Itineraries with GIS at São Cristóvão/SE - Brazil

CRISTIANE ALCÂNTARA DE JESUS SANTOS¹¹⁰

ANTONIO CARLOS CAMPOS¹¹¹

LARISSA PRADO RODRIGUES^{112 113}

Abstract:

During the last decades, tourism became a strategy to socioeconomic development in many countries. In this period, some changes also affected tourists' preferences and reasons, which generated a larger segmentation between touristic offer and demand. Thereby, the tourist practice becomes more complex in the use of space in relation to offer and demand components. This way, our aim is to highlight the relevance of using new technologies in tourism as tools that can aggregate information and subsidize the planning and management processes of the territory where the tourist activity will be deployed, in addition to provide the tourist with the possibility to have specific information about auto-guided itineraries in the city of São Cristóvão, where the São Francisco Square (World Heritage - UNESCO) is located. To accomplish this, we used bibliography research, collection of information, touristic inventory and the creation of cultural itineraries through Quantum GIS (QGIS) as methodological procedures to create alternatives to diversify the local touristic offering. Thus, we try to make a contribution to the territorial development of the destination, being studied by adopting spatial concepts in the decision-making process by the Public Administration and the private sector, and also for the new touristic products design. Furthermore, creating new cultural itineraries can raise awareness about the Cultural Heritage of São Cristóvão.

Keywords: New technologies; Tourism; GIS; Itineraries; Diversifying Offers

¹¹⁰ Tourism Division, Sergipe Federal University, Sergipe, Brazil, cristieog@uol.com.br

¹¹¹ Department of Geography, Sergipe Federal University, Sergipe, Brazil, antonio68@gmail.com

¹¹² Tourism Division, Sergipe Federal University, Sergipe, Brazil, larissa4912@hotmail.com

¹¹³ Funding for this research has been provided by UFS (Sergipe Federal University) Dean'S Office for Research Studies

Resumo:

Durante as últimas décadas, a atividade turística se converteu em uma estratégia de desenvolvimento socioeconômico para muitos países. Neste período também foram produzidas algumas transformações no que diz respeito às preferências e as motivações dos consumidores turísticos, o que gerou uma maior segmentação da oferta e da demanda turística. Assim, a prática turística passa a apresentar uma complexidade no momento de espacialização dos componentes desta oferta e da demanda. Desta forma, objetivamos destacar a importância do uso das novas tecnologias no turismo enquanto ferramenta capaz de articular as informações e subsidiar o processo de planejamento e gestão do território onde será implantada a atividade turística, ademais de proporcionar ao turista a possibilidade de obter informações específicas de roteiros autoguiados da cidade de São Cristóvão, onde encontramos a Praça São Francisco (Patrimônio Mundial - UNESCO). Para atingir esse objetivo foram utilizados como procedimentos metodológicos o levantamento bibliográfico, a coleta de informações, inventariação turística e a elaboração de roteiros culturais através do Quantum GIS (QGIS), a fim de criar alternativas para a diversificação da oferta turística local. Assim, vislumbramos contribuir para o desenvolvimento territorial do destino estudado, a partir da adoção de noções espaciais no processo de tomada de decisão por parte dos gestores públicos e dos empreendedores da iniciativa privada e também para a formatação de novos produtos turísticos. Ademais, a elaboração de roteiros culturais poderá se converter em uma alternativa de conscientização acerca dos bens patrimoniais culturais da cidade de São Cristóvão.

Palavras-chave: Novas Tecnologias; Turismo; GIS; Roteiros; Diversificação da Oferta

Resumen:

La actividad turística se ha convertido en una estrategia de desarrollo socioeconómico para muchos países en las últimas décadas. A lo largo de este período se han producido algunos cambios sobre las preferencias y motivaciones de los consumidores turísticos, lo que ha generado una mayor segmentación de la oferta y de la demanda turística. Sabemos que, la práctica turística presenta una complejidad en el momento de gestionar los componentes de la oferta y de la demanda. Por este motivo, deseamos destacar en este estudio, la importancia del uso de las nuevas tecnologías en el turismo como herramienta capaz de articular las informaciones y subsidiar el proceso de planificación y gestión del territorio donde será implantada la actividad turística. Consideramos la importancia fundamental de proporcionar al

turista la posibilidad de obtener informaciones específicas de itinerarios auto guiados de la ciudad de *São Cristóvão*, donde encontramos la Plaza São Francisco (Patrimonio Mundial – UNESCO). Para cumplir este objetivo han sido utilizados como procedimientos metodológicos: la revisión de la literatura, colecta de informaciones e inventario turístico y la elaboración de itinerarios culturales a través del Quantum Gis (QGIS). Todo ello con la intención de crear alternativas para la diversificación de la oferta turística local y poder contribuir hacia el desarrollo territorial del destino estudiado. Por tanto, a partir de la admisión del conocimiento espacial en el proceso de toma de decisión -por parte de los gestores públicos y de los emprendedores privados- llegaremos a la formulación de nuevos productos turísticos. Sin olvidar que, la elaboración de itinerarios culturales podrá convertirse en una alternativa de concientización de los bienes patrimoniales de la ciudad de *São Cristóvão*.

Palabras Clave: São Cristóvão; Desarrollo Socioeconómico; Quantum; GIS (QGIS); Itinerarios Culturales

1. Introduction

For many years, touristic activity has been considered an important development factor to areas of destination, specially in countries where it is difficult or impossible to develop other economic activities, such as industrialization.

However, it is required that the State, the private sector and the individual work together to develop tourism, in order to conceive strategies and guidelines that reach positive economic, cultural and, specially, social goals.

The touristic activity has become a critical strategy to local, regional or national economy as the flow of tourists and visitors generates new methods of touristic spatial production and consumption. Cooper *et al.*, 2011: 3 say that "the extension of touristic activities in global terms and the absolute number of people travelling explain why tourism is described as one of the major drivers of global economy." Such flows are produced from some changes occurring in society, specially about preferences, motivations and access to information, which leads to an increase in offer segmentation and the raise of touristic demand in many countries. According to Debbage and Loannides (1998: 287), "although the changes to consumer demand and the emergence of increasingly sophisticated preferences are the key to position a touristic product, it is the 'information production mechanism' that helps to manipulate and facilitate the origin-destination flow of tourists across the world."

Based on this assumption, we understand that tourism studies should focus on these transformations, new production and consumption process. The touristic activity planning must consider new communication media when spatialize the offer components in order to comply with the new demands of a society more and more connected to internet.

Thus, our aim is to analyse the importance of the use of geo-technologies in tourism as a tool capable of articulate information and subsidize the planning and management processes of the touristic territory. Starting here, we try to aggregate new values to tourism planning and management, as well as to present to city planners the possibility of expanding their administrative perspectives by entering a globalized world driven by information. In this case study, we focused our analysis perspective in the city of São Cristóvão/SE, one of the most important destinations of the Sergipe state, located at the Northwest region of Brazil, where the São Francisco Square, UNESCO World Heritage, is located and that we will examine afterwards.

In order to accomplish this, we used as methodological proceedings: bibliography - we consulted authors that focused on planning and the use of new technologies in tourism, as well as analyses of the city as a destination, namely their historic centre (World Heritage) that needs to be identified, mapped and published in a correct way in several Internet's search engines. In this step, we have used Free Software - Quantum GIS (QGIS) and Google Earth (by disclosure of Kml/kmz files) to extend the applicability to more users and to elaborate touristic itineraries to the city of São Cristóvão in a more flexible and accessible way in different kinds of mobile devices, like smartphones.

Therefore, the article aims to indicate alternatives to the diversification of local touristic offer. Initially, we will approach the use of geographic information systems at the planning and management of tourism, considering the importance of GIS as a planning and management tool. The discussion will become deeper in the following item, with the approach to the use of these systems in tourism and, later, its use in tourism in the Sergipe state (Brazil). Eventually, we will highlight the use of a specific GIS – QGIS (Quantum GIS) and its applicability in the elaboration process of auto-guided touristic itineraries at São Cristóvão/SE.

2. Using the Geographical Information System for Tourism Planning and Management

Geographical Information Systems (GIS) are increasingly being considered as part of solutions and innovative projects capable of building a database and qualitative attributes that can associate mobile applications, internet and geo-codification of historical bases. In Brazil, GISs are more and more important in several areas, including tourism, as they can be used in the

majority of the activities having a spatial component, because the raw material is always spatial information resulting from historical and geographical data inserted in a system that associate them to territorial bases.

Duque and Mendes (2006) say it is possible to formulate a methodology that allows the development of tourism of a place by using cartography and GIS, as both tools can be understood as very important for planning, and are also powerful to promote touristic competitiveness by the formulation of new touristic products.

In fact, as Santos *et al.* (2006) say, GIS is a tool that supports fast decision-making and marketing applications, among other resources. Thus, in tourism, the Public Administration can use GIS to connect related activities, such as the design of a new touristic product, city space analysis, inventory and others.

According to Silva and Souza (1987: 236), the Geographical Information System:

is the more important kind of structure to make geoprocessing feasible. The last one, being a set of computing procedures operating in geocoded databases, or more developmentally, in geographical databases, executes the analysis, reformulations and synthesis on the available environmental data.

Rodrigues and Quintanilha (1991: 513-9) say that the Geographical Information Systems can be understood as:

real world models, useful to a certain purpose; they subsidize the observation process (definition, measurement and sorting activities), acting (operation, maintenance, management, building, etc) and the real world analysis.

To Câmara (1993: 19),

GIS's main characteristics as a system are: integrate, in a single database, spatial information from cartographical data, census data and urban and rural register, satellite images, networks and land numerical models; to combine the information through manipulation algorithms to generate derived mapping; to consult, retrieve, visualize and plot the content of geocoded database.

From these concepts, one can realize that geographical information systems can be converted into a tool that generates information to support tourism planning and management,

as it can be used as a mechanism to integrate, visualize and summarize complex, diverse information.

According to Duque and Mendes (2006), the use of these new technologies to touristic planning can be thought from two angles: the planner angle and the tourist angle. So, its use can help Public Administration by opening the possibility of compiling data, organizing old information and generating new information, in addition to leading data into touristic information to the benefit of administrative efficacy, specially in the decision-making process. The organization and manipulation of this information are vital to the touristic planning, whether at a local or regional level, because GIS allows space analysis and recognition in digital media. If, in one hand, consumers/tourists need information to make decisions about the touristic practice, in other hand the information has to be available by the suppliers (public or private sector) to present the products/destinations in an attractive way. For the tourist, this will be an excellent communication tool, capable of guiding the rational use of the touristic space, "giving to the tourist a geographical space overview with touristic appeal, with important information to plan activities and coordinate the available time" (Aranha and Guerra, 2014: 43).

According to the ideas of Câmara et. al. (2004: 323), "the use of Geographical Information Systems in the last years have evolved more and more consciously, raising its significance as a solid knowledge and information base". However, despite the growing speed of GIS adoption by tourism, one can see that there is still need for disseminating the tool, specially its insertion in Public Administration and in the effective use of touristic information by the users.

3. The Importance of the Use of Geographical Information System in Tourism

The touristic activity can be understood as an economic system that offers services and products addressed to leisure and as a social and cultural practice, in which State - Private Sector - Civil Society shall be connected. Given its complexity, it uses the knowledge and know-how of different areas to better understand the multiple angles of the touristic practice to illustrate its multidisciplinary character. Related areas, such as Psychology, Anthropology, Sociology and Geography help tourism with analyses on landscapes; construction, use and space appropriation using GISs.

According to their characteristics, GISs have too much importance to several areas and tourism "lacks the development and use of new instruments and tools that can make viable a more refined planning, in other words, with more information" (Ladwig, 2012: 20). It also requires quick and easy accessed solutions, suggesting an "Internet of Things" in the managers,

tourists and even the community's routine that will use the systems to better manage activities related to tourism.

According to Aranha and Guerra (2014: 31),

However, the technology development produced a dramatic change in its presentation way. Nowadays, there are maps in very different media, each one with its peculiarities. It is possible to mention maps in computers, touristic terminals, internet, palmtops, tablets, smartphones, and others, which many times allow interaction between the user and other technologies, as GPS.

When planning, the manager can project new products and touristic services from the awareness and visibility that the system provides with territorial and spatial information based on geographical data to assist in the decision making, as well as increasing competitiveness among destinations.

GIS is important to the tourism planning as it allows the possibility of managing information based on geographical data, organized in layers and connected to attribute tables capable of spatial interrelation to produce new information (Ladwig, 2012). Besides, GIS provides access to historical information, as a base to compile new ideas and to the production of destinations and touristic products with diagnostic and spatial information analyses - in other words, these systems quickly provide a significant and diverse amount of data and rich spatial/territorial information that can be accessed remotely by communication networks. This is highly important to plan and manage tourism, as managers/planners can use this information to support policies, projects and efforts and by end touristic activity users, as well, aiming to know better the destination and enjoy their visit at a maximum.

Some functions that can be performed by these systems in tourism management are presented by Ramon Morte (1997). Some of them are: preparation, disclosure and use of self-guided or guided itineraries; touristic expansion and landscape analyses; risk prevention; analyses of the environmental impact caused by touristic activity deployment; land use capacity; inventory; infrastructure and services quality management; destination products and services visibility. Besides management, GISs can provide bases to Virtual Tourism¹¹⁴, a touristic segment

¹¹⁴ Tourism without physical displacement via Web, in which the visitor can explore the destination(s) by photos, videos and others multimedia resources.

that is being discussed by industry experts, since the appearance and considering the possibilities generated by *Cyberspace*¹¹⁵.

However, web-based GIS is essential for a destination's marketing, as it allows for promotion of new touristic products, which is a competitive advantage. The potential tourist can choose the destination through internet according to his needs. Finally, using GISs is important to design and consolidate tourist products.

Managers should expand their horizons by assembling as many information as possible, considering the increasing consumer's requirement at the moment of choosing and purchasing touristic destination and services. To this, Geographical Information Systems function as a foundation and, when associated to internet, they become a new publicity and commercialization method that is available to the whole online community, allowing the creation of new, differentiated services and products, aiming at new market segments and leveraging the competitive edge.

Destinations using GISs and applications connected to Internet's main search engines to promote their touristic products and services have not only more chances to attract potential tourists, but also to increase time spent in the destination. This happens because GIS can present itineraries with different attractions, often poorly promoted and unknown by the visitor, expanding the offer and the profitability with tourist spending at the destination. According to Aranha and Guerra (2014), with GIS, the information can be transmitted clearly and objectively to facilitate tourist's understanding about the visited touristic place. One also highlights that, besides the visitor, GIS can benefit the receiving community, because it will access information more quickly and will have more knowledge of the local, valuing it and becoming aware of the importance of preservation. Also, it will reduce management costs with promotion, considering the traditional advertising methods, such as folders, magazines, etc.

In short, the main (and several) applications of GIS in tourism are the analyses of environmental impact; spatial information supply; touristic services and products promotion; tourists, managers, private sector and receiving community's awareness; internet visibility.

Thus, it is possible to realize that the use of Geographical Information Systems in tourism has countless benefits to the activity that will be developed based on precise information and space analyses, aiming to minimize social, environmental, cultural and economic impacts. Besides, in a consolidated product management, GIS can make analyses to enhance the present activity; the proper web promotion and commercialization to support decision making process, increasing

¹¹⁵ Virtual communication space enabled by the Internet and computers.

competitiveness and solving problems of space use. It also has potential to be, in the future, an indispensable tool to the development of the touristic activity anywhere, considering that tourism is an exploring activity and cannot be developed without space.

4. The Use of Geographical Information Systems in Sergipe State Tourism.

There are real applications of Geographical Information System in Brazilian tourism. One can mention the use, in the Minas Gerais state, of the ECOGUIA application (Figure 1), that allows the user to explore and localize Ecotourism points in the Northwest of Minas Gerais (Silva and Dias, 2002).

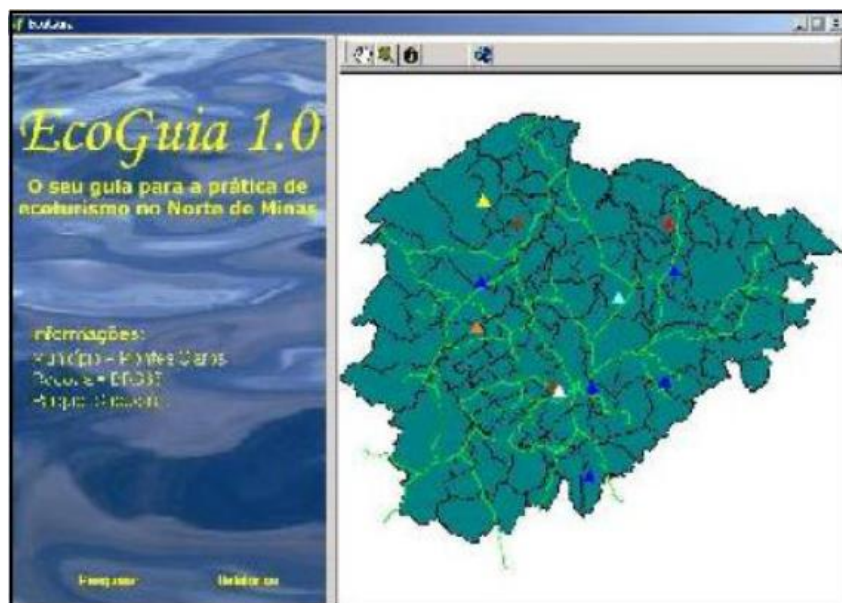


Figure 1. EcoGuia 1.0 Main Screen

Source: Silva and Dias, 2002

Santana and Moura (2005) have developed a GIS, in which the visitors could walk through the Belo Horizonte/MG Central Market in a self-guided way. Schmidt *et al.* (2007) developed a GIS to make information available to tourists about tourist equipment and services in downtown Pelotas/RS, but not using the WebGIS technology applied to the proposal to use GIS in the city of Aracaju/SE, that will be discussed ahead.

In the case of the state of Sergipe, we highlight the importance of GIS to effectively deploy the touristic practice, once the State has not elaborated the inventory of touristic offering, which is the main barrier to create effective tourist routes and itineraries (Santos, 2014). Having an

inventory allows obtaining a previous knowledge about the infrastructure that supports tourism, as well as touristic amenities, products, equipment and services the places have, in order to create products that show the actual site's potential.

Based on the State's needs for an inventory and on precise information about the touristic activity, Dias Junior *et al.* (2006) started to develop a web-based GIS (WebGis) to integrate information related to the touristic activity in the city of Aracaju, Sergipe's capital city, aiming to extend the communication channel between managers and tourists, as well as to make the data available to the population. Named "GEOTUR WEBGIS – Atlas Turístico de Aracaju" (GEOTUR WEBGIS – Aracaju's Touristic Atlas), the city was chosen primarily for having the largest amount of equipment and support infrastructure concentration to this activity, requiring work in the field from authors, in order to make an inventory of the city's touristic products. According to Dias Junior *et al.* (2005)¹¹⁶:

The collected data are the base for an analysis (quantitative and qualitative) of the tourism's spatial distribution, to support a better understanding and management of touristic attractions that characterize the activity in the city of Aracaju. For the application's operation, this Atlas in beta version shows navigability satisfactory levels (speed and theme presentation) as well as the function of cartographic data navigation basic tools.

However, the link or the internet page made available by the authors, <http://mapaturistico.com.br/cidades/default.asp?idcidade=145>, does not work, which may show that the project was discontinued.

In Sergipe, an academic research project as also developed in 2014 and 2015 by the Sergipe Federal University, Tourism and Geography disciplines, to apply Open GIS and QGIS to create self-guided touristic itineraries in the city of São Cristóvão.

São Cristóvão is a city 25 km far from the capital, Aracaju. It was founded in 1590 and is considered the fourth oldest city in Brazil. There, one can find the São Francisco Square, that received the World Heritage of UNESCO title, at August 03, 2010 during the 34th UNESCO World Heritage Committee Session. The basic document for the proposition of São Francisco Square

¹¹⁶ For more information, please refer to: Gestão da Geoinformação: Sistema de Gerenciamento de Banco de Dados e aplicações WebGis para o turismo em Aracaju-SE (2006) (in Portuguese), available at: http://www.cpatc.embrapa.br/labgeo/srgsr3/artigos_pdf/o64_t.pdf. (consulted on: 02.06.2015).

application in the World Heritage list (2007: 19) showed four items that assure its cultural significance:

- São Francisco Square's exclusive characteristics and its environment point to a unique and exceptional testimonial of a colonial city conformation in Brazil. It evidences the influence of Spanish urban legislation and practices in Brazilian urban centres conformation;
- The square and its surroundings constitute an urban centre with potential architectonic unity and aesthetic-visual integrity, configuring a harmonic and authentic set that reassert its exceptional universal value;
- As for the place significance, the Square reassert Brazilian colonial period's cultural values of memory and history, adding a wide and variable multiplicity of past values remaining not only in memory, but also in the daily life, present in the importance of the city life;
- São Francisco Square's authenticity is evident, due to its design, surroundings, techniques, use, function, historical and cultural context, which highlight not only shape and structure, but also its modifications over time.

The extract of the decisions adopted by the 34th session of the World Heritage Committee determines that São Francisco Square is a World Heritage because:

- The São Francisco Square is the only outcome of the merging of the modes territorial occupation and settlement of Portugal and Spain according to which urban settlements were established in their respective colonial empires. This property reflects an exceptional interchange of visions and urban and architectural models, which occurred due to the extraordinary historic circumstances of having the two rival Empires under one crown;
- The São Francisco Square constitutes an exceptional example of a unique model of urban and architectural typology that has been preserved as a space that seats religious and civil powers. It shows a paradigm of integrated rational town planning and adaptation to the specificities of the local topography. It is a landmark used as a place for social and cultural manifestations¹¹⁷.

¹¹⁷ For more information, see Dossiê da Candidatura (in Portuguese) available at: <http://portal.iphan.gov.br/pagina/detalhes/43>.

Furthermore, the following items were recognised: integrity, authenticity, protection and management requirements.

Thus, São Cristóvão has one of the biggest and more important material and immaterial property assets of the state. According to Santos and Campos (2012: 279),

the promotion of São Francisco Square, in the city of São Cristóvão, to World Heritage, redesigns a new panorama in Sergipe's historical and architectonic recognition. For this reason, the city of São Cristóvão will have a fundamental role in (re) arranging touristic flows, which even without a suitable policy for planning touristic activities, opens possibilities for the inclusion of other historical cities in the cultural tourism map and promotes economic and social development of their inhabitants.

However, despite the state and local administrators' acknowledgement of the importance, there are no tangible proposals or well-defined strategies that allow the conversion of São Cristóvão into a consolidated touristic destination, and consequently a competitive destination in the long run (Santos, 2014).

Even being critical to Sergipe's tourism, São Cristóvão lacks the actual conditions of basic and touristic infrastructure maintaining and services, restraining tourism development. Previous research done in the city showed by field work that some São Cristóvão heritage assets are unknown by tourism guides and travel agencies that send tourists in daily visits. Such research also found that the local population does not know much of the local heritage. For this reason, to idealize development strategies for the practice of tourism using GIS to overcome the aforementioned barriers in the city is the most important factor in the extension project, whose focus is the preparation of self-guided cultural itineraries.

Starting from resources recognition and applicability of GISs, it is possible to use geo-technology in tourism to prepare self-guided cultural touristic itineraries, as tourists and the population will get to know better the several elements comprising the city's touristic offering, including its heritage assets, which can lead to an increasing awareness and an educational process about the heritage that will empower a new preservation conscience, so required by the touristic activity survival.

According to Bahl (2006: 298),

Among the diversity of activities inherent to touristic planning, the one most evident is the preparation of configured itineraries as products, because they

summarize an ordination process of intertwined elements in a trip execution. The preparation can establish guidelines and generate a posterior tourist circulation, according to certain paths, creating flows and making possible a reasonable using of the region and attractions that will be visited.

Therefore, the visitor will have the freedom to choose between following the standardized available itinerary or to create his/her his own, considering that touristic itineraries are flexible as they do not require an initial and final itineraries points. In other words, they don't require a visitation sequence and allow the tourist to start the visit in any of their points. Self-guided touristic itineraries have the main function is to facilitate tourist displacements and allow for the contact with attractions without the presence of a professional tourism guide (Santos, 2014) as the creation of an itinerary allows the emergence of supplemental products, rendering the segment not an exclusive one. For this study, we prioritize the cultural tourism segment, but we highlight the need of offering diversification.

5. QGIS to Elaborate Self-Guided Touristic Itineraries in São Cristóvão/SE

As mentioned before, Geographical Information Systems are a functional tool that makes possible several applications and possibilities for tourism. Among these, we will emphasize management, availability of fast and precise information to communities and related organizations, and the elaboration of self-guided cultural touristic itineraries, because they are the actual need of São Cristóvão city. For that, we used the QGIS software, a free Geographical Information System to prepare some itineraries that can be accessed in the Internet. QGIS Online module allows to perform some basic tasks, such as creation of dots, lines, polygons, tags, captions, among others; to create new layers or edit the existing ones through data acquired from the city touristic inventory, comparing the City's Planning Secretariat Map Planning Government Office (Banco de Imagens da Secretaria de Planejamento) and the Sergipe State Government Water Resources Superintendence's database (Banco de dados da Superintendência de Recursos Hídricos do Governo do Estado de Sergipe) (Figure 2).

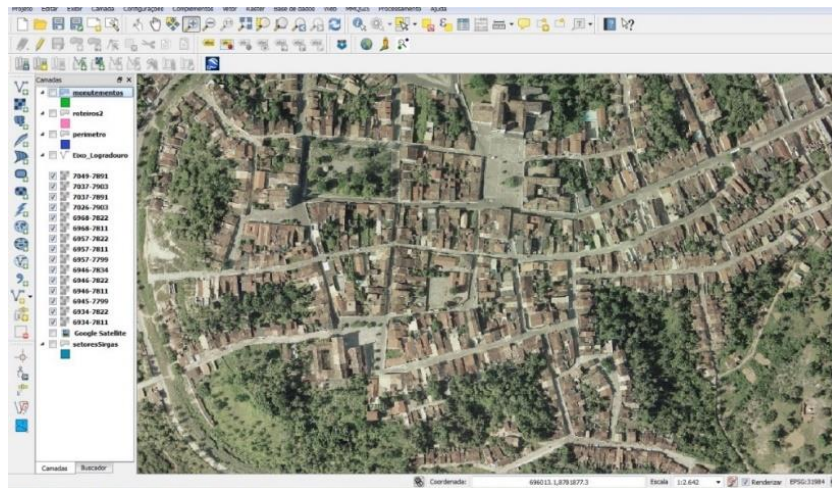


Figure 2. QGIS 2.2.0 Main Screen

Source: Santos, Campos and Rodrigues, 2015

We used this tool to input data collected in the touristic inventory process to prepare mappings proposals that feature cultural touristic itineraries for the city of São Cristóvão (Figure 3). This action made possible two new vital components in the Public Administration modernization: The development of an analytical - spatial awareness from local tourism spatial distribution; digital inclusion, using new technologies.

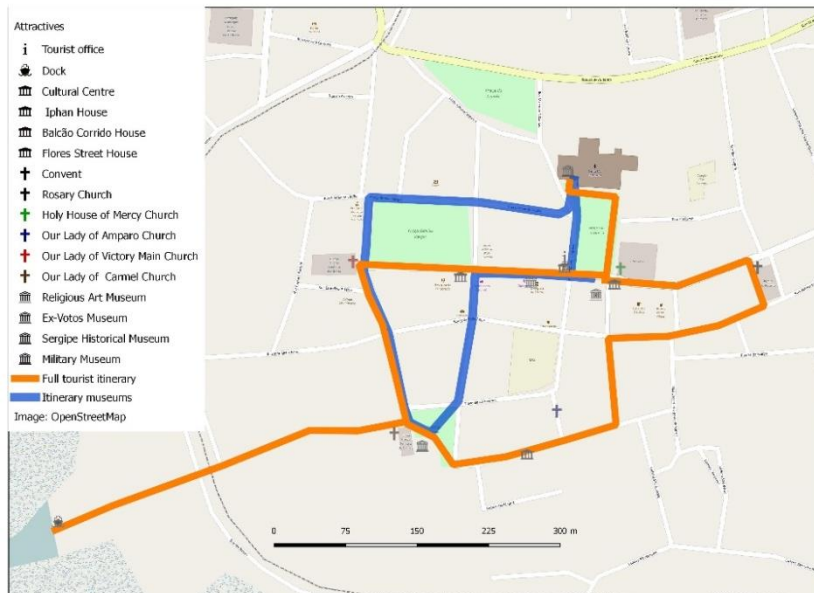


Figure 3. QGIS Screen with Touristic Itineraries

Source: Santos, Campos and Rodrigues, 2015

As we can see in the figure above, two cultural touristic itineraries were prepared. The first one includes the city museums: Religious Art Museum (Museu de Arte Sacra), Sergipe Historical Museum (Museu Histórico de Sergipe), Ex-Votos Museum (Museu dos Ex-Votos), and Military Museum (Museu Militar); the second itinerary covers the main city cultural amenities: São Francisco Square (World Heritage) (Praça São Francisco (Patrimônio Mundial)), São Francisco/Santa Cruz Church and Convent (Igreja e Convento de São Francisco/Santa Cruz), Holy House of Mercy Church (Igreja Santa Casa de Misericórdia), IPHAN House (Casa do IPHAN), Cultural Centre (Casa da Cultura), *Balcão Corrido* House (Sobrado do Balcão Corrido), Our Lady of Victory Main Church (Igreja Matriz de Nossa Senhora da Virótia), Our Lady of Mount Carmel Convent and Church (Carmo Maior and Menor) (Convento e Igreja de Nossa Senhora do Carmo (Carmo Maior e Menor)), Flores Street House (Sobrado à Rua das Flores), Our Lady of Amparo Church (Igreja de Nossa Senhora do Amparo), Our Lady of the Rosary of Black Men (Slaves) (Igreja de Nossa Senhora dos Homens Pretos (Escravos)) and Paramopama River Berth, with the previously mentioned museums. To prepare these itineraries, we initially defined the inherent elements for the touristic itineraries, in other words, the touristic attractions that are part of the itineraries from the touristic inventory process, followed by a hierarchical list of attractions. Next, we proceed to the the following steps: a) definition and suitability to target audience (visitants/tourists going to São Cristóvão independently); b) planning and preparation of itinerary; c) testing itineraries with some community members to verify and fix possible fails, to ensure that those following these itineraries can enjoy the city at a maximum and to allow the city's inhabitants to explore their heritage; d) mapping.

This way, we hope that São Cristóvão's touristic offering is extended, bringing more tourists to less-explored places, but that have a large touristic potential, as well as they can follow the proposed itineraries or make their own itineraries based on information from attractions supplied by the public Open GISs. Furthermore, São Cristóvão administrators will be able to better manage and plan tourism from the data supplied by GIS. In fact, it is believed that the city will benefit from a larger exposure created by the wealth of information on cultural itineraries that is available in WebGis format, possibly attracting potential tourists that use internet to choose and buy touristic destinations - in other words, touristic marketing, as mentioned before. The idea is supported by (Ramos et. al, 2009: 22) by stating that "Internet was one of the ICT that emerged from the 90's, and it came to revolutionize the way of travel. Due to its interaction characteristics, it allows the clients to find touristic information in several places in the world, as well as making reservations and buy touristic products, which allows the traveller to save time and money".

Thus, we propose that building a database for the destination and geo-referencing the main attractions listed, as well as publishing itinerary proposals in a single website for the city, could reduce direct searches to the destination, once it would require extensive marketing efforts. Considering the lack of budget, it would hardly generate an increment in the number of visitors. On the other hand, activities developed for generating itineraries open several and innovative perspectives based on the Web characteristics. We could distribute these itineraries for free in search engine maps, such as Google Maps or Bing Maps, posting the files in Kml or .Kmz formats¹¹⁸ that are generated by the Software QGIS¹¹⁹ online, along with internal Google Earth¹²⁰ plug-ins (Figure 4).

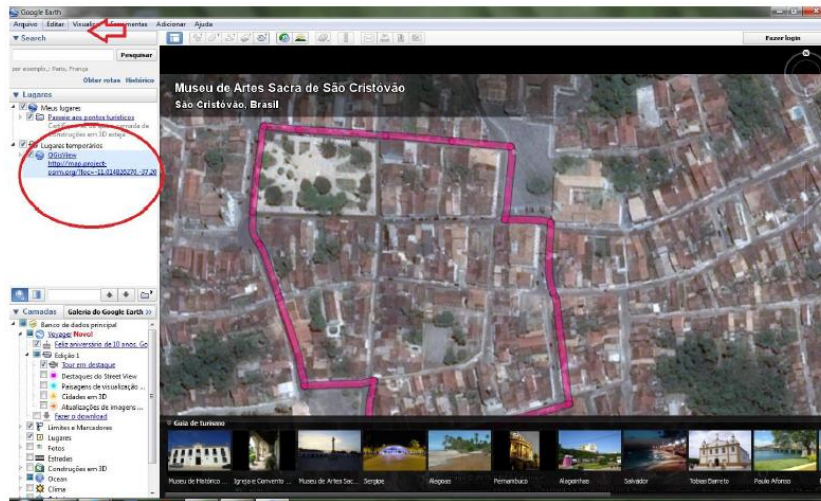


Figure 4. Proposal to promote São Cristóvão as a destination

Source: Santos, Campos and Rodrigues, 2015

Equally, the distribution of data inventoried from the city can generate multiple uses and categorizations, according to users. They can add specificities, such as places of interest, photographs, descriptions and even new itineraries after enrolling and posting in information propagation WebGis communities as, for example, Open Street Map

¹¹⁸ Keyhole Markup Language (KML) is the format used by Google Earth in the geo-referenced addresses marking and three-dimensional geospatial data. It is based on XML (Extensible Markup Language) language that is heavily used on advanced application development to internet, because it does not require HTML (Hiper Text Markup Language), offering a really efficient way to transmit, in text format, all kind of data through the computers global network. Each KML file has data for title, latitude and longitude, and additional information like descriptions, links and models in 3D. For more information, refer to <http://earth.google.com/kml>.

¹¹⁹ The most updated software version can be found in: <https://www.qgis.org/en/site/forusers/download.html>

¹²⁰ GOOGLE EARTH can be downloaded for free in: <http://earth.google.com>.

(<https://www.openstreetmap.org/>), which is a collaborative mapping project to create a free and editable world map, inspired by websites like Wikipedia.

Therefore, one can realize the importance of the GIS platform to Sergipe tourism, which still has problems in its development, but that progresses towards solutions based on technologic tools, as it is the case for Aracaju and São Cristóvão. This shows the Geographical Information Systems are “an excellent tool to systematize an array of information that is available in several sources and that is able to aggregate data in a single data base highly useful to tourists and to the organization responsible for the planning and management of the activity” (Polidoro, 2010:1).

6. Final Considerations

Geo-processing technology can support planning and possibly increase exposure and, consequently, demand and profitability, promoting the development necessary to the touristic potential of Sergipe state.

In this study, we discussed the development of the touristic activity in the city of São Cristóvão from the preparation of touristic itineraries by QGIS. However, we highlighted that there are possibilities to expand this applicability to other Sergipe cities that present touristic vocation. One of them is Laranjeiras/SE, that, just like São Cristóvão, has a rich material and immaterial historical heritage, but faces barriers to develop tourism, due to the lack of publicity and few itineraries including attractions that are not so close, but that are recognised as relevant to the city.

Thus, GIS could support the assortment of attractions and, after that, the creation of itineraries, as these actions are necessary to consolidate the destination. Also, several attractions are often closed due to the lack of visitors, which is caused by low exposure and crime rates in the area, a problem often mentioned by tourist guides working there. This is confirmed by previous research, making impossible the visitation and consequently the touristic activity, exposing the administrative paralysis.

The Geographical Information System used to support the development of São Cristóvão's tourism sector is critical, because it is a cornerstone for the future application in the state's tourism and in other places in Brazil. Also, it is an important tool for the city management and planning that lacks solutions regarding the touristic activity. For this reason, with the use of new technologies, we hope that: a) touristic offering be expanded to consolidate “new products”; b)

the community gets closer to its heritage and know, recognise and preserve it; c) that information be generated in a practical and fast way to the community and to organizations in charge of management and planning; and, finally, d) that the city becomes more visible. In short, cultural attractions in WebGis format will be available to attract tourists that use virtual media to choose touristic destinations and products, as well as to enable tourists to walk through the city as they see fit or still, to create new itineraries from information provided according to the visitor's interest.

References

- Aranha, R.C., Guerra, A.J.T. (orgs) (2014), *Geografia Aplicada ao Turismo*, São Paulo, Oficina de Textos.
- Bahl, M. (2006), "Planejamento Turístico por meio da Elaboração de Roteiros", in D.M. Ruschamnn and K.T. Solha (orgs), *Planejamento Turístico*, Barueri, Manole, 298-316.
- Câmara, G. (1993), "Anatomia de sistemas de informações geográficas: visão atual e perspectiva de evolução", in E. Assad and E. Sano, *Sistema de informações geográficas: aplicações na agricultura*, Brasília, Embrapa, 15-37.
- Cooper, C., Hall, M.C., Trigo, L.G.G. (2011), *Turismo Contemporâneo*, Rio de Janeiro, Elsevier. Coleção Eduardo Sanovicz de turismo.
- Debagge, K.G., Loannides, D. (eds) (1998), *The Economic Geographic of the Tourist Industry. A Supply Side Analysis*, London, Routledge.
- Dias Junior, W.U., Bastor Junior, E.M., Santana, J.M. (2006), *Gestão da Geoinformação: Sistema de Gerenciamento de Banco de Dados e aplicações WebGis para o turismo em Aracaju-SE*, available at: http://www.cpatc.embrapa.br/labgeo/srgsr3/artigos_pdf/o64_t.pdf, (consulted on: 21.10.2015).
- Duque, R.C., Mendes, C.L. (2006), *O planejamento turístico e a cartografia*, São Paulo, Alínea.
- Ladwig, N.I. (2012), "O Sistema de Informação Geográfica para o planejamento e a gestão sustentável do turismo", *Revista Gestão Sustentável Ambiental*, 1(1), 19-32.
- Polidoro, M., Barros, M.V.F. (2010), "Proposta Metodológica de Desenvolvimento de Sistema de Informações Geográficas em Ambiente WEB (WEBGIS) Aplicado ao Turismo", *Ar@cne Revista Electrónica de Recursos en Internet sobre Geografía y Ciencias Sociales*, 133, available at: <http://www.ub.edu/geocrit/aracne/aracne-133.htm> (consulted on: 20.09.2015).
- Rámon Morte, A. (1997), *Sistemas de Información Geográfica en la actividad turística: nuevas tecnologías aplicadas al turismo*, Universidad Internacional Menéndez Pelayo y Escuela Oficial de Turismo de Alicante.

- Ramos, C.M.Q., Rodrigues, P.M.M., Perna, F. (2009), "Sistemas e Tecnologias de Informação no Sector Turístico", *Revista Turismo e Desenvolvimento - Journal of Tourism and Development*, 12, 21-32.
- Rodrigues, M., Quintanilha, J.A. (1991), "A seleção de software SIG para gestão urbana", in *Anais de Congresso Brasileiro de Cartografia*, 15, 1991, São Paulo, São Paulo, SBC, 3, 513-9.
- Santana, S.A., Moura, A.C.M. (2005), "SIG analógico no mapeamento de atividades para a visita turística do Mercado Central de Belo Horizonte", in *Anais do XXII Congresso Brasileiro de Cartografia*, Rio de Janeiro, Sociedade Brasileira de Cartografia.
- Santos, C.A.J, Campos, A.C. (2012), "Turistificação dos Centros Históricos de São Cristóvão e Laranjeiras/SE", in L.N. Coriolano and F.P. Vasconcelos, *Turismo, Território e Conflitos Imobiliários*, Fortaleza, EDUECE, 267-282.
- Santos, C.A.J. (2014), "Planejamento Territorial e SIG: Ferramentas para Elaboração de Roteiros Turísticos Culturais Autoguiados na Cidade de São Cristóvão – Sergipe", in *VI Congreso Iberoamericano de Estudios Territoriales y Ambientales*, São Paulo, USP, 3355 - 3371.
- Santos, N.N.S, Ramos, M.G.G., Campos, M.T.S. (2006), "Sistema de Informação Geográfica SIG. Do Patrimônio Histórico, Cultura e Turístico da Cidade de Pelotas – Brasil", in *Anais da I Conferência Nacional Turismo e Tecnologias de Informação Geográfica*, Lisboa, Universidade Nova de Lisboa e Instituto Politécnico de Coimbra.
- São Cristóvão (2007), *Proposição de inscrição da Praça São Francisco em São Cristóvão/SE na lista do patrimônio mundial*, Aracaju, Secretaria do Estado da Infra-Estrutura, IPHAN, Prefeitura Municipal de São Cristóvão, CD-ROM.
- Schmidt, K.R., Ramos, M.G.G., Santos, N.N.S. (n.d.) *Sistema de Informação Geográfica (SIG) dos serviços turísticos do centro de Pelotas-RS*, available at: http://www.feg.unesp.br/~delamaro/quiosques/CH_01617.pdf (consulted on: 12.08.2015).
- Silva, J.X. da, Souza, M. (1987), *Análise ambiental*, Rio de Janeiro, UFRJ.
- Silva, P.P.O, Dias, T.C.S. (2002), "Ecoguia – Guia Digital de Busca e Orientação para a Prática de Ecoturismo", in *Anais do I Simpósio Regional de Geoprocessamento e Sensoriamento Remoto*, Aracaju/SE, 17th and 18th of October.

Chapter XVII

The Perception of Cultural Heritage in the City of Trinidad de Cuba

The Perception of Cultural Heritage in the City of Trinidad de Cuba

PAULA VASCONCELOS¹²¹

Abstract:

In scientific research, the subject 'perception' has been studied from the cultural, touristic and environmental perspective. There is a lack of information about Trinidad in what the population knows, thinks, adds value to and how it takes part on the construction of the heritage, since this subject has not been developed yet. Been considered a recent study in the city of Trinidad, the objective of the research was aimed at determining characteristics of perception of cultural heritage among the inhabitants of the Trinidad city who can contribute to the maintenance of the status granted by UNESCO as Cultural Heritage. Qualitative and quantitative approaches were adopted as the methodology, using the techniques of questionnaire and structured interview. For the application of the questionnaire, a sample of 360 people aged 16 and older was used, taking the data from the last Census, in 2002. Structured interviews were conducted with the researchers from the city of Trinidad and Valle de los Ingenios Curator Office. The limited knowledge of the population about the cultural heritage and the importance of Trinidad as Cultural Heritage, as well as the limited participation in the cultural activities of the city and in the heritage conservation may be considered the main social threats to the heritage.

Keywords: Perception; World Cultural Heritage; Trinidad

Resumo:

Na investigação científica, o tema percepção foi estudado desde o ponto de vista cultural, turístico e ambiental. Saber o que a população conhece, pensa, valoriza e como participa na construção do património são pesquisas insuficientes em Trinidad, uma vez que este assunto ainda não tinha sido tema de investigação. Sendo considerado um estudo recente na cidade de Trinidad, o objectivo da pesquisa foi determinar as características de percepção do património cultural entre os habitantes da cidade de Trinidad que possam contribuir para a manutenção da declaração concedida pela UNESCO de Património Cultural da Humanidade. A metodologia do trabalho tem um carácter quanti-qualitativo, onde se utilizou as técnicas de questionário e entrevista estruturada. Para a aplicação do questionário, foi utilizada uma amostra de 360

¹²¹ Faculdade Metropolitana de Manaus, FAMETRO, paulanardey@yahoo.com.br

peessoas a partir dos 16 anos de idade, levando em consideração os dados do último Censo de 2002. Foram realizadas entrevistas estruturadas com os pesquisadores da cidade de Trinidad e da Oficina del Conservador. O conhecimento limitado da população sobre o património cultural e a importância de Trinidad como Património Cultural da Humanidade, bem como a participação limitada nas actividades culturais da cidade e na conservação do património podem ser consideradas as principais ameaças sociais ao património.

Palavras-chave: Perceção; Património Cultural da Humanidade; Trinidad

Resumen:

En la presente investigación científica, el tema de la “percepción” se ha estudiado desde el punto de vista sociocultural, turístico y ambiental. Se pretende pues, conocer lo que sabe, piensa, valora y cómo participa la población, en la construcción del patrimonio. Porque hemos detectado que las investigaciones realizadas en Trinidad han sido insuficientes ya que hasta el momento no se ha trabajado la temática percepción. El objetivo de la investigación se orientó a determinar características de la percepción del patrimonio cultural en los habitantes de la ciudad de Trinidad que puedan contribuir al mantenimiento de la condición otorgada por la UNESCO de Patrimonio Cultural de la Humanidad. Se adoptó como metodología el enfoque cualitativo y cuantitativo, utilizando las técnicas de cuestionario y entrevista estructurada. Para la aplicación del cuestionario se tomó una muestra de 360 personas, en edad de 16 años o más, a partir de los datos del último Censo del 2002. La entrevista estructurada fue realizada con investigadores de Trinidad y de la Oficina del Conservador de la ciudad. El limitado conocimiento de la población sobre el patrimonio cultural y de la importancia de Trinidad como Patrimonio Cultural de la Humanidad, así como la limitada participación en las actividades culturales de la ciudad y en la conservación del patrimonio, pueden ser consideradas las principales amenazas sociales al patrimonio.

Palabras Clave: Percepción; Patrimonio Cultural de la Humanidad; Trinidad

1. Introduction

The World Heritage list registers the cultural and natural sites that the United Nations Educational, Scientific and Cultural Organization (UNESCO) recognises as exceptional and with

universal value. Cuba has nine sites with the status of World Heritage, being a "rich culture by its diversity and possession of an extraordinary intangible and tangible heritage" (Moré, 2006b: 5).

The World Heritage Committee, composed of representatives of 21 Member States, declared, in 1988, in Brasilia, the historic centre of Trinidad and the Valley of Los Ingenios, World Cultural Heritage, recognising its authentic historical and cultural values, disseminating it worldwide. The city, founded in 1514 by Diego Velázquez, is the third town in Cuba established by the Spanish settlers, in the province of Sancti Spiritus, and is the second Cuban site included on the World Heritage list.

The historic centre of Trinidad covers an area of 48.5 hectares, of religious, civil, domestic and vernacular architecture originating from the 17th to the 19th century, and demonstrates the different values of the city, the economic boom derived from the development of the sugar industry and genuine human work. The Valley of Los Ingenios "occupies an area of 276 km², with numerous archaeological, architectural and natural sites of great value within" (López and Pérez, 2003: 12).

A historical city like Trinidad contains a rich and diversified cultural heritage, "whose understanding, recovery and productive reuse require a broader approach than purely architectural" (Troitiño Vinuesa, 2006: 5). The study on the perception of cultural heritage in Trinidad is inserted into a paradigm that this subject has never before been studied and it can be noticed from the results of research that, on behalf of tourism in the city, the perception is "producing different and new effects of meaning and interpretation actions "(Cousillas, 1997 apud More, 2006b: 122) which can be seen as a possible threat to social equity.

Therefore, the importance of studying the perception of cultural heritage in Trinidad and Valle de los Ingenios is: understand what the people who live there know and think about their cultural heritage; how they understand the similarities and distinctions of the several collective perceptions; the questions about the cultural heritage of their city and what are their concern about this. It helps to understand what people think and how they interact with their heritage, how they describe it and how they identify their city as a cultural heritage site.

As mentioned above, it was formulated as a general objective to determine the characteristics of perception of cultural heritage among the inhabitants of the Trinidad city, which can contribute or become a threat to the maintenance of the status granted by UNESCO as a World Cultural Heritage of Humanity.

As methodology in order to collect data, this study adopted both qualitative and quantitative approaches. The technique used in the field research was a questionnaire. The use

of the questionnaire, adapted from the research "Knowledge and Perception of the Spanish Historical Heritage Society" from Gabriel Morate Martín (2007) was aiming to have a direct contact with the population, so that they could express their opinions and attitudes within the theme developed.

The questionnaire was also based on the indicators - knowledge, acceptance, identity, participation and evaluation - constituted of the reviewed literature on the topic. The survey sample was 360 people, aged 16 or older, who were considered eligible to have civil rights (voting) and physical and mental abilities to respond to the questionnaire.

2. Perception and Cultural Heritage

It is difficult to find in Trinidad of Cuba a point of separation between the material and the immaterial, since both complement the cultural heritage of the city. By touring in the historic centre of Trinidad, we can note the "component and defining parts of an urban centre, all of it declared a good of historical interest or very significant as World Cultural Heritage" (Castells, 2008: 9).

Throughout time, it has not been studied the perception of the population to know their understanding and knowledge about the Trinidadian heritage, in order to contribute to their maintenance. It is interesting to know what society defines as heritage and that it "builds its own history deciding which elements of their culture should reach the category of symbols of their identity" (Zamora Acosta, 2003: 11).

Perception can be studied in many ways, as Canevaro (2003) noted after he had conducted a survey regarding the manifestations of popular culture in the neighbourhoods and historic centres, aiming to establish communication between the city and the people. It has also been studied the perception of heritage, for example, in Spanish society, in order to "deepen the true meaning of heritage for society, finding out in what extent the Spanish know and appreciate their heritage" (Martín, 2007: 1).

The study of perception is inadequate in many societies and without the necessary investigations, it will be very difficult to know and understand the population's needs and the social processes of their environment, as stated Martín (2007: 3):

It is a fact that the emptiness of research on how the people's perception of their cultural heritage persists, we'll continue to ignore the basic data to effectively link cultural heritage actions related to the needs of the population.

The investigation of cultural heritage perception is necessary to know what people know and think about cultural issues; understand the similarities and differences among the collective perceptions; the "whys" about the cultural heritage of the city and what is the current concern. This helps to understand what people think and how they interact with their heritage, how they describe, identify and relate with their city as a World Cultural Heritage.

Studying the perception of cultural heritage in Trinidad is as important as researching the architectural character (built heritage) and also archaeological, touristic, legal, economic and social-cultural characters. Knowing what the population knows, thinks, values and how they participate in the construction of the heritage are insufficient investigations, since, so far, it has not been yet worked the perception in which the issue is known, to what extent is the construction, maintenance and perhaps the destruction of heritage, which limits the ability to respond to "variables that do not depend on the experts' opinion but on the historical trajectories of societies (or each of the groups composing) constituted subjects of their own history " (Zamora Acosta, 2003: 11).

Understanding the cultural heritage by the inhabitants of the Trinidad city helps in the interpretation and in the formation of a representativeness, which implies something that is part of the life and history of the city. Perceiving is not only knowing that Trinidad is a World Heritage Site, but to observe it as a dynamic process that requires the population's contribution to maintain its grant, since there are natural hazards to heritage, such as: natural disasters (sites suffer irreparable damage caused by natural events such as earthquakes, tsunamis or hurricanes); lack of budget or international projects (which makes difficult the restoration and beautification of the existing heritage) and among other dangers, those which come from society, when it is not involved and lacks knowledge about World Heritage, which also belongs to them.

The act of perceiving and interpreting the cultural heritage by the inhabitants of the Trinidad city is a dialogue between past and present, an inquiry into what can be done for cultural property, whether tangible or intangible. Gaining knowledge, participation and exchange between people and heritage is the answer to study the perception of cultural heritage as a key element to determine the characteristics that may contribute to its preservation.

One of the main factors contributing to the maintenance of the status of Cultural Heritage of Humanity is the perception that inhabitants have about their city. Therefore, it is consistent with the thinking of Marqués (2005, 6-7), who said: "the social agents involved in the preservation and maintenance of heritage, apart from the competent authorities, are the population close to the heritage site". Speaking of cultural heritage or activities without considering the population's

perceptions can lead to insurmountable contradictions, such as "increasingly alienate people from their heritage" (Baig, 2005: 1).

The population's perception helps to "identify objects and places that can be considered cultural heritage, related to the history of individuals" (Prats, 2005, 7), and also having the "social function of democratizing knowledge and, consequently, enhancing the heritage" (Goodey, Murta, 1995 apud Pires; Ferreira, 2007: 6). As mentioned above, due to insufficient research on the subject, of knowing what people think and know about their heritage, the next question poses as a problem: what features the perception of cultural heritage among the inhabitants of the city of Trinidad has that can contribute or become threat to the maintenance of the status granted by UNESCO?

Knowing what the population thinks, understands and identifies as the heritage of its city, it can provide a platform for discussions, create and evaluate cultural activities for the population. In turn, they can be more involved of conservation, assisting in the conservation of cultural heritage, because they already know its value and the importance of their city as World Heritage.

Perception begins to be assimilated from childhood to adulthood, when there is a selection and identification of what the environment represents for each person. In that environment, there is the cultural heritage of each city, which is revalued by the population's perception. Psychology and sociology are indispensable to materialise the study of cultural heritage perception in Trinidad. The first is the basis of the term that is studied and seeks to understand individual behaviour of each person through psychological processes and the latter studies the way social interaction is conducted.

The perception of cultural heritage in Trinidad is part of the knowledge that people get along life, it can be conceived at first as a social representation, because looking at the heritage, an image is imprinted on your mind, and through it the subject is able to represent the object, because he built it in his memory. In a second stage, when the abstract becomes concrete and can interpret the stimuli received, this process leads the individual to know, to identify, assess and comment on something that previously was not perceived or, was perceived, but not interpreted. Interpretation is the formation of individual consciousness of the subject and his relationship with the perceived.

A look at the tangible and intangible is the perception of cultural heritage that through the subject's knowledge of his environment values and interprets what he sees. It aggregates importance, sense of belonging and representation. It is an indispensable element to understand

the processes and build a culture inserted into the heritage of the city. Therefore, there are characteristics in the population of the Trinidad city on the perception of cultural heritage, which can contribute to the maintenance of the status granted by UNESCO, but also others that might become threats.

Through perception, it is possible to engage people in the conservation, maintenance and appreciation of cultural heritage so that "(...) through interpretation, understanding; through understanding, appreciation; and through appreciation, protection " (Tilden, 1998 apud Pires; Ferreira, 2007: 10). Interpreting, appreciating and protecting the heritage can be considered useful and it can lead to the construction of alternative courses in cultural processes, by allowing to know the people's perception about their heritage and, from their perception, may propose protective measures and in some way involve in the work of preservation and maintenance of heritage.

3. The Cultural Heritage of Humanity

The creation of the declaration of World Heritage, according to Santamarina Campos (2005: 60) is perhaps the most significant legacy of UNESCO, where the author gives a description of changes in interpretation about the heritage, conventions and decisions.

It represents a transformation of the classical heritage conception (globalization of heritage) and encapsulates its policy regarding custody (awareness and safeguard). The Convention on the Protection of the World Cultural and Natural Heritage in Paris, 1972, established that there were heritage elements that should be protected and preserved, because they were the common heritage of humanity and the humanity should safeguard them, even though the countries where they are in do not take care of them.

Rigol (2003) notes that, since the late 70s and 80s, began in Europe the ideas about integrated economic and social frameworks conservation, where the International Council on Monuments and Sites (ICOMOS), the study for the conservation and Restoration of Cultural Property (ICCROM) and UNESCO played a key role as managers of more advanced thinking on the subject. UNESCO (2009: 7) describes the creation date when it became operative and the definition of Cultural and Natural Heritage:

The concept of World Heritage was recognised by UNESCO in Paris, in 1972 and operative in 1975, includes monuments, groups and sites as having outstanding universal value from the point of view of history, art or science, and natural monuments, geological formations, natural landscapes that have exceptional value from the point of view of science or conservation.

The concept of Cultural Heritage and Cultural Heritage of Humanity is associated with the concepts of protection and preservation thereof, it presupposes legal provisions and means to protect from physical deterioration, besides taking into account traditional knowledge, craftsmanship, way of life and people's worldview. In Cuba, the assessment of cultural heritage begins with the triumph of the Cuban Revolution, in 1959, rising a stage of organization and use of cultural heritage and proper ideological concept to make use of cultural facilities in accordance with the principles of the Revolution.

According to Arjona (1986), it was conceived the plan to develop museums around the country, with restoration of movable property workshops, training of specialized staff on monuments laws for the protection of cultural heritage were enacted, the Commission of National Monuments was created, and also the school of Museology and the National Centre for Conservation, Restoration and Museology.

In Cuban society, there are several sites, natural and cultural factors that are on the List of World Heritage. Cuba taking a leading position and responsibility as belonging to the list of countries with World Heritage status implies a commitment to society and State, contributes to the maintenance of the status granted by UNESCO and to a further study of this site, so that it can provide local knowledge to society and to other people. Apart from its cultural representation, it is also considered a market value, because it attracts visitors and has been converted into privileged places of international tourism system. Cobiella (2009) describes several Cuban sites that are on the list of recognised by UNESCO as sites of Natural and Cultural World Heritage interest:

- Historic city centre of Havana and its Fortifications (1982).
- Trinidad and the Valley of the Sugar Mills (1988).
- San Pedro de la Roca Castle, Santiago of Cuba (1997).
- Granma Landing National Park (1999).
- Viñales Valley (1999).
- Archaeological Landscape of the First Coffee Plantations in Southeast Cuba (2000).

- Alexander Humboldt National Park (2001).
- Historic Centre of Cienfuegos (2005).
- Historic Centre of Camagüey (2008).

According to UNESCO (2008), in late 2004, there were six criteria in cultural and four in the natural category. In 2005, this was changed so that there is only one set of ten criteria. To be included in the World Heritage List, a site must have an outstanding universal value and meet at least one of the following criteria:

1. Represent a masterpiece of human creative genius.
2. Witnessing an important interchange of human values over a period of time or within a world cultural area, on developments in architecture or technology, monumental arts, town planning or landscape design.
3. Provide a unique or at least exceptional testimony to a cultural tradition or an existing or already vanished civilization.
4. Offer an outstanding example of a type of building, architectural or technological ensemble or landscape which illustrates a significant stage in human history.
5. Be an eminent example of a traditional human settlement, use of the sea or land, which is representative of a culture (or cultures) or human interaction with the environment, specially when it becomes vulnerable to the impact of irreversible changes.
6. Be directly or tangibly associated with events or living traditions, with ideas or beliefs, with artistic and literary works of outstanding universal significance. (The Committee considers that this criterion should be preferably accompanied by other criteria).
7. Contain superlative natural phenomena or areas of exceptional natural beauty and aesthetic importance.
8. Be one of the representative examples of major stages of Earth history, including evidence of life, geological processes creators of landforms, significant geomorphic or physiographic features.
9. Being one of the eminent examples of ecological and biological processes in the course of ecosystems evolution.
10. Contain the most representative and most important natural habitats for biodiversity conservation, including those containing threatened species of outstanding universal value from the point of view of science and conservation.

Baéz (2009) states that the site being inscribed on the World Heritage List is a first step towards safeguarding, due to peoples' sensitivity on their heritage, be it cultural or natural, because "management preservation and permanent processes are of interest to both local communities, site managers and national authorities."

World Heritage means the representation of a country, its history, customs and culture, is a reflection of the society that produces it and so, in the next chapter, the research methodology and a historical approach to the city of Trinidad and the Valley of Los Ingenios as Cultural heritage will be presented, since the World Heritage represents the legacy of present and future generations and the responsibility to protect is incumbent upon all signatory countries of the World Heritage Convention, to the international community and civil society. Everyone has the right, the privilege and responsibility to understand and preserve the universal values pertaining to cultural heritage that, at the same time, belongs to humanity and has global significance.

4. Methodological conception for the analysis of the perception of cultural heritage in the city of Trinidad

As methodology to collect data, this study adopted both qualitative and quantitative approaches to enable, throughout the results, the use of statistics to understand the motivations, behaviours and opinions of the researched people; thus, by appropriating the respondents' experiences and reflections, this study can critically report the descriptive analysis of the work.

The research has a sociological character, taking into account some elements of psychology and also sociological, since it investigates a social group in the context of an area considered as World Heritage Site by UNESCO, a very special way to "discover and describe how a society understands the world" (Zamora Acosta, 2003: 12); because it doesn't impose a vision or a bias which is higher or lower in a society; by studying people who are part of a society and it is involved in their perceptions of the cultural heritage, that means, to know, to review and criticise.

In order to know – in the investigation - about the characteristics of the cultural heritage perception that Trinidad's population has, Psychology studies were important to establish which is an external stimulus (sensations) and which is perception (interpretation). People were not studied individually, by taking in account their behaviour and interrelationships, but rather as a group of people, which resulted in the research sample to know how they get related to the socio-cultural environment and their perception about the patrimony.

The perception of cultural heritage in the study, by having as subject the population and as object the Cultural Heritage of Trinidad, was investigated by considering the way the population perceives the heritage, how people see it, what makes them interested, the social threats (those ones related to the perception of the population) and those ones which can contribute and / or endanger the condition of Trinidad as Cultural Heritage of Humanity, as there are others threats, as Baéz says (2009) related to the "natural and administrative causes."

The ethnographic method, dedicated to the observation and description of the various aspects of culture, routine and people's life, based the field study with the resident population in the city of Trinidad, noting its main characteristics as a social group and then describing and interpreting, also allowing to understand current realities and human perceptions. It was applied by observing the social life of the place, "in which the ethnographer uses his own human conditions, ability to communicate and capture the meanings of social life, to interpret and understand the actions of others in certain social contexts" (Pineda, 2009: 2).

For the conception of research, the variables analysed were the perception of cultural heritage and the condition of cultural heritage of humanity. Social indicators, formed from the main definitions discussed in the research, were: knowledge, acceptance, appreciation, identity and participation; the questionnaire and interview were designed from the reviewed literature on the subject and according to the indicators.

During the realization of fieldwork, a questionnaire that aimed to have direct contact with the population was applied, so to express their opinions and attitudes towards the subject discussed, to, later, do the analysis of responses and gather a large volume of descriptive statistics. It was adapted from the Knowledge and Perception of Historical Heritage Research in the Spanish Society, from Martin (2007), which helped determine to what extent the population of Trinidad know, participate and appreciate their cultural heritage.

The statistical universe for the composition of the data analyzed in this study was the population of the city of Trinidad, in Cuba and the unit of analysis, the population living in the city, so priority was given to a sample of the population aged 16 or older, as the age which residents in the country are considered eligible to exercise the right of voting and should possess the potential physical and mental abilities, providing more robust answers to the questionnaire, given the maturity in the formation of their personality.

To carry out the work, it took into account the total number of inhabitants living in the city of Trinidad, considering the 2002 Census data in the Municipal Bureau of Statistics, which are the most up-to-date data they have. It goes up to a total of 41,293 inhabitants. Of these, 8,212 are

children within the ages from 0 to 14 years old, so they were excluded from the sample. People of higher age were a total of 33,081, accounting for 80.1% of the population, constituting the sample universe. From the above population, considering, in this case, the adult population, a sample of 360 inhabitants, which represent 1.1%, was taken. All this was calculated mathematically by probability sampling. The random sample obtained can be considered simple, which allows considerations not only for the studied population, but also for the entire context of the city.

The questionnaire and structured interview were held in June 2015, with the questionnaire being answered by residents from areas A, B, C, transition zone (TZ) from the historic centre and also by residents of the periphery (P) of the city (Figure 1).

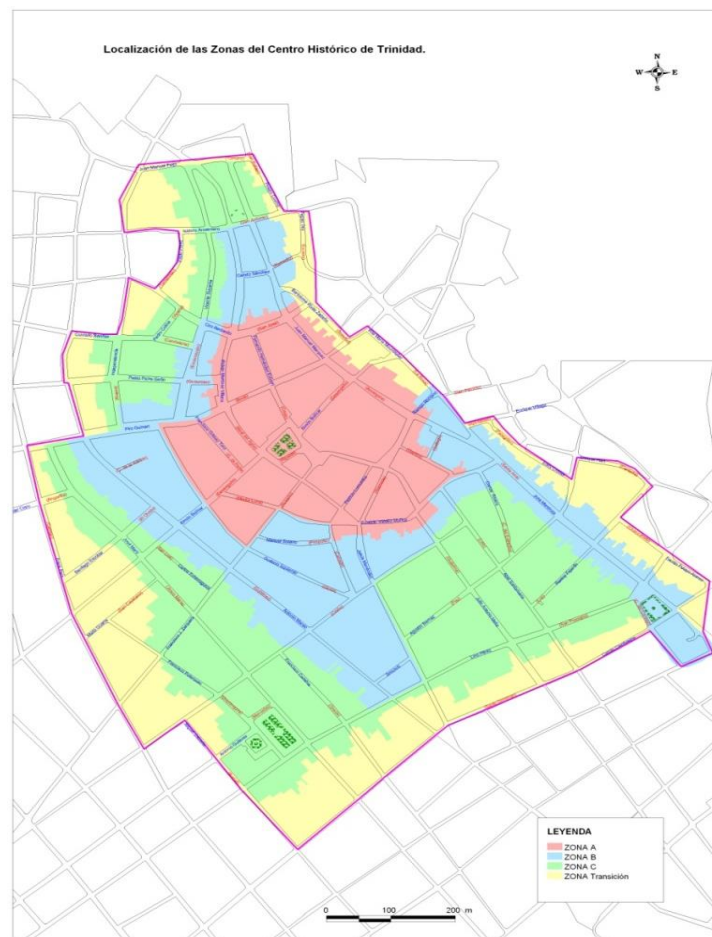


Figure 1. Historic centre areas

Source: City of Trinidad and the Valle de los Ingenios Curator's Office, Master Plan Department, 2010

The questionnaire purpose was to verify the residents' perception on Trinidad's world heritage with questions about gender, education level, residence area, occupation, definition of cultural heritage; if they agreed that the historic centre of Trinidad should be considered cultural heritage of humanity; if the historic centre being a world heritage site makes it an identity factor for the Trinitarian; the importance of preserving the historic centre as a world heritage, among other questions. As for the structure interviews, researchers and city historians working at the Curator's Office were asked to describe, in their work, the history, the granting of cultural heritage of humanity, heritage conservation status, restoration policies, among other questions.

This geographical distribution was done with the objective of having different perceptions on cultural heritage, as people that are located in the historic centre, mainly in zones A and B, identify what they perceive as necessary for economic development city, where conservation is fundamental to this achievement, while people living in the periphery feel remote and some do not understand the importance of cultural heritage, its value and the much still needed to be done for its conservation.

The Urban Historic Centre declared area "has 1168 monumental buildings, mostly homes, representing the domestic architecture of the 18th and the 19th centuries and occupies an area of 48.5 ha" (Lopez and Perez, 2003: 10). Historic centre areas are divided according to the historical-architectural, integrity and condition values. To protect the heritage of the historic centre, degrees of protection that correspond to its assessment, condition, their relation with the environment and other factors that determine their social and cultural interest were established.

The statistic package used for quantitative data was SPSS version 15 and Microsoft Office Excel 2007. The quantitative and qualitative results were interpreted descriptively.

5. From Village to City of Cultural Heritage of Humanity: A historical approach to Trinidad and Valle de los Ingenios

On the declaration issued by UNESCO in Brasilia, in 1988, with ten criteria, items 4 and 5 are the ones that declare Trinidad and Valle de los Ingenios Cultural Heritage and second Cuban site inscribed on the World Heritage List world. These items are:

4- Provide an outstanding example of a type of building, architectural or technological ensemble or landscape, which illustrates a significant stage in human history.

5- Being an eminent example of a traditional human settlement, use of the sea or land, which is representative of a culture (or cultures), or human interaction with the environment, specially when it becomes vulnerable to the impact of irreversible changes.

The former village of the Santísima Trinidad, now known as Trinidad of Cuba, belonging to the province of Sancti Spiritus, was founded in 1514, in the 16th century by Diego Velázquez; it is the third of the first seven villages founded by the Spanish colonizers. "It is located in the south centre of the country" (González, 1997: 7), has as main limits: "the north is protected by the Guamuhaya mountains, on east, the San Luis Valley (...), extends itself to the proximity of the city of Sancti Spiritus. For the West, the Tayaba (...) River. To the south, the Caribbean sea "(Santana, 2008: 186).

The territory belonging to Trinidad, called Valle of los Ingenios, occupies an area of "276 km², which are scattered by numerous archaeological, architectural and natural sites of great value" (Lopez and Perez, 2003: 12). The perimeter declared Heritage of Humanity "includes three geographic areas: the San Luis Valley, the Valley of Santa Rosa and Meyer Agabama-depression, all inserted in the historical and social-economic phenomenon of the last century "(Lopez and Perez, 2003: 12).

The urban historic centre of Trinidad gives the example of architectural ensemble maintained over time, a native of the 17th to the 19th century, demonstrating the different values of the city's religious, civil, domestic and vernacular architecture, the economic boom derived from the development of the sugar industry and an authentic human work. The paving stones and houses deliver a colonial atmosphere with the natural landscape, leading to a key touristic attractive for the development of the city.

The historic centre has features that are highlighting worth due to the preserved traces of the original layout, "for being irregular or spider web shaped, through which growth spontaneity is reflected" (City of Trinidad and Valle de los Ingenios Curator's Office, 2008) and their curvatures, cracks and inequalities, Trinidad has remained with the cobbled streets (...) "(Santana, 2008: 282) that give exceptional heritage value.

The newspaper "Vocero Cívico" published, respectively in 1954 and 1956, the opening of institutions like the Lyceum Society, the Gustavo Izquierdo Library and the decrees and laws regulating tourism in Trinidad, in which the "Association for Trinidad is invested as delegate of the Cuban Tourism Board as a matter of Conservative Institute of the city of Trinidad" (Echemendía, 1954: 257).

With the triumph of the Cuban Revolution in January 1959, protective actions were consistently continued and also the government implemented new cultural policies throughout the country. In 1974, the building known as the Palacio Brunet Romantic Museum was reopened; recognition of Trinidad by the National Monuments Commission as "National Monument was in 1978, beginning in this period major studies to determine the area of greatest historical value" (Vázquez, 2008: 3). The Municipal Monuments Commission would then regulate the activity of protection and largely restoration actions of local heritage.

Currently, the responsible for the restoration and conservation of the historical town is the Master Plan of the Curator's Office, whose main objectives, among others, are "to investigate, diagnose and propose intervention plans for the historic centre and to the properties thereof, besides the management and approval of changes in land use and integrated management of heritage " (City of Trinidad and the Valley of the Sugar Mills Curator's Office, Master Plan Department, 2010: 2). It also plans to establish a management plan, which responds to the need for a planning tool to face the challenge of protecting and sustainably manage the monuments.

It would be interesting that the institution responsible for "taking care" of the heritage city always take into account the words of Santana (2008) apud Cruz (2008: 19) when he states that the declaration of Trinidad as Cultural Heritage is not a simple coincidence, it is because of the economic and social aspects of the past and therefore must be preserved, and also keep the aspects that makes it an universal heritage:

No wonder Trinidad has been distinguished with this declaration of World Heritage as well as Havana, that does not mean it is more valuable, but more exceptional. What is this exceptional about? Well, first the condition of typological integrity in which the city has reached our days: Trinidad is an extraordinary case of preservation of a historical past; it is preserved as it was in the past. This relation between historical and natural environment preserved is what makes Trinidad a very exceptional case to be maintained.

It is population's and public institutions' duty to maintain the conservation of the historic city and its Valley of los Ingenios, so that, for the next centuries, it remains an example of exceptionality. Tourism in Trinidad began in the 90s as a new economic alternative "because, in 1989, the Cuban government faced an economic crisis caused by the decline of socialism" (Vázquez, 2008, 5) and constituting an important "source of income necessary to stabilise an economy hit hard by the decline of socialism and the strengthening of the blockade of the United States" (City of Trinidad and the Valley of the Sugar Mills Curator's Office, 2008).

The convenient solution to this crisis was to announce to the world that the freezing of Trinidad in time by economic and geographical factors were interesting to be appreciated by the idea of working on cultural, sun, beach and nature tourism. Cultural tourism was based on cultural heritage, main attraction of Trinidad, which, added to the natural attractions, constitutes what it has today as a tourist product marketed nationally and internationally.

With the advent of tourism, the city was not ready to receive a non-traditional economic alternative and with the mass arrival of tourists it was necessary to restore some buildings and rehabilitate them for tourism, thinking about what is now called private lease for hotels, since there were not available, at that time, in the city, enough hotels to meet the tourist demand.

Like any city starting with a new economic alternative, there were strategies to "embrace" the local tourism, such as mobilizing and strengthening the culture and cultural agents, in order to "give visitors the best and most native of its music, dances and craft traditions, while they redesigned and put into practice new conservation plans and urban revival in priority sectors" (Echenagusía, 2007: 17).

Today, the task of tourism is to contribute to safeguard the heritage of Trinidad, thinking that, for the enjoyment of future generations, this heritage must be limited on usage, authenticity and everything that can change or rehabilitate it in function of tourism should be well managed, considering the significance of the building and immaterial in a city declared a World Heritage Site, and a "historical and artistic study in question must be one of the most ambitious programmes of action (...)" (Escribano and Sanchez, 2004: 4), always coordinated with multidisciplinary actions between tourism and the public sector in the areas of collaboration, coordination and cooperation.

Perhaps, heritage cities lack tourism policy designed solely to stimulate cultural tourism, to make use of participatory revenue and carry out conservation of tangible and intangible heritage, indispensable for the tourist market, because as stated Vázquez Nieto (2005: 1), there is a "lack of a tourism policy designed exclusively for heritage cities".

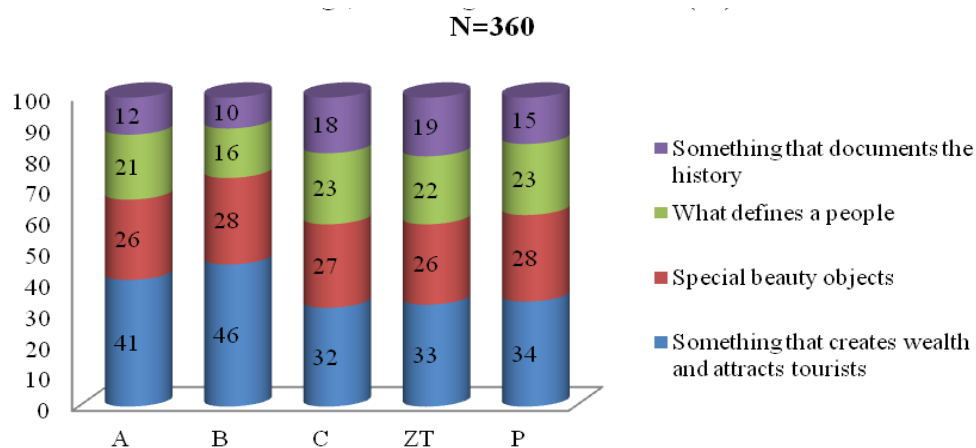
Still, each city considered World Heritage maintains its features and elements that allowed it to boast the category awarded by UNESCO and at the tourism market, which reflects the international category of product and touristic segment diversification, patrimonial cities offer a "highly competitive product (...) and that encompasses the cultural, the monumental, artistic and, in many cases, natural heritage. We are, of course, much more than a beach and a palm tree, because we are the World Heritage and the Heritage of Humanity" (Vázquez Nieto, 2005: 1).

6. Results of the perception of cultural heritage in Trinidad

From the sample size, a random selection of the population was made and then proceeded to the collection of information required for analysing the data. The sample was made as follows: of the 360 people surveyed, 53% are women and 47% men, 98% are from Trinidad and only 2% are not, 99% permanently living in Trinidad and 1% not.

68% of the population is aged between 16 and 45, and 32% is aged 46 or plus. 57% of respondents have a higher level of secondary education (pre-university and technical school), 25% higher education and only 2% primary level. On the level of population's employment, 37% are top-level media professionals and technicians and the rest are housewives, self-employed, etc.

Zones A, with 41%, and B, with 46%, are the ones that specify with more percentage the definition of Cultural Heritage such as generating wealth and attracting tourists. However, the upper secondary education, with 21%, said objects of special beauty as closer to heritage definition (Graph 1).



Graph 1. Population's perception on the definition of cultural heritage according to residence area

Source: Author

Areas A and B are the most representative when it comes to operation and expansion of tourism in the city of Trinidad, as they are located in the monumental area of historic centre, which explains their perception about cultural heritage.

According to the references used in the theoretical framework, cultural heritage is related to heredity, with identity, a social construction that links people with its history, a collective

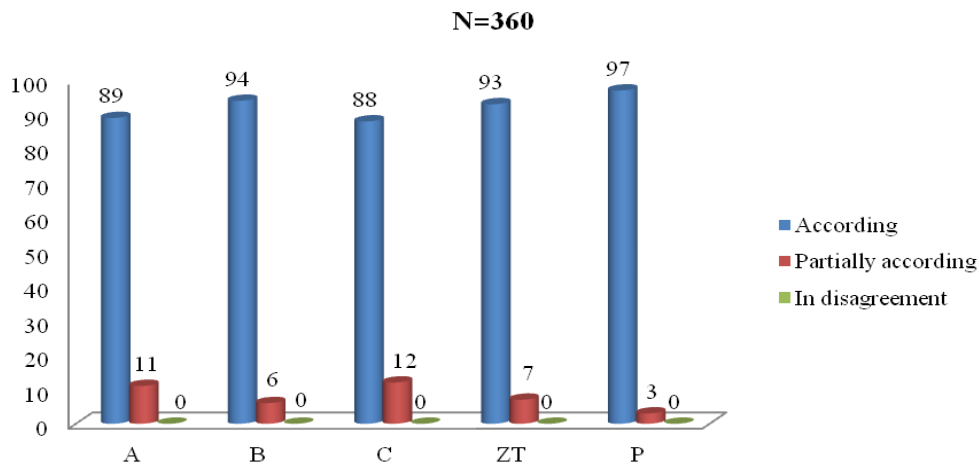
memory that can remember the past in this and other conceptual meanings that give importance to heritage. However, the prevailing definition that the population of Trinidad have on cultural heritage matches the research done by Flores (1997) apud Barretto (2003: 54), when studying tourism in the Brazilian city of Blumenau, which obtained as response on interviews that "the tourism is something that brings money."

With the population's answers, it is possible to note that they don't have a clear definition of cultural heritage and the benefits it can bring to them, because something that generates wealth and attracts tourists is a positive result of a tourism product that is used as "dynamic economic resource" (Azkarate *et al.*, 2003, 5) and not a type of model used by industrialized societies, who have a concept of "development understood as economic growth, where the culture is in a dependent level of economic development, limiting its scope to the acquisition and assimilation of knowledge" (Moré, 2006a: 56) and avoiding, in a way, the essence of heritage representativeness.

The other argument, which sees heritage as an object of special beauty, is considered an outdated concept, because heritage "is no longer focused on objects, but on the context" (Moré, 2006a, 17). If in the 17th century heritage was seen as an object of beauty, examples of aesthetic value, today they are conceived in a cultural context, as a "vehicle of social integration, such as work or legacy of the past in which a community recognises and identifies itself (...)" (Azkarate *et al.*, 2003: 5).

Perhaps, with tourism, the Trinidadian are mixing culture with economic development, which does not cease to be beneficial, because, at present, heritage is seen as dynamic, socialized among societies, which can be consolidated as a source of wealth and developing, an alternative to the city's economy and generator of economic flows.

On the level of acceptance that the historic centre of Trinidad is considered Cultural Heritage, over 88% of respondents agreed with the granting of UNESCO, highlighting the outskirts of the city with 97% acceptance; more than 3% partially agreed and none of the respondents disagreed, which we can understand from the answers on the "acceptance" indicator (Graph 2).

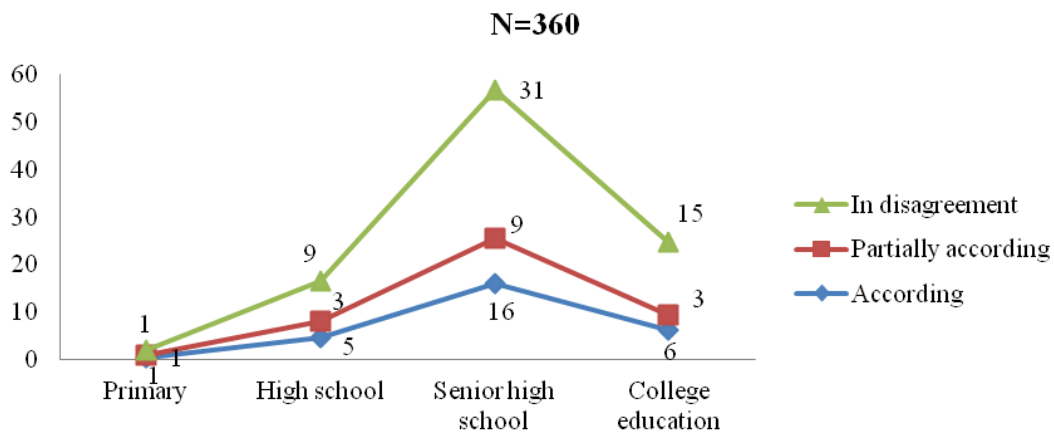


Graph 2. Acceptance level by residence area of the Historic Centre Trinidad being considered Cultural Heritage

Source: Author

The data confirms the point made by Troitiño Vinuesa (1995: 742) that this "small portion of urban fabric is a symbolic space that serves to identify, differentiate and give personality to the cities" and a "real book where traces of the past reveal the history of the city and its inhabitants" (Lery, 1987 apud, Troitiño Vinuesa 1995: 742). Although the majority of respondents felt that they agree with the qualification of the historic centre of Trinidad as World Heritage, it was not mentioned among the three most representative examples of cultural heritage of the city. The cause may be related to the fact that what the population distinguishes as cultural heritage is not the architectural ensemble, but each of the elements that forms this set, which can be appreciated in the historic centre, and serves as a "coat" for them, a bit of Trinidad seen as a museum without doors, walls nor windows.

Concerning the "identity" indicator, the condition of Cultural Heritage, for those with College education (15%) and Senior high school (31%) do not consider it as part of his Trinidadian identity, so they disagree. Between 16% and 28% of respondents partially agree that this condition is part of their identity, that it has additional value and identification with this place (Graph 3).



Graph 3. The condition of Cultural Heritage as an identity factor, according to the education level of the respondent people

Source: Author

If Trinidadians do not consider the status of Cultural Heritage as part of its identity, is because they do not feel recognised, they can not interpret the significance of the site, there is no deeper knowledge that will make them understand the value and, therefore, as this award is given by UNESCO, an international institution, this nomination is seen by Cuba as a title.

For this title to be considered by the public as important, the promotion and cultural activities are the main vehicles of communication, so that people can come to understand, appreciate and value this universal heritage which also belongs to them. To boost the cultural heritage so that it reaches all population layers, it is necessary that the promotion and cultural activities to areas of the historic centre and periphery are "from the community, for the community, with the community and for all the community, considering the important role that the community plays as leading axis in any process of cultural development " (Rodríguez, 2004: 10).

If Trinidadians do not recognise the declaration as part of their identity, it is because there is no promotion of awareness and identification with the heritage, either through the promotion of cultural activities, whether in school or in visits to museums. Keep in mind that when there is misinformation and ignorance, there is loss of identity, because memory is not able to remember what was not learned.

Cultural development and identity imply reproduction and recognition of the nourished values of cultural heritage, update citizens about the ways in which a society can appropriate itself of its own history and collective memories. By recognising the value of heritage, they are

taking into account features or elements that lead people to recognise and identify themselves with what they have in common, which is part of their culture and history.

7. Conclusion

The historical antecedents demonstrate that it is not by chance that Trinidad is Cultural Heritage of Humanity, since the city's conservation and maintenance work begins with the Pro Trinidad Association and is currently in charge of the City of Trinidad and Valle de los Ingenios Curator's Office. Trinidad was granted the title of National Monument in 1978, and in 1988 UNESCO declared it Cultural Heritage of Humanity, which reaffirms its historical-cultural values present in a city of over 500 years of foundation. The main characteristic of cultural heritage perception in Trinidad, known from the results of the research, are the limited knowledge of the population on cultural heritage and the importance of Trinidad as a Cultural Heritage, limited participation in the city's cultural activities and heritage conservation, expressed in the fact that heritage is conceived as an economic rather than cultural capital.

The population has little knowledge about cultural heritage and the granting of Trinidad's heritage of humanity, as to the Trinitarians, cultural heritage is related to everything that generates wealth and attract tourists. In the survey, the heritage definitions linked to a people's identity and historical legacy were not mentioned by many of them, indicating that tourism, in fact, commercializes culture. Therefore, the perception of cultural heritage is linked to the economic factor and level of education, since the autonomous workers and the workers of the tourism sector perceive the heritage more as an economic resource than sociocultural. However, the higher the population's level of education is, the more they will be directed to realize the assets as an aggregating value of their identity and that tourism only appropriates it to make the tourists have a consumption experience of its tradition and cultural manifestation.

The population's limited knowledge about cultural heritage and the importance of Trinidad as a Cultural Heritage of Humanity, as well as the limited participation in the city's cultural activities and the heritage conservation process can be considered the two main social threats. The participation of residents in safeguarding the heritage and cultural activities that make them have interest to know and understand the importance of their city as a World Heritage and its historical representativity, are essential strategies to counter potential social threats.

There is a high acceptance to the fact that the historic centre of Trinidad is considered Cultural Heritage and the people recognise its value. However, it was demonstrated through their answers that they do not conceive the idea of the historic centre as an ensemble. The

population does not consider as part of their identity the status of Cultural Heritage, which may indicate that they don't see themselves recognised, don't know its meaning, have difficulty assimilating the declaration and can be seen it as nothing more than a title.

References

- Arjona, M. (1986), *Patrimonio cultural e identidad*, La Habana, Cuba, Editorial Letras Cubanas, 11-41.
- Azkarate, A., Ael, M.J.R., Santana, A. (2003), *El Patrimonio Arquitectónico*, 1-27, available at: <http://www.ehu.es> (consulted on: 20.05.2010).
- Baéz, A. (2009), *Turismo Patrimonial, para conservar lo nuestro*, (Multimedia) Turismo Cultural en América, Programa de las Naciones Unidas para el Medio Ambiente.
- Baig, A. (2005), "Participación comunitaria para la revitalización de las ciudades del Patrimonio Mundial", Trabajo presentado en el 8º *Coloquio Mundial de la OCPM*, Cusco, Perú.
- Barretto, M. (2003), "La delicada tarea de planificar turismo cultural: Un estudio de caso con la "germanidad" de la ciudad de Blumenau, SC, Brasil", *Revista de Turismo y Patrimonio Cultural*, 1(1), 51-63, available at: <http://www.pasosonline.org> (consulted on: 20.12.2008).
- Canevaro, J.S. (2003), *Percepción y memoria de la ciudad*, 1-7, available at: <http://www.jdsac.com> (consulted on: 11.01.2009).
- Castells, J.F. (2008), "Patrimonio en cuestión lo tangible y lo intangible en el patrimonio de una ciudad histórica", Trabajo presentado en la mesa redonda Patrimonio Cultural en el *II Congreso Internacional de la Asociación Latinoamericana de Antropología*, San José, Costa Rica, 1-28.
- Cobiella, N.M. (2009), *Patrimonios de la humanidad ciudades virtuales latinas*, 1, available at: <http://www.redcubaba.com> (consulted on: 15.04.2009).
- Cruz, A.C. (2008), "Un don del Cielo: entrevista con la investigadora Alicia García Santana", *Revista Tornapunta de la Oficina del Conservador de la Ciudad de Trinidad y el Valle de los Ingenios*, 2(4), 18-22.
- Echemendía, T.L. (1954), "Trinidad y el Turismo: historia de una larga jornada a favor del resurgimiento de un pueblo", *Editorial Gente*, 7-11.
- Echenagusía, V. (2007), "Hotel Iberostar Trinidad, tradición y modernidad", *Revista Tornapunta de la Oficina del Conservador de la ciudad de Trinidad y el Valle de los Ingenios*, 1(2), 16-20.
- Escribano, S.S., Sánchez, R.L. (2004), "Las políticas locales de desarrollo del turismo cultural". *I Congreso Internacional Patrimonio, Desarrollo Rural y Turismo en el siglo XXI*, Osuna, España, 2-10.

- González, A.G. (1997), *Trinidad de Cuba: Guía Turístico Cultural*, Torino, Italia, 5-67.
- López, R., Pérez, Y. (2003), "Trinidad y el Valle de los Ingenios: un esquema de manejo sostenible en sitios de pequeña escala", *Revista Arquitectura y Urbanismo*, 24(1), 1-12.
- Marqués, S.R. (2005), "Ciudades del pasado, ciudades del futuro: dar vida a la arqueología urbana puesta en valor de los yacimientos arqueológicos urbanos", *Coloquio Internacional e Interdisciplinar – APPEAR*, Unión Europea, Comité de las Regiones. Bruselas, 4 y 5 de octubre, 1-7.
- Martin, G.M. (2007), "Conocimiento y percepción del patrimonio histórico en la sociedad española", *Revista de Patrimonio*, 1-10, available at: <http://www.revistadepatrimonio.es>, (consulted on: 23.03.2009).
- Moré, P.T. (2006a), "Patrimonio e Interpretación", in Moré, P.T. (coord). *Técnicas de interpretación del Patrimonio Cultural, selección de lecturas*, La Habana, Editorial Félix Varela, 15-74.
- Moré, P.T. (2006b), "El Patrimonio Histórico Cultural y Natural como factor de producción turística", in Moré, P.T. (comp). *Gestión Turística del Patrimonio Cultural, selección de lecturas*. La Habana, Editorial Félix Varela, 5-8.
- Oficina del Conservador de la Ciudad de Trinidad y el Valle de los Ingenios (2008), *Trinidad de Cuba: Patrimonio de Todos* (Multimedia).
- Oficina del Conservador de la Ciudad de Trinidad y el Valle de los Ingenios, Departamento de Desarrollo e Inversiones (2010), *Leyes de Protección al Patrimonio Cultural en Cuba*, 1-5.
- Pineda, R. (2009), *Investigación Etnográfica*. Departamento de Antropología. Serie: Aprender a Investigar. Modulo 2: La Investigación, 1-3, available at: <http://www.ciefim.googlepages.com> (consulted on: 10.01.2010).
- Pires, F.M., Ferreira, M.A.T. (2007), "Percepções sobre a interpretação do patrimônio edificado em Tiradentes", *Revista Eletrônica de Turismo Cultural*, 2º semestre, 1-23, available at: <http://www.eca.usp.br/turismocultural> (consulted on: 05.06.2009).
- Prats, L. (2005), "Concepto y gestión del patrimonio local", *Cuadernos de Antropología Social*, 21, 1-15, available at: <http://www.scielo.org.ar>, (consulted on: 9.06.2009).
- Rigol, I. (2003), "Los centros históricos y el patrimonio", *Revista Cultura y Desarrollo*, 3, 1-13, julio, available at: <http://www.unesco.org/cu/revistac&dmagazine> (consulted on: 18.08.2009).
- Rodríguez, G. J. H. (2004), Reflexión en torno al desarrollo cultural y desarrollo humano.
- Santamarina Campos, B. (2005), "Instituciones, Normativas y Categorías del Patrimonio Cultural", in Santamarina Campos, B., *La Memoria construida, patrimonio cultural y modernidad*, 53-89.

- Santana, A.G. (2008), "Trinidad: un don del cielo", in Santana, A.G and Larramendi, J.A., *Las primeras villas de Cuba*, Guatemala, Ediciones Polymita S.A, 181-230.
- Troitiño Vinuesa, M.A. (2006), *Centros Históricos: Nuevos procesos y actividades económicas. Turismo y estrategias de cualificación y dinamización*. Plan y gestión urbanística en la rehabilitación de los Centros Históricos, FEMP, Cuenca, 14 de noviembre de 2006, 1-17.
- UNESCO (2008), *Definición del Patrimonio Cultural*, available at: <http://www.portal.unesco.org> (consulted on: 16.01.2009).
- UNESCO (2009), *O patrimônio: legado do passado ao futuro*, 1-7, available at: <http://www.unesco.org>, (consulted on: 11.07.2009).
- Vázquez, N.B. (2008), "Más de veinte años en la defensa de Trinidad", *Revista Tornapunta de la Oficina del Conservador de la Ciudad de Trinidad y el Valle de los Ingenios*, 2(4), 3-9.
- Zamora Acosta, E. (2003), *Sobre Patrimonio y Desarrollo. Aproximación al concepto de Patrimonio Cultural y su utilización en procesos de desarrollo territorial*, 1-18, available at: <http://www.personal.us.es> (consulted on: 20.05.2010).

Chapter XVIII

Lisbon Fado as Heritage of Humanity:

Interconnections with Tourism

Lisbon Fado as Heritage of Humanity: Interconnections with Tourism

CLÁUDIA H. N. HENRIQUES¹²²

Abstract:

The city of Lisbon and its historic quarters have a cultural tradition and identity associated with *fado*, which was classified as “Intangible Cultural Heritage of Humanity” by the United Nations Educational, Scientific and Cultural Organisation in 2011. In this context, this study sought to find out how territorial and sectorial planning and management policies have contributed to tourists’ appreciation of *fado*. In terms of methodology, the literature on this topic was reviewed. A content analysis was then carried out on a set of planning and management documents, among them the “Reports and Accounts” of the *Empresa de Gestão de Equipamentos e Animação Turística* (Facilities Management and Tourism Entertainment Company), the municipal company that manages Lisbon’s *Museu do Fado* (Fado Museum). The study’s results confirm that the importance of this intangible heritage for tourism in Lisbon and its historic quarters has been widely recognised. The findings also show that a set of initiatives are continually being implemented under the “protection plan”, such as strengthening the archival network, creating and disseminating a digital (sound) archive of *fado* phonograms, developing educational programmes, generating publications and creating *fado* routes.

Keywords: Fado; Intangible Cultural Heritage; Lisbon; Historic Centre; Historic Quarters; Fado Museum

Resumo:

A cidade de Lisboa e seus bairros históricos têm a sua tradição e identidade culturais associadas ao Fado, classificado como Património Intangível da Humanidade, pela UNESCO, em 2011. Neste contexto, o presente capítulo tem como objetivo averiguar de que modo as políticas de planeamento e gestão territorial e sectorial contribuíram para a valorização turística do Fado. Em termos metodológicos, para além de uma revisão bibliográfica sobre a temática, apresenta-

¹²² Department of Economics, School of Management, Hospitality and Tourism (ESGHT), University of the Algarve. CIEO - Research Centre for Spatial and Organizational Dynamics, chenri@ualg.pt

This paper was supported by national funds from Fundação para a Ciência e Tecnologia (FCT).

se uma análise de conteúdo de um conjunto de documentos de planeamento e gestão pública, entre eles os “Relatórios e Contas” da EGEAC, empresa que gere o Museu do Fado. Os resultados evidenciam o reconhecimento crescente da importância turística do Fado para Lisboa e seus bairros históricos. Evidenciam, também, a existência e implementação de um conjunto de ações, nomeadamente em domínios como: reforço da rede de arquivos, criação e divulgação de arquivo digital de fonogramas, programa educativo, publicações/edições e roteiros de Fado.

Palavras-chave: Fado; Património Cultural Intangível; Lisboa; Bairros Históricos; Museu do Fado

Resumen:

La ciudad de Lisboa y sus barrios históricos tienen su tradición y su identidad cultural asociada al *Fado*, clasificado como Patrimonio Cultural Inmaterial de la Humanidad por la UNESCO en 2011. En este contexto, el presente estudio tiene como objetivo investigar cómo las políticas de planificación y gestión territorial y sectorial (relativos al turismo) han contribuido a la apreciación del *Fado*. En cuanto a la metodología, el trabajo, además de una revisión de la literatura sobre el tema, presenta un análisis de contenido de un conjunto de documentos de planificación y gestión pública, incluyendo los *Relatórios e Contas* de EGEAC, la empresa que gestiona el *Museu do Fado*. Los resultados destacan la importancia turística de poner en valor este patrimonio inmaterial para Lisboa y sus barrios históricos, así como un conjunto de acciones que se han implementado, en particular en áreas tales como el fortalecimiento de la red de archivos, creación y difusión del archivo digital de fonogramas, programa educativo, ediciones y los scripts de *Fado*, entre otros.

Palabras Clave: Fado; Patrimonio Cultural Inmaterial; Lisboa; Barrios Históricos; Museo do Fado

1. Introduction

Fado is a “rooted poetically musical tradition” (Nery, 2012: 72) in Portugal. *Fado*, as “urban popular music” (Nery, 2012: 8), is a clearly identifiable cultural element of the historic quarters (HQs) of the city of Lisbon and of Portugal, having been classified as “Intangible Cultural Heritage (ICH) of Humanity” by the United Nations Educational, Scientific and Cultural Organisation (UNESCO) in 2011. The present study sought to determine the importance of public sector planning and management in the appreciation of *fado* as cultural heritage experienced by residents and tourists, particularly after its classification as ICH.

The second section below presents the theoretical framework applied, including the importance of culture for the development of cultural and creative urban tourism and, more specifically, conceptualising ICH as “living heritage”. In this context, the value of this heritage and the need to safeguard it – as defined in a set of documents, among them the 2003 Convention for the Safeguarding of ICH – are discussed.

Centring on the case of *fado*, the third section presents the results of this study’s analytical methodology – a literature review and content analysis of a set of territorial and sectorial planning and management documents. The fourth section provides a brief definition of *fado* and its important role in Lisbon’s cultural identity, namely, in its HQs. The criteria taken into account by UNESCO to classify *fado* as an ICH are next reviewed. Then, this chapter reflects on the importance attributed to tourism in the spatial planning and management of Lisbon and its HQs, focusing on urban rehabilitation policies that led to the creation of the *Museu do Fado* ((*Fado* Museum (FM)).

The study then focused on an analysis of the *Relatórios e Contas* (Reports and Accounts) of Lisbon’s *Empresa de Gestão de Equipamentos e Animação Turística* (EGEAC)¹²³ (Facilities Management and Tourism Entertainment Company). The documents examined were from the period immediately after the classification of *fado* as ICH, in 2011, until the present, in order to determine how the FM’s management has integrated the initiatives presented in the protection plan developed for *fado*’s candidacy to UNESCO’s Representative List of the ICH of Humanity. The final section presents conclusions based on the study’s results.

2. Importance of culture for urban tourism development

2.1 Culture and urban development

Culture, as a complex concept, has been defined from multiple perspectives. This multiplicity needs to be understood as part of an evolutionary process that has resulted in an expanded conceptualisation of culture. As Ashworth (2015) points out, culture has become associated with not only “high culture” but also “popular culture” and “everyday culture” in which, in addition to more tangible expressions, culture’s intangible manifestations and lifestyle features have gained increasing importance.

¹²³ EGEAC is a municipal company founded in 1995 – initially known as EBAHL (Facilities of Lisbon’s Historical Neighbourhoods) – and given the responsibility of managing cultural facilities and activities in Lisbon. EGEAC manages the FM.

According to UNESCO's 2001 Universal Declaration on Cultural Diversity, culture can be seen as "the set of distinctive spiritual, material, intellectual and emotional features of a society or a social group that encompasses art and literature, lifestyles, ways of living together, value systems, traditions and beliefs". This is associated with a set of "cultural domains" and with ICH (UNESCO, 2013).

The ongoing development of the concept of culture is compatible with two tendencies: the culturalisation of economic life and the economisation of cultural life (Scott, 2000). This has ensured that the recognition of the value of culture has increased.

Holden (2004: 17-20) distinguishes between three interdependent forms of cultural value: instrumental, institutional and intrinsic. Simultaneously, culture's "commercial value" and its "use" and "non-use value" are recognised. Thus, culture is associated with cognitive, educational, symbolic, semiologic, economic, artistic, national, historical, social, spiritual and aesthetic values (Holden, 2004; O'Brien, 2010).

As culture matters for economic development, its full integration into sustainable development¹²⁴ should be based on a simbiotic relation between culture and economy. As defined by the UNWTO/UNESCO's (2015) World Conference on Tourism and Culture: Building a New Partnership, culture "is (...) a driver of development, led by the growth of the cultural sector, creative industries, tourism and the arts and crafts". Culture is recognised as:

A key tourism asset, inspiring millions of tourists to visit new destinations each year. Sustainably managed, tourism can be a considerable force for the promotion and safeguarding of the tangible and intangible heritage it relies on, while encouraging the development of arts, crafts and other creative activities.

Consequently, culture, creativity, innovation, knowledge and access to information are powerful drivers of sustainable development (UNWTO/UNESCO, 2015).

Regarding the role of cultural heritage in development strategies, the Nara +20 (ICOMOS, 2014: 21) points out that cultural heritage "must take into account cultural values, processes, community concerns and administrative practices while ensuring equitable participation in socioeconomic benefits". The keywords, in this context, are: authenticity, conservation, community, cultural values and stakeholder participation.

¹²⁴ See Florence Declaration - 2014 and 2030 Agenda for Sustainable Development.

Concerning urban places, the UN's 2030 Agenda for Sustainable Development includes among its 17 goals a specific objective to "make cities and human settlements inclusive, safe, resilient and sustainable" (UNESCO, 2016). The agenda also identifies culture and creativity as two of the essential levers for action in this context (UNESCO, 2016). The aim is to promote culturally sensitive urban strategies to build resilient and inclusive cities through "re-humanising the city, enhancing local culture, recognising cultural diversity, promot(ing) pluralism, access to culture, participation in cultural life, cultural infrastructures, heritage conservation, create a sense of belonging (and) job creation" (UNESCO, 2016).

Cultural tourism is recognised as having the "potential to facilitate the building of cultural identity and image within a host city" (UNESCO, 2016). Although this type of tourism emerged in the 1970s, only in the 1980s and 1990s was it recognised as a growing phenomenon of great magnitude and a generator of higher Gross Domestic Product and employment. As Mckercher and Cros (2002, cited in Henriques, 2003) state, the fragmentation of the mass market meant that researchers began to recognise cultural tourism as a "high profile, mass market activity", with a privileged role in cities.

Cultural tourism is now regarded as the catalyser of the "meeting" with the "other" and their culture, making this "other" "visible". If culture is considered a source of creative experiences, creative tourism can be seen as an extension of cultural tourism (Richards, 2011). For UNESCO (2013), creative tourism associates travel directly to more engaging and authentic experiences with active participation in learning about the arts, heritage or each place's unique character, as well as involving greater contact with residents and local "living culture". In this sense, cultural tourism and creativity are increasingly integrated (Frey, 2009, cited in Richards, 2011) to the extent that "cultural capital and the creative features of places are fundamental resources to attract tourists motivated by culture".

More recently, this emphasis on creativity has led researchers away from conventional models associated with cultural tourism based on heritage. More future-oriented models of creative tourism have been developed that value intangible culture, contemporary creativity, innovation, platforms and content (i.e. technology), networks, financing (not only by public, but also private organisations). This cooperation is based on partnerships and the knowledge and expertise shared among residents and tourists (OECD, 2014: 3, 55).

2.2 Role of Intangible Cultural Heritage

The importance of intangible heritage or “living heritage” and its safeguarding can be viewed through three periods: “1946-1981: first steps”; “1982-2000: from Mondiacult to Our Creative Diversity” and “2000 onwards and the drafting of the (2003) Convention” (UNESCO, 2013a: 4). The 2003 Convention for the Safeguarding of ICH has been a decisive factor in promoting the growing visibility of ICH, although the 1972 Convention concerning the Protection of the World Cultural and Natural Heritage and the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions, among other milestones, should also be highlighted.

According to UNESCO/ICCROM/ICOMOS/IUCN (2013: 29):

The 1972 Convention’s adoption introduced into international legislation the idea that some heritage in the world was of such importance that it was of value to all humanity, and that responsibility for its management was of more than national significance, even if the primary responsibility remained with individual nations.

This world cultural and natural heritage focused on works of art, built environments and natural spaces. However, during the negotiations leading to the adoption of the 1972 Convention, “a number of state representatives shared the idea that the scope of that Convention was too narrow and that the actions of the international community in the field of cultural heritage should extend to its immaterial manifestations” (Lenzerini, 2011: 104).

What followed was a set of initiatives and important documents focused on safeguarding ICH, such as the Protocol added to the Universal Convention in order to protect folklore, proposed by the government of Colombia in 1973; the Mexico City Declaration on Cultural Policies (1982); and the Recommendation on the Safeguarding of Traditional Culture and Folklore (1989). Other initiatives include UNESCO’s Living Human Treasures Programme (1994), the aforementioned *Our Creative Diversity* report of the World Commission on Culture and Development (1996) and the Proclamation of the Masterpieces of the Oral and Intangible Heritage of Humanity programme (1998). Notably, these were closely followed by UNESCO’s Recommendation on the Safeguarding of Traditional Culture and Folklore (1989). The above initiatives were also carried on in UNESCO’s Universal Declaration on Cultural Diversity (2001) and in the Istanbul Declaration (2002) adopted by the Third Round Table of Ministers of Culture.

In 2003, the Convention for the Safeguarding of ICH recognised the “importance of (ICH) as a mainspring of cultural diversity and a guarantee of sustainable development” (UNESCO, 2003: 2). At the same time, this document stresses that economic, social and environmental spheres are “highly interdependent”.

ICH “means the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated there with – that communities, groups and, in some cases, individuals, - is recognised as part of their cultural heritage” (UNESCO, 2003). It is manifested *inter alia* in the following domains (UNESCO, 2003):

- Oral traditions and expressions, including language as a vehicle of ICH
- Performing arts
- Social practices, rituals and festive events
- Knowledge and practices concerning Nature and the Universe
- Traditional craftsmanship.

In Article 1 - Purposes of the Convention (UNESCO, 2003), the programme’s goals are defined as:

- To safeguard ICH
- To ensure the respect for the ICH of communities, groups and individuals concerned
- To raise awareness at the local, national and international levels of the importance of ICH, and ensuring mutual appreciation thereof
- To provide for international cooperation and assistance.

In addition, the 2003 Convention (UNESCO, 2003) considers “safeguarding” to be “measures aimed at ensuring the viability of ICH, including the identification, documentation, research, preservation, protection, promotion, enhancement, transmission, particularly through formal and non-formal education, as well as the revitalisation of various aspects of such heritage”. These measures are crucial since many expressions or manifestations of ICH are under threat, endangered by globalisation and cultural homogenisation, hegemony and uniformity, as well as by a frequent lack of support, appreciation and understanding. As a result, UNESCO published a Representative List of the ICH of Humanity and developed other mechanisms, such as the List of ICH in Need of Urgent Safeguarding, the Register of Best Safeguarding Practices and International Assistance.

ICH has value, so the relevant entities need to commit to its protection. Duvelle (2009) associates its economic value, first, to a “direct value” or the value of the products resulting from ICH - “for personal consumption, for consumption by others and with commercial use”. The cited

author refers, second, to “indirect value” or the value of knowledge and skills, including the value of transmission of knowledge and skills (“the value of the transmission of knowledge and skills, revenues obtained by other sectors thanks to ICH manifestations, social value and conflict prevention, cost of non-intervention”).

The concept of ICH itself, however, is quite new, having been largely credited to the 2003 Convention. After more than 10 years¹²⁵, some specialists have only now begun reflecting upon the concept’s evolution and scheduling meetings to encourage research on, and discussion of, the results of the 2003 Convention.

Regarding the management of this heritage’s protection, UNESCO/ICCROM/ICOMOS/IUCN (2013: 12) affirm s that:

The “management system for cultural heritage” helps to conserve and manage a given property or group of properties in a way that protects heritage values, in particular the OUV (outstanding universal value) if it is a world heritage property, and, where possible, enhances wider social, economic and environmental benefits beyond the confines of each property.

The cited organisations categorise “heritage management systems, in general, and in World Heritage” according to nine characteristics: three elements (i.e. legal framework, institutional framework and resources); three processes (i.e. planning, implementation and monitoring); and three results (i.e. outcomes, outputs and improvements). In addition, the cited organisations have defined a set of “indicators to monitor and assess management processes, outputs and outcomes” (UNESCO/ICCROM/ICOMOS/IUCN, 2013: 97). Among these indicators can be highlighted the relevant material gathered (e.g. publications and reports on previous activities, including monitoring), frequency of data collection defined and methods identified for collecting existing data (e.g. archive consultation) and data from new sources (e.g. samples, interviews and observations).

¹²⁵ See the Eighth Session of the Intergovernmental Committee (8.COM) (December, 2013). See also the expert meeting held in Beijing, China (in 2016), and its results presented to the 11th session of the Intergovernmental Committee (in Ethiopia, in 2016).

3. Methodology

The present study's general objective was to determine the importance of public sector planning and management to developing a greater appreciation of fado as ICH. The specific objectives were to investigate:

- The importance of ICH for tourism
- The touristic value of Lisbon and its main attractions, including HQs, associated with fado performances
- The FM's importance within the framework of integrated urban rehabilitation processes
- The touristic valorisation of Lisbon's HQs, as well as *fado*, in tourism policy and planning documents

The extent to which the FM's management has developed fado recovery initiatives within the framework of the protection plan submitted to UNESCO.

Given these objectives, the conceptual framework was based on the need for awareness of culture's importance when developing creative and cultural urban tourism. In order to determine *fado's* importance in Lisbon, a literature review of *fado* definitions, including its origins and characteristics, was conducted. Then, the size and features of Lisbon tourism were examined based on data from the National Institute of Statistics and Tourism Observatory surveys (i.e. *Turismo de Lisboa – Visit Lisbon*).

The methodology used to determine the interconnections between *fado* and tourism planning and management was content analysis, given that this is a "research method that uses a set of procedures to make valid inferences from texts" (Weber, 1990, cited in Vitouladiti, 2014: 279). Vitouladiti (2014) suggests this type of analysis is a reliable approach to examining textual data for patterns and structures among key features. Therefore, a content analysis was done of policy and planning documents (obtained from the central government, Lisbon city council, and public organizations related to cultural tourism).

Tourism planning or policy documents were also reviewed at the local, regional and national level in order to determine to what extent HQs and Lisbon's heritage are considered a valued attribute in tourism. In addition, EGEAC's "Reports and Accounts" from 2012 to 2015 were analysed, focusing on the FM's initiatives. In the analysis of these reports, the aim was to determine selected indicators' performance (i.e. those suggested by UNESCO/ICOMOS/ICCROM/IUCN (2013)). The present research also evaluated the level of implementation of the initiatives in the protection plan of fado's ICH candidacy, namely, an

“archive network”, “digital archive of fado recordings/phonograms”, “educational programmes”, “publications” and “*fado* routes”. These were selected as categories of analysis (Bardin, 2014).

4. Case study: Tourism planning and management – interconnections with fado

4.1 Fado: Intangible heritage of the city of Lisbon and the world

Fado is a “performative genre that integrates music and poetry” (IC, 2014). In their relationship with fado, each person, whether a tourist or not, may appreciate fado not only as a whole but also for each of its components, such as music, lyrics, kinesics and participants (IC, 2014). Understanding each part helps to illuminate the whole. According to Carlos do Carmo (2008, cited in Nielsen, Soares and Machado, 2008), “fado is in the air” – an indefinable, shared experience – and, therefore, fado can only exist when three participants or partners – singers, musicians and an audience – are involved.

Accompanied by the guitar, fado is associated with “sentiments of the soul that can’t be explained but only felt”, “saudades (deep longing) that are felt” and “feelings” (TL, 2016). *Fado* has many themes, such as those identified by Patel (1904, cited in Nery, 2012:107) at the beginning of the 20th century: love, teasing matches, aspects of daily life and tales from the streets, dramatic jealousies, major disasters, famous people’s deaths, biblical passages and religious affairs, descriptions of bulls as they wait to fight and expressions of wickedness.



Figure 1. Fado (José Malhoa)

Source: Henriques P. (2002: 65), José Malhoa, Edições INAPA, Coleção Pintura portuguesa do Século XIX

The origin of *fado* is controversial. For his part, Sardinha (2010) emphasises that *fado* was first a “poetic text” and “narrative poem”, before it became a musical genre. He underlines the “national origin of *fado*” associated with a history that can trigger emotions in all those involved – with roots in a Medieval and Renaissance heritage. More recently, *fado* as contemporary literary creation has conquered the traditional territories of erudite poetry. The cited author argues that, from a musical point of view, *fado* reached “its definitive form in the second half of the 18th century”, although, as a “poem that narrates the chronicles of the life of the people”, quite likely it existed “long before, (...) in the 16th century and maybe much earlier” (Sardinha, 2010: 48, 59).

Fado as “the song of Lisbon” is an integral part of the “people’s traditional culture” (Sardinha, 2010: 21, 35), and strongly associated with Lisbon (Nery, 2012: 8) and its HQs, namely, Alfama, Mouraria, Bairro Alto and Madragoa. This association with the city reaches back to the 19th century (IC, 2014), when *fado*’s popularity started to consolidate in its long-term social base “within the extended network of popular Lisbon society” (Nery, 2012: 67).

Fado appeals, therefore, to a “memory theatre” (Elliott, 2010: 4), in which the audience explores the relation between the poem (i.e. lyrics) and its musical setting, listening to the “echo” of the words throughout Lisbon and its neighbourhoods. This relation emphasises a spatial and imagery dimension of the city – “fadoscapes” (Elliott, 2010) – “the interlocking processes in which *fado* mythology and ontology of place, loss, memory and mourning are presented, re-presented and reconfigured”. This urban “soundscape” contributes to a “sonic profile” and sense of place. These musical associations can have implications for some visitors’ expectations. Their *fado*-related experiences and places that they visit may be at odds with the imagery promoted by official city marketing and the city centre locations that are typically promoted as places to visit (Long, 2014). These tourists may, thus, seek to understand and discuss further Lisbon’s musical identity.

4.1.1 Fado as Intangible Cultural Heritage

In June 2010, the Lisbon City Council – working through EGEAC and the FM – submitted an application to include *fado* in UNESCO’s Representative List of the ICH of Humanity. This initiative was developed in partnership with Nova University’s Institute for Ethnomusicology of the School of Social and Human Sciences and two cultural ambassadors (i.e. *fado* singers Mariza and Carlos do Carmo), as well as scientific and advisory committees.

In November 2011, *fado* was incorporated in the 2011 Representative List of the ICH of Humanity, a decision made at the UNESCO International Committee's sixth meeting (UNESCO, 2016a). "*Fado* – an urban, popular song of Portugal", therefore, satisfied the criteria for inclusion in the Representative List. Among others, the following criteria were highlighted (UNESCO, 2016a):

- **1: Fado strengthens the feeling of belonging and identity within the community of Lisbon.**
- **2: (Fado's inclusion in) the Representative List could contribute to further interaction with other musical genres, (...) encouraging intercultural dialogue.**
- **3: Safeguarding measures reflect the combined efforts and commitment of the bearers, local communities, the FM, (and) the Ministry of Culture, as well as other local and national authorities, and aim at long-term safeguarding through educational programmes, research, publications, performances, seminars and workshops.**

The *fado* protection plan (i.e. safeguarding measures) included five key types of initiatives to be programmed (Museu do Fado, 2011):

1. "Securing the involvement of Civil Society by way of an institutional co-operation network gathering, in an integrated manner, universities, museums, archives, community associations and centres, among other public and private entities who own collections relevant to research on the Fado and/or representing the interests of the Fado community.
2. Fostering Education/Training by way of the implementation of Educational Programmes contemplating the actual involvement of artists, musicians and instrument makers in knowledge dissemination.
3. Promoting Publication/Research by implementing a programme aimed at publishing historical sources, musical sources, iconographic sources and sound sources, while simultaneously promoting other literary publications and the publication of thematic documentaries.
4. Energising and revitalising traditional Fado venues by creating and developing Thematic Circuits in the city of Lisbon, comprising the venues in which the Fado is performed by professionals and amateurs.
5. Taking actions to promote, at the national and international level, the universe and culture of Fado" (Museu do Fado, 2011).

In summary, the initiatives planned were an "archive network", the "creation and dissemination of a digital (sound) archive of fado recordings/phonograms", "educational programmes", "publications" and "fado routes".

4.2 Tourism in urban and sectorial planning: Relationship with Lisbon and its Historic Quarters

4.2.1 Integrated urban rehabilitation policies in Lisbon's Historic Quarters and the Fado Museum

The municipality of Lisbon, until the 1990s, lacked medium and long-term planning, which was largely responsible for the degradation of many historic buildings in various HQs. This trend was reversed after the 1990s based on the Strategic Plan of Lisbon (1992), the Municipal Director Plan (1994) and Urbanisation Plans (UPs) (1996), whose guidelines were followed up by the Lisbon City Council's activity plans (Henriques, 2002).

Regarding the UPs of the HQs, priority was given to the recuperation of historic buildings that were considered in 1996 to be in an advanced state of "physical degradation". Only after reversing this situation could the Lisbon city council move on to integrated rehabilitation and tourism development (Henriques, 2002).

In 1994, through the Urban Rehabilitation Process (URP), five integrated projects (IPs) did much to ensure the URP's continued integration. The IPs sought to create local cultural facilities as an important investment that could contribute to the HQs' tourism development. Among the five IPs, only one was directly associated with the valorization of the *fado*, namely the "Recinto da Praia, the Largo do Chafariz de Dentro and the Surrounding Area" (CD-IP). The FM was built in this area, that is, the HQ of Alfama. With the objective of managing the developed facilities, the municipal company of *Equipamento dos Bairros Historicos de Lisboa* (EBAHL) (Facilities of the HQs of Lisbon) was created in 1995, after which its name was changed to EGEAC. Meanwhile, the URP was followed up according to the Municipal Director Plan (revised and rectified in 2012 and 2015) (CML, 2016), the Pluri-Annual Investment Plan and the Local Housing Programme.

In its "Strategic Letter 2010–2024", the Lisbon City Council states that culture (and cultural tourism) is associated with three main neighbourhoods, which include "the downtown area of *Chiado* (which extends into all the historic areas, with a specific emphasis on Castle, *Alfama* and *Bairro Alto*)". The other two areas are the monumental area of *Belém-Ajuda* and the urban renewal area of the *Parque das Nações* (CML, 2009: 83). The *Estratégia de Reabilitação Urbana de Lisboa 2011–2024* (Urban Rehabilitation Strategy of Lisbon 2011–2024) (CML, 2011) also recognises that an integrated intervention strategy is essential for the continued competitiveness of Lisbon and its neighbourhoods.

More recently, in its *Programa de Governo da Cidade de Lisboa 2013–2017* (Lisbon City Council Programme 2013-2017), the Lisbon City Council sets out initiatives along five major axes, namely, a closely integrated city that is enterprising, inclusive, sustainable and global. The programme's strategic objective is to create a city with better lifestyle opportunities (CML, 2013: 82). Within the framework of a "global" Lisbon, the goal is to develop a "city of culture and creativity; a city of intercultural dialogue, tourism and the sea; and a metropolitan city". The programme emphasises the need to "enhance the renewal and protection of the tangible and intangible heritage of Lisbon through specific programmes and projects, including exhibitions".

Within the focus on "making the most of the city's tourism potential", the document refers to exploiting features ranging "from the climate to the landscape, passing through tangible and intangible heritage; traditional products and gastronomy, goods and cultural and leisure activities associated with the sea" (CML, 2013: 85). In addition, the programme highlights the importance of "improving tourism centres through the rehabilitation of areas of high potential". It further seeks to "enrich and densify the tourism supply chain, namely, through the integration of cultural resources, proposals of itineraries and events around unique experiences connected to the city's reality (e.g. the European Age of Discoveries and HQs)" (CML, 2013: 86).

4.2.2 Tourism planning in Lisbon and its Historic Quarters

In all of Portugal's regions, tourism is considered a strategic sector. The Lisbon region is the second largest in the country in terms of overnight stays in hotels, accounting for 25% of national overnight stays and coming in first in number of guests. Over the past 10 years, Lisbon's overnight stays have increased by 69%, revealing a higher increase than the national average and reaching, in 2015, 12.3 million overnight stays, of which 75.9% were non-residents. In overnight stays by country of residence, the following are listed in descending order of importance: Portugal (24%), Spain (9.2%), France (9.2%), Germany (7.7%), Brazil (6.5%) and the United Kingdom (5%) (IMPACTUR, 2016). The last five markets represent 31% of the national tourism market share.

Lisbon comes in first in terms of "business", "visiting" and "to live" (Bloom Consulting, 2015). The "Satisfaction and Image Survey – 2015" (TL, 2015: 21) shows the "image of the Lisbon and Lisbon region" as, among other aspects, a "capital city" (97.0%), "city of feelings/sensations" (93.9%) "ancient city with history" (92.9%), "creative and trendy city" (92.0%) and "unique city" (88.0%) – based on percentage of answers of "agree" and "totally agree" ("agreement"). As for the activities carried out in "Lisbon city" (TL, 2015a: 26), the three most significant are "going

out to dinner" (96.7%), "walking around" (90.9%) and "museums and monuments" (86.9%). The "Visited Attractions and Places of Interest – 2015" includes in "places of interest – Lisbon City" the central area and its HQ, traditionally associated with fado, and, more specifically, the city centre (*Baixa - Lisboa*) (97.9%), *Bairro Alto* (86.2%) and the *Alfama* (44.5%) (TL, 2015a: 32).

Portugal's tourism strategy is based on the *Turismo 2020* (Tourism 2020) plan (TP/Governo de Portugal, 2015), which is linked to the *Portugal 2020* plan. According to the "Proposta de Valor na Região de Lisboa" (Proposal of the Lisbon Region's Tourism Value), the value proposition of tourism in the Lisbon region "lies in its diversity and (...) its main identity factors" (TP/Governo de Portugal, 2015). Regarding Lisbon (municipality), it is seen as a "strong international brand, well positioned in terms of city and/or short breaks, with a diversified offer complemented by the bordering municipalities".

Among Lisbon's tourism resources, the following are highlighted:

- Lisbon, docks and marinas
- Museums and monuments
- Conference facilities
- Gastronomy and shopping
- Activities and entertainment events, surf and golf (TP/Governo de Portugal, 2015).

Specifically in regard to the HQs and valorisation of their distinctiveness, the "Development of the Micro-Central Area of Lisbon's Castle Hill (Alfama/Castelo/Mouraria)" project (TP/Governo de Portugal, 2015) is particularly important.

The "Strategic Plan for Tourism in the Lisbon Region 2015–2019" (Roland Berger/ERTRL/TL, 2014) seeks to place Lisbon in the "city/short breaks" market and highlights the city's culture as an across-the-board "qualifier" of Lisbon's tourism offer. With regard to the "main assets of Lisbon's city centre" in the field of culture, this plan lists the "Jerónimos Monastery, St. George Castle, Tower of Belém, Berardo Collection, Tiles Museum, Carriages Museum, Gulbenkian, Convent of Mafra, National Museum of Ancient Art, Museum of Design and Fashion and Marquês de Pombal Square". In gastronomy, the plan mentions *pastéis de Belém* (Belem pastries), restaurants and "fado houses", and, in terms of events, Lisbon offers the Volvo Ocean Race, Rock in Rio, Peixe em Lisboa, Lisbon Festivals and NOS Alive.

The cited plan, therefore, specifically refers to "fado houses", in addition to Lisbon festivals. This indicates that fado is regarded as a cultural element that is important in the creation of routes along which "fado houses" – mainly those in HQs – and the city's festivals demonstrate the value of *fado's* contribution to a unique cultural identity.

More recently, the *Estratégia Turismo 2027 – Portugal* (Portugal Tourism Strategy 2027) (LET, 2016) views Lisbon as being “a multicultural destination with a strong international vocation”. It recognises Lisbon as having a set of assets that attract tourists, namely, “active differentiators” (i.e. climate and light; history and culture; sea, nature and biodiversity; and water), “active qualifiers” (i.e. gastronomy and wines, artistic and cultural events, sports and business), “emerging assets” (i.e. wellbeing, living in Portugal) and “unique transversal asset” (i.e. people).

In addition, other areas of central and historic Lisbon are being targeted as valuable with the approval of two applications by the Lisbon City Council to the indicative list of Portugal as world heritage: “Historic Lisbon, Global City” and “Pombalina Lisbon”. This falls within the framework of efforts to update the Indicative Lists of all nations (CML, 2016).

4.3 Role of the FM in the management of fado as Intangible Cultural Heritage of Humanity

To analyse the activities developed to enhance fado as ICH, EGEAC’s “Reports and Accounts” first need to be analysed. The FM as a cultural activity, originating in the URP for Lisbon HQs, opened its doors in 1998 (EGEAC, 2016):

[It celebrates] fado’s exceptional value as a symbolic identifier of the city of Lisbon, with its deep roots in the traditions and cultural history of the country, its role in the affirmation of cultural identity and its importance as a source of inspiration and of intercultural exchange between peoples and communities.

Currently, the museum “integrates multiple facilities” beyond its exhibition circuit: a documentation centre, a school of Portuguese guitar courses and singing lessons, a thematic shop and an auditorium with regularly scheduled events, as well as a cafeteria/ restaurant. “The museum also contains a rich collection of documents, artefacts and recordings, such as photographs, films, posters, periodicals, directories, sheet music, programmes, trophies, instruments and various other objects. Through a succession of environments recreated through audio-visual technologies, visitors are encouraged to learn about the history of fado” (*Museu do Fado*, 2016).

Between 2012 and 2015, the FM (EGEAC, 2015, 2014, 2013, 2012) reports its primary focus as follows:

We sought to implement (...) the activities contained in the protection plan associated with fado's candidacy to UNESCO's Representative List of the ICH of Humanity, developed alongside a diverse schedule of exhibitions, concerts, workshops and activities related to the universe of fado and the Portuguese guitar – geared towards domestic and foreign audiences.

Since *fado's* classification as ICH, the number of tickets of the FM has risen from 55,474 in 2011 to 152,854 in 2015 (see Table 1), which has corresponded also to increased revenues and sponsorships (EGEAC, 2012). In the first year after its classification, from 2011 to 2012, the FM experienced a 40% increase in revenue and 400% in sponsorship. The latter increase, in particular, resulted from contributions from the organisations Portugal Tourism and the *Turismo de Lisboa* – Visit Lisbon, which supported dissemination activities celebrating UNESCO's consecration of *fado* as ICH (EGEAC, 2012).

<i>Years</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>
Tickets (n°)	55474	79901	168877	169629	152859

Table 1. Number of tickets for the Museum of *Fado*: 2011-2015

Source: EGEAC, 2015, 2014, 2013, 2012

Regarding the set of predicted actions by FM, in the context of the “protection plan” it is important to highlight the following (Table 2):

Action: Archive Network

Strengthening the network of archives via an integrated institutional cooperation for a wide range of archival institutions and museums, with collections relevant to the study of the *Fado*: the *Fado* Museum, National Library, Portuguese television and Radio Broadcast, Music Museum, National Museum of Theatre, National Museum of Ethnology, José Malhoa Museum, Museum of

Music, Folk Art Museum, Amália Rodrigues Foundation, Portuguese Cinematheque Foundation, Museum of the City, Municipal Newsroom of Lisbon, Municipal Audio Room of Lisbon, Olisiponenses Office, the Voice of the Worker, the Portuguese Society of Authors, Musicians' Union, among others (*Museu do Fado*, 2016).

Action: Digital Sound Archive of *Fado* recordings/phonograms

Availability of the Digital Sound File of the MF, online (since June 2016 and housed in the Museum's website) where the sound recordings of the *Fados* recorded since the beginning of the 20th century (discs that circulated and were marketed in Portugal between 1900 and 1950) can be accessed. It is "the first collection of phonograms available online, from one of the largest collections of phonograms in the country" (*Museu do Fado*, 2016).

Action: Educational Programme (EP)

Provision of EP, through:

- partnerships with primary and secondary schools of the city of Lisbon
- regular school activities (Portuguese guitar, *viola*, *fado* singing, workshops, seminars in creative writing)
- partnerships with the School of Arts of *Castelo Branco*, Conservatory of *Sines* and University of Lisbon and the *Nova* University
- other activities, such as courses on the history of the *fado*, grants, documentaries, conferences, workshops, training seminars; preparation of teaching materials, informal workshops, guided tours/field trips, singing visits, visits with activities, initiative "Sing *Fado*" (directed to the international audience) (EGEAC, 2015, 2014, 2013, 2012)

Action: Publications

Publications of books in the editorial program. The following is highlighted: *A History of the Fado*, *Idols of the Fado*, *Fados to the Republic* (in partnership with the Imprensa Nacional Casa da

Moeda), *Fado Living Heritage* (in partnership with CTT), "Data Book" (*António Parreira*), "Anthology of Popular Poets" (*Gouveia and Mendes*) and "All this is Fado/Nuno Saraiva Comics" (Co-production FM and SOL Newspaper), catalogues "Without Whim or Presumption: The *Fado* by *Júlio Pomar*", "Family Album" (*Aurélio Vasques*) and "All this is *Fado*" (*Nuno Saraiva*) (EGEAC, 2015, 2014, 2013, 2012).

Action: *Fado* Routes

Promotion of thematic circuits/routes of the *Fado* in the city of Lisbon, involving the performative spaces of professional and amateur *Fado*. Among the various activities, the following should be noted:

- Programming and/or promotion in the network activity of "fado houses" and recreational activities
- Publication and promotion (in printed and digital support of thematic circuits/routes)
- Guided visits programme to the most emblematic places of the *Fado*
- Virtual Route of *Fado*
- Route of Amateur *Fado*
- Route of *Fado* in Mouraria (EGEAC, 2015, 2014, 2013, 2012)

Table 2. Actions developed by the Fado Museum (EGEAC): 2012 to 2015

Source: Own elaboration based in MF, 2016 and EGEAC, 2015, 2014, 2013, 2012

In connection with the activities described previously and as part of its regular programming during the four years analysed, the FM promoted:

- Concerts, presentations and seminars
- National and international festivals
- Temporary exhibitions
- Partnerships with the private sector (i.e. "fado houses").
- Activities associated with the promotion of *fado*-related tourism

As to the first activities, the initiatives developed involved multiple events and renowned *fado* singers (*fadistas*). These were often co-produced with important cultural organisations of Lisbon (e.g. Centro Cultural de Belém, Teatro Nacional de São Carlos and Aula Magna), including, from 2013 onward, *Há Fado no Cais* (There's *Fado* in the Harbour) and, after 2014, *Lisboa na Rua* (Lisbon on the Streets).

Festivals considered significant on a national level included the *Festival Caixa Alfama* organised by the *Caixa Geral de Depósitos* bank in 2013, 2014 and 2015. On an international level (i.e. *Programming Actions/International Communication – International Festivals*), annual events aiming to capture an international public are the *Fado Festival of Madrid* (2011), the *Fado Festival of Brazil*¹²⁶ (from 2013 onward), the *Fado Festival of Buenos Aires* (from 2014 onward), the *Fado Festival of Bogota* (from 2014 onward)¹²⁷ and the *Fado Festival of Seville* (2015)¹²⁸. Another programme that deserves to be mentioned is the *Cruzeiro do Fado (Fado Cruise)*¹²⁹.

As for the FM's schedule of "temporary exhibitions", the museum has sustained a dialogue between *fado* and other arts, figures and artistic legacies focused around the history of the genre, namely, cinema,¹³⁰ fashion,¹³¹ theatre,¹³² photography,¹³³ and painting,¹³⁴ as well as the exhibits *Carlos do Carmo 50 Years* (2014) and *Fernando Mauricio* (2015) (EGEAC, 2015, 2014, 2013, 2012). Other cultural events have been held at the same time in association with national and international roaming exhibitions.¹³⁵

Regarding the FM's relationship with the private sector, the museum has partnerships with many establishments (i.e. restaurants, "fado houses", taverns, bars and theatres) that regularly offer *fado* performances in the HQs. Given the strengthening of its partnerships with Lisbon's "fado houses", the FM has created not only a virtual *fado* route but also the project "Fado à Mesa" (Fado at the Table). These have been seen as positive initiatives, according to the President of the Associação Portuguesa dos Amigos do Fado (Portuguese Association of Friends of Fado) (Souza, 2014: 193), who states that "fado houses" "have registered market difficulties and reductions in the Portuguese public, mainly due to the increased inflow of tourists. (...) If previously we had an average of 80% of Portuguese (in "fado houses"), presently we don't even have 40%". This situation is due to the high prices that are charged, which "drive away residents, maximising the presence of tourists who go to traditional neighbourhoods looking for these types of performances".

¹²⁶ See the roaming exhibition *History of Fado*, in Rio de Janeiro and São Paulo (first edition in 2013) at <http://festivalfadobrasil.com/>.

¹²⁷ See <http://madeinportugalmusica.pt/1-edicao-do-fado-em-buenos/>.

¹²⁸ See <http://www.everythingisnew.pt/festival-fado-Seville-raquel-tavares/>.

¹²⁹ The cruise operator Classic International Cruises, in partnership with the FM, held the first *fado* theme cruise in 2014.

¹³⁰ See the exhibition *O Fado no Cinema* of 2012.

¹³¹ See the exhibition *Com Esta Voz Me Visto – O Fado e a Moda* of 2012 and 2013.

¹³² See the exhibition *O Fado e o Teatro* of 2013 and 2014.

¹³³ See exhibitions of photographs in *Album de Família de Aurelio Vasques*.

¹³⁴ See *Sem Capricho ou Presunção: O Fado por Júlio Pomar* exhibited in 2015.

¹³⁵ See the roaming exhibition *Exposição História do Fado* organised within the framework of the London Olympic Games by the FM, at Canning House in 2012.

EGEAC has also regularly participated in tourism and culture fairs. On a national level, it has attended the BTL – International Lisbon Tourism Fair (from 2008 to the present). In addition, EGEAC participates in international promotional campaigns, in partnership with *Turismo de Lisboa – Visit Lisbon*. These campaigns have used the brand *Fado* Intangible Cultural Heritage of Humanity as a differentiating factor to promote Lisbon as a tourist destination through the main media of Spain, France, Italy and the United Kingdom. Worldwide, EGEAC has maintained a significant presence at the MIF – International Fair of Macau (Macau); INTUR – International Interior Tourism Fair (Valladolid); Expovacaciones – Trends and experiences (Bilbao); ExpoGalaecia – Salón de Turismo, Gastronomía y Artesanía (Vigo); and Alcultur Meetings/ExpoCultura (Guimarães), Lagos and Zaragoza, among other fairs.

The importance of *fado's* classification as ICH is also reflected in the FM's celebration of the anniversary of *fado's* consecration as ICH by UNESCO. For its first anniversary in 2012, the museum promoted singers' visits, *desgarradas* (piecemeal) workshops and concerts. For the second anniversary, the museum sponsored the event Party in the Museum – Fado World Heritage. On the third and fourth anniversaries in 2014 and 2015, in addition to the Party in the Museum activities, the FM offered singers' visits on its exhibition circuit. The programme The Greatest Fado House in the World¹³⁶ also took *fado* to other cultural, recreational and restaurant facilities in Lisbon. In 2015, the temporary exhibition *Family Album of Aurélio Vasques* took place, as well as a concert that promoted not only UNESCO's consecration of *fado* but also another intangible national musical heritage, *cante alentejano* (Alentejo singing) in 2014. This concert was organised as a co-production with Serpa City Council.

5. Final Considerations

Researchers and managers have increasingly recognised the importance of culture and intangible heritage in promoting the economic development associated with tourism. The city of Lisbon is of great importance to Portugal's tourism, having grown in recent years both in overnight stays and number of guests. As a capital city that offers tourists "sensations", "feelings" and unique experiences, Lisbon has in *fado* one of its key identity symbols. In this

¹³⁶ In 2014, the FM and *Time Out* turned the Ribeira Market into the biggest *fado* house in the world, with programming designed by Mariza, who is a *fado* ambassador to UNESCO. In 2015, in a similar event in the Ribeira Market, a concert was given by Carlos do Carmo, who is also a *fado* ambassador to UNESCO.

context, the HQs of Lisbon's city centre and the "fado houses" located there help to emphasise spatial and imagery dimensions – a "fadoscapes" – contributing to a strong sense of place.

A content analysis of official tourism policies showed that *fado* is a cultural element that qualifies as a cultural and/or heritage tourism offering of Lisbon, serving to reinforce thematic routes that include "fado houses", especially those in the HQs, and city festivals. Officials value *fado* as an active differentiator. A further analysis of tourism dynamics in the integrated urban rehabilitation processes of Lisbon and its HQs highlighted the presence of IPs, including, among others, the CD-IP, which has contributed not only to the physical rehabilitation of the HQs but also to the creation of cultural tourist facilities, including the FM.

This museum, after UNESCO classified *fado* as ICH in 2011, increased its ticket sales and revenues because of *fado's* recognition as a popular urban musical genre. Concurrently, a set of initiatives stands out within the framework of the protection plan for *fado*: an "archive network", the "creation and dissemination of a digital (sound) archive of *fado* phonograms", "educational programmes", "publications" and "fado routes". In addition, events have been developed such as concerts, presentations and seminars; national and international festivals; and temporary exhibitions, along with partnerships with the private sector (i.e. "fado houses") and activities associated with the promotion of *fado* tourism.

These initiatives show that, by providing increased contact with this living heritage, the FM has encouraged a deeper understanding of *fado*, as well as creating emotions and/or feelings regarding *fado* among both local communities and visitors. The management of the FM in accordance to *fado's* identity value, as expressed in the aforementioned protection plan, has reinforced event programmes and partnerships with – and the involvement of – various agents ranging from local residents and *fado* singers to EGEAC.

References

- Ashworth, G. (2015), "Railway heritage and tourism: a global perspective", *Tourism Management*, 47, 240-240.
- Bardin, L. (2015), *Análise de Conteúdo*, Edições 70, Extra Coleção, Coimbra.
- Bloom Consulting (2015), *Portugal City Brand Ranking 2015, Municípios de Portugal*, available at: <http://www.bloom-consulting.com/rankingportugal/> (consulted on: 05.01.2016).

- CML - Câmara Municipal de Lisboa (2009), *Estratégias para a Cultura em Lisboa, CML – Pelouro da Cultura – Site da CML: Estudos de Caracterização*, available at: http://www.cm-lisboa.pt/fileadmin/VIVER/Urbanismo/urbanismo/Documentos/estrategias_para_a_cultura.pdf (consulted on: 01.02.2016).
- CML (2011), *Estratégia de Reabilitação Urbana de Lisboa – 2011/2024*, available at: <http://www.cm-lisboa.pt/fileadmin/VIVER/Urbanismo/urbanismo/Reabilitacao/estrat.pdf> (consulted on: 14.01.2016).
- CML (2013), *Programa de Governo da Cidade de Lisboa 2013/2017*, available at: http://issuu.com/camara_municipal_lisboa/docs/programa_gov_cidade_de_lisboa_2013 (consulted on: 14.01.2016).
- CML (2016), *Site da CML – PDM Lisboa*, available at: <http://www.cm-lisboa.pt/viver/urbanismo/planeamento-urbano/plano-diretor-municipal/pdm-em-vigor> (consulted on: 05.01.2016).
- Duvelle, C. (2009), “The Tangible Value of the Intangible Cultural Heritage”, in *UNESCO - Intangible Cultural Heritage - IC Intellectual Capital for Communities in the Knowledge Economy*, available at: <http://unesco.org/culture/ich>, (consulted on: 01.02.2016).
- EGEAC (2012), *Relatório e Contas - 2012*, available at: http://www.egeac.pt/wp/wp-content/uploads/2015/09/EGEAC_Relat%C3%B3rio_e_Contas_2012.pdf (consulted on: 01.02.2016).
- EGEAC (2013), *Relatório e Contas - 2013*, available at: http://www.egeac.pt/wp/wp-content/uploads/2015/09/EGEAC_Relat%C3%B3rio_e_Contas_2013.pdf (consulted on: 01.02.2016).
- EGEAC (2014), *Relatório e Contas – 2014*, available at: <http://www.egeac.pt> (consulted on: 26.01.2016).
- EGEAC (2015), *Relatório e Contas – 2015*, available at: <http://www.egeac.pt> (consulted on: 25.01.2016).
- EGEAC (2016), *Cultura em Lisboa*, available at: <http://www.egeac.pt/> (consulted on: 01.02.2016).
- Elliott, R. (2010), *Fado and the Place of Longing – Loss, Memory and the City*, Ashgate Popular and Folk Music Series, England.
- Henriques, C. (2002), *Planeamento e gestão do turismo sustentável nas cidades e seus centros históricos. O caso de Lisboa*, Tese de Doutoramento, Universidade do Algarve.
- Henriques, C. (2003), *Turismo, Cidade e Cultura – Planeamento e Gestão Sustentável*, Lisboa, Edições Silabo.
- Holden, J. (2004), *The value of culture cannot be expressed only with statistics. Capturing Cultural value*, DEMOS, UK.

- IC (Instituto Camões) (2014), *Site do Instituto Camões*, available at: <http://www.instituto-camoes.pt/exposicoes-para-itinerancia-pelas-redes/> (consulted on: 01.02.2016).
- ICOMOS (2014), *Nara +20: On Heritage Practices, Cultural Values, and the concept of Authenticity*, Work Group ICOMOS Italy/Agency of Cultural Affairs (Government of Japan).
- IMPACTUR (2016), *Informação estatística turística de Lisboa*, available at: http://www.ciitt.ualg.pt/impactur/dt_anuais.asp?nut=17 (consulted on: 01.02.2016).
- Lenzerini, F. (2011), "Intangible Cultural Heritage: The Living Culture of Peoples", *Oxford Journals Law, European Journal of International Law*, 22(1), 101-120, doi: 10.1093/ejil/chro06.
- LET (Laboratórios Estratégicos para o Turismo) (2016), *Estratégia Turismo 2027 Portugal*, Laboratório Estratégico Lisboa.
- Long, P. (2014), "Popular music, psychogeography, place identity and tourism: The case of Sheffield", *Tourist Studies*, 16(2), 170-191.
- Museu do Fado (2011), *CML/EGEAC-EEM: Candidatura do Fado à Lista Representativa do Património Cultural Imaterial da Humanidade*, available at: http://img.rtp.pt/icm/antena1/docs/4b/4b7988dabb20bba091e2120ef1cfa048_9769574c5cod e34766b61de80fab299c.pdf (consulted on: 14.01.2016).
- Museu do Fado (2016), *Site do Museu do Fado*, available at: <http://www.museudofado.pt/gca/index.php?id=37> (consulted on: 14.01.2016).
- Nery, R.V. (2012), *Para Uma História do Fado*, Imprensa Nacional-Casa da Moeda, S.A., 2.ª ed., Lisboa.
- Nielsen, C., Soares, A-M., Machado, C. (2008), "The Cultural Metaphor Revisited: Exploring Dimensions, Complexities and Paradoxes through the Portuguese Fado", *International Journal of Cross Cultural Management*, 9(3), 289–308.
- O'brien, D. (2010), *Measuring the value of culture: a report to the Department for Culture Media and Sport*, Dcms/ESRC/Arts & Humanities Research Council, Department for Culture, Media and Sport, London.
- OECD (2014), *Tourism and the Creative Economy*, OECD Studies.
- Richards, G. (2011), "Creativity and Tourism. The State of the Art", *Annals of Tourism Research*, 38(4), 1225–1253.
- Roland Berger/ERTL/TL (2014), *Plano Estratégico para o Turismo na Região de Lisboa 2015-2019 - Posicionar a Região de Lisboa num novo patamar de excelência turística*, available at: <http://ertrl/TL%20> (consulted on: 26.01.2015).
- Sardinha, J.A. (2010), *A Origem do Fado*, Tradisom.
- Scott, A.J. (2000), *The Cultural economy of cities: essays on the geography of image-producing industries*, Sage, London.

- Souza, R. (2014), "Um turismo afadistado: Uma análise dos usos turísticos e de lazer do fado nos bairros tradicionais de Lisboa", *Revista Semina - Revista dos Pós-Graduandos em História da UPF*, Passo Fundo-RS, 13(1), 189-199.
- TL (2015), "Satisfaction and Image Survey - 2015 – Lisbon Region", *Observatório de Turismo de Lisboa*, available at: <http://www.visitlisboa.com/sites/default/files/2016-10/SATISFACTION%20AND%20IMAGE%20SURVEY%202015.pdf> (consulted on: 26.03.2016).
- TL (2015a), "Visitor Activities and Information Survey – Lisbon Region – 2015", *Observatório de Turismo de Lisboa*, available at: <http://www.visitlisboa.com/sites/default/files/2016-10/VISITOR%20ACTIVITIES%20AND%20INFORMATION%20SURVEY%202015.pdf> (consulted on: 24.01.2016).
- TL (Turismo de Lisboa) (2016), *Site do Turismo de Lisboa*, available at: <http://www.visitlisboa.com/see-and-do/heritage-and-culture> (consulted on: 01.02.2016).
- TP/Governo de Portugal (2015), *Turismo 2020: Plano de Ação para o Desenvolvimento do Turismo em Portugal*, available at: <http://www.turismodeportugal.pt> (consulted on: 26.03.2016).
- UNESCO (2003), *Convention for the Safeguarding of the Intangible Cultural Heritage*. UNESCO, Paris, available at: <http://www.unesco.org/culture/ich/doc/src/01851-EN.pdf> (consulted on: 26.01.2016).
- UNESCO (2013), *Creative Economy Report: Widening Local Development Pathways*, available at: <http://www.unesco.org/culture/pdf/creative-economy-report-2013.pdf> (consulted on: 26.01.2016).
- UNESCO (2013a), *Working Towards a Convention - Intangible Cultural Heritage*, available at: <http://www.unesco.org/culture/ich/doc/src/01854-EN.pdf> (consulted on: 26.01.2016).
- UNESCO (2016a), *Fado, urban popular song of Portugal - Representative List of the Intangible Cultural Heritage of Humanity in 2011*, available at: <http://www.unesco.org/culture/ich/en/lists> (consulted on: 26.03.2016).
- UNESCO (2016), *Why creativity? Why Cities?*, available at: <http://en.unesco.org/creative-cities/content/why-creativity-why-cities> (consulted on: 26.01.2016).
- UNESCO/ICCROM/ICOMOS/IUCN (2013), *Managing Cultural World Heritage, Resource Manual*, UNESCO and Cultural Organization, Paris.
- UNWTO/UNESCO (2015), *World Conference on Tourism and Culture, Building and Partnership*, Siem Reip – 2015.
- Vitouladiti, O. (2014), "Content Analysis as a Research Tool for Marketing, Management and Development Strategies in Tourism", *Elsevier - Procedia Economics and Finance*, 9, 278-287.

Chapter XIX

The Mediterranean Diet and Traditional Algarvian Gastronomy: Gastronomic Itineraries as a Tool to Raise the Profile of the Algarve's Traditional Products

The Mediterranean Diet and Traditional Algarvian Gastronomy: Gastronomic Itineraries as a Tool to Raise the Profile of the Algarve's Traditional Products

FRANCISCO SERRA¹³⁷

Abstract:

The study of traditional Algarvian cuisine has become a topic of great interest since it has acquired ever greater importance in the context of tourism promotion. The justification of this study lies in this growing interest and, in particular, the scarcity of local studies on the topic. Therefore, knowledge about the Algarvian culture needs to be expanded to promote the dissemination of this intangible heritage, including customs, traditions and typical products, as well as to assess the value of this heritage as part of tourism promotion in the Algarve region.

This research sought to assess the role of the Algarve's traditional gastronomy as a factor in tourism promotion and to highlight differences in eating habits between the coastline and the interior of the Algarve. In addition, this study examined the motivations that lead tourists to choose Algarve as a tourist destination and evaluated the importance of gastronomic tours and itineraries in the dissemination of the region's intangible heritage. The research resulted in two itineraries based on geographical and sociological relevance criteria, one starting in Tavira and ending in Alcoutim and the other beginning in Faro and finishing in Querença.

In conclusion, the results show that local stakeholders continue to consider the Algarve to be a tourist region where the 'sun and sea' product continues to be a strong attraction. Nevertheless, the region's traditional cuisine, along with its traditions and local customs, have become increasingly important in tourist contexts as an important factor in the region's economic recovery.

Keywords: Mediterranean Diet; Traditional Algarvian Cuisine; Gastronomic Itineraries; Tourism

¹³⁷ University of Algarve, Escola Superior de Gestão, Hotelaria e Turismo, fserra@ualg.pt

Resumo:

O estudo da gastronomia tradicional algarvia é um tema de grande interesse, na medida em que tem vindo a adquirir cada vez maior importância no contexto da promoção turística.

Este estudo justifica-se por ser esta uma temática sobre a qual existe um interesse crescente e ainda existem poucos estudos ao nível dos locais; para aprofundar o conhecimento sobre a cultura algarvia, promovendo a divulgação do seu património imaterial, tradições e produtos típicos e para aferir o valor deste património como elemento da promoção turística da região do Algarve.

O objetivo é promover o conhecimento de realidades locais; aferir o papel da gastronomia tradicional algarvia como fator de promoção turística; evidenciar diferenças nos hábitos alimentares entre a zona litoral e o interior serrano; perceber quais as motivações que levam os turistas a optarem pelo Algarve como destino turístico e verificar a importância dos itinerários/roteiros gastronómicos na divulgação do património imaterial.

Para este estudo foram desenhados dois itinerários baseados em critérios de relevância geográfica e sociológica, um deles com início em Tavira e termo em Alcoutim e o outro com início em Faro e termo em Querença.

Em conclusão, constatou-se que os agentes locais continuam a considerar que: o Algarve é uma região turística onde o produto "Sol e Praia" continua a ser um forte atrativo, mas que, não obstante, a gastronomia tradicional, juntamente com as tradições e costumes locais, tem cada vez maior importância no contexto turístico, sendo um importante fator de valorização do mesmo.

Palavras-chave: Dieta Mediterrânica; Gastronomia Tradicional Algarvia; Itinerários Gastronómicos; Turismo

Resumen:

El estudio de la cocina tradicional del Algarve es un tema de gran interés en que ha adquirido cada vez más importancia en el contexto de la promoción del turismo.

Este estudio se justifica para profundizar en el conocimiento de la cultura del Algarve, la promoción de la difusión de su patrimonio inmaterial, tradiciones y productos típicos y para evaluar el valor de este patrimonio como parte de la promoción del turismo de la región del Algarve. Puesto que este es un tema en el que hay un creciente interés y existen muy pocos estudios del nivel del local.

El objetivo del mismo es promover el conocimiento de las realidades locales; evaluar el papel de la cocina tradicional del Algarve como factor de promoción del turismo; mostrar diferencias en los hábitos alimenticios entre las zonas costeras y en el interior serrano; comprender las motivaciones que llevan a los turistas a elegir el Algarve como destino turístico y verificar la importancia de las rutas / itinerarios gastronómicos en la difusión del patrimonio inmaterial.

Para este estudio se han diseñado dos rutas en base a criterios de relevancia geográfica y sociológica, uno con punto de partida en Tavira y llegada a Alcoutim; y el otro a con salida desde Faro y final en Querença.

En conclusión, se ha encontrado que los agentes locales siguen considerando que el Algarve es una región turística donde el producto "sol y playa" sigue siendo un atractivo fuerte. Pero que, sin embargo, la cocina tradicional con las tradiciones y las costumbres locales se han vuelto cada vez más importante en el contexto del turismo, siendo un factor importante de la apreciación de la misma.

Palabras Clave: Dieta Mediterránea; Cocina del Algarve Tradicional; Itinerarios Gastronomía; Turismo

1. Introduction

The Mediterranean diet encompasses the traditional food of countries around the Mediterranean Sea, which is considered a model for a healthy diet based on the regular consumption of indigenous products or those introduced by various civilisations that occupied these regions. In Portugal's case and, in particular, Algarve, this combination of foods has resulted from the presence of such peoples as the Phoenicians, Carthaginians, Romans and Arabs, who brought together all the products and spices coming from Africa and India – to which were later added those from the Americas.

Currently, research on traditional Algarvian gastronomy is a topic of great interest since it has grown in importance in the context of tourism promotion. As a result, the academic community has increasingly focused its attention on this area of research.

The growing interest in gastronomy is important because, in addition to generating basic publicity for regions, this focus on gastronomy has helped to raise the profile of all that is associated with food traditions. This accompanying local culture embodies the way of living and being of the people who are born and live in this region.

Until a few decades ago, gastronomy in and of itself was not considered a research topic. This only became a subject of research when some researchers dedicated themselves to the

study of everyday behaviours and habits (e.g. death, wills, marriages and fashion) in order to better understand humans as social beings. These studies fall within the scope of social anthropology, history and human geography, among other disciplines.

Gastronomy, as a part of cultural heritage, helps to define each people's cultural riches. Humans cannot be studied solely through what they eat but necessarily also in the way they eat.

Traditional gastronomy – resulting from the sum of various characteristics shaped by unique varieties and identities – occupies an extremely important place among the cultural objects that best identify the Portuguese as a people. It also is rooted in a collective memory that is the fruit of centuries of experimentation and creativity. However, in recent years, there has been a rapid introduction of products, specialities and dietary concepts from other countries. These have come largely through the distribution chains of large shopping centres.

According to Cabugueira (2000), this phenomenon results from various exogenous and interrelated dynamics. These include, among others, the diversification strategies of large agribusiness groups, the market entry strategies adopted by various brands to encourage profits based on economies of scale and the supply strategies adopted by large groups that distribute and sell food products. In addition, this process is the result of restrictions on leisure time imposed by many professions, especially in cities where people sometimes still have to deal with long delays due to traffic jams. Other influences are the disproportionate investment and promotional material associated with “non-traditional” products compared with those connected with traditional products, as well as the greater standardization, ease of use and design of most “non-traditional” products and the widespread exposure of individuals to outside cultural influences that result in progressive acculturation.

However, a revival can be observed, both in the public sector and among small entrepreneurs and their associated agents, of efforts to raise the profile of traditional Algarvian gastronomy's offer. These initiatives have made this cuisine well-known, repositioning it as a nutritionally-rich, high quality and contemporary – from the perspective of the combination of elements in the region's food. This cuisine's quality is made up of tangible and intangible elements, which include, among others, the ingredients, the materials used when the food is served, the overall services provided by the people and organisations involved, the systems guaranteeing the products' safety and hygiene standards and the associated facilities and decorative elements.

If these efforts succeed, the necessary conditions will exist to attract traditionally alienated market segments, such as youths, and to keep the loyalty of traditional segments whose potential size is quite substantial. The literature, therefore, indicates that the greatest effort needs to be concentrated on fulfilling the conditions listed in the last part of the previous

paragraph in order to guarantee a high overall quality that is not merely a marketing pitch but also a concrete cultural element that clients can perceive directly.

2. Conceptual evolution of gastronomy as part of cultural heritage

Serra (1996) argues that gastronomy as cultural heritage is, undoubtedly, much more than simply culinary art. Gastronomy is an important vehicle of folk culture, showing how the inhabitants of a specific region live, in a specific time. Along the same lines, the scope of the relationship between diet and culture is clearly not restricted just to the processes connected to the handling of the specialities consumed but also includes table manners and the places and ways in which eating happens. This means that humans' eating patterns are affected by social, economic and technological changes.

The aforementioned traditional cuisine can be identified through observations of certain eating habits and practices that – through their characteristic preparation and consumption patterns and the significance that these have for the communities that practice them – eventually become local symbols. These are the so-called typical dishes that are specialities prepared in specific ways in each region, with connections to history, production conditions and local culture that are “incorporated” into the identity or name of the specialities.

In July 2000, the Council of Ministers passed a resolution to raise Portugal's gastronomy to the official status of cultural heritage. At the time, various business associations reacted to this government decision with declarations of support, which highlighted the significance of this resolution for the business world, because the raising of gastronomy to heritage status allowed it to be dealt with in a much more promising way, attracting new chefs and other stakeholders, motivated to make a contribution to innovation in the field.

Alltogether, it was an important development to promote the use of new techniques, new recipes (and) new experiences but, above all else, to preserve the authenticity of Portuguese gastronomy. The raising of gastronomy to national heritage status also meant that the oldest recipes were recalled, many of which had already disappeared from traditional menus.

2.1 Conceptual evolution of gastronomy as a part of tourism promotion

Typical gastronomy, when presented and reinforced as inherent to a region, becomes a way to reaffirm any identities that need strengthening. Thus, the appreciation and protection of national and regional gastronomic symbols should be upheld as a way to preserve regional

identity. Notably, the relationship that is established between spaces and food production is easily visible and is currently recognised by residents, tourists and holidayers visiting specific places. In terms of tourism activities, to which local differences and particularities are basic raw materials, this gastronomic territoriality is not only encouraged but also widely publicised, as a way to differentiate tourism destinations from their competition. The more differentiated a destination is, the more it will be valued by visitors.

Tourism is made up of socioeconomic and cultural activities that are based on tourists' desires, needs, motivations and expectations. Tourism, therefore, needs to maintain a differentiated offer that resists globalisation tendencies, promoting the offer of typical dishes in hotels and restaurants located in areas with the most tourism. The homogenisation and industrialisation of everyday meals, especially in larger urban centres, result in a cultural dilution that threatens typical local dishes and meals and weakens more traditional cuisines. Specifically, in regard to cultural tourism – a category that can be divided into subareas, including gastronomic tourism – gastronomy, especially typical local gastronomy, deserves a prominent place in tourism not only because it is a cultural asset that deserves to be appreciated, but also because it provides important points of contact between tourists and host regions, offering a “taste” of local rites, values and traditions.

In this context, typical dishes are particularly important, precisely because they refer to more “authentic” and “genuine” experiences. These dishes popularise the cuisine of particular places and draw the attention of the food industry, primarily within the context of tourism.

Labaredas (1995) argues that Portugal contains a centuries-old, rich gastronomy, which can be considered one of the most important in the European continent. Many local authorities and associations have begun gastronomic initiatives – competitions, festivals, samplings, thematic weeks and fairs – to pursue the fundamental objective of publicising and strengthening gastronomic heritage. These organisations have not forgotten that these types of initiatives can improve the economy of the respective municipalities and localities, since these events are a way to attract more visitors. The cited author reports, at the time of the study in question, that independent gastronomic events could be found in 50% of Portuguese municipalities, which shows the interest generated by the various regional cuisines as a way to attract visitors.

2.2 Algarvian gastronomy

Serra (1996) observes that much has changed since the beginning of the 70s, when tourism began to expand and increasingly took on the role of the primary driver of regional economies.

Gastronomic traditions and dietary habits have been influenced by, in addition to the aforementioned factors, some other tendencies that have to do with a progressively more diverse demographic base, interregional migrations and residents' contact with tourists. This has meant that many traditions have been forgotten or challenged, even as others have been "commercialised", "adapted" or simply distorted, depending on the degree to which they have been changed to deal with new realities or commercial interests.

A study carried out by Fernandes (1993) compiled a variety of relevant information in order to understand the geographical and socioeconomic characteristics of the Algarve's central zone in the first half of the 20th century. In this study, the author refers that the soil quality and relative abundance of water determined the type of produce and crops grown, as well as the shaping of the animal husbandry, forestry and other activities.

The cited author also reports that the mountain-ridge farms basically relied on cereals and legumes adapted to an arid climate and that fertile valleys allowed the cultivation of small irrigated fields of potato, maize, vegetables and legumes. In addition, the mountain ridges provided enough vegetation to feed herds that satisfied the locals' need for milk, cheese and meat. Honey and *medronho* (i.e. a brandy made from the fruit of the strawberry tree), which are other mountain products, had a significant economic importance beyond that of household consumption. Fresh cheese with honey and bread with honey-water (i.e. a syrup-like mixture) are still today traditional food eaten by the mountain-ridge people.

In the Barrocal hills, the economic conditions were virtually identical to those in the mountain ridges. Because of the land's characteristics and property structure, locals lived off of small cultivated land parcels (*courelas*) where essentially dry farming was done (i.e. wheat, barley, oats, broad beans and peas). This was indispensable to both the humans and the mules and donkeys' diet and was complemented by harvests of olives and fruit – with the latter dried – and small vegetable gardens cultivated for household consumption.

The animals were used to provide tractive force in farm chores, such as ploughing and water lifting for irrigation, and to transport people and loads, namely, cereals and dried fruit. To minimise soil erosion, many families rented "fourths" (i.e. small parcels of land) to be able to do crop rotation.

The coastal area, where the land was more fertile because of the presence of water sources, could support large-scale agricultural production. Fruit trees were plentiful, including, among others, tangerine, orange, loquat, plum, pomegranate and peach trees.

In fishing centres, the sea's resources provided the main means of livelihood. As fish was the main source of income and food for the coastal communities, locals had to guarantee an abundance of fish even when weather conditions did not allow boats to go out to sea. Thus, the locals resorted to drying and stocking. Drying was done by private individuals, while stocking was done in fishing centres.

Meat played a reduced role in the local diet. Beef was rarely in demand and was considered an exotic food. Poultry, pork and, to a lesser degree, goat and mutton were more often eaten in the urban centres than in the countryside, where practically only poultry and pork were eaten. Normally, every family slaughtered a pig, except for richer households that could kill two or more: one at the beginning of winter to have meat to eat with cabbage and the other at the beginning of summer for the time of harvest.

2.3 Emergent sociocultural aspects

In terms of gastronomy – as happens with many other aspects of culture – the Algarve is quite distinct from the rest of Portugal. In addition to having long and deeply rooted traditions, this region's culture is one of the richest in the country. As one descends from the mountain ridges to the coast, one can find special ways in which the food is cooked and the ingredients are used.

Restaurants and hotels must preserve the main features of Algarvian cuisine, making local specialities part of these establishments' brand image. Rather than resorting to foreign recipes, raising the profile of Algarvian gastronomy needs to be considered a strategic commitment to differentiation and even innovation.

Serra (1996) reports that, from the 80s onwards, changes in eating habits became greater and more visible. Despite this and the many actions that still need to be taken, attempts have been made to recuperate certain authentic traditions that can guarantee the region's uniqueness, differentiating it from other destinations. These traditions should constitute a preferred way to market the region. Unfortunately, examples of inventions still abound that, despite their apparently huge success in the media or even commercial success, need to be more carefully thought out by government and business decision-makers.

3. Methods

The present study used a combination of methods considered acceptable for social science research requiring primary and secondary data collection to meet specific objectives, which in this study was carried out as follows. First, in locations selected for their geographical, heritage and cultural characteristics, unstructured interviews were conducted in order to obtain stories and life experiences considered important to understanding customs and traditions. Second, questionnaires were developed and distributed to tourists/visitors and restaurants. Third, semi-structured interviews were conducted with representatives of official entities and tourism associations, namely, town halls, the Entidade Regional de Tourism do Algarve (Regional Tourism Agency of the Algarve) (ERTA) and business associations (Associação dos Industriais de Hotelaria e Similares do Algarve (Association of Hotel and Related Industries of the Algarve) and Associação de Hotéis e Empreendimentos Turísticos do Algarve (Association of Hotels and Tourism Enterprises of the Algarve)). Last, the data were analysed using statistical techniques.

The survey of tourists was conducted with two groups of 100 individuals selected using random sampling through convenience. The restaurant survey was conducted with two groups of 20 establishments, based on the same random sampling through convenience.

3.1 Information sources

In the first phase of this research, a document search was carried out to enable an a priori deeper understanding of the topic under study. Secondary sources also were used to create the project's framework, as previous studies on similar topics have done.

In the second phase, a questionnaire was developed – with eight closed-ended questions and three open-ended questions – to be distributed to tourists. Another questionnaire with 12 open-ended questions was distributed to restaurant managers/owners to illicit information essential to understanding their cooking methods, ingredients used, the origin of ingredients and the dishes on their menus. In addition, a guide with four questions was written for structured interviews with heads of government agencies and tourism and restaurant associations. The questionnaires administered to restaurant managers were followed up with guided conversations to gather additional information in order to evaluate these managers' knowledge of typical and traditional gastronomy and to determine more clearly what their restaurants offer.

3.2 Treatment of data

The data collected from the two samples were analysed using the statistical software SPSS. The matrix of data was examined using only valid instances, with any non-responses and all other similar situations considered missing values. After all the information was processed, the next step was to analyse and select the results with which to continue this research.

3.3 Definition and creation of itineraries

The creation of itineraries is a tourism marketing initiative normally developed by tour operators or tourism marketing organisations. These routes consist of itineraries that tourists can follow during their stay in specific destinations.

In addition to other features, these routes need to include the most background information and attractions possible to match the interests and meeting expectations of potential clients, whose profiles should be determined previously. The quality of itineraries is directly related to its proper design, and these routes help determine tourists' choices during their stay in terms of the activities in which they engage.

There is, currently, no official classification system for routes, but they need to take into account geographical characteristics in association with other elements that contribute to the area's identity, namely, typical products, cultural sites, unique landscapes or production facilities. Thematic itineraries are a good example of this, since they are based on the identification of specific resources that can be offered as experiences composed of tangible and intangible elements. These can have an identity like that of a product, being equally amenable to being promoted and sold. Therefore, thematic routes can be an important way to enhance tourists' experiences during their stay, helping to sustaining a positive, well-established image of tourism destinations. Serra *et al.* (2003) created two itineraries based on geographical and sociological criteria, which served as reference points for the present study during the fieldwork.

4. Results

Itinerary 1 begins in Tavira and ends in Alcoutim, and Itinerary 2 starts in Faro and finishes in Querença. In terms of their features, both run between the coast and the mountain ridges, passing through Barrocal-hill areas. The routes are relatively homogenous in terms of geography, but the sociological characteristics are quite different along both itineraries, which

makes them particularly interesting in regard to gastronomy, handcrafts and even indigenous production.



Figure 1. Tavera to Alcoutim itinerary 1

Region: The Algarve – Sotavento

Areas covered: Coast, Barrocal hills and mountain ridges

Source: Serra *et al.*, 2003



Figure 2. Faro to Querença itinerary 2

Region: The Algarve – Sotavento

Areas covered: Coast, Barrocal hills and mountain ridges

Source: Serra *et al.*, 2003

4.1 Tourist survey results related to Itinerary 1 (from Tavira to Alcoutim)

Based on the answers given in the tourist survey regarding Itinerary 1, the following statements can be made about the respondents:

- 36% are Portuguese, followed by the British (34%), Dutch (16%) and Germans and other nationalities (14%).
- 58% were visiting the Algarve for the first time, mainly for the following reasons:
 - The climate/beaches
 - Prices
 - Recreation/contact with nature
 - The region's heritage/culture, including gastronomy
- 36% consider the local traditional gastronomy an important factor in their choice of this destination.
- 63% reported having some knowledge of typical Algarvian dishes and confectionaries.
- 86% report that tourism itineraries are extremely useful and greatly facilitate finding out more about the region.

4.2 Tourist survey results related to Itinerary 2 (from Faro to Querença)

The respondents who filled out the questionnaire referring to Itinerary 2 provided the following information about themselves:

- 28% are Portuguese, followed by the British (36%), Germans (16%) and Irish and other nationalities (20%).
- 52% were visiting the Algarve for the first time, mainly for the following reasons:
 - The climate/beaches
 - Sport activities (i.e. golf)
 - Prices
 - The region's heritage/culture, including gastronomy
- 40% consider the local traditional gastronomy an important factor in their choice of this destination.
- 54% reported some knowledge of typical Algarvian dishes and confectionaries.
- 62% reported that tourism itineraries are extremely useful and greatly facilitate finding out more about the region.

4.3 Restaurant survey results related to Itinerary 1 (from Tavira to Alcoutim)

Based on the responses of managers/owners contacted in the survey regarding Itinerary 1, the following statements can be made about these restaurants:

- 80% are already included in gastronomic routes publicised by town halls, the ERTA and other entities.
- The typical dishes most often offered by restaurants are:
 - Grilled fish or meat
 - Seafood dishes
 - Game dishes
- The most popular dishes are:
 - *Açordas* (bread-based stew)
 - Grilled meats
 - Seafood rice
- In terms of participation in gastronomic fairs/festivals:
 - 70% do not join these kinds of initiatives.
 - 30% participate and acknowledge that these events help promote their restaurant.
 - Despite the low level of participation, around 14% that have not yet joined such events intend to do so in the future.

4.4 Restaurant survey results regarding Itinerary 2 (from Faro to Querença)

Based on the information given by managers/owners contacted for the survey about Itinerary 2, the following observations can be made about these restaurants:

- 77% are already included in gastronomic routes promoted by town halls, the ERTA and other entities.
- The typical dishes most often offered by restaurants are:
 - Grilled meat and fish
 - Corn meal with meat
 - Gazpacho with sardines
- The most popular dishes are:
 - Poultry dishes such as home-raised cockerel
 - Grilled meat and fish

- Razor clam rice and *cataplanas* (lidded casseroles traditionally made from copper)
- In terms of participation in gastronomic fairs/festivals:
 - 60% do not join these types of initiatives.
 - 40% participate and recognise that these help to promote their restaurant.
 - 53% of those that have not yet participated intend to do so in the future.

The authenticity of Algarvian gastronomy, for these restaurant owners, has mostly been safeguarded by recipes passed down to them by their grandmothers and mothers. The concept of a typical Algarvian cuisine, especially for the Barrocal-hill restaurants, is a combination or mixture of mountain-ridge dishes – influenced by the Alentejo region – and coastal dishes. This cuisine also preserves Algarvian customs and traditions through local products.

Sometimes, individuals from the community, such as fishermen, also work together with the restaurants, teaching them how to cook specialities that have been forgotten. One of the restaurants surveyed researched traditional dishes that had been largely forgotten, and some of these became part of their regular menu. Both Portuguese and foreign tourists, according to the restaurants surveyed, want this type of food, and, notably, Portuguese tourists are increasingly interested in traditional Algarvian food.

All the restaurants surveyed feel that it is worthwhile maintaining traditional Algarvian gastronomy so that this can be preserved for, and appreciated by, future generations. All of the restaurateurs also greatly enjoy this type of activity.

Variables	1 Tavira-Alcoutim	2 Faro-Querença	Dif. 1>2
Portuguese	36%	28%	
English	34%	36%	
Dutch	16%	-	No comparison
German and others	14%	-	No comparison
German	-	16%	No comparison
Irish and others	-	20%	No comparison
First visit	58%	52%	
Main motivations			
Weather/ beach	1 st	1 st	
Price	2 nd	2 nd	
Leisure/ contact with Nature	3 rd	-	No comparison
Heritage/ culture (including gastronomy)	4 th	4 th	

Sports activities (golf)	-	2 nd	No comparison
Interviewed who consider the traditional gastronomy an influencing factor in the destiny choice	36%	40%	
Interviewed who affirm having some knowledge about the typical Algarvian dishes and pastry	63%	54%	
Interviewed who affirm the touristical routes have great utility and facilitate the knowledge about any region	86%	72%	

Figure 3. Chart comparing tourists' answers by itinerary

Source: Author

4.5 Interviews of representatives of government agencies and associations

The interviews conducted with representatives of local and central authorities, as well as representatives of regional associations involved in the issue of traditional gastronomy, revealed that the interviewees assert that traditional Algarvian gastronomy is extremely important. It plays a significant role in the Algarve tourism product, as shown by the following interview excerpts:

- “The gastronomic offer needs to evolve as a part of the Algarve products that can represent the region and differentiate it from other destinations.”
- “Traditional Algarvian gastronomy is a ‘hidden complement’ to the Algarve tourism product. In relation to Portuguese tourists, gastronomic festivals are increasingly important and work very well.”
- “The traditional Algarvian gastronomy is very important from the perspective of offer – as a tourism product. The mountain-ridge zone with its products should be more publicised, and this publicity needs to be accompanied by other measures, namely, promotions of visits to the mountain ridges and the most interesting places there.”
- “The Algarve tourism product – even though some attempts have already been made to change this – continues to be based on sun and sea. Not only should the quality of dishes offered be improved, but also the quality of services. The consumption of regional dishes needs to be encouraged from a local culture perspective, which, in my opinion, has nearly been lost with the influx of other regions and countries’ cultural influences.”

- “Gastronomy is an integral part of our cultural heritage and a means of transmitting popular culture.”

5. Conclusions and recommendations

The above results confirm that traditional Algarvian gastronomy is, in fact, a form of cultural heritage. It is part of the traditions and way of life of the people of the Algarve region. This cuisine has been inherited from previous generations, and attempts are being made to preserve it so that subsequent generations will be able to recognise – in addition to their ancestors’ other customs – all the types of food and products that make up Algarvian cuisine.

Currently, a rebirth of traditional gastronomy can be seen, as well as a desire to transmit these traditional flavours to the people who come in search of what the Algarve has to offer and who are interested in the region’s culture and customs. All the entities contacted are unanimous in affirming that traditional Algarvian gastronomy is winning over increasing numbers of fans and that various restaurants already exist that offer a quite good quality of traditional food. Thus, the region’s gastronomic offer needs to evolve further as a part of the Algarve tourism product, contributing to differentiating this region from other destinations.

This study confirms that gastronomy is an important factor in tourists’ satisfaction levels. However, a wider and deeper study of tourists’ gastronomic preferences needs to be conducted, which could further raise the profile of traditional Algarvian gastronomy and its contribution to tourists’ overall satisfaction with their experiences in the Algarve as a tourism destination par excellence.

References

- Águas, P. et al. (1994), *Estudo do Perfil do Turista – Relatório Final*, Universidade do Algarve, E.S.G.H.T.
- Bastos, C. (1993), *Os Montes do Nordeste Algarvio*, Lisboa, Edição Cosmos.
- Cabugueira, A. (2000), “Do desenvolvimento regional ao desenvolvimento local. Análise de alguns aspetos de política económica regional”, *Revista Gestão e Desenvolvimento*, Departamento de Economia, Gestão e Ciências Sociais do Centro Regional das Beiras da UCP, 9, 103–136.

- Comissão de Coordenação e Desenvolvimento Regional do Algarve (2005), *Festa da Gastronomia e das Receitas Típicas das Aldeias do Algarve – à descoberta dos sabores tradicionais*, Terra Culta, Lda.
- Diário da República (2000), Resolução do Conselho de Ministros nº 96/2000, I Série B, nº 171, 26th of July of 2000.
- Diário da República (2001), Resolução do Conselho de Ministros nº 169/2001, I Série B, nº, 19th of December of 2001.
- Diário da República (2002), Portaria nº 312/2002, I Série B, nº 69, 22nd of March of 2002.
- Diário da República (2006), Resolução do Conselho de Ministros nº 39/2006, I Série B, nº 79, 21st of April of 2006.
- Diário da República (2008), Decreto-Lei nº 39/2008, I Série B, nº 48, 7th of March of 2008.
- Diário da República (2008b), Portaria nº 327/2008, I Série B, nº 82, 7 28th of April of 2008.
- Fernandes, A. (1993), "Gastronomia Tradicional do Concelho de Loulé: 1ª metade do séc XX", *Al-ulyã*, 2, 199-222.
- Fragoso, A. (2005), "Contributos para o debate teórico sobre o desenvolvimento local: um ensaio baseado em experiências investigativas", *Revista Lusófona de Educação*, 5, 63-83.
- Guerra, J.C. (2000), *Entrevista: Intermagazine*. (August/ September), Lisboa, Edições do Gosto.
- Henriques, C., Custódio, M.J. (2015), "Turismo e gastronomia: A valorização do património gastronómico na região do Algarve", *Encontros Científicos - Tourism & Management Studies*, 6, 69-81.
- Kivela, J., Crotts, J.C. (2006), "Tourism and gastronomy: Gastronomy's influence on how tourists experience a destination", *Journal of Hospitality and Tourism Research*, 30(3), 354-377.
- Labaredas, J. (1995), *Iniciativas Gastronómicas do Poder Local. Poder Local-Revista de Administração Democrática*, 127, 56.
- Richards, G. (2002), "Gastronomy: an essential ingredient in tourism production and consumption?", in Hjalager, A.M. and Richards, G. (eds), *Tourism and Gastronomy*, Routledge, London, New York, 3-20.
- Santiago, L. (1993), *Cozinha Regional do Algarve*, Editor Francisco Lyon de Castro, Lisboa, Publicações Europa-América.
- Serra, F. (1996), "Gastronomia e Cultura", *Revista dos Algarves*, 1, 2.º sem, 9-11.
- Serra, F. et al. (2003), *Itinerários Gastronómicos do Algarve*, ESGHT, Faro, np.
- Sousa, L. (2000), *Entrevista: Intermagazine*, (August/ September), Lisboa, Edições do Gosto.
- Vaz, A. (1994), *Algarve, Reflexos Etnográficos de uma Região*, Faro, Secretaria de Estado da Cultura, 92.

Chapter XX

“Cante Alentejano” and Tourism in Alentejo

“Cante Alentejano” and Tourism in Alentejo

BERNADETE DIAS SEQUEIRA¹³⁸

PAULO MARIZ LOURENÇO¹³⁹

MANUELA GUERREIRO¹⁴⁰

JÚLIO MENDES^{141 142}

Abstract:

The bid to recognise *Cante Alentejano* as Intangible Cultural Heritage of Humanity was approved unanimously on 27, November 2014, exactly three years after *Fado* became part of the UNESCO Representative List of the Intangible Cultural Heritage of Humanity.

This candidacy was promoted by Tourism of Alentejo, E.R.T, in partnership with the municipality of Serpa and including the participation of the community, musical groups and local and regional public bodies. The purpose of the bid was the safeguarding of the intangible cultural heritage and it was built upon, among others, the collection and analysis of documents about the *Cante Alentejano*, the collection and analysis of its musicography, and the characterization of groups and singers of *Cante*.

This recognition of *Cante Alentejano* as Intangible Cultural Heritage of Humanity poses challenges to stakeholders directly or indirectly involved in the management process.

In this context, and given the strategic importance of tourism for the development and competitiveness of Alentejo, it is important to promote the debate about the UNESCO recognition of *Cante*, in order to draw the most appropriate strategies for its preservation and appreciation, while enhancing the multiplier effects on the tourism development of the region

¹³⁸ University of Algarve (Portugal), Faculty of Economics, CIEO - Research Centre for Spatial and Organizational Dynamics, bsequei@ualg.pt

¹³⁹ DGLAB - District Archive of Faro (Portugal), paulomariz@gmail.com

¹⁴⁰ University of Algarve (Portugal), Faculty of Economics, CIEO - Research Centre for Spatial and Organizational Dynamics, mmguerre@ualg.pt

¹⁴¹ University of Algarve (Portugal), Faculty of Economics, CIEO - Research Centre for Spatial and Organizational Dynamics, jmendes@ualg.pt

¹⁴² This paper was supported by national funds from Fundação para a Ciência e Tecnologia (FCT).

Using a set of in-depth interviews conducted with key informants, we aim to analyse and discuss the potential of *Cante Alentejano*, recognised as Intangible Heritage of Humanity, for the experiential tourism development in the tourism destination Alentejo.

Keywords: Cante Alentejano; UNESCO Intangible Heritage; Cultural Tourism; Alentejo

Resumo:

A candidatura do Cante Alentejano a Património Cultural Imaterial da Humanidade foi aprovada por unanimidade a 27 de Novembro de 2014, exatamente três anos depois da inscrição do Fado na lista de Património Cultural Imaterial da Humanidade da UNESCO.

Esta candidatura foi promovida pelo Turismo do Alentejo, E.R.T, em parceria com a Câmara Municipal de Serpa e contou com o envolvimento da comunidade, de grupos musicais e de entidades públicas locais e regionais. O objetivo desta candidatura é a salvaguarda do património cultural imaterial e a mesma foi consubstanciada, entre outras, na recolha e análise documental sobre o Cante Alentejano, na recolha e análise da musicografia do Cante Alentejano e na caracterização do Cante Alentejano, dos grupos de Cante e dos cantadores.

Este reconhecimento do Cante Alentejano como património imaterial da humanidade vem colocar um conjunto de desafios aos diversos stakeholders direta e indiretamente envolvidos na gestão do processo.

Neste contexto, e devido à importância que o turismo assume como setor estrategicamente importante para a competitividade e desenvolvimento do Alentejo, torna-se necessário promover uma reflexão sobre esta distinção de modo a desenhar as estratégias mais adequadas à sua preservação e valorização ao mesmo tempo que são potenciados os efeitos multiplicadores no desenvolvimento turístico da região.

Através da condução de entrevistas em profundidade a um conjunto de personalidades-chave, pretende-se analisar e discutir as potencialidades do Cante Alentejano, distinguido como Património Imaterial da Humanidade, para o desenvolvimento do turismo experiencial no destino turístico Alentejo.

Palavras-chave: Cante Alentejano; Património Cultural Intangível; Património Imaterial da Humanidade; Alentejo

Resumen:

En el 27 de noviembre de 2014, se aprobó la candidatura del Cante Alentejano como patrimonio cultural inmaterial por unanimidad; exactamente tres años después de la inscripción del fado en la lista del patrimonio cultural inmaterial de la UNESCO.

Esta candidatura fue promovida por la Agencia de Turismo de Alentejo, E.R.T, en colaboración con el Ayuntamiento de Serpa e incluyó la participación de la comunidad, grupos musicales y las autoridades locales y regionales.

El objetivo de esta candidatura es la salvaguardia del patrimonio cultural inmaterial y se ha plasmado en su contenido, entre otras, la recogida y el análisis de documentos sobre el Cante Alentejano, en la recogida y análisis de musicografía del Cante Alentejano y la caracterización del Cante Alentejano de los grupos Cante y de sus cantantes.

Este reconocimiento del Cante Alentejano como patrimonio inmaterial de la humanidad ha puesto una serie de retos a los diferentes actores involucrados directa e indirectamente en la gestión del proceso.

En este contexto y teniendo en cuenta el importante papel que desempeña el turismo -como dinamizador de un sector de importancia estratégica para la competitividad y el desarrollo de la región del Alentejo-, es necesario promover la reflexión sobre esta distinción con el fin de diseñar las estrategias más adecuadas para su conservación y mejora mientras que los efectos multiplicadores se potencian en el desarrollo turístico de la región.

Con la realización de entrevistas en profundidad a una serie de personalidades clave, se pretende analizar y discutir el potencial del Cante Alentejano, -distinguido como Patrimonio Inmaterial de la Humanidad-, para el desarrollo del turismo experiencial en el destino turístico Alentejo.

Palabras Clave: Cante Alentejano; Patrimonio Cultural Inmaterial; Patrimonio Inmaterial de la Humanidad; Alentejo

1. Introduction

Cante Alentejano (Alentejo Song) is a melodic structure characteristic of Alentejo, southern Portugal; a way of singing without instrumental accompaniment; a poetry, a chant that is based solely on the voices of its performers (Cabeça and Santos, 2010). This cultural expression was recently classified as UNESCO Intangible Cultural Heritage of Humanity. This recognition give

rise to other dynamics around *Cante Alentejano*, either as an object of study or tourist attraction, or even as an artistic expression that must be protected, in order to maintain the authenticity.

Generally speaking, research around this artistic expression of identity focuses, above all, on the perspective of *Cante* while musical structure or from the perspective of sciences such as Anthropology, History or Sociology. The study of the relation between *Cante* and tourism is a recent field of research that began with the recognition of *Cante* as Intangible Heritage by UNESCO. Its relations with tourism, impacts, authenticity and attractiveness are aspects that arise after the approval of this bid and, simultaneously, a concern and a challenge to the entities that manage the areas of culture, heritage and tourism in the region.

In this study, we aim to understand the perceived impacts of the distinction of *Cante Alentejano* as Intangible Heritage of Humanity in the enhancement of the tourism region of Alentejo. Underlying the achievement of this general objective of research are the following specific objectives: 1) Investigate to what extent the recognition of *Cante Alentejano* as UNESCO Intangible Heritage led to a transformation of *Cante Alentejano*; 2) Analyse to what extent the recognition of *Cante Alentejano* as UNESCO Intangible Heritage has led to an expansion of the manifestation of *Cante Alentejano*; 3) Analyse to what extent UNESCO brand promoted new public interest in *Cante Alentejano*; 4) Understand the importance of the promotion of *Cante Alentejano* as tourist attraction; 5) Assess to what extent *Cante Alentejano* is perceived as an asset for the development of tourism in Alentejo.

We tried to understand these dimensions through the perceptions of the actors involved in the candidacy of *Cante Alentejano* to UNESCO Intangible Heritage and that were, at the time, key entities linked to *Cante Alentejano*. Thus, it was assumed that the impact in a region of the recognition of a cultural expression as UNESCO Intangible Heritage is a complex phenomenon and it can only be understood in the light of the perspective of the social actors involved.

Therefore, in this research, we opted for an exploratory qualitative study. We tried to pave the way for new approaches and raise questions for future research.

One of the main objectives of the qualitative approach is the reconstitution and "understanding" of the actors' subjective meaning regarding their actions. Denzin and Lincoln (1994: 2) deepened this question by saying: "qualitative research study things in their natural setting, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them". In this sense, the possible realities are constructed socially and mentally by the people who experience the events, and result from the individual construction of these

experiences. We sought to produce an "objective" knowledge about the subjective meaning that the actors give to the world around them.

This is an exploratory study of a qualitative nature based on a methodological strategy that includes the semi-structured interview. The main results point to the emergence of a set of common ideas around which it will be feasible to develop the guidelines of the region tourism strategy with regard to the use of *Cante Alentejano* as a tourism product.

2. Literature Review

2.1 *Cante Alentejano* as part of the Intangible Cultural Heritage of Humanity, commitments and challenges

In the bid enacting terms, *Cante* is presented as an "intangible cultural expression, a performing art and a tradition, an oral expression that includes language as a vehicle of heritage" (Lima, 2015: 16). *Cante* is described as an expression of traditional polyphonic singing without instrumental accompaniment. Its temporal dimension reveals a continuous documented presence that goes back to more than a hundred years. Throughout this period, the expression soaks in and conveys the social changes of society and consolidates as a cultural and identity symbol.

Cante is considered a cultural phenomenon of Alentejo, but it surpasses its geographical barriers, gaining a global dimension with its people's diaspora. The support from various choral groups and their geographical dispersion clearly illustrate the spread of *Cante*, even beyond Portuguese territory.

The Convention for the Safeguarding of the Intangible Cultural Heritage of the United Nations Educational, Scientific and Cultural Organization (UNESCO), signed in Paris on 17, October 2003, laid the foundations for the creation of a Representative List of the Intangible Cultural Heritage of Humanity and, since then, the Organization promotes the safeguarding and classification of Intangible Heritage of Humanity. In fact, over the course of 13 years, bids from different countries have been submitted to UNESCO, with a multiplicity of socio-cultural expressions of identity that have enriched the intangible heritage list from 2003 to the present day. In this list, Portugal submitted the Mediterranean diet, a joint bid of various countries, *Fado*, *Cante* and, very recently, the Art *Chocalheira* (cowbells). This momentum reveals the great interest that the country has shown in promoting the recognition and safeguarding of its intangible heritage.

According to the Convention for the Safeguarding of the Intangible Cultural Heritage (UNESCO, 2012: 27) the prerequisites for the recognition of cultural forms to be included in the Representative List of the Intangible Cultural Heritage of Humanity by UNESCO include:

- 1 - The element constitutes Intangible Cultural Heritage, as defined in the Article 2 of the Convention (UNESCO, 2003).
- 2 - The inscription of the element will contribute to the visibility and awareness of the importance of the Intangible Cultural Heritage and the promotion of dialogue, thus reflecting the world's cultural diversity and giving testimony of human creativity.
- 3 - Safeguarding measures are elaborated that may protect and promote the element.
- 4 - The element has been nominated following the widest possible participation of the community, group or, if applicable, individuals concerned and with their free, prior and informed consent.
- 5 - The element is included in an inventory of the Intangible Cultural Heritage present in the territory of the submitting State party, according to the Articles 11 and 12 of the Convention (UNESCO, 2012: 27 and 28).

The candidacy of *Cante* to Intangible Heritage of Humanity, resulted from a long process, starting in 2011, based on research, analysis and dialogue between public and private entities, local groups and civil society. At that time, the town of Serpa presented its candidacy to the UNESCO Creative Cities Network, in which *Cante* assumed a major role.

The promotion entities were *Confraria do Cante Alentejano*, *Casa do Alentejo* and the Association MODA. The municipality of Serpa and the Tourism of Alentejo and Ribatejo (E.R.T.) sponsored the initiative. The Committee of Honor, chaired by the (then) President of the Portuguese Republic, included members of the Government, elements of the Catholic Church, business representatives and other Portuguese cultural and social institutions. The management of the bid has gone through a period of upheaval, when Rui Vieira Nery, President of the Scientific Committee, criticised the strategy outlined and argued for a greater involvement of *Cante* practitioners in the submission process (Diário do Alentejo, 2012). After a period of some uncertainty, the team responsible for the process was restructured and the *Casa do Cante de Serpa* has come to assume a pivotal role in the management process that culminated with the submission, in Paris, on 30 March 2013, along with other 46 bids.

The submission of *Cante* had the active involvement of communities, choral groups and individuals in the safeguarding of their own intangible cultural heritage that included, among

others, the collection and analysis of documents and musicography related to *Cante Alentejano*, and the characterization of *Cante*, the choral groups, and the individual singers. Meanwhile, it was developed a safeguarding plan of this heritage since this is one of the main factors to be evaluated by UNESCO, because "the States must demonstrate the creation of safeguard measures aimed at the protection and promotion of the element" (Lima, 2015: 22).

The safeguard measures indicated in the submission of *Cante* were based in four courses of action: the creation of institutional networks, the recognition of *Cante* as Intangible Cultural Heritage, its transmission and sustainability, and the promotion of information and communication channels. The framework of initiatives and actions presented a chronological continuity and pointed to actions already undertaken or underway for 2015 and 2016.

Within the creation of institutional networks, the proposal provided for the promotion of shows, debates, and exhibitions, the development of an educational programme and the creation of a digital archive of open access.

Regarding the recognition of *Cante* as Intangible Cultural Heritage, the submission has committed to develop actions that promote the classification and registration of *Cante Alentejano* as municipal interest, to provide to the bearers of the tradition of *Cante* the conditions for documentation and transmission of their knowledge, to elaborate ethical guidelines for the actors and agents of *Cante* regarding the protection of the intellectual property.

Within the scope of transmission and sustainability, the bid committed to promote *Cante* among young people. For that, it intended to carry on a strategy of joint promotion involving all actors and institutions linked to *Cante*. This effort would entail debates around *Cante* and the promotion of cross-cutting events encompassing all *Cante* groups, their performance in public spaces of various nature and participation in intercultural events; support and encourage formal and informal learning of *Cante*.

Regarding communication and information, a crucial aspect of the safeguard plan, the bid committed with the creation of communication channels and networks between bearers of *Cante* and the public, using, for this purpose, traditional and digital media, such as the publication of monographs, critical editions and recordings, creating a record label for *Cante* and a music festival circuit. In order to bring closer bearers, researchers and other publics, the candidacy provided for the creation of a digital platform that gathered and allowed the sharing of knowledge about *Cante*, the creation of a virtual museum, a traveling exhibition about *Cante*, the dissemination of information through QR-code and the promotion of *Cante* in social media.

The bid of *Cante Alentejano* to World Heritage was considered exemplary and approved unanimously on 27 November, 2014. As of this date, the *Cante* is inscribed on the UNESCO Representative List of the Intangible Cultural Heritage.

The UNESCO recognition of the tangible or intangible cultural heritage of humanity means a "collective ownership" of that heritage, a kind of property of all and not of a particular country or region. Despite this appropriation, it should be noted that this cultural expression and identity of the people from Alentejo will always have its epicentre in this region, that must assume a more prominent role in terms of management for its safeguarding, preservation, and dissemination. According to Rui Nery, the inscription on the list of UNESCO brings "a huge international visibility, but also an enormous responsibility, both for the Government and for local authorities in the region, in terms of the preservation and dissemination of our cultural memory" (Diário de Alentejo, 2014).

Since then, *Cante Alentejano* gained a new dimension and visibility, "in the last 12 months, a lot has changed. *Cante* packed houses, became a strong identity, created tastes and projects, traveled, became much more mixed with a territory" (Lima, 2015: 8). The country began to listen to *Cante* and to learn a little about its reality and dimension. "The recognition of UNESCO breathe new life to *Cante*, with many new projects appearing and the renewal of the existing groups. The world began to look at us (...)" (Pires, 2015: 9). This new visibility also increased the requests for choral groups' participation in national and international events.

The actions listed in the *Cante* Safeguard Plan are currently the major concern of the different actors of *Cante Alentejano* - bearers, researchers, organizations or the community in general. It is the task of everyone involved to meet that commitment.

Within the framework of the institutional network, the municipality of Beja has recently launched its safeguard plan of *Cante Alentejano*, which is part of the regional effort of the trans-municipality safeguard plan transposed from the candidacy regulations (Pporto.pt, 2016). Generally speaking, the municipalities have promoted shows, debates, exhibitions and other initiatives focused on *Cante*. In addition, several activities have been carried out with the schools in the region, in particular the teaching of *Cante*, and various initiatives aiming to promote the creation of younger or mixed groups, in order to ensure genuine continuity of this tradition for future generations. Examples of this effort are the municipalities of Serpa and Vidigueira that have been promoting the teaching of *Cante* in primary schools (CIMBAL, 2016; Rede Portuguesa de Municípios Saudáveis – Portuguese Network of Healthy Municipalities, 2016).

The municipality of Serpa, which was at the origin of the creation of the *Casa do Cante* (House of *Cante*), among other initiatives, participates in a partnership with the municipality of Portel and the company of *Sistemas de Futuro* for the development of the open access digital archive of *Cante*, the *Arquivo de Cultura Popular* (Popular Culture Archive). Meanwhile, some publications on *Cante Alentejano* were released adding to the visibility and momentum on social media, namely through the *Casa do Cante*, present on Facebook and Instagram.

The *Casa do Cante*, in Serpa, was created in June of 2012, aiming the protection and safeguarding of this Intangible Heritage of Humanity. It is, together with the competent authorities, one of the responsible for the actions of compliance with the Safeguard Plan for *Cante Alentejano*. Currently, the *Casa do Cante* is developing the Museum of *Cante* (Pires, 2015).

2.2 Tourism and culture on the way to the development of regions

According to Richards (2005), the definition of cultural tourism is complex, because it relates to two equally complex and no consensual concepts – tourism and culture. Also, the definition provided within the Mexico City Declaration on Cultural Policies, culture is understood as "the whole complex of distinctive spiritual, material, intellectual and emotional features that characterize a society or social group, which includes not only arts and letters, but also modes of life, the human being's fundamental rights, value systems, traditions and beliefs." (UNESCO, 1982: 1). This broad definition goes beyond art and heritage and encompasses an intertwined web of aspects, which, as a whole, defines a particular society in cultural terms.

Cultural Tourism is a recent concept, though, in Europe, tourism and culture have always been closely linked (Richards, 1996: 5) and they are both permanently associated with the relevant historical-cultural assets that characterize this region of the globe since the most remote times, attracting the attention of those with a spirit of curiosity and adventure (Henriques *et al.*, 2014: 23).

The United Nations World Tourism Organization (UNWTO, 1985) presents two definitions of cultural tourism. A more narrow definition associates cultural tourism to the movement of people associated essentially to cultural motivations, such as learning, performing arts and cultural tours, travel to attend festivals and other events, visits to sites and monuments, travel to study nature, folklore or art and pilgrimages. Another broader definition assumes, in the perspective of the European Centre for Traditional and Regional Cultures (ECTARC, 1989), that tourism should be understood as cultural whenever the selection of holiday destinations is, firstly, related to cultural motivations and includes activities that, in general, can be considered

high culture, associated with "all movements of persons to satisfy the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge and encounters". For the European Union (2010), culture refers to a set of attitudes, beliefs, customs, values and practices that are often shared by a group; or as a tool to qualify a sector of activity: the cultural sector. It should, therefore, be understood in the context of the relation between high culture and every day culture (or popular culture) and increasingly focused on the intangible. The UNESCO (2003), on its definition of cultural products, points out that these are not necessarily tangible. The importance of the intangible cultural heritage is highlighted, including oral traditions and expressions, knowledge and social practices as well as a set of practices concerning Nature.

Accordingly with UNESCO's Convention for the Safeguarding of the Intangible Cultural Heritage (2003) there are five domains in which intangible heritage is visible: (1) Oral traditions and expressions, (2) Performing arts, (3) Social practices, rituals and festive events (4) Knowledge and practices concerning Nature and the Universe, (5) Traditional craftsmanship. In each of these domains, the UNESCO distinguishes those which, due to their historical, scientific or aesthetic qualities have universal value.

The association between tourism and culture derives, on the one hand, from the recognition of the contribution of culture to the economy, and, on the other hand, from the structural changes in society which acknowledges culture as a commodity (UNESCO, 2010).

The impact of having a cultural resource at the World Heritage List (WHL) is considered to be of great interest both by professionals and politicians. The attraction of tourists and the expected impacts on economic development of regions is getting the attention of professionals from all over the world (Cuccia, Guccio and Rizzo, 2016).

There is, among academics and professionals, a growing recognition of the importance and relevance in exploring the unique features of the destinations, in particular with regard to their cultural and historical heritage, as a source of product development able to enhance the unique and differentiating tourism experiences (Agarwal and Brunt, 2006; Costa, 2004; Smith, 2004; Valle *et al.*, 2011). In this context, cultural products contribute actively to add value to tourism destinations becoming strategically important within the tourism development plans of the regions (Myerscough, 1988; Richards and Bonink, 1995).

Specially in the last two decades, tourism has become one of the driving forces of the world economy accounting for 9.3 percent of global Gross Domestic Product (GDP) (total contribution – Travel and Tourism economy) and for about 8.7 percent of total employment, in 2012 (WTTC,

2013). In Europe, in the same year, tourism represented 8.4 percent of GDP and 9.1 percent of employment (WTTC, 2013a). Data from the Organization for Economic Co-operation and Development (OECD, 2009) show that cultural trips rose from 190 million in 1995 to 359 million in 2007, equivalent to a growth from 37 percent (1995) to 49 percent (2007). A study of the United States Cultural and Heritage Tourism Marketing Council (2009) concluded that 78 percent of all leisure travelers are undertaken by cultural/heritage tourists. Various authors (Richards and Raymond, 2000; Valle, Guerreiro, Mendes and Silva, 2011) recognise that certain segments of tourists search, in their holidays, for tourism experiences, which contribute to their personal enrichment.

From a political and business perspective, Cultural Tourism is of strategic interest whether for its promising growth, with repercussions in terms of employability, as for the strengthening of identity and cultural diversity of the regions. Richards (2007) and Richards and Palmer (2010) point out as major trends within Cultural Tourism the increasing number of individuals who seek to live a "cultural holiday"; the increase in the level of education and income of the contemporary tourist; tendency for short-term holidays; greater use of the internet in the purchase-decision process, particularly for information and booking; greater demand for festivals and cultural events (in a context of increased supply); greater interest in having unique and 'creative' experiences.

The relevance of Cultural Tourism is also associated with its impact in reducing seasonality, insofar as it has an interesting potential to amplify positive effects of tourism development at the regional level (European Commission, 1995 in Bonet, 2003; Cuccia and Rizzo, 2011; Figini and Vici, 2012). This argument posits that regions far from the main tourist routes or without the usual resources to attract tourists have the potential to develop economically and attract tourists through the conservation and restoration of cultural heritage (European Commission, 1995 in Bonet, 2003).

In an analysis on cultural and artistic entities in Portugal, Gomes, Lourenço and Martinho (2006) conclude that, in general, the regions are turning to Cultural Tourism due to its recognised potential for local development. In general terms, new areas of culture are emerging, in particular in the field of popular culture and intangible heritage (European Commission, 2010). According to the same document "omnivorous" patterns of cultural consumption are developing, i.e., people consume every form of culture combining popular and high culture. Munsters (2004) draws attention to the fact that the culture is "fragile for massive consumption", stressing that the attractiveness of cultural tourism product is determined by the quality of the

cultural offer. There is a sustainability factor that must be balanced with the increasing demands of tourists (Munsters, 2004).

Some studies posit that, if the material and symbolic values that have contributed for the World Heritage status are to be maintained and remain accessible to present and future generations, thus the sustainable management of tourism activities must be prioritized (Landorf, 2009). In addition, the historical and cultural environment is a non-renewable resource (Phillips, 2015) and some of the impacts of tourism are irreversible and intangible.

3. Research methodology

In this section, we present the setting of the research, the perspective that has guided the study, the research method, the techniques of data collection and sampling, as well as the process of field work and data analysis.

3.1 Setting

The Alentejo region extends from the Tagus River, in the North, to the first rocky outcrops of the mountains of the Algarve, in the South, bordering Spain to the East and the Atlantic Ocean and the region of Lisbon to the West. The territory "presents internal coherence from the economic and social perspective, and also in its landscape, its culture and its traditions, strong features that often hide the diversities that effectively exist" (Almeida, 2002: 8). According to the European Nomenclature of Territorial Units for Statistics (NUTS), it is the largest NUTS II region in the country (DR, 1989: 590), with an area of 31,605 km² (Região do Alentejo em números, 2014: 4) which corresponds to about a third of the national territory (Almeida, 2002: 8). The region has 757,302 inhabitants, about 7.2 percent of the country's total population (Censos 2011 Resultados Definitivos - Região Alentejo, 2012: 18) and a population density of about 24 people per km², lower than the average density of the country - 114.5 people per km². Similarly to the country, the age structure of the region shows an increasing share of older persons, with an ageing index of 162.69, higher than the national index (102.23) (INE, 2012).

The Alentejo has a rich natural and cultural heritage. The region is characterized by dispersed settlement, low population density and the landscape features large landed estates. In addition to the agricultural landscape, the region also has "a coast line of 263 km, one of the best preserved in Europe ..." (CCDR Alentejo, 2012: 12).

From an economic perspective, the tertiary employment rate in Alentejo is lower than the European and the country's average rate. The economic structure is characterized by a "productive specialization profile", in which "farming, forestry and fishing" stand out, "being a poorly diversified economy, largely dependent on the public sector" (Augusto Mateus e Associados; CIRIUS; Geoldeia; CEPREDE, 2005: 93).

The tourism sector in Portugal has been consolidating its growth in recent years and the Alentejo has followed this trend. The large region of Alentejo has a diversified tourism offer, presenting itself as "a certified and internationally recognised destination for its identity and unique experiences offered" (Turismo do Alentejo, 2013: 3). In this region, the tourism offer is diversified and includes products like eco-tourism, cultural tourism, wine tourism, handicrafts and cuisine, along with an extensive coastline.

In the national context, the accommodation capacity (bed places) of Alentejo, in 2013, represented 5.1 percent of the total, of which 40 percent is on the coast (Fazenda, 2015). In terms of regional distribution of overnight stays in hotels, resorts, apartments and others, between January and August 2016, the region recorded 1,110,100 overnight stays and accounted for 3 percent of the national total (Turismo de Portugal, 2016). The rate of change of tourism demand for overnight stays increased 17.2 percent between 2013 and 2014 (Fazenda, 2015). These figures show a strong increase in the tourism demand in the region. In this period, most of the guests in the region were domestic tourists. With regard to the external market, the major source countries were Spain, France, Brazil, Germany and the United Kingdom.

The Regional Tourism Promotion Agency - Tourism of Alentejo - in its strategic document for tourism 2014-2020, sets the goal of contributing to the creation of a regional strategy to boost tourism in all sub-regions in an integrated manner. This document sets quantitative objectives of increasing the supply of bed-spaces by 27 percent and the overnight stays in the region by 63 percent until 2020 (Turismo do Alentejo, 2013).

3.2. Design of data collection instrument

This study adopts two main techniques of data collection, namely, the documentary research and in-depth (Miles and Huberman, 1994) and semi-structured (Bryman, 2008) interviews.

The documentary research consisted mainly of secondary sources, in particular the *Cante Alentejano* project proposal submitted to UNESCO Representative List of the Intangible Cultural Heritage of Humanity, newspaper articles and the websites of the entities linked to *Cante*

Alentejano. The main purpose of this technique was to characterize the contexts of the bid of *Cante* to UNESCO List of Intangible Heritage and review the literature in the field of tourism and culture, as well as to complement the information obtained through the semi-structured interviews.

The primary research was carried out through in-depth interviews, whose main advantage is the collection of abundant and detailed information about a specific phenomenon (Stake, 1995). This instrument allows to ask a set of guiding questions, relatively open, without a fixed sequence. The semi-structured interviews meet the two requirements: on the one hand, they allow the respondents to structure their thinking about the object under analysis, although, on the other hand, the very definition of the object of study restricts the respondent's field of interests and requires the deepening of aspects that they could not clarify. This instrument allows, therefore, to deepen a particular topic or verify the evolution of a particular domain (Ghiglione and Matalon, 1997).

According to Guerra (2006: 53), the most important issue in the construction of the interview guide consists of the "clarification of the goals and the dimensions of analysis that the interview contains". So, as a first step, the guide was built according to specific goals which resulted from the topic under study, as it is presented in Figure 1.

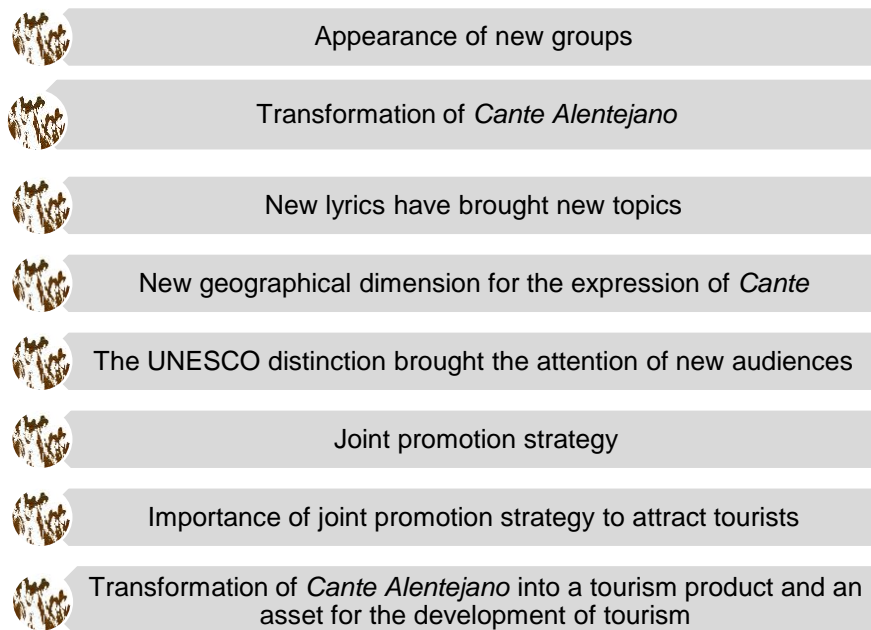


Figure 1. Dimensions of the semi-structured interview

Source: Authors

3.3. Sampling

The interviews were essentially addressed to actors who were involved in the submission of *Cante Alentejano* to UNESCO Intangible Heritage and represented, at the time, key entities related to the *Cante Alentejano*. Therefore, it was used purposive sampling consisting of five elements, of which three have been interviewed.

3.4. Data Collection

Respondents were firstly contacted by telephone and the objectives of the study were presented highlighting the importance of the interviewee in the provision of information and ensuring confidentiality. After that, an email was sent providing a link to access the interview guide.

3.5. Data Analysis

Although other sources of information were used, research data were collected primarily from the semi-structured interviews. The answers given by respondents were analysed by content analysis in order to address the objectives of this study.

Content analysis is basically a technique to interpret textual data through a systematic classification process, composed, normally, of the following steps: clarification, codification and identification of themes (Hsieh and Shannon, 2005). In this way, the content analysis focused on thematic analysis (Ghiglione and Matalon, 1997) or categorical analysis (Bardin, 1995), in the sense that we sought to identify the central corpus of the interviews, with the identification of categories and subcategories (Guerra, 2006). In this way, the categories are at the core of the analysis, being the discourse dismantled and the pieces grouped in categories (Bardin, 1995). In the initial stage of data processing, we started a project in the software QSR NVivo version 9, to which we imported the texts of the interviews and defined the main categories of analysis that resulted from the specific objectives of the research.

It is common to assign codes to context units¹⁴³ constructed from letters and digits, linking each registration unit¹⁴⁴ to the code assigned to the context unit from which it was withdrawn.

¹⁴³ It is frequent in the analysis of transcribed text of several interviews consider each of the interviews as a context unit, since it is the whole interview that allows the understanding of the meaning of each unit of record and that we intend to codify (Esteves, 2006).

In this study, we decided to identify the context units, specifically each of the interviews, as follows: E1; E2; E3. The documentary analysis was based primarily on in-depth reading, selection and systematization of information.

4. Results

The classification of *Cante Alentejano* while cultural expression listed as Intangible Heritage of Humanity brought with it changes and consequences. One of the most visible consequences is the high visibility of this cultural expression, at national and international levels. Another sign of change could be the way the community redefines its perception of the cultural expression itself. Under this perspective, we question about the appearance of new groups dedicated to this cultural expression.

From the respondents' point of view, we are witnessing the birth of new groups of *Cante*. However, there is no clear agreement on this issue. They have different perspectives because not all share the idea of a massive appearance of new groups, one of the interviewees, for example, emphasized the lack of continuity of these new formations.

In effect, one of the respondents reveals a greater enthusiasm about the outbreak of *Cante* groups.

They've exploded! There is an online platform, the www.paisagem-id.pt, as we find new groups we entered the information there. We're shooting all groups, singers, costumes. At the moment, there are between 150 and 170 groups. (E1)

The other respondents assume the emergence of new groups, some of young people, but consider less remarkable the amount and put the emphasis on continuity.

Long before, there was a higher number, however, its continuity was ephemeral. The document submitted refers to groups with regular activity. (E2)

As far as I have been given notice, although not in great quantity, new groups have emerged, with young people, dedicated to Cante. (E3)

¹⁴⁴ The registration unit is an element of meaning to be coded in a particular category (Esteves, 2006).

All artistic expressions suffer influences, the result of a social context where their current or potential practitioners work as agents of change, whether it is voluntary or involuntary. As above-mentioned, the very sustainability of the practice of *Cante* is based on promotion of its continuity. The text of the submission and the respective safeguard plan point to an opening up to the society as a way to strengthen the relationship with the community, not only with a view to preservation, but also as a vehicle to promote this expression. In this sense, the study of *Cante*, its dissemination, the attraction of new practitioners, new audiences is indicated. These new actors will bring with them new ways of looking, thinking and expressing *Cante*.

When faced with the question of whether the new practitioners have contributed to the transformation of *Cante Alentejano*, opinions are divided on some aspects. One of the respondents reveals a more open, inclusive and informal attitude, revealing a concern with the content and practice of the expression, regardless of the form or presentation and clothing of practitioners. On the other hand, another of the respondents, although recognising the original identity of *Cante*, he believes on the contribution of new generations to the construction of a live cultural expression that mirrors a new connection to current society and that responds actively to any mutations.

We don't judge the way of singing or the costume. The important thing is that people come together and sing! (E1)

The major contribution of the new practitioners lies above all in the statement that Cante, regardless of its "patrimonialization" and/or "turistification", is a cultural practice, with a strong identity value in the region that is still alive, with its own dynamic and capable of adapting to new social practices and new forms of conviviality. (E3)

One of the respondents does not share this view. In fact, this respondent recognises the inevitability of the influences, but reveals some concern with the mutations. To him, the practice of *Cante* should be guided by moderation and by the defense of the artistic expression while legacy passed between generations.

Mutations in current societies interfere with the modus vivendi. Cante is also subject to them, it seems to me, however, that moderation is the prerogative of those who love the legacy of our ancestors!

As above-mentioned, *Cante Alentejano* is a very old cultural expression with an identity matrix uniquely linked to the very history of society and the peoples of Alentejo. This is one of the cornerstones of the bid. Over time, societies change and, thus, ideas, thoughts and even aesthetics come into mutation. *Cante Alentejano* is characterized by traditional ideals but over time new subjects emerge, intertwined with the contemporary social context of their interpreters

When asked if the new compositions of *Cante* are just revisiting the traditional themes or if they are innovative lyrics that illustrate new themes, the respondents say that they are under the impression that the new lyrics have contributed to bring new subjects to *Cante Alentejano*. Although the traditional themes are revisited, the introduction of topics that reflect issues of contemporary society is also observable.

As some respondents refer:

There is, undoubtedly, a revisitation of traditional themes, however, following the evolution of the times and social practices and even the changes in the landscape, new themes are being introduced in the lyrics of the songs, and to name one I'd say the topic of the Alqueva dam. (E3)

The introduction of new subjects is happening. There is a group in Alcáçovas that from the Paulo de Carvalho's song "Children of Huambo", introduces a letter against the «Troika». (E1)

Two respondents highlight that one of the particularities of *Cante Alentejano* is that it is a cultural manifestation constantly evolving, and therefore it turns out to be a representation of their own story.

We feature Cante as a voice that begins, there's a soloist who takes the place and another that enters. From this model Cante Alentejano may include everything. The big difference with the folk movement is that Cante Alentejano constantly reinvents itself and the former is a historical re-creation. (E1)

Everything evolves, and also Cante, "Canticum Novus". (E2)

The text of the submission of *Cante* to Intangible Heritage of Humanity shows a cultural expression with a spread of actors that goes beyond a traditional geographic scope. In fact, in

this document, active groups with a long history are identified predominantly spread through the Alentejo. However, the text still refers to the presence of *Cante* in other regions of Portugal and even the formation of *Cante* groups abroad. In this context, when questioned about whether the recognition of *Cante Alentejano* as UNESCO Intangible Heritage has resulted in a new geographical dimension to this cultural manifestation, two of the respondents highlight, firstly, that the municipalities of Serpa and Cuba correspond to central geographical areas of *Cante Alentejano* and in each of these municipalities it is sung differently.

It is subject to controversy, these are lands (municipalities (Serpa and Cuba)), distinguished in many aspects, even in singing. Cuba is called the "Cathedral of Cante", but Serpa is "the Vatican", who authorizes a church to be a Cathedral or not... (E2)

In Cuba, the singing style is slower and in Serpa is faster. Cuba wants to be the Cathedral of Cante. A few days ago, I was with the singers of Serpa and one of them said that if Cuba is a cathedral, Serpa is the Vatican! (E1)

Despite the implementation surpasses the boundaries of the Alentejo at the time of the preparation of the bid, all the respondents recognise unanimously that the inscription of *Cante Alentejano* as UNESCO Intangible Heritage has allowed the consolidation of its geographic expansion, particularly in the South of the country, including the Algarve, without forgetting the groups of Alentejo communities in the Lisbon region and those abroad.

Cante has a larger geography! Following the bid it happened the strengthening of this geography and the extension to the South. Until then, we went as far as Évora and right now we are also in Castro Verde and recently even in Zurich. (...) The Cante Alentejano goes from Évora to the mountains in the Algarve, and from Serpa to Sines. (E1)

(...) I mean that is not only in Serpa and Cuba that we fight (for Cante Alentejano), it's in all municipalities of Baixo Alentejo, in some from Alto Alentejo and in the region of Lisbon and Faro, Cante is alive! (E2)

Serpa and Cuba are, and maybe they'll continue to be, the vital centres of the formal bid process that has led to the recognition of UNESCO, but the nerve centre of Cante, while manifestation and cultural practice of a community, is

wherever it is practised, in particular the corresponding area of Alentejo where it happens, without forgetting, anyway, the groups of communities from Alentejo in the region of Lisbon and the Portuguese diaspora around the world, in Europe and in other continents (E3).

The 'label' UNESCO offers a unique attractiveness and visibility, specially in terms of interest. This reality is evident with respect to the tangible heritage, but could it be extended to the classified intangible heritage? In this regard, all respondents have the clear perception that the UNESCO brand promoted the interest of new audiences and new fans of this cultural manifestation. The respondents associate attracting new audiences to tourism, that is, when new audiences are mentioned, they are referring to tourists. One of the respondents also mentions to a greater presence of *Cante Alentejano* in the media and in new stages.

Yes, of course. There are two moments: before and after the inscription. (...) The new audiences' adhesion stems from the recognition of UNESCO and also from a previous valuation of Alentejo as a tourism destination. The CCB venue was full. This stems from the UNESCO. (E1)

Certainly, earlier, for the first time, Madrid was enthralled with our Cante (...), before audiences of tourists we did one, two encores, this happened after the UNESCO designation. (E2)

(...) being a mere empirical perception, while circulating around the region, you see quite often, in the early evening, choral groups heading to hotels wherein, presumably, they'll perform. Although it happened before, after the inscription of Cante on the UNESCO List of Intangible Heritage, it seems to happen more often now and, in this way, it can reach new audiences. (E3)

In the text of the submission of *Cante Alentejano* to the UNESCO List of Intangible Heritage, within the scope of safeguard measures, it was recommended the design and implementation of a joint promotion strategy by the municipalities, groups and other institutions linked to *Cante*. In the respondents' discourse, it is observable that there are initiatives and an effort of entities linked to *Cante* for its promotion. However, one of the interviewees points out that a comprehensive and coordinated strategy will be very difficult to draw up and put into practice without a strong structure.

All agents are working in this direction, just take a look at the initiatives that are carried out on a weekly basis, with sacrifice, but with an unwavering will! (E2)

There is a growing interest of institutions on Cante. For example, the interest of schools on Cante. (E1)

This coordinated and comprehensive strategy will be very difficult to implement. (...) Without a strong structure, it will be too complex to create a common strategy. The safeguard plan outlines the strategic paths. (...) It isn't possible to force a municipality to take this or that way... All we can do is negotiate, so that it does it in this or that way. (E1)

In the words of the interviewees, we can discern, on the one hand, still some uncertainty about the role assigned to *Cante Alentejano* while attractive tourism product. On the other hand, the analysis of the respondents' discourse reveals that these are convinced that a strategy for the joint promotion of *Cante Alentejano* is relevant to attract tourists to the region. *Cante Alentejano* could be a tourism attraction factor among others in the region, although without a relevant role.

We have to figure out first if Cante itself increases the interest for the territory; then, if Cante itself can be a product. Cante is not a product! Or, at least, cannot yet be regarded as such. We are in a territory that already has other tourism products. In this sense, it (Cante) enhances the territory. (E1)

The attraction of tourism is a result of several factors, this is, of course, one of these factors, with no particular importance, in my view. (E3)

However, *Cante Alentejano* has today additional visibility. This new dimension turns out to echo in the offers of tour operators that will eventually incorporate this cultural expression within the set of tourism attractions in the region. Against this background, from the respondents' words is clear the belief that the recognition of *Cante Alentejano* as Intangible Heritage of UNESCO may be a possible enhancer factor for the tourism in the region. One of the respondents mentioned the transformation underway in the choral movement and the existence of some projects in order to create tourism offers referring to *Cante*. However, he warns to the

fact that we are in an initial phase, and it is early to have a real perception of the impacts of these initiatives. One of the problems singled out is the lack of resources in order to study the changes in course.

(...) the choral movement is changing. After almost two years, movements not yet well known begin to emerge pointing to interesting directions. We still haven't been able to understand the impacts. (E1)

There are already some projects. There is a pilot project in which we motivated a choral group to buy a tavern in Pias. We're going to create a tourism route between Pias, Cuba and Évora connected to three choral groups (...) associating Cante to other products such as wine, the cuisine (E1)

Another respondent believes that the recognition of *Cante Alentejano* as UNESCO Intangible Heritage reinforced the potential of *Cante* for tourism development, working as a kind of universal certification of the authenticity of *Cante*.

The "turistification" of Cante, as the "turistification" of any other cultural asset, tangible or intangible, goes through a previous process and that is the process of "patrimonialization" and that's what happened to Cante, a cultural value of ours, becomes an asset of humanity and, in the process, it can be assumed that, as a result of this recognition, works as a kind of universal certification of the authenticity of this product. The Cante has strengthened its potential for the development of tourism of Alentejo. (E3)

The respondents put forward various suggestions for maximizing the impact of the distinction of UNESCO in tourism development of the Alentejo region, in particular: ensuring a responsible tourism and heritage ethics; invest in safeguarding the authenticity of *Cante Alentejano* and greater commitment of the regional tourism organization of Alentejo – Tourism of Alentejo.

The only suggestion that one can give is to ensure a responsible tourism and heritage ethics. (E1)

To resist the temptation of the obvious, of a possible mass "consumption" of Cante, strive for safeguarding of the authenticity of this cultural manifestation.
(E3)

5. Conclusion

The growing closeness between tourism and culture has prompted, among academics and professionals from the cultural and creative sector, tourism, and territorial management, an increasing wish of exploring this relationship, which is intended to be symbiotic. The quest for exciting and unique experiences, the search for authenticity of the products and the contact with the most genuine cultural elements of places, have led to the exploitation of the unique features of the destinations, in particular with regard to their cultural and historical heritage. The development of culture-based tourism products contribute to add value to tourism destinations and become strategic areas within the tourism development plans of the regions. The World Heritage brand, conferred by UNESCO, is, thus, an important asset insofar as it certifies the virtues, tangible and intangible, of the listed object. However, this process threatens the conservation and safeguarding of those objects, because, as they become increasingly exploited for tourism purposes, the authenticity is put at risk. This is a concern repeatedly expressed by the bearers of *Cante Alentejano* and by UNESCO, which determines the design of the safeguard measures to be implemented following the classification.

The implementation of a safeguard plan is not devoid of difficulties. Despite all the commitment expressed by the various stakeholders, the promoters lack the capacity to take responsibility for financing and ensuring the implementation of this plan. The socio-economic context is adverse and the budget availability is increasingly limited. This may be the right time for a strategic realignment that would allow mobilizing the agents of *Cante* for the establishment of commitments and networks of partnerships between the various entities, including civil society actors. This is a course of action wherein all actors are involved in the safeguarding project, understand and participate in setting goals and the very definition of a strategy of change embodied in a new organizational and integrated model.

Following the listing of *Cante Alentejano* as UNESCO Intangible Heritage of Humanity, the municipality of Serpa develops efforts to register *Cante* in the National Inventory of Intangible Cultural Heritage. In general, all municipalities involved have sought, through various activities, to raise awareness of the value of *Cante*, in particular through educational plans targeted at young people. However, it would be necessary to verify among the bearers of the tradition of

Cante if they are been given the appropriate conditions to the documentation and the transmission of knowledge and the protection of the intellectual property.

Throughout the region of Alentejo, it is possible to observe the existence of several initiatives and performances. However, it would be essential to realize to what extent a consistent and global promotion strategy is being implemented aiming the protection, safeguard and enhancement of *Cante*. The transmission of knowledge and skills is a major concern of the bearers of *Cante*, cultural associations, and other institutions across the Alentejo and in the whole country.

References

- Agarwal, S., Brunt, P. (2006), "Social exclusion and English seaside resorts", *Tourism Management*, 29(1), 25-55.
- Augusto Mateus e Associados, CIRIUS, Geoldeia, CEPREDE (2005), *Competitividade, coesão e convergência: a óptica específica das regiões portuguesas*, 3, região do Alentejo, available at: http://www.pofc.qren.pt/ResourcesUser/2011_Documentos/Monitorizacao/Estudos/CompetitividadeTerritorial_Alentejo.pdf (consulted on: 19.10.2016).
- Bardin, L. (1995), *Análise de conteúdo*, Lisboa, Edições 70.
- Bonet, L. (2003). *Cultural tourism. A handbook of cultural economics*. Edward Elgar Publishing.
- Bryman, A. (2008), *Social research methods*, 3ª ed., New York., Oxford University Press.
- Cabeça, S.M., Santos, J.R. (2010), "A mulher no Cante Alentejano", in Conde, S.P., *Proceedings of the International Conference in Oral Tradition*, Concello de Ourense, Ourense, 2, 31-38.
- CCDR Alentejo (2012), *Programa Operacional Regional do Alentejo 2007-2013 (FEDER)*, available at: http://www.ccdr-a.gov.pt/docs/desenv_regional/2014-2020/InAlentejo-2007-2013.pdf (consulted on: 25.010.2016).
- CIMBAL (Comunidade Intermunicipal do Baixo Alentejo), available at: <http://www.cimbal.pt/destaques/4237/camara-de-vidigueira-promove-expressao-musical-e-cante-alentejano-nas-escolas.aspx> (consulted on: 20.10.2016).
- Costa, N. (2004), *I sistemi turistici locali (STL) e il progettista/gestore degli STL*, Turismo, Territorio, Identita.
- Cuccia, T., Rizzo, I. (2011), "Tourism seasonality in cultural destinations: empirical evidence from Sicily", *Tourism Management*, 32, 589–595.
- Cuccia, T., Guccio, C., Rizzo, I. (2016), "The effects of UNESCO World Heritage List inscription on tourism destinations performance in Italian regions", *Economic Modelling*, 53, 494-508.

- Denzin, N., Lincoln, Y.S. (1994), "Introduction: Entering the field of Qualitative Research", in Norman K. D. and Yvonna S. L. (eds), *The Sage Handbook of qualitative research*, 4ª ed., Thousand Oaks, Califórnia, Sage Publications, 1–17.
- Diário do Alentejo (2012), *Rui Vieira Nery demitiu-se da presidência do Conselho Científico do Cante a Património da Humanidade*, available at: <http://da.ambaal.pt/noticias/?id=1412> (consulted on: 02.10.2016).
- Diário do Alentejo (2014), *Depoimentos ao DA sobre o cante alentejano a Património Cultural Imaterial da Humanidade*, available at: <http://da.ambaal.pt/noticias/?id=6826> (consulted on: 04.10.2016).
- ECTARC (1989), *Contribution to the Drafting of a Charter for Cultural Tourism*, Llangollen, Wales, European Centre for Traditional and Regional Cultures.
- European Commission (2010), *Green Paper Unlocking the potential of cultural and creative industries*, Brussels.
- Fazenda, N. (2015), *Turismo 2020 - Plano de ação para o desenvolvimento do turismo em Portugal*, available at: <http://www.turismodeportugal.pt/Portugu%C3%AAs/turismodeportugal/apresentacoes/Documentos/Turismo-2020-Alentejo.pdf> (consulted on: 21.10.2016).
- Figini, P., Vici, L. (2012), "Off-season tourists and the cultural offer of a mass-tourism destination: The case of Rimini", *Tourism Management*, 33(4), 825–839.
- Ghiglione, R., Matalon, B. (1997), *O Inquérito: Teoria e Prática*, 3ª ed., Oeiras, Celta Editora.
- Gomes, R. T., Lourenço, V., Martinho, T.D. (2006), *Entidades Culturais e Artísticas em Portugal*, Centro Cultural de Cascais.
- Guerra, I.C. (2006), *Pesquisa Qualitativa e Análise de Contéudo: Sentidos e formas de uso*, Estoril, Príncipe Editora.
- Henriques, C., Mendes, J., Guerreiro (2014), *Turismo cultural no Algarve*, Faro, RTA.
- Hsieh, H.-F., Shannon, S.E. (2005), "Three Approaches to Qualitative Content Analysis", *Qualitative Health Research*, 15(9), 1277–1288.
- INE (2012), *Censos 2011 Resultados Definitivos - Região Alentejo*, available at: http://censos.ine.pt/xportal/xmain?xpid=CENSOS&xpgid=ine_censos_publicacao_det&contexto=pu&PUBLICACOESpub_boui=156654102&PUBLICACOESmodo=2&selTab=tab1&pcensos=61969554 (consulted on: 25.10.2016).
- Landorf, C. (2009), Managing for sustainable tourism: A review of six cultural World Heritage Sites. *Journal Sustainable Tourism*, 17, 53-70.
- Lima, P. (2015), "Editorial", *A Tradição, Revista de Etnografia*, 0, 7-8.

- Munsters, W. (2004), *Cultural x Tourism: merely a marriage of convenience?*, Maastricht, The Netherlands.
- Myerscough, J. (1988), *The Economic Importance of the Arts in Britain*, London, Policy Studies Institute.
- OECD (2009), *The impact of culture on tourism*. Paris, OECD.
- Pires, T. (2015), "Dossier UNESCO do Cante Alentejano - Processo de Candidatura N.º 1007 para Inscrição na Lista Representativa do Património Cultural Imaterial da Humanidade em 2014", *A Tradição, Revista de Etnografia*, 0, 13-128.
- Pires, T. (2015), "Em Modo Cante — um ano de Património da Humanidade", *A Tradição, Revista de Etnografia*, Volume 0, 9-10.
- Pporto.pt (2016), *Beja lança plano para valorizar o cante alentejano Autarquia quer transmitir o património às novas gerações*, available at: http://www.pportodosmuseus.pt/2016/03/06/beja-lanca-plano-para-valorizar-o-cante-alentejano/?utm_source=feedburner&utm_medium=email&utm_campaign=Feed%3A+pportodosmuseus%2FrxgW+%28pportodosmuseus%29 (consulted on: 02.01.2016).
- Rede Portuguesa de Municípios Saudáveis (2015), available at: http://redemunicipiossaudaveis.com/index.php/pt/projetos/serpa/cante_nas_escolas (consulted on: 20.10.2016).
- Richards, G., Bonink, C. (1995), "Marketing cultural tourism in Europe", *Journal of Vacation Marketing*, 1(2), 173-180.
- Richards, G., Palmer, R. (2010), *Eventful Cities: Cultural Management and Urban Revitalisation*, Elsevier.
- Richards, G., Raymond, C. (2000), "Creative tourism", *ATLAS News*, 23, 16–20.
- Richards, G. (1996), "Production and consumption of European cultural tourism", *Annals of Tourism Research*, 23(2), 261–283.
- Richards, G. (2007), *Cultural tourism: Global and local perspectives*, Binghamton, Haworth Press.
- Richards, G. (ed) (2005), *Cultural tourism in Europe*, Wallingford, UK, ATLAS.
- Smith, M. (2004), "Seeing a new side to seashores: Culturally regenerating the English seaside town", *International Journal of Tourism Research*, 6(1), 17-28.
- Stake, R.E. (1995), *The art of case study research*, Thousand Oaks, California, Sage Publications.
- Turismo de Portugal (2016), *Análise Regional - Agosto 2016*, available at: <http://travelbi.turismodeportugal.pt/pt-pt/Documents/An%C3%A1lises/Alojamento/analiseregionalagostoreceitas2016.pdf>, (consulted on: 22.10.2016).

- Turismo do Alentejo (2013), *Documento Estratégico Turismo do Alentejo 2014 – 2020. Visão, Prioridades Estratégicas e Eixos de Intervenção*, available at: http://estrategia.turismodeportugal.pt/sites/default/files/Alentejo2014_2020_DOCUMENTO_ESTRATEGICO_TURISMO.pdf (consulted on: 21.10.2016).
- UNESCO (1982), *Mexico City Declaration on Cultural Policies*, World Conference on Cultural Policies.
- UNESCO (2003), *Convention for the Safeguarding of the Intangible Cultural Heritage*, available at: http://portal.unesco.org/en/ev.php-URL_ID=17716&URL_DO=DO_TOPIC&URL_SECTION=201.html (consulted on: 02.01.2016).
- UNESCO (2010), *The power of culture for development*, Paris.
- UNESCO (2012), *Textos base da Convenção de 2003 para a Salvaguarda do Património Cultural Imaterial*, available at: http://www.unesco.org/culture/ich/doc/src/2003_Convention-Basic_texts_version_2012-PT.pdf, (consulted on: 02.10.2016).
- Museum Store Association, American Association of Museums and the U.S., Cultural & Heritage Tourism Marketing Council, (2009), *The Cultural & Heritage Traveler Study*, available at: <https://theculturaltraveler.com/media-releases-2008-2012/52-the-cultural-heritage-travel-study/file> (By Rosemary McCormick, President, Shop America Alliance).
- UNWTO (1985), *The States Role in Protecting and Promoting Culture as a Factor of Tourism Development and the Proper Use and Exploitation of the National Culture Heritage of Site and Monuments for Tourism*, Madrid, WTO.
- Valle, P.O., Guerreiro, M., Mendes, J., Silva, J.A. (2011), "The cultural offer as a tourist product in coastal destinations: The Case of Algarve, Portugal", *Tourism and Hospitality Research*, 11(4), 233–247.
- WTTC (World Travel & Tourism Council) (2013), *Travel & Tourism economic Impact – World, 2013 Edition*, available at: <http://www.wttc.org> (consulted on: 01.2014).
- WTTC (World Travel & Tourism Council) (2013a), *Travel & Tourism economic Impact – European Union, 2013 Edition*, available at: <http://www.wttc.org> (consulted on: 01.2014).

Chapter XXI

The Intangible Heritage as Cultural Tourism Product: Attractiveness and (Re) Construction of the Territories - The Case of Cante Alentejano

The Intangible Heritage as Cultural Tourism Product: Attractiveness and (Re) Construction of the Territories - The Case of Cante Alentejano

JOSÉ MENDONÇA¹⁴⁵

EUNICE R. LOPES¹⁴⁶

Abstract:

The use of cultural heritage is closely linked to an effort of conservation and valorisation, for its symbolism and importance in strengthening the sense of identity and collective memory. The recognition of the historical and cultural importance of intangible heritage and its legal protection through the Convention for the Safeguarding of the Intangible Heritage of UNESCO (2003), reinforces its classification and safeguarding. There is long since culture is one of the most important reasons for the visit of tourists to Portugal where the intangible cultural heritage is greatly appreciated, by the approach of “experiencing sensations and emotions” which provides the opportunity for authentic cultural exchange between visitors and the communities. In this framework, we intend to give as an example the Cante Alentejano (CA), distinguished on the 27th of November 2014 by UNESCO as Intangible Cultural Heritage of Humanity (ICH). The activation of the intangible cultural heritage of Cante Alentejano, is part of a Regional Entity’s Strategy of Tourism of Alentejo and Ribatejo (ERTAR)) and the operationalisation of the CA as a tourist product, results from the Diagnostic Study of the Strategic Plan for the Development of Cultural and Scenic Touring of Alentejo and Ribatejo (DTCPAR). In order to present some measures which enrich the valorization of the Cante Alentejano as a cultural tourism product, the methodology which was used included the direct observation of the phenomenon in different contexts and interviews with several relevant intervenients related with the CA. The results obtained on the CA, point to a favourable recognition to the safeguard of this intangible cultural heritage as a tourist product, improving local sustainable development and enhance the (re)construction of the territory.

Keywords: Cante Alentejano; Intangible Cultural Heritage; Safeguard; Attractiveness; Tourist Experiences

¹⁴⁵ CJCP, ADBES, Évora, Portugal and JMDC – Animação Turística, LDA., Santarém, Portugal, jrmendonca78@sapo.pt

¹⁴⁶ UDCS, Politechnic Institute of Tomar, CRIA-FCSH-UNL and GOVCOPP-UA, Portugal , eunicelopes@ipt.pt

Resumo:

O recurso à “patrimonialização da cultura” está intimamente ligado a um esforço de conservação e de valorização, pela sua simbologia e importância atribuída no reforço do sentimento de identidade e da memória coletiva. O reconhecimento da importância histórica e cultural do património imaterial e a sua proteção legal através da Convenção para a Salvaguarda do Património Cultural Imaterial da UNESCO (2003) veio reforçar a sua classificação e salvaguarda. Há muito que a cultura é um dos mais importantes motivos de visita de turistas a Portugal, onde o património cultural imaterial é grandemente apreciado, pela aproximação de “vivências sensações e emoções” que permite entre os turistas e as comunidades. Neste enquadramento, pretende-se dar como exemplo o Cante Alentejano (CA) distinguido no dia 27 de Novembro de 2014 pela UNESCO, como Património Cultural Imaterial da Humanidade. A ativação do património cultural imaterial Cante Alentejano insere-se numa estratégia da Entidade Regional de Turismo do Alentejo e Ribatejo (ERTAR) e a operacionalização do CA como produto turístico, resulta do estudo Diagnóstico do Plano Estratégico para o Desenvolvimento do *Touring* Cultural e Paisagístico do Alentejo e Ribatejo (DTCPAR). Com o objetivo de se apresentar algumas medidas que (re)concentrem a valorização do Cante Alentejano como produto de Turismo Cultural, utilizou-se uma metodologia que incluiu a observação direta do fenómeno em diferentes contextos e também entrevistas com diversos atores relacionados com o CA. Os resultados obtidos sobre o CA apontam para um reconhecimento favorável à salvaguarda deste património cultural imaterial, enquanto produto turístico, contribuindo para o desenvolvimento local sustentado e (re)construção do território.

Palavras-chave: Cante Alentejano; Património Cultural Imaterial; Salvaguarda; Atratividade; Experiência Turística

Resumen:

La Convención para la salvaguardia del patrimonio cultural inmaterial de la UNESCO (2003) valoriza el reconocimiento de la importancia histórica y cultural que ha de tener el patrimonio inmaterial, además de constituir una herramienta de referencia para su protección legal. El uso del patrimonio cultural está estrechamente ligado a un esfuerzo de conservación y de recuperación, principalmente por su simbolismo e importancia al fortalecimiento del sentido de la identidad y la memoria colectiva. Existen muchos estudios que demuestran que la cultura es una de las principales motivaciones para los desplazamientos de turistas a Portugal, donde el patrimonio cultural inmaterial es muy apreciado por el enfoque de “experiencias de sensaciones

y emociones” que permite una inmersión entre turistas y comunidades. En este contexto, se ha pretendido dar como ejemplo el Cante Alentejo (CA), expedido el 27 de noviembre de 2014 por la UNESCO como patrimonio cultural inmaterial de la humanidad. La activación del patrimonio cultural inmaterial Cante Alentejo, es parte de una estrategia de la Autoridad Regional de la Turismo de Alentejo y Ribatejo (ERTAR) y la operación de la CA como producto turístico, resulta del estudio Diagnóstico del Plan Estratégico para el Desarrollo del Turismo Cultural y del Paisaje del Alentejo y Ribatejo (DTCPAR). Con el fin de introducir algunas medidas para centrar y revisar la apreciación del Cante Alentejo como producto de turismo cultural, se utilizó una metodología que incluye la observación directa del fenómeno en diferentes contextos y también entrevistas con diversos actores relacionados con la CA. Los resultados del punto de CA son un reconocimiento favorable para proteger este patrimonio cultural inmaterial como producto turístico, contribuyendo al desarrollo sostenible local y la nueva construcción del territorio.

Palabras Clave: Cante Alentejo; Patrimonio Cultural Inmaterial; Salvaguardia; Atractivo; Experiencia Turística

1. Introduction

On the 27th November 2014, the Cante Alentejano was recognized by UNESCO as a Intangible Cultural Heritage of Humanity. As an aim of safeguarding and transmitting the Cante, it is also important to “start wondering about this cultural asset as an economic asset, to help evolving the sustainability of the Cante and the development of its region” (Mayor of Serpa, Tomás Pires, *in* Observador newspaper, 27th November 2014). It is essential to reflect and substantiate the best operational framework of this intangible cultural heritage as a tourism product of excellence, promoting the commercial aspect without compromising its safeguarding, maintaining its authenticity, genuineness, enhance and expanding new segments through the tourism industry. The recent distinction by the United Nations Educational, Scientific and Cultural Organization (UNESCO) and the increasing in “touristification” sparked greater attention to the importance of this tourist resource in the relationship between Cultural Tourism and the enhancement of the CA. This article aims to highlight the safeguarding of this intangible cultural heritage as a tourist product and its contribution to the sustainable local development and the evolving of the territory. The starting point was to reflect and develop possible policies and actions for operationalizing this heritage as a tourism product, embracing

its principles of safeguards and international guidelines on the management of the intangible cultural heritage.

2. Methodology

For the realization of this article, a qualitative approach was made to highlight the performances of the individuals which have been considerate relevant to this study, describing the context where the object of study unfolds, relating the CA and Tourism. Primary information-gathering techniques were given precedence, such as direct observation of the phenomenon in different contexts. Likewise the use of interviews with several individuals, most of whom using public statements disclosed by the media. According to this, an adjustable structure was viable to maintain in which the research work was developed, adjusted and adapted according to the needs and research opportunities that have emerged. The base of this research was the study of the CA heritage, and its characterization in the technical, cultural, social and territorial context. The safeguarding of the intangible cultural heritage and tourism management were also addressed as well as tourism management with patrimonial significance on the basis of the guidelines of UNESCO. As a product of Cultural Tourism, sought to frame the CA in the Nacional Tourism Strategic Plan and the Strategic Plan for the Development of Cultural and Scenic Touring in the Alentejo and Ribatejo promoted by the Regional Tourism of Alentejo and Ribatejo. There was a reflection on some impacts that the CA "turisfication" could have on communities and on strategic analysis of the CA product, its potential weakness, strengths, opportunities and threats. Finally, it refers to the main strategies defined by it for the operationalization of the CA, Cante Homes and Routing in order to provide quality tourist experiences. From November 2014, when CA has been distinguished as intangible cultural heritage of humanity, a number of newspapers and magazines were compiled related to CA and Tourism. CA houses, taverns and restaurants with CA were visited, there were conversations with its owners and customers, religious festivals and weddings where CA was held, in events, exhibitions, festivals and parties dedicated to the CA and a dinner that was organized with the presence of a CA group.

3. Socio-Cultural Context

The CA traditionally was a spontaneous and informal melody that took place in the Alentejo fields and marked the rhythm of the daily work of the traditional agricultural activities such as

mowing, weeding, the olive harvest, cork, etc. With the mechanization of agriculture, the aging of the population and migratory waves that led to a sharp depopulation of Alentejo in recent decades, the practice of CA associated to the work in the fields has disappeared. Fortunately there are still places with traditional practises of CA like the traditional festivities in the streets or in churches, and the taverns (Figure 1).



Figure 1. Festival of Vine and Wine

Source: Mendonça, 2014

The taverns are the places where this cultural heritage has retained its authenticity and where it is still possible to enjoy it with genuine encouragement and incentive for CA performances which can be seen today, driven by the CA into ICH and the growing in tourist demand. According to Rodrigues (2012), the taverns has always been meeting places and conviviality of the men, after a day of work. Among the traditional cuisine prepared with products of the season in a local base, accompanied with glasses of wine or brandy produced in the region, popular cultural performances were seen spontaneously and not premeditated. The CA, the songs sang at the challenge, popular poetry, traditional games, among others, always enjoyed the evenings in the taverns. In the more isolated places, the taverns use to sell grocery or were the site of communication with the outside world, either through the presence of a public phone or mail delivery and reception. The innkeeper was a prominente figure in the community and often assumed a mediating role in everyday problems. The taverns have always had importance as an economic activity and as key elements in preserving the cultural legacy and identity of a region. Although in the recent past years taverns were seen as decadent locations which were frequented by marginalized people with alcoholic habits, nowadays currently business owners and Town Halls look to typical taverns as places of great opportunities for businesses and tourism attraction, thanks to the role that they take as great popularizers of

delightful cuisine and local wines, as convivial spaces for people, and as a local of authentic and genuine cultural expression. The example of the “Route of Taverns” in Grândola, already in its 20th edition, demonstrates the growing importance of these places as tourist attractions and as important promoters of the products and the culture of the regions, contributing to local development and strengthening of the identity of the territories.

4. Safeguarding of the Cante Alentejano

Safeguarding` are the measures aimed at ensuring the viability of the intangible cultural heritage, including identification, documentation, research, preservation, protection, promotion, enhancement, transmission, particularly through formal and non-formal education, as well as the revitalization of the various aspects of such heritage (according to the norms of the Convention for the Safeguarding of the ICH – UNESCO, art. 3, 2003). According to this document, it is up to each State Party to identify, define and update regularly, the existing ICH in their territory, with the involvement and participation of communities and other organizations concerned, in order to implement appropriate safeguard measures. Basic challenges that the current globalization process poses to cultural heritage in the face of a demand for tourist destinations, where the presence of testimonials and own heritage of local communities to encourage their ‘authentic ownership’ (Lopes, 2015), make qualitative changes, responding to the imperatives of global integration that enables them to articulate the heritage with cultural tourism. Also in this order of ideas UNESCO highlights the role of individuals and local communities, in the preparation, safeguarding, maintenance and recreation of the ICH, the General Conference held in Paris on the 17th of October 2003. UNESCO recognised the importance of ICH as mainspring of cultural diversity and for harnessing its potential for sustainable development.

The Convention for the safeguarding of the ICH refers to some measures to be followed and adapted by different States signatories of the UNESCO, which should be incorporated in the legal, technical, administrative and financial system of the different countries, according to their specific needs, aspirations, limitations and public policy organization structures. This measures range from the adoption of policy measures of appreciation of the ICH, the creation of institutions responsible for the protection and monitoring of the ICH in their territory, encouragement of research and studies, in the various áreas related to the safeguarding of the ICH and the promotion of educational programmes to raise awareness, promotion and conservation of the ICH, directed to young people and communities and groups involved. The

involvement of communities, groups and individuals are highlighted in safeguarding of the ICH and should be involved whenever possible in all decision making, strategies and methodologies related to its management and protection. UNESCO conceived, in order to perpetuate, transmit, document and disseminate the ICH, the figure of a human living treasures.

According to this organization, the figure of the Living Human Treasure is defined as the recognition and the listing of individual or groups of people who have knowledge and have ancestral techniques, which allow them to interpret and recreate certain elements of ICH. These individuals, authentic depositories of authenticity and tradition, would be identified by teams of experts and encouraged to teach younger generations for the perpetuation of this heritage, being involved in various policies, methodologies and strategies related to the safeguarding and valorization of this heritage of ancestral knowledge. Portugal signed the Convention for the Safeguarding of the Intangible Cultural Heritage (on the 26th March, 2008), pledging to integrate the guidelines of UNESCO, in its national legislation. It is recognized the importance of the ICH in the internationalization of the portuguese culture, in coordination with other sectorial policies, in the strengthening of local and national identity. The importance of the participation of the communities is highlighted as well as groups and individuals in the defence and enhancement of ICH. The framework and the role of local authorities also also emphasized in this decree-law, which helps to identify, support and promote the manifestations of the ICH of the communities. It also establishes an independent organization called the Commission for Intangible Cultural Heritage, with powers of decision on the registration of manifestations of the national inventory system of ICH. The scope of this decree-law shall cover the following areas (see table 1).

Traditions and oral expressions, including the language as an Intangible Cultural Heritage.
Artistic expressions and performance manifestations.
Social practises, rituals and festive events
Knowledge and practices related to nature and the universe.
Competences and traditional techniques

Table 1. Manifestations domains of the ICH

Source: Mendonça and Lopes, 2015

The safeguarding of the CA, Intangible Cultural Heritage of Humanity, is part of this regulation, to include oral traditions and expressions of the Alentejo, comes from social practices, rituals, manifests itself in many festive events of the region and reveals ancestral

knowledge of practices of man's relationship with nature. The CA was classified as UNESCO ICH (27th of November, 2014) and in the application process were included generic guidelines on the Safeguard Plan. "It was the Portuguese State who applied for the CA and who will have the responsibility, within three years, to answer to the UNESCO, for the Safeguard Plan which provides a series of measures, actions and practices contributing to the safeguarding of the CA. It emphasises the importance of this plan, however without letting this "patrimonializes" a lot the cultural manifestation because it removes its authenticity" (Regional Director of Culture, Ana Paula Amendoeira *in* Rádio Voz da Planície, April 2015).

It was signed between the Regional Tourism of Alentejo and Ribatejo and the municipality of Serpa in the (5th of June, 2015), a protocol for the implementation and management of the Safeguard Plan, with a strategy that will seek to involve all stakeholders and local and national entities, aiming at the development of safeguard projects, enhance, promote and transmit to future generations the CA.

5. Cante Alentejano Houses

António Ceia da Silva, Regional Tourism of Alentejo and Ribatejo President, in an interview to the newspaper "Público" on the 8th of February 2015, states that "the Alentejo will have Cante Alentejano houses" the CA Houses will be prime locations, according to its president, where tourists can enjoy this heritage, a bit like the existing "Fado Houses" in Lisbon. They will be places where the tourist can enjoy the delicious food and, at the same time, watch shows from CA (Figure 2).



Figure 2. Cante Alentejano

Source: Mendonça, 2015

The Community funds will be crucial to support entrepreneurs interested in Open Houses of CA. This is one of the strategies to turn the CA into a Tourist product. Another strategy goes through the creation of singing routes. On the 10th of February 2015, in an interview to the newspaper "Diário do Sul", the President of Regional Tourism of Alentejo and Ribatejo is more specific when saying that the restaurants that want to integrate "the gastronomic route from the sound of the chant" will be more valued with the Association. He also refers that the Intangible Heritage is addressed exclusively to the private sector, not to the public sector. In one hand is the "House of Chant" of Serpa and Viana of Alentejo, who value the chant from the cultural point of view, on the other hand will be the "Houses of Chant" in restaurants as gastronomic spaces where the tourist will be also enjoying music it is referred in the same newspaper. The operating system is defined, like the one in the Fado Houses in Lisbon, being necessary for the groups who want to have dinner or lunch with the singing groups, make previous reservations in future restaurants that will open doors within the project. The Regional Tourism of Alentejo and Ribatejo will promote, publicize and create the route of CA. In April 2015, António Ceia da Silva, in an interview to the radio "Voz da Planície" stated that the CA will be like restaurant units where it will be also possible to hear the chanting in different forms, as in group, duets or solo, structured as tourist demand, being equally necessary to create circuits associated with heritage. In the same interview it is considered that this will be a greater project valued in future, because it will allow the cultural and economic dynamism, from a tourist dynamic perspective, attracting more visitors to the Alentejo (Figure 3).



Figure 3. Cante Alentejano in the castle

Source: Mendonça, 2015

6. A strategic review of Cante Alentejo as Tourist Product

The start of the CA as an Intangible Cultural Heritage is included in the Regional Tourism of Alentejo and Ribatejo strategy, framed in the current community framework programme for research and innovation, known as Horizon 2020. The CA appears as one of the differentiating elements that will permit to qualify this region as one of the destinations of excellence for Cultural Tourism. The Regional Tourism of Alentejo and Ribatejo has an immense concern in territory identity and has invested on a set of applications of imaterial assets, such as the rattles of Alcáçovas, the festivities of Campo Maior, Arraiolos Tapestry, avieiras culture from Ribatejo or the artisanal fishery in São Torpes, which make part from a biggest project, called "Imaterial Heritage Activation" which pretends to make from this region one of the destinations with more assets classified by UNESCO, which is expected to increase the attractiveness of this territory and make it a world reference in the field of Cultural Tourism.

The operationalization of the CA as a tourist product, fits into the strategies defined by DTCPAR as previously mentioned, namely in terms of the role of creativity in creating unique and attractive products and in the importance of networks or clusters, in the integration of CA as a main or secondary product on value creation of tourist experiences. In table 2 it is systematized the SWOT analysis information presenting systematically the strengths and weaknesses, the opportunities and the threats that, in a market perspective, fall into the CA. This analysis is the result of the observations and conclusions taken from the observation of CA in practice in different contexts discussed in the methodology of this study.

Strengths	Weaknesses
<ul style="list-style-type: none"> -Cultural authenticity; -Framework with the territory; -Several places where it is possible to express itself like taverns, monuments, streets, churches, fields, festivities; -Singers spontaneity; -Easily framed with other products such as gastronomy and wines, Events, Religious Tourism, Industrial Tourism, Nature Tourism, Nautical Tourism, Health and Well-Being, among others. 	<ul style="list-style-type: none"> -Ageing of the population and groups; -Few records and availability in CD and DVD format compared to other products as such Fado; -Lack of tourism professionals to mediate CA as a touristic product; -Difficulty in professionalizing elements of CA groups and make elements of these groups be part of Cante House or making exterior performances.
Opportunities	Threats
<ul style="list-style-type: none"> -Great attractiveness for cultural heritage distinguished by UNESCO; -Market with great purchasing power; -Not dependable on seasoning factors; -Allow the promotion of other local products; -Local proximity with good accessibilities from two touristic places; Algarve and Lisbon. 	<ul style="list-style-type: none"> -Lost of authenticity if the Safeguard Plan is not fulfilled. -Competitiveness between municipalities and lack of strategies; -Proximaty with two ICH best known: Fado and Flamengo; -Risk at commodification of communities and their culture; -Dependency of economic and political situations of the tourism source markets.

Table 2. Swot analysis summary

Fonte: Mendonça, 2015

The new trends in “cultural tourism consumption” point to a more motivated tourism for experimentation and emotions, feelings and “valorisation of authenticity” (Lopes, 2012). The operationalization of the CA as a tourism product should always be framed in strategies that enhance their value and mitigate the negative consequences that their commercial exploitation may have upon communities and the safeguarding of the heritage itself, to become an asset for the sustainable development of the region.

7. Conclusion

The heritage assets of a territory give it authenticity and uniqueness. In Cultural Tourism market this could signify a bigger advantage over other destinations. The Cante Alentejano contributes to the attractiveness of the destination of Alentejo which will be enhanced if the activation of this tourist heritage, are associated with identical singularities that will distinguish Alentejo from other regions. These resources need to be integrated into sustainable development strategies for tourism. Any tourism strategy of activation of the Cante Alentejo should involve the choirs groups and the whole community, organizations, institutions and entrepreneurs, through the establishment of joint networks and partnerships. The basis of management and decision will have to be local, supported by national and international policies. This project was initiated a year ago, precisely in the context when the Alentejo was living the great joy for the elevation of this heritage to a cultural universal asset. The ones who were

interested in this project hoped several valued scenarios for this cultural asset, mainly its activation as a tourist product in order to contribute to the economic development of the Alentejo through Tourism. There are currently some strategies to promote and value the Cante Alentejano as a Cultural Tourism Product. The opening of Cante Alentejano Houses and the Chant Route are strategies which have been developed. In our opinion, and as a way to ensure the future sustainability of this cultural resource, it should only be implemented after the completion of the safeguard plan, which is still in the process of elaboration. The cultural dimension of Cante Alentejano needs to be well framed in the strategies of economic recovery, so that tourists can enjoy authentic experiences that match their expectations. Specific vocational training is required of tourism technicians, in the interpretation and understanding of the Cante Alentejano, to qualify on mediation between the Cante Alentejano and the Tourist, in a way to add more value to the product. The association of the Cante Alentejano to other tourism products, such as gastronomy and wines, can add more value to the set, than just the individual operation of each one of them, allowing it to create unique, authentic experiences and more attractiveness. The main aim of this article is to reflect on the framing of the CA in the context of its implementation into the tourist practise of it. This implementation cannot be seen just considering the immediate economic value. Any strategy of operationalization of the CA, as a tourist product, will have to be framed in terms of safeguarding this heritage and in the prevention and mitigation of the negative aspects that tourism can have to the communities where this practise is expressed. In the future, it would be importante to develop methodologies to measure the impact of tourism on communities where this heritage is expressed, as well as develop strategies for monitoring, evaluation and improvement of practices developed to enhance CA as a tourist product in territories where the Cante Alentejano is of common practice.

References

- C.M.E. (2014), *Évora e o Cante Patrimónios da Humanidade*, Évora, PT, CMÉ.
- Dias, C. (2014). *Porque não ter no Alentejo casas do Cante?*. Público, novembro 28, 9-10.
- Dias, F., Gonçalves, P., Pereira, O. (2012), *Manual de animação turística e cultural*, Lisboa, PT, Media XXI.
- Direcção Regional de Cultura do Alentejo (2015), *Convenção para a salvaguarda do património cultural imaterial – Unesco*, available at: <http://www.cultura-alentejo.pt> (consulted on: 13.10.2015).

- Direcção Regional de Cultura do Alentejo (2015), *Novo regime jurídico de salvaguarda do património cultural imaterial*, available at: <http://www.cultura-alentejo.pt> (consulted on: 13.10.2015).
- Direcção Regional de Cultura do Alentejo (2015), *Tesouros humanos vivos – directrizes da Unesco*, available at: <http://www.cultura-alentejo.pt> (consulted on: 13.10.2015).
- Dores, R. (2015), *Declarações de António Ceia da Silva*, Diário do Sul, fevereiro 10, 2.
- Lopes, E. R. (2012), "The museum of sacred art and ethnology as a tourist attraction (Fátima, Portugal)", *Revista Turismo & Sociedade*, 5(1), 295-309, ISSN:1983-5442.
- Lopes, E. R. (2015), "Objetos etnográficos, diversidade criativa e turismo", in *Atas do seminário Processos de musealização - um seminário de investigação internacional*, Porto, Universidade do Porto, Faculdade de Letras, Departamento de Ciências e Técnicas do Património. ISBN: 978-989-8648-47-1, 75-89, available at: <http://ler.letras.up.pt/uploads/ficheiros/13477.pdf>, (consulted on: 13.06.2015).
- Mendonça, J. (2015), *O Cante Alentejano como Produto de Turismo Cultural*, Projeto de Mestrado em Desenvolvimento de Produtos de Turismo Cultural, Instituto Politécnico de Tomar.
- Rito, F. (2015), *Entrevista a António Ceia da Silva*, Público, February, 8.
- Rodrigues, A., (2006), "Estruturas de promoção do turismo cultural", Comunicação apresentada no âmbito do II Encontro da Rota do Fresco, Alvito em out/nov.
- Rodrigues, J. (2012), *A memória e a actualidade das tabernas do concelho de Grândola*, Projeto de Mestrado, Universidade Nova de Lisboa.
- Santos, J. (2008), "Que estratégia para salvaguarda do Cante", Comunicação do Congresso Anual da Associação "A Moda", Universidade de Évora, maio, available at: <http://dspace.uevora.pt/rdpc/handle/10174/2675> (consulted on: 13.10.2015).
- Tréfaut, S. (2014), *Alentejo, Alentejo*, DVD, Lisboa, PT, Faux.
- Turismo de Portugal (2008), *Plano Estratégico Nacional do Turismo*, available at: <http://www.turismodeportugal.pt/> (consulted on: 01.10.2015).
- Turismo de Portugal (2015), *Plano estratégico para o desenvolvimento do touring cultural e paisagístico no Alentejo e Ribatejo – Estudo de diagnóstico*, available at: <http://www.turismodeportugal.pt/> (consulted on: 10.10.2015).
- UNESCO (1999), *Carta internacional do turismo cultural*, available at: <http://www.patrimoniocultural.pt/> (consulted on: 13.10.2015).
- Zacarias, M. (2015), *Modas alentejanas têm vindo a fomentar maior dinâmica social na região*, Diário do Sul, julho 29, 2.

Chapter XXII

World Heritage, Grassroot Management:

A Community Participation Experience Inventorying Six

“Milongas” in Buenos Aires

World Heritage, Grassroot Management: A Community Participation Experience Inventorying Six “Milongas” in Buenos Aires

MERCEDES GONZÁLEZ BRACCO¹⁴⁷

Abstract:

This paper reflects on the pilot experience of community participation in the inventory of six “milongas” (tango dance venues) in Buenos Aires. Coordinated by the UNESCO Regional Office for Latin America in 2013, it led to the active participation of the community through six “milongueros” as representatives of the milonga scene. Led by two UNESCO coordinators, they established which milongas would be treated, what elements to register and the community implied. Through participant observation of the process and further interviews with some of the partakers, this paper aims to inquire about the opportunities and limitations of a participatory experience, and how it can be improved in order to empower the community involved to make decisions regarding their heritage.

Keywords: UNESCO; Tango; Intangible Cultural Heritage; Community Participation; Inventory

Resumo:

Este trabalho reflete sobre a experiência piloto da participação comunitária no inventário de seis milongas de Buenos Aires. Coordenado pelo Escritório Regional da UNESCO para a América Latina em 2013, permitiu a participação ativa da comunidade através de seis milongueiros como representantes da atmosfera da milonga. Liderada por dois coordenadores da UNESCO, foram eles que estabeleceram que milongas inventariar, quais dos elementos registrar e qual era a comunidade envolvida. Através da observação participante do processo e subsequentes entrevistas com alguns desses representantes, o objetivo deste estudo é investigar as oportunidades e limitações de uma experiência

¹⁴⁷ University of Buenos Aires-CONICET, mercedesbracco@yahoo.com.ar

participativa, e como elas podem ser melhoradas para empoderar a comunidade envolvida para a tomada de decisões sobre o seu património.

Palavras-chave: UNESCO; Tango; Património Cultural Imaterial; Participação da Comunidade; Inventário

Resumen:

Este trabajo reflexiona sobre la experiencia piloto de participación comunitaria en el inventario de seis milongas en Buenos Aires. Coordinado por la Oficina Regional para Latinoamérica de UNESCO en 2013, permitió la activa participación de la comunidad a través de 6 milongueros como representantes del ambiente de la milonga. Liderados por dos coordinadoras de UNESCO, fueron ellos quienes establecieron qué milongas inventariar, qué elementos registrar y cuál era la comunidad involucrada. A través de la observación participante del proceso y entrevistas posteriores con algunos de estos representantes, el objetivo del trabajo es indagar acerca de las oportunidades y limitaciones de una experiencia participativa, y de qué manera puede ser mejorada en pos de empoderar a la comunidad involucrada para la toma de decisiones en torno a su patrimonio.

Palabras Clave: UNESCO; Tango; Patrimonio Cultural Inmaterial; Participación Comunitaria; Inventario de Milongas

1. Introduction: UNESCO and the heritage management

Since its creation and with up-growing legitimacy and support from important countries in the world, the United Nations Educational, Scientific and Cultural Organization (UNESCO) has started to concentrate and unify conservation and safeguarding parameters. At the same time, the legitimate spectre of what can be patrimonialised¹⁴⁸ has been broadened. This process has intensified the internationalization of heritage passing to be considered as belonging to "all humanity". It has also incorporated new arguments for conservation according to the idea that it is threatened by contemporary economic and social changes. This expansion in heritage

¹⁴⁸ As examples of how the range has widened, we highlight the definition of the international principles and guidelines concerning archaeological sites in 1956, the Safeguarding of Beauty and Character of Landscapes and Sites in 1962, the Convention for the Protection of World Cultural and Natural Heritage in 1972, the creation of the Living Human Treasures programme in 1994, the Convention on the Protection of Underwater Cultural Heritage in 2001, the Safeguarding of Intangible Cultural Heritage in 2003 and the protection and promotion of the diversity of cultural expressions in 2005. All the texts are available at <http://www.unesco.org>.

acceptance has appeared as a counterpoint to the transformation process of big cities worldwide, from economy trans-nationalization to information technologies expansion. Heritage was therefore reformulated in the tension between new local and global interactions during a moment of accelerated transformations due to the expansion of the global market. This reformulation was also affected by the dissolution and/or transformation of national identities and the crisis of territory references (Ortiz, 1997; Huyssen, 2001; García Canclini, 2001).

Since the Convention on Safeguarding Intangible Cultural Heritage (ICH) in 2003, the importance that the cultural expression had for the community and its respect for the international law were added as new criteria. Thus, two lists of Intangible Cultural Heritage were defined. The "Urgent Safeguarding List", which seeks for preserving menaced cultural expressions; and the "Representative List" which corresponds to the new determination to acknowledge cultural expressions as community identity referents. Under this last denomination, Argentina has successfully proposed two elements. The first one, submitted together with Uruguay is tango, incorporated in 2009 (Gómez Schettini *et al.*, 2011). The second element is "filete porteño", incorporated in 2015 (González Bracco *et al.*, 2015).

It is worth saying that tango, as a cultural expression of the identity of the City of Buenos Aires, had already been subject of several public policies in order to promote its visibility in the international tourism field. Nevertheless, since its declaration, events for international audiences have grown in popularity (Morel, 2009). As an example, in 2015, the Tango World Championship – included in the Tango Festival and Championship that has taken place under different names since 1998 – had 600.000 spectators and participating couples from 37 countries¹⁴⁹. This success, however, does not represent the reality of other elements related to tango such as musicians, lyric writers or dancing places, subject to economic fluctuations and disseminating problems, among other issues that threaten their survival. This reality, shared by other acknowledged elements, made UNESCO implement strategies to strengthen the national capacities to safeguard the ICH. The Project "Living Heritage" carried out by the Regional Office for Latin America, which at a first stage benefited Argentina, Uruguay and Paraguay, is included in these strategies. In the local case, this Project took the form of a pilot experience of making an inventory of six milongas¹⁵⁰ with community participation.

According to UNESCO parameters, inventories intend to identify and define elements that compose ICH in order to establish their viability and generate a process tending to their

¹⁴⁹ The number of assistants doubled since 2009. Information available at <http://www.estadisticaciudad.gob.ar>.

¹⁵⁰ The term "milonga" refers to a dancing rhythm as well as to places where tango is danced. Here, I refer to the second meaning.

safeguarding. They reaffirm the continuity of community members and contribute to the public management and sustainable development plan¹⁵¹. In the case of the tango, the aim of making an inventory of milongas was to establish the boundaries of this sub-element in order to study it in depth, making it possible to obtain inputs to formulate direct safeguarding measures. At the same time, this project had the active participation of its own "holders" as a distinctive feature. They were the ones that defined and esteemed the dimensions to be considered for its safeguarding and continuity.

2. About milongas and milonguer@s¹⁵²

In terms of historical construction, the genealogy of the tango has usually been represented in terms of a journey. With a dark origin related to the brothels of late 19th century Buenos Aires, the tango travelled to Europe, where it was coded and "became decent". It returned to its place of origin with a new prestige and dignity, which opened doors to dance halls and celebrations of the local upper classes. After a golden period throughout the 1940s and 1950s, its popularity declined to the point of being almost hidden in a few enclosed spaces. The dance recovered its esteem in the mid-80s thanks to a successful worldwide tour of the theatre show *Tango Argentino*. As several authors have observed, it is once again the story of the successful trip to Europe what restates tango as a highlighted local cultural expression. Thus, it is explained that since then it has been "rediscovered" by new Argentinean generations that began to listen and dance to its rhythms (Morel, 2012; Carozzi, 2015).

Apart from this real or imaginary bond, it is interesting that while the story of the marginal beginning and triumph of the tango in Europe has been repeated to exhaustion as an unquestionable truth, it is barely known what was going on in the places where tango was effectively listened to and danced. Meeting places with popular music and dances such as milongas, ball rooms and kermises did not find a relevant place in academic studies until a few years ago, when they started to call to the attention of some historians, sociologists and anthropologists that went through their history and present, describing uses and practices associated to them (Pujol, 1999; Maronese, 2008; Cecconi, 2009; Carozzi, 2015; among others).

¹⁵¹ For further information on inventories, see <http://www.unesco.org/culture/ich/en/inventorying-intangible-heritage-00080>.

¹⁵² Translation from the book title by Maronese (2008). As it is called "milonga" the place where tango is danced, "milonguero/a" refers to the experienced tango dancer.

According to these studies, milongas started to multiply, as well as diversify, in the last few decades. Among them, the “traditional” ones are the most well known. Frequented by tourists and locals, the dancing is exclusively between man and woman, with rigid dressing and social codes. There are also more “relaxed” milongas, mostly frequented by young people, where norms may be infringed without problem and the “practice venues” – which are not strictly milongas –but rehearsal places especially frequented by beginners that do not dare to dance in milongas yet. In the last years “queer” milongas, where same-sex couples are welcome and dancing roles defined by gender can be exchanged, have also started to appear. This diversity creates sub-worlds that coexist, in tension but also in harmony. Taking the question formulated by Maronese at the beginning of her enquire (2008: 12) as a starting point: “How do dancers and musicians manage the fact that these forms are rooted in the community for its use and, however, they have to be renewed in the contemporary world?”¹⁵³, I believe this to be the challenge of any “living heritage”, it must find an equilibrium between tradition and innovation.

In order to see how this paradox works, this paper reflects on the pilot experience of the participatory inventory of six “milongas” in Buenos Aires mentioned above. Having had the opportunity to witness the experience as a Technical Assistant, the chosen methodology was based on an ethnographic approach that involved participant observation and further interviews with some of the partakers. According to this primary information, I describe the whole process, with its ups and downs, observing the development as was proposed by UNESCO Coordinators and performed by the milongas spokespersons. As a result of this research, it is possible to apprehend the opportunities and limitations of a participatory experience, and how it can be improved in order to empower the community involved to make decisions regarding their heritage.

3. Inventory with community participation: the experience

As stated above, the Project “Living Heritage” was carried out by the Regional Office for Latin America and aimed to make an inventory of milongas of Buenos Aires with community participation. An anthropologist and a sociologist coordinated it and, as it was a pilot experience, the community participation was restricted to six spokespersons. These participants were dancers, some were also teachers and in almost all cases they organised milongas at the

¹⁵³To illustrate this contradiction, the author refers to the sacredness of music that reifies most milongas’ experience. According to the organisers and DJ’s, dancers - with few exceptions - just want to dance to the music of the great orchestras from the 40s and 50s, which tends to crystallise and folklorise the genre: “this is why milongas ‘sound’ all the same” (Maronese, 2008: 80).

moment of performing the inventory. In regards to demographic composition, there were three men in their seventies, of vast trajectory in the world of milongas, and a younger man, professional dancer and president of the *Asociación de Organizadores de Milongas* (Milongas Organisers Association - AOM). Two middle-aged women who organise milongas completed the group. The work also counted with observers from the Ministry of Culture of the Buenos Aires City Government and from the National Government.

As the coordinators said on the first meeting, the fact that spokespersons were (currently or not) milonga organisers was a key point for recruitment, as this role provided them with a specific knowledge making them able to define items that had to be included in the inventory. They were the ones who would decide which milongas should be inventoried and what should be observed in each one of them (meeting with spokespersons, fieldwork notes).

The project lasted from May to October 2013 and was based on two pillars. On one hand, the spokespersons assisted to the selected milongas, where they made observations and carried out interviews accompanied by photographs and videos. On the other hand, and as a complement, meetings were held every two weeks, during which issues to observe were discussed, criteria was adjusted and the progress of the inventory was shared.

For a better comprehension of this process, I distinguish three dimensions in order to analyse the possibilities and limitations of this work dynamic: the scope limits, the elements to inventory and the fieldwork¹⁵⁴.

3.1 Limiting the scope: milonga as cultural space

Given the character of the project as a preliminary test, it was known from the start that we would work with a limited number of milongas, which ended up being six. However, the criteria for their selection were not yet defined. Therefore there was a debate regarding the role of milongas as high-density cultural spaces due to their relation with their locations (social and sports clubs in many cases), their closeness to different neighbourhoods and the relationship with their audience. At this point, their vulnerabilities, related to authorization problems, tourism seasons and access to wider outreach, were exposed among other issues. Consequently, the initial discussion allowed gathering different proposals that were to be taken as safeguarding measures at a latter stage. These included, among others, the need for a real acknowledgment

¹⁵⁴ All the descriptions that follow are based on the meetings with spokespersons and the visits to the milongas as registered in my fieldwork notes; and the further interviews with two of the spokespersons. However, it does not include the inventory itself. For further information on the inventory results, see Lacarrieu and Maronese (2014).

of these places and the formation of a tango circuit that goes beyond the international festival (which, on the other hand, does not include milongas).

Taking into account the aforesaid, it was decided to leave aside the diversity and create an ideal type of milonga taking into account its acknowledgeable elements. Because of that, an important criterion for its selection was durability, which means the persistence of milongas or their organisers. Some milongas selected survived the “resistance period” (between the 60s and 90s), thanks to the perseverance of their organisers or habitual attendants. Other milongas selected were comparatively new, but had a history linked to their locations or acquired a highlighted identity due to the trajectory of their organisers. This allowed them to have, according to the spokespersons, a “very good dancing level”. Another important criterion was geographical diversity, as historically there were differences in dancing according to areas where it was practised (issue that, as explained below, was largely discussed). Finally, to this diversity in areas, gender diversity was added (milongas organised by men and others by women were considered). At every moment, it was agreed that these criteria were not the only possible nor should they highlight any essentialism. Nonetheless, the selection tried to feature those places where milonga traditional codes were maintained or recreated preserving their spirit. In words of the spokespersons, this meant selecting milongas where the most important thing was a good dancing level.

Although it was not theorised at the moment of performing the inventory, the selection of this type of milongas corresponds to the ideas submitted by Carozzi (2015) regarding the appreciation of traditional milongas as the places with the best dancing level. The author observed that young people frequently assisted to these milongas with the objective to dance with the old milongueros, seeing this as a way of entering in the selected circuit of good dancers. Moreover, these old milongueros successfully imposed their preferences in regards to music and dancing floor social codes, as the organisers invited them as a tactic to obtain a better hierarchization of their milongas and in this way, attract the audience interested in “true” tango dancing.

The final selection included four milongas organised by participating spokespersons and two others, organised by third parties. These were: *Milonga Malena* (Club Sunderland¹⁵⁵ - Villa

¹⁵⁵ Although it is not exactly known when it started and has counted on several organisers all throughout their history, the Club Sunderland’s milonga is one of the most traditional in Buenos Aires. The milonga investigated for this work was “Malena”, which has been taking place for several years on Saturday nights. More information at <http://www.sunderlandclub.com.ar/paginas/milongamalena.html>.

Urquiza), *Sin Rumbo*¹⁵⁶ (Villa Urquiza), *Lo de Celia*¹⁵⁷ (Constitución), *Club Atlético Milonguero*¹⁵⁸ (Club Huracán – Parque Patricios), *La tierrita*¹⁵⁹ (Asociación de Fomento Mariano Acosta – Parque Avellaneda), *La Milonguita*¹⁶⁰ (Palermo and Constitución) (Figure 1).



Figure 1. Buenos Aires City Map placing the milongas

Source: Lacarrieu and Maronese, 2014

Below, some spokespersons referred to this election as appropriate for a preliminary trial but that a greater diversity of spaces should have been taken into account to show the present variety of milongas:

I think they used a criterion that is a criterion to take into account, more traditional milongas, which are not always representative of the current ones. This is

¹⁵⁶ This club, that opened in 1919 and was called "tango cathedral" by the fame of its dancers in the Golden period, holds another of the most important milongas of the city, which also went through different organisers. More information at <http://elsinrumbo.com.ar/>.

¹⁵⁷ This milonga is performed, since 2000, in a place formerly occupied by another renowned dancing floor. It is organised by Celia Blanco (spokesperson of this work), of well-known trajectory as tango dancer and spokesperson of this work. More information at <https://www.facebook.com/lodecelia.tango>.

¹⁵⁸ The social site of Club Atlético Huracán, opened in 1941, was the venue of great neighbourhood dances with live orchestras. In 2012, after performing milongas at other spaces in the same neighbourhood, the organiser Julio Bassán (spokesperson of this work) relaunched the milonga in this place calling it Club Atlético Milonguero. Due to differences with the club management, this milonga stopped working in 2014.

¹⁵⁹ The Association is from 1929 and its milonga is one of the oldest operating without interruption. To this, it is added the importance of Oscar Hector (spokesperson of this work), of vast trajectory as milonga organiser.

¹⁶⁰ This milonga was created more than a decade ago by Graciela Lopez (spokesperson of this work) and, due to issues with city permits, it has changed its location several times. Although at the time of the project it had two rooms, currently it maintains only the one in Palermo. More information at <http://www.milonguitabaile.com.ar/>.

so because it is as... The flourishing development of milongas and proposals is such that there should also be given a place to all the young people that are around doing things (Graciela López, spokesperson, personal interview with the author, 11/10/15).

There could have been others... a broader range. (...) I think it can be done in another way... but anyway, now it is very easy to say it. (...) There are some things in which you must set the categorizations aside a little, in order to be more pluralist in the selection. Anyway, within the range of possibilities that we had, it was interesting (Julio Bassán, spokesperson, personal interview with the author, 01/06/16).

3.2 The elements included in the inventory: live tango

Once the milongas that would participate in the record were defined, it was quickly agreed that all elements to include in the inventory should represent in an open, but at the same time restricted, way what is to be found in a typical milonga. However, during the following encounters, the selected elements started to change, as observations and interviews made initial guidelines richer and more complex. For the final document, the following elements remained:

- Spatial sectioning: from the observations, sketches of dancing halls were made indicating the disposition of the place, chairs to sit down (men and women mixed or separated), dancing floor, bar, disc jockey, toilettes, etc.
- Dancing floor social codes: they are a set of implicit and positively valued rules that may be found in a greater or lesser degree in all milongas. They included the respect for the round of dancing (counter clockwise, entering through the corners, not push nor step on the adjoining couple), the “nod” (subtle signal from the man to the woman as invitation to dance), the hug (as proof of intimacy achieved by the couple while dancing), dancing close to the floor (do not make pompous figures which may bother other couples dancing) and the silence (as a way to feel the music).
- Community: this element involves those who are part of the restricted community as producers or transmitters, which means those who make the milongas possible (organisers, DJs, clubs management, buffeters); and on the other hand, the widened community, which means those attending the milongas, for example professional dancers, experienced milongueros, professors with their students, locals, foreigners.

Outside these elements, there were discussions regarding others that were finally left aside. One of the most important disagreements was about the dancing styles. The decision to not consider this element was based on the understanding that today there are styles which are not danced anymore (such as "canyengue"), while those that are still practised ("ballroom", "milonguero", and several neighbourhood styles) tend to be more homogeneous and therefore it was going to be very difficult to establish marked differences. There were long discussions regarding styles and their tendency to disappear after tango academies appeared. Older and more experienced spokespersons talked about their beginnings in dancing as something related to the home or of everyday life (they learned from dancing with their sisters or looking at their older brothers in local club dances). This non-systematised beginning was what defined differences in dancing styles among different neighbourhoods. As a counterpart, they mocked the exaggeratedly technical components that they observed in current academies, which diluted the said differences. One of the spokespersons exemplified: "*And this seminar was called 'Concave and convex forms in tango figures'. What is that? You have to go there with a dictionary!*" (Meeting with spokespersons, fieldwork notes)¹⁶¹.

Dressing codes were also discussed, but they varied from milonga to milonga and did not seem to influence in its development, that is why it was dismissed. Something similar occurred while discussing the exhibitions of professional dancers, quite frequent in milongas, but that are not part of the unity of these spaces with their regular visitors.

3.3 Field work: registration modes and instruments

The selected elements (spatial sectioning, dancing floor social codes and community) were elaborated as result of the attendance of spokespersons to the selected milongas. There, supported by the coordinators, they carried out observation registries and interviews with the organisers, DJs and frequent attendants; they also filmed and took photographs. At that moment, several problems emerged due to the difficulty that the majority of them did not know how to use data recollection instruments (photo cameras, film cameras and recorders). In order to help the spokespersons, the agreed solution was that coordinators would accompany them during their visits to milongas as technical support. This unexpected variation of the original plan developed into a positive output, as very interesting mixed registers were set in a dialogue

¹⁶¹ Despite the discussions about them "killing" diversity in tango, academies have existed since the early beginnings of tango dancing (Pujol, 1999).

between the novice and the expert view, which allowed opening concepts or situations naturalised by spokespersons.

It is worth mentioning that not all the elements presented the same difficulty for its register. For example, the space sectioning recollection was mainly descriptive, for which it did not cause major trouble for its registration. Something very different happened with dance floor codes, as they had to deal with implicit and naturalised knowledge, it was very difficult for the spokespersons to register them. Because of that, it was necessary to work permanently together with the coordinators to obtain a more analytical and less valorising view. The same happened at the time of performing the interviews. Apart from the interview guides developed in the meetings, in many cases the spokespersons tended to induce answers: "So, tell me, would you say this is the best milonga in Buenos Aires?" They also tended to register only the best dancers on the floor and those whose behaviour was appropriate according to what was positively valued by them, forcing the results and avoiding observing situations that showed other codes or the lack of them. For example, despite the importance granted in meetings to nodding as a fundamental element within the dance floor codes, at the moment of observing milongas, this element was absent, or evasive, and difficult to register due to its cohabitation with other forms of dancing invitation.

Also, and despite the efforts to capture it, spokespersons agreed that the final work could not fully get the milonga "spirit", which was described as a proper failure of the inventory as an instrument:

For me, there was structurally an initial problem, which is that the enumeration we did was taken for granted at the first or second meeting, but we did not know that it was going to be so structured and rigid (...) It is fine that they are like tango prototypes but for a final work of this kind, it then happens that everything learnt is very superficial. Do you understand? It is fine as picturesque. It is as if I take a photograph. Then, I see the clothes, see the things... but after... if instead of the photography there was somebody observing, it is not the same. Because there is something dynamic, deep that moves there, and that was definitely not respected in the book, because it is... as the book was exactly... an inventory, which is what it was meant to be (laughter) (Graciela López, spokesperson, personal interview with the author, 11/10/15).

The most difficult thing really, and that could not be expressed, for me, in the work, has to do with the things that are "lived". You can write with words and a

beautiful syntax and semantics about what a milonga can be, a picture can be taken when you say, "Can you see? There it is, that is tango", but it is not before you live it that you know what tango is. You may have an idea, but a felt idea? No! And tango is to be felt. And there was the issue to explain it in the film, isn't it true? To be conscious, to say why there we see a connection, what is it that... they are subtle things (Julio Bassán, spokesperson, personal interview with the author, 01/06/16).

4. Conclusion: strengths and weaknesses of a community based inventory

The matters explained until here establish the first local experience of community participation in an inventory. Led by two UNESCO coordinators, stakeholders were who decided which milongas would be treated, what elements to register and the community implied. After describing this process, opportunities and limitations of this kind of participatory experience can be enquired, along with how it can be improved in order to empower the community involved to make decisions regarding their heritage.

As said, the work ended in October 2013, and the inventory was finally presented as a book in February 2014. At that moment, the spokespersons general perception was positive and all expressed to be pleased to have participated in the project. Moreover, some of them expressed later that, if it had been possible to continue, the five working months carried out would have worked as a good training for starting a new recollection in a more consistent and complete way.

Being consulted regarding the content of the publication, the spokespersons critics concentrated on two issues, although it was highlighted that in many cases problems were due to lack of time to develop the work in depth. The first of these issues was the rigidity with which elements were defined. They should have deserved a better reflection and development, so when published they were not crystallised:

I don't know how to investigate this, I haven't got the least idea, and I don't know how to investigate. That's your job, but if it is a living phenomenon, you cannot stab a butterfly to see how it flies, because everything is ruined (Graciela López, spokesperson, personal interview with the author, 11/10/15).

This means that the fact of having only considered traditional milongas, when the idea was to show "living heritage", did not allow to show the real diversity that currently exists. At the other end, the fieldwork recovered the central elements of the stereotype which, as previously

mentioned, does not always represent the reality of many current milongas, where codes recollected do not exist or are diluted. Notwithstanding, as also acknowledged by the spokespersons, for this pilot project a homogeneous panorama was necessary to delimit the universe.

The second question to consider is the one referred to the difficulty to “translate” expectations about how to perform the fieldwork. Concepts postulated from UNESCO (terms such as “inventory”, “element”, “community”) were not clear for spokespersons, which resulted in trial and error exercises in seeking a point of encounter to perform the registrations:

There are things that are very difficult to work with and we do not have a job as anthropologists or sociologists, who probably manage certain codes, certain structure where said search may be more fluid and fast. Likewise, one of the things that I think it was very interesting was that one, I mean that the job was not done by anthropologists, because the anthropologist also has a preconceived structure in which he will try to obtain this or that, which was even present in the discussions in the meetings (Julio Bassán, spokesperson, personal interview with the author, 01/06/16).

This means, if on the one hand the danger was crystallisation, on the other hand the discipline view of how to perform fieldwork recordings and the difficulty to use the technological recollection instruments also influenced in the way of “describing” the milonga, in a continuous back and forth over what each party understood that had to expose in the inventory.

However, the latter problem was also referenced as a positive aspect. The spokespersons highlighted the ethnographical-type job in order to achieve a “defamiliarization” that allowed them to denaturalise their daily routine as organisers and attendees of milongas. Moreover, meetings allowed a space for reflection about their own practices, which was also valued by the informants. For example, the group discussion methodology to elaborate ideas was reproduced the following year in the AOM annual meeting¹⁶².

Another point to underline is the requirement of the spokespersons that the work performed had to go beyond a simple publication, being in fact useful for the promotion and safeguarding

¹⁶² López commented on the utility of this methodology for her job: “... there were different topics and each one had to take one with a group, then we discussed in groups of five or six. It was very interesting what each one was contributing with, saying, whatever... If you had told me two years ago, which is the difference between a practice venue and a milonga, I would have said anything. But now I have a concept thanks to that.” (Graciela López, spokesperson, personal interview with the author, 11/10/15).

of milongas. In this line, the participation of state officers as observers allowed, once the UNESCO project was over, the agreement on some public policies together with the community. This is how, since 2014 and under the sponsorship of the *Dirección General de Patrimonio e Instituto Histórico* (General Department of Heritage and Historical Institute - Buenos Aires City Government), "The Milongas Week" is organised in the city of Buenos Aires, to which an annually updated milongas map is added.

Having in consideration the foresaid, it can be said by the pilot experience of making an inventory with community participation turned out to be positive. In terms of exchange, because it allowed reflecting about a specific element – the milonga – from the spokespersons' point of view and experience, who were empowered at the time of discussing, recollecting and defining elements that had to be registered and safeguarded. Nevertheless, a lesson for future projects would be that the meetings with academic and technical assistants have to respect a longer time to adapt to each other and to translate needs and expectations.

In terms of public policy, it turned out to be an essential exercise in order to perform any action or create legislation around promotion and protection of this "live heritage". Despite all its problems, this experience shows that opening the field to the communities permits a real participation in taking decisions, promoting a flow from the bottom to the top in heritage appropriation and management. In the case of milongas, as mentioned by all spokespersons in the last meeting, it is a work that has just started.

References

- Carozzi, M. J. (2015), *Aquí se baila el tango: una etnografía de las milongas porteñas*, Siglo Veintiuno Editores, Buenos Aires, Prohistoria, 24, 396 pp., ISBN: 978- 987 -629-550-5.
- Cecconi, S. (2009), "Territorios del tango en Buenos Aires: aportes para una historia de su forma de inscripción", *Iberoamericana*, IX(33), 49-68.
- García Canclini, N. (2001), *Culturas híbridas*, Buenos Aires, Paidós.
- Gómez Schettini, M.; Almirón, A., González Bracco, M. (2011), "La cultura como recurso turístico de las ciudades. El caso de la patrimonialización del tango en la ciudad de Buenos Aires", *Estudios y Perspectivas en Turismo*, 20(5), 1027-1046.
- González Bracco, M., Salatino, P., Mazettelle, L., Barber, N. (2015), "La postulación del filete porteño a la lista representativa de patrimonio cultural inmaterial de UNESCO: una experiencia de participación comunitaria", in Ministerio de Cultura de la Nación (comp.)

- PensarLaCulturaPública: apuntes para una cartografía nacional*, Ministerio de Cultura de la Nación, Buenos Aires, 164-176.
- Huysen, A. (2001), *En busca del futuro perdido. Cultura y memoria en tiempos de globalización*, Buenos Aires, FCE.
- Lacarrieu, M., Maronese, L. (2014), *Inventario de seis milongas de Buenos Aires: experiencia piloto de participación comunitaria*, Montevideo, UNESCO.
- Maronese, L. (2008), *De milongas y milonguer@s*, Buenos Aires, Comisión para la Preservación del Patrimonio Histórico Cultural de la Ciudad de Buenos Aires.
- Morel, H. (2009), "El giro patrimonial del tango: políticas oficiales, turismo y campeonatos de baile en la ciudad de Buenos Aires", *Cuadernos de Antropología Social*, 30, 155–172.
- Morel, H. (2012), "Vuelve el tango: "Tango argentino" y las narrativas sobre el surgimiento del baile en Buenos Aires", *Revista del Museo de Antropología*, 5, 77-88.
- Ortiz, R. (1997), *Mundialización y Cultura*, Buenos Aires, Alianza.
- Pujol, S. (1999), *Historia del baile*, Buenos Aires, EMECE.

Chapter XXIII

Belém in the Pathways of Faith:

World Heritage and the Amorcomtur Web!

Belém in the Pathways of Faith: World Heritage and the Amorcomtur Web!

MARIA LUIZA CARDINALE BAPTISTA¹⁶³

RENATO DOS SANTOS LIMA¹⁶⁴

Abstract:

The article presents historical aspects of the Brazilian city of Belém and the religious festival known as Círio de Nazaré (the Taper of Our Lady of Nazareth), its dimension as a web interfacing with tourism and its listing as World Heritage by UNESCO. In 2015, the city received the world title of Creative City in gastronomy, in addition to having the Círio as intangible cultural heritage since 2014. The paper describes aspects of a study that has been developed in the Master's Degree Programme in Tourism and Hospitality at the University of Caxias do Sul, southern Brazil, on the Marian devotion event and its interfaces with tourism. It is also linked to the research called Trama Amorcomtur! Complex communication and subjective processes that enhance the potential for tourism, considered from the point of view of lovingness and autopoiesis, and to Amorcomtur! Study Group on Communication, Tourism, Lovingness and Autopoiesis of the University of Caxias do Sul (UCS). It is a result of a post-doctoral project developed at the Federal University of Amazonas – *Chaosmotic interlacing with Amazon Knowledges* – in the Graduate Programme on Amazonian Society and Culture (PPGSCA-UFAM). Its theoretical approach involves studies on Tourism, Religiosity; historical aspects of devotion to Our Lady of Nazareth; tangible and intangible heritage. The methodological strategy is Cartography of Knowledges in line with Contemporary Science assumptions. The results confirm the importance of Belém do Pará and Círio de Nazaré as World Heritage, providing information about the exuberance of the Amazon region, the high historical value of the monuments and the centuries-old event, which expresses the web of lives interlaced in the construction of Marian faith.

Keywords: Tourism; World Heritage; Círio de Nazaré; Belém; Pará

¹⁶³ University of Caxias do Sul (UCS/BRAZIL) Federal University of Amazonas (UFAM/BRAZIL), malu@pazza.com.br

¹⁶⁴ University of Caxias do Sul (UCS/BRAZIL), renato_limaz1@hotmail.com

Resumo:

O artigo apresenta aspectos históricos da cidade de Belém e da festa religiosa Círio de Nazaré, sua dimensão de trama de interface com o turismo e o reconhecimento como Patrimônio Mundial, pela UNESCO. A cidade recebeu, em 2015, o título mundial de Cidade Criativa na Gastronomia, além de ter o Círio como patrimônio cultural imaterial da humanidade, desde 2014. O texto relata aspectos de estudo que vem sendo desenvolvido no Mestrado em Turismo e Hospitalidade, na Universidade de Caxias do Sul, no Sul do Brasil, sobre o evento de devoção mariana e suas interfaces com o Turismo. Vincula-se, igualmente, à pesquisa denominada Trama Amorcomtur! Complexos processos comunicacionais e subjetivos, que potencializam o turismo, considerados sobre o viés da amorosidade e autopoiese, e ao Amorcomtur! Grupo de Estudos em Comunicação, Turismo, Amorosidade e Autopoiese, da Universidade de Caxias do Sul (UCS). Decorre de projeto desenvolvido na Universidade Federal do Amazonas, em nível de pós-doutoramento: Entrelaços Caosmóticos com Saberes Amazônicos, no Programa de Pós-Graduação em Sociedade e Cultura da Amazônia (PPGSCA-UFAM). A abordagem teórica envolve estudos sobre Turismo, religiosidade; aspectos históricos da devoção à Nossa Senhora de Nazaré; patrimônio material e imaterial. A estratégia metodológica é a Cartografia dos Saberes, alinhada aos pressupostos da Ciência Contemporânea. Os resultados reiteram a importância de Belém do Pará e do Círio de Nazaré, como patrimônios mundiais da humanidade, trazendo informações sobre a exuberância da região amazônica, a grandiosidade do valor histórico dos monumentos e do evento centenário, que expressa a trama de vidas entrelaçadas, na construção de fé mariana.

Palavras-chave: Turismo; Patrimônio Mundial; Círio de Nazaré; Belém; Pará

Resumen:

El artículo presenta aspectos históricos de la ciudad de Belém y de la fiesta religiosa Círio de Nazaré, su dimensión de trama de interfase con el turismo y el reconocimiento como Patrimonio Mundial, por UNESCO. La ciudad recibió, en 2015, la titulación de *Cidade Criativa na Gastronomia*, además de poseer el Círio como patrimonio inmaterial de la humanidad, desde 2014. El texto relata aspectos desarrollados en el Mestrado em Turismo e Hospitalidade, en la Universidade de Caxias do Sul, en el sur de Brasil, sobre el evento de devoción mariana y sus interfases con el Turismo. Se enlaza este texto igualmente a la investigación *Trama Amorcomtur! Complexos procesos comunicacionales y subjetivos*, -que potencializan el turismo- y al *Amorcomtur! Grupo de Estudos em Comunicação, Turismo, Amorosidade e Autopoiese*, de la

Universidade de Caxias do Sul (UCS). Dando como resultado un proyecto desarrollado en la Universidade Federal do Amazonas, en nivel de posdoctorado: Entrelaços Caosmóticos com Saberes Amazônicos, en el Programa de Pós-Graduação em Sociedade e Cultura da Amazônia (PPGSCA-UFAM). El enfoque teórico involucra estudios sobre Turismo y religiosidad en aspectos históricos de la devoción a *Nossa Senhora de Nazaré*; patrimonio material e inmaterial. La estrategia metodológica es la Cartografía de los Saberes, alineada a los presupuestos de la Ciencia Contemporánea. Los resultados reiteran la importancia de Belém do Pará y del Círio de Nazaré como patrimonios mundiales de la humanidad, contribuyendo con informaciones sobre la exuberancia de la región amazónica, la grandiosidad del valor histórico de los monumentos y del evento centenario, que expresa la trama de vidas entrelazadas, en la construcción de la fe mariana.

Palabras Clave: Turismo; Patrimonio Mundial; Círio de Nazaré; Belém; Pará

1. Introduction

This work presents the city of Belém do Pará and Círio de Nazaré (the taper of Our Lady of Nazareth as World Heritage and their interface with tourism. Belém in the Pathways of Faith describes a little of the historical-social aspect of the 400th anniversary of the city and its relationship with tourism, heritage and Catholic religiosity. It is intended to signal how the city of Belém has worshiped the name of Our Lady over these centuries, identifying her as Nazaré, and how such devotion has been dealt with in order to boost Tourism and Religiosity in Pará's state capital.

In this text, scientific assumptions correspond to the changing scenario of Science, in which phenomena are approached as systemic and complex processes engendered in ecosystems – living systems – where multiple intervening beams are always at stake.

That is how tourism, Belém do Pará and Círio de Nazaré are thought: with their multiple implications. We assume the tourism-web view in the interlacing of beams of intervening factors. Therefore, the theoretical basis of tourism – the general basis for the discussion involving Trama Amorcomtur and the phenomenon of Círio de Nazaré as an investigative plateau – a continuous intensity level – corresponds to the systemic-complex view present in contemporary studies, which include postmodern visions. That is the case, for instance, of the conceptual discussion, followed by Moesch's (2002) proposition of complex approach to tourism. It is also close to Gastal (2005), with the perspective of complexity and diversity that

involves travelling and tourism as a complex social, cultural and economic phenomenon. In direct connection with the prospect of the Amorcomtur research group, significant studies on hospitality are presented in the text organised by Marcia Maria Cappelano dos Santos and Isabel Baptista (2014).

Belém do Pará is located in northern Brazil. 'Initially named Feliz Lusitânia, it has also been called Santa Maria do Grão Pará, Santa Maria de Belém do Pará, and finally Belém (Dias and Dias, 2007: 2). It is now known as Belém do Pará, the second largest city of the region in terms of population, with approximately 1.5 million inhabitants and a area of 1,059,459 Km² (IBGE, 2016).

The so-called Círio de Nazaré has traditionally taken place in the region for over two centuries. It gathers 2 million people in the streets of the city centre. Together they seek to worship Our Lady, affectionately called 'Nazica' by devotees. With a 20-day programming that starts on the Tuesday of the week preceding the second Sunday of October, the event has a solemn opening in the house of Plácido (named after the local resident who found the image), 15 processions, playful and liturgical activities. It only ends three weeks later, with the so-called Recírio on the last Monday of that month, when the image of Our Lady of Nazareth returns to Gentil Bittencourt School where it is kept until the next edition.

Belém is now the result of a glamorous and rich historical past, since several architectural complexes stand out with their monuments, buildings and public spaces listed by Brazil's National Heritage Institute IPHAN. As an example, the category of Tangible Heritage includes: Feliz Lusitânia Complex (Church of St. Alexander and former Jesuit School, the Metropolitan Cathedral of Belém, Frei Caetano Brandão Square, the Sacred Art Museum, the Fort of the Nativity Scene, the Cathedral of Belém, the House of Eleven Windows, and the Castle Slope), the Ver-O-Peso Complex (the Architectural and Landscape Ver-o-Peso Complex, its adjacent areas, Pedro II Square, Boulevard Castilhos França Avenue, Fish Market or Iron Market, Meat Market or Bologna Market, the Clock Square and Solar da Beira), Maranhão Square and the Military Hospital, the Zoo and Botanical Park of Emílio Goeldi Pará Museum, Solar Guajará Baron, Paz Theatre, António Lemos Palace, Lauro Sodré Palace, Pinho Palace, Pará Historical and Geographical Institute, Old Palace, Governor José Malcher Avenue and Rui Barbosa Lane (architectural complex), Nazaré Avenue (architectural complex), Church of St. John the Baptist, Church and Convent of Our Lady of Mount Carmel and Chapel of the Third Order, Church of Our Lady of the Rosary of Black Men, Santana Church, Sanctuary Basilica of Our Lady of Nazareth, Convent and Church of Our Lady of Mercy, Cemetery of Our Lady of Solitude and Sugarcane Processing Plant Murucutu: ruins and Chapel of Our Lady of the Conception (IPHAN, 2004).

The Círio de Nossa Senhora de Nazaré is registered as Intangible Heritage under the category Celebration (IPHAN, 2004). It is worth noting that Belém stands out in two other ways. First, for having Círio de Nazaré as National and World Heritage since October 5, 2004 and December 8, 2013 respectively. And second, for being part of the Creative Cities Network under UNESCO's Gastronomy Category since November 11, 2015.

Next, we proceed to understand a little more of the pathways of faith, which consolidated this world heritage in its nuances, peculiarities and historical value density.

2. Belém in the pathways of faith

The late 16th and early 17th centuries saw the emergence of the so-called Iberian Union (1580-1640) between the Spanish and Portuguese crowns. To continue the domain of the two major powers in the Americas, on January 16, 1616, Captain-Major of Rio Grande do Norte Francisco Caldeira Castelo Branco, leading a 200-strong expedition, arrived at the great river 'Paraná-Guaçú',¹⁶⁵ to a piece of land he called 'Happy Lusitania, under the invocation of Santa Maria de Belém' (IBGE, 2016). The site dominated by the Iberian crown in America is 'geographically unique, (since) it was colonised over the Tordesillas Meridian,¹⁶⁶ in land belonging to Spain' (Dias and Dias, 2007: 2). However, it was colonised by the Portuguese. In order to maintain its physical and political sovereignty, Portugal used to establish small fortifications in every place it conquered, to represent its military power and ensure its hegemony with greater security (Tavares, 2008).

After the arrival of the expedition, the city's features consisted only of a fort completed in 1616 and the Jesuit School finished in 1626. Both buildings were located at the highest point of the land, near the river shores' (Dias and Dias, 2007: 2). Buildings were placed in high places at the time as military defense strategy that provided 'higher visibility (...) towards both the river shores and the ground' (Dias and Dias, 2007: 2).

Located near the entrance to the mouth of the Amazon River, the city began to raise great interest in other European nations, specially because of territorial control in places of indigenous

¹⁶⁵ 'Paraná-Guaçú, the native name for the Guajará river as a place suited to sea-river transportation and interconnections with the whole estuary comprising the Guama, Tocantins, Amazonas and other rivers' (Arruda, 2003: 17).

¹⁶⁶ 'The Tordesillas meridian was a result of the Treaty of Tordesillas, an agreement signed in 1494 in the Spanish city of the same name. The Treaty included Portugal and Castile, part of today's Spain. The agreement aimed at the division of New World lands, i.e. the Americas. The terms were based on a meridian drawn 370 leagues west of the Cape Verde Islands; the land located to the west belonged to the Spanish Crown and those to the East belonged to the Portuguese Crown' (Lisboa, 1957 apud Dias and Dias, 2007: 2).

concentration, in order to conduct catechetical education according to the dogmas of the Catholic faith. With that aim, the so-called "Territory of the missions" was created in the area (Tavares, 2008: 60) by sending some religious orders (Carmelites, Franciscans, Mercedarians and Jesuits), under the directions of the crown, so that one order had no doctrinaire interference in the space occupied by the others and there would be no conflicts of jurisdiction. Therefore, the religious orders were divided so that the Jesuits were located to the south of the Amazon River; the Franciscans of Piety were on the left side of the lower Amazon; the Antonian Franciscans had their missions in Marajó and the Lower Amazon; the Mercedarians were in the Urubu Valley; and the Carmelites in the valleys of the rivers Negro, Branco and Solimões (Tavares, 2008).

In catechetical terms, the Jesuits were the most important of all the religious orders that participated in that initial context in the 17th century because they worked in the educational conduct of Indians belonging to colonised lands (Dias and Dias, 2007), as well as Jesuit Father António Vieira, a prominent missionary expedition (Tavares, 2008).

The missions were important to the region not only for educating Indians, but for establishing parishes with strong ties to the missions and villages they administered. With the arrival of the 18th century, many things began to change in the region, specially with the policy applied by the Portuguese crown. On March 4, 1719, at the request of Dom João V, King of Portugal, the Church of Belém do Grão Pará is elevated to the status of Diocese by Pope Clement XI, under Bull *Copiosus in Misericordia*, after the territory of the Maranhão Diocese was divided. In 1750, the Treaty of Madrid established the city of Belém as a territory under full Portuguese rule, and Sebastião José de Carvalho e Melo, known as the Marquis of Pombal, was appointed to the government, and his intervention started in the Amazon (Dias and Dias, 2007).

The government of Portugal gave Pombal the mission to carry out profound changes. The main one was the expulsion of the Jesuits, who had their property confiscated by the Crown and lost their guardianship rights over the Indians and saw names of villages and missions being changed to Portuguese town names¹⁶⁷ (Tavares, 2008).

With the replacement of the names of the villages and the institution of 'vilas', administrative units were created in the region as City Councils whose members could be elected among the

¹⁶⁷ During the 18th century, 62 parishes were founded (Barbosa 1976: 219-240), most of them based on the missions and villages administered by the missionaries. With Pombal's policy, those missions became 'vilas' named after Portuguese towns. Abaetetuba (1750); Aveiros (1751); Macapá and Ourém (1752); Colares, Maracanã, Muaná, Salvaterra, Soure and Souzel (1757); Acará, Alenquer, Almerim, Chaves, Curuçá, Faro, Melgaço, Monte Alegre, Óbidos, Oeiras, Portel, Porto de Moz and Santarém (1758); and Mazagão (1770), and others that were considered 'povoados' due to their small population: Benfica, Monforte, Monsarás and Vila do Conde (1757); and Arrayolos, Alter do Chão, Boim, Esposende, Fragoso, Pinhel, Pombal, Veyros and Vila Franca (1758). The transformation of villages and missions into 'vilas', as ordered by Mendonça Furtado, included replacing indigenous names by those of Portuguese towns (Tavares, 2008: 61).

Indians and aimed '(...) to encourage local development, (...) to continue the exploitation of indigenous labor, in addition to defining the tithe to be paid by each community on the product of agriculture' (Tavares, 2008: 62).

The measure benefited Northern Brazil, which started having more direct contact with Portugal, but it drove that region away from other Brazilian capitals. Because of that, during the Proclamation of the Republic, the city of Belém did not recognise the independence of Brazil until a year after it happened (Dias and Dias, 2007).

Even with that distance and its proximity to Portugal, on March 4, 1719, canonically elected by Pope Clement XI by Papal Bull *Copiosus in Misericordia*, the Belém do Pará Diocese (Diocesis Belemensis of Para), at the request of Don João V to the Vatican, was separated from the Maranhão Diocese. On May 1, 1906, the diocese became Archdiocese and Metropolitan See, and started to be called Belém do Pará Archdiocese (Tavares, 2008).

As the Metropolitan Cathedral of the Ecclesiastical Province of Belém do Pará, the city began to influence the religious scene, and specially after what happened on the banks of a river/stream in the city's surroundings. The appearance of an image changed the city's religious routine and it became known as the city of Círio de Nazaré.

The Círio de Nazaré religious festival has been held in Pará's state capital Belém since the 18th century. It brings faith and devotion to the streets in the city centre. However, we should not look at the event as being common to others existing within Catholic universalism, since "it is not a regular, ordered religious procession (...); it is different, and it continues with such fervor because it actually belongs to the people" (Rocque, 1981: 11).

Legend has it, a half-Indian man from the Amazon region called 'Plácido José de Souza' found an image of Our Lady on the edge of the Murucutu stream (the current site of the Sanctuary Basilica of Our Lady of Nazareth). He took it to his nearby 'hovel'. The next morning, he woke to realise that the image was gone from his home. Worried and thinking that someone could have broken in to get the image, he went out to look for it. After an intense search and deciding to give it up, he decided to return to his home and took the same path as the previous day, along the Murucutu stream. To his surprise, the image was in the same place where he had found it. Plácido decided to take the image home. The next morning, he realised that the image was not where he had left it. Stunned, he decided to search for it, but now towards the stream. And once again the image was there (Rocque, 1981: 30).

The fact was repeated for a few days. The news of the saint that disappeared spread all over town. The governor decided to verify the veracity of the facts and, fearing some plot against his

government, he ordered his guard to watch the image throughout the night. The next morning, he and everyone who was in the government palace were surprised to see that the image that spent the night under armed surveillance had disappeared and returned to its place of origin – the Murucutu stream. This was crucial to the understanding that the image really wanted to stay in the place where it was found. So the governor ordered a chapel to be built on the site, making Pará inhabitants' devotion to the image of Nazareth official (Rocque, 1981).

Over the years, expressions of faith and devotion increased so that the Church had to be aware of what happened. Therefore, in 1792 the Vatican authorized the first procession in honour of Our Lady of Nazareth, which took place on September 8, 1793 (Rocque, 1981).

At that time, however, there was no specific date to worship the saint. The *Círio* Festival would take place in September, October and November. In 1901, Bishop Francisco do Rego Maia ordered the procession to be held on the second Sunday of October. Initially, they used to take place in the afternoon and, as they continued in the evening, participants used traditional candles that were very common during major peregrinations and processions. Thus, the term '*Círio*' (from Latin *Cerus*, or wax), meaning 'big candle', was introduced into the ceremony and became "synonymous with the Nazaré procession in Belém" (Portal *Círio* de Nazaré, 2015).

The small 'saint' found by Plácido is a 28-centimetre wood sculpture with long hair, some of which falls on its right shoulder. Its arms carry a child playing with a globe. In 1969, the real image was replaced by a replica called 'pilgrim image', because they understood that the original 'saint' should be preserved in a safe place. It was then kept in the sacristy of the Sanctuary Basilica.¹⁶⁸ It is currently on display, at Glória, and it is used in the ceremony when the image is lowered.

It has been 222 years of tradition, faith and religiosity in a one-day event that gathers more than two million people. Its high point – the festival – focuses on two categories whose structure may help understanding the dynamics established in the 15 days of intense movement around the city of Belém, which is the Pathways of Faith and Praise.

To illustrate the pathways of faith gathered in the celebration value that follow the Catholic Church's doctrinal rites and the system of religious belief and acquired knowledge, it focuses on Liturgical-Symbolic activities, identified as follows: liturgical activities, expressed by 12

¹⁶⁸ The construction of the Church of Our Lady of Nazareth started in 1909, in the same place where Plácido had found the image. It was opened in 1922 and it is an approximate reproduction of the Roman Basilica of St. Paul in the Vatican. The following year, it received the title of Basilica from Pope Pius XI. At that time, there were only two churches in Brazil with the same definition (Bahia's Sé and São Paulo's São Bento), and Belém's was the third one to gain that title and the first one in the Brazilian Amazon. In 2006, it was raised to the category of Sanctuary of Mariana Faith, now called Sanctuary Basilica of Our Lady of Nazareth (Portal *Círio* de Nazaré, 2015).

peregrinations (transfer to Ananindeua, road peregrination, river procession, motorcycle peregrination, transference, taper, bicycle peregrination, youth peregrination, runners peregrination, children's peregrination, party procession and Recírio), peregrinations to the homes of the faithful, masses held during the festival, worshiping the Holy God, prayer groups and the third of the rosary (Terço da Alvorada) at dawn; symbolic activities focus on identification of the Sanctuary Basilica of Nazareth, the authentic image and the pilgrim image, the mantle of Our Lady of Nazareth, the image holder, the rope, the campaign not to cut the rope, the cars of Círio miracles, the festival's poster and anthem, the promise makers, the Círio museum, the memorial of Nazareth, and the Círio lunch.

Three processions identified in Liturgical Activities and at the Círio Lunch that are presented in the symbolic activity deserve our full attention for the belonging value that devotees ascribe to them. They are: the river peregrination (which is held in the Guajará bay and runs along much of the city of Belém and, in 2015, included 292 vessels); the transference (a procession held at night – the first moment of appearance of symbolism of the rope and that has included the participation of one million devotees), and the Círio (procession held on Sunday with over two million people; its rite includes the symbolism of the offer cars and the presence of the rope), and the "Amazon banquet".

The Pathways of Praise category, in turn, is represented by the Cultural Celebration and the honorable and "not honorable" religious-spiritual manifestations of devotion, with the idea of Playful-Profane activities characterized as follows: Playful activities identified as Círio Musical, Arraial de Nazaré and Feira de Miriti; Profane activities include Arraial das Águas, Auto do Círio and Festa da Chiquita.

Understanding this, on December 5, 2001, the Belém Archdiocese filed the process with the Institute of National Historical and Artistic Heritage (IPHAN) to include the festival as intangible cultural heritage in the 'celebration' category (IPHAN, 2004).

After the Archdiocese's request, three years were spent in search for validations that conclusively proved that the Círio presents, in all its ritual, traditional value with cultural, social and symbolic potential. Finally, on August 4, 2004, the first favorable report was published in the Official Gazette. It described the historical and traditional context of the festival and its past and present meaning in devotees' lives. The main elements of the celebration were: the processions of transference and the Círio, the (original and pilgrim) images of the saint, the rope, the saint holder, the Círio lunch, the Arraial de Nazaré, the allegories of the Círio procession, the fair and toys of Miriti, the ceremonies and the Recírio procession (IPHAN, 2004).

That report was published on the Official Gazette two months before the event turned two centuries and eleven years old. And on October 5, 2004, the city of Belém received a Certificate that included the event in the Celebrations Registration Book. On October 11, 2004, the festival received the title of Brazilian Cultural Heritage, and on December 4, 2013, it was included in the World Cultural Heritage list of the United Nations Educational, Scientific and Cultural Organization – UNESCO (IPHAN, 2004).

3. Belém as World Heritage in Trama Amorcomtur!

The value of this World Heritage is by itself the result of a complex web of elements involving the tangible and intangible dimensions. Therefore, Belém is an exemplary locus of discussion relevant to the Trama Amorcomtur, which involves complex communication and subjective processes that enhance the potential for tourism from the lovingness and autopoiesis point of view. This value has been specially reflected in a study aligned to Project Trama Amorcomtur, which deals with the lovingness marks of devotees who are subject participants of the Círio de Nazaré, which has also under way at the University of Caxias do Sul.

The two studies are being in line with Contemporary Science assumptions aligned with the perception of changes in the scientific scenario and the basic guidelines for research production. The option for the complex-system perspective, considering the chaotomic and ecosystem character of the processes, leads us to consider Belém and the Círio under the observation of a web of crossings that make up the significance beams. What is seen, what is recorded, what can be described is great, but negligible given the intensity of inscriptions of time, faith, tradition, the many journeys travelled, the tears of belief and gratitude that accumulate along the pathways. There, in the middle of the crowd, one sees the power in uniting around something that interlaces subjects, which can be seen as the rope, but it is also felt as faith. In terms of the Trama Amorcomtur, it is also the love between subjects, the social-love as it is worked out by Amorcomtur – love as relationship ethics. It has interlaced in it the feeling of belonging in the confidence of support by a Higher Mother. Whether we believe or not, we must recognise in the phenomenon analysed the great proportion of the Marian faith at the same time that we see how magical a crowd gathered becomes in the name of a pathway of faith.

The research production of the interlaced projects, which constitute the significance and investigative web from which this text results is guided by the methodological strategy Knowledge Cartography proposed by Maria Luiza Cardinale Baptista (2014). This is a research strategy that considers pathways as plural and, thus the method loses its uniqueness to take on

the condition of web investigative tracks, where what is at stake includes researchers' personal knowledge, theoretical knowledge, what the author calls Production Factory (involving the systematic recording of investigative approaches and the sequence resulting from actual investigative actions) as well as the fourth track, which is the intuitive dimension of research. As the substrate of this proposition, the assumptions inherent in the Contemporary Science interlacing with the transdisciplinary dimension, which brings together the views of physicist Fritjof Capra (1990, 1991, 1997), chemist Ilya Prigogine (2000 and 2001), the schizoanalytic perspective with Felix Guattari and Gilles Deleuze (1992); the New Theory of Communication with Ciro Marcondes Filho (2009, 2010 and 2013), or the thick studies by Muniz Sodré (2006), as well as the complex view related to the epistemology of Tourism, with Susana Gastal and Marutschka Moesch (2007).

In terms of operational procedures, the Knowledge Cartography has its starting point in another attitude, as a 'whole act' by researchers, who are less concerned with rigidly proving their hypotheses and more prone to investing in signaling tracks for the investigative trip. The methodological base is broad and no methods and techniques are discarded beforehand; rather, they are re-viewed, re-considered or re-configured, we could say, feeding a plural attitude, the subjective dimension, the consideration of the chaomotic and changing character of research. Subjects fully delving into the investigative trip produce approximations followed by investigative actions. These gradually delineate their own pathway, which will be made as they walk, as we are taught by Antonio Machado's well-known poem: *Caminante no hay camino. El camino se hace al andar.*

To understand the social-loving tourist route¹⁶⁹ that is configured during the Nazaré festival, we need to realise that, in order to offer the faithful 20 days of programming, Belém prepares itself during the whole year to change its daily habits as a city and decorates itself as explained by Alves (1980): "when a society or a segment of it comes out of their regular daily routine every year to live the "extraordinary" (...) it is because such an event has to do with the very existence of the social body" (Alves, 1980: 21). The dynamics established during the religious festival of the Círio is closely linked to the assumption of welcoming and caring for visitors since families

¹⁶⁹ The term social-loving, attributed to tourism, is being used here in the sense defined by Maria Luiza Cardinale Baptista in her studies at Amorcomtur, by proposing the concept of lovingness as ethics of relations, in confluence with the complex fields of the processes of her research. It is therefore an ethical dimension, of welcoming and care, which constitutes love in the social field, in social ties, in relations. The theoretical basis for the proposal is broad and signals to paradigmatic ruptures with capitalism's model for plundering discussed by Harvey (2005 and 2012). The term calls into question the need for creating relations marked by cooperation, interlacing and investment in respectful coexistence and, accordingly, generating mutual trust. Authors behind Baptista's conceptual proposition include Humberto Maturana (1998), Felix Guattari (1987, 1990, 1992 and 1995), Edgar Morin (1991 and 2013), Roland Barthes (1986), Paulo Freire (1987, 1996 and 2003), Suely Rolink (1989, 1993, 1992a, 1992b and 1992c), among others.

receive their relatives and/or friends who travel from other states and countries, the Church opens up even more for those who come in search of spiritual care, public leaders in tourism organise to better receive visitors, and businesspeople prepare within their commercial specifics to better serve their customers.

It is important to clarify that, even with all this preparation, when visitors-tourists are received and welcomed, they remain all the time as participants in the Nazaré festival, since their motivation for moving transcends their belief in themselves and joins the value of a higher power. Therefore, people who go to Belém at the time of the festival can connect to a pilgrim ecosystem because just by being present at the party they relate to an experience of faith in the city even if they do not identify with Catholic doctrinal experiences. That is what Oliveira explains when he says that “the pilgrimage (...) is not pilgrim subjects’ individual choice but their manifest retribution to the deity (the saint) that favored them” (Oliveira, 2004: 15). From this perspective – in this case the image of Our Lady of Nazareth – even if the travel to worship the saint does not express suffering and penance, it may be linked to the discussion of pilgrimage and an experience of Religious Tourism. Here the term does not refer to an idea of segmentation, but to the understanding of the relationship of tourism and religious experiences during the Círio.

It is important to remember that the Catholic Church, since 1969, has sought to present tourism through a religious perspective to the church itself. This is clear after the 1970s, when the Pontifical Council for the Pastoral Care of Migrants and Itinerant People began operating in the Holy See, in Rome. It is responsible for all media and participation of the church in the tourism area. From that we can infer that the Church sees Tourism through a view based on ‘encounter’ between the faithful (pilgrim) and the Sacred (GOD), but it does not move away from the understanding of the human-spiritual relationship regarding family unit, solidarity and restoration of the human person (CNBB, 2009). In view of this, it is of fundamental importance that the tourist-religious activity is based on: the person (social, tourist and pilgrim-devotee), the imaginary (religious spaces and the culture around), and equipment (support infrastructure).

Therefore, referring to Panosso Netto (2013), given varied concepts, the discussion is guided by the understanding that tourism is crossed by three strains: the lay one that is based on the idea of leisure travel; the business-oriented one, involving market segmentation (economic value); and the academic and scientific one, which discusses the activity in a complex web of relationships, starting from a social, philosophical, environmental, political, cultural and interdisciplinary understanding, looking into crossings present in the study of tourism as a phenomenon, but not moving away from the other two strains (Panosso Netto, 2013).

According to Panosso Netto, tourism might be (...) 'the output and return phenomenon (...) which implies hospitality, encounter and communication with other people and the use of technology (...) which will generate varied experiences and distinct impacts' (2013: 33). For the Church, the understanding of tourism is based on a (...) 'new way to employ freetime, which implies displacement from one's usual residence, either within or outside one's country, without the sole purpose of profit or labor' (CNBB, 2009: 15).

Therefore, the dynamics established during the religious festival of the Círio is closely linked to the assumption of welcoming and caring for visitors who will live the festival as pilgrims. With this, visitors and tourists are directly linked to a true experience of faith, as explained by Oliveira when he says that 'the pilgrimage (...) is not pilgrim subjects' individual choice but their manifest retribution to the deity (the saint) that favored them' (Oliveira, 2004: 15). In this perspective, the travel made to honor the saint, where the image of Our Lady of Nazareth can be linked to the Tourism and Religion discussions.

From a historical perspective, the State Department of Tourism (SETUR), in partnership with the Municipal Tourism Coordination – BelemTur, develops the Tourist's Friend Project, which is an activity with bilingual volunteers distributed over the main sights and tourist information services, providing assistance and welcoming visitors. In addition, the segment has special tariffs for the event because October is considered high season in Bethlehem, even if it is low season in Northern Brazil. These are aspects that show the importance of the event.

4. Summary considerations at this point of the journey

In recent years, tourism in Belém do Pará has gained momentum regarding the number of visitors who arrive at the city. An estimate by the Pará State Department of Tourism (SETUR) shows that 1,741,787,000 visitors arrived at the Val-de-Cans International Airport (Belém) in 2015, compared to 1,669,658 in 2013 (Fapespa, 2016). Furthermore, in the week before the Círio festival, 84,000 visitors passed through the said airport's landing sector (Nazareth Taper Portal, 2015).

Thinking about Belém without directing one's eye at the "Nazaré" festivity and without experiencing it in its religious completeness is, for many devotees, an experience of 'orphanhood' and matriarchal oblivion in a 'holy family'. This corresponds to the fact that the devotion of the many names of Catholic Saints projects a reflection of Mary, mother of Jesus, as a woman and a living person (Boff, 2006).

In many parts of the world, there are hundreds of names under which Our Lady is venerated. Many of those names are of European devotional origin but were introduced in Brazil along with the colonization or migration process, such as: of Grace (France), Fatima (Portugal), Immaculate Conception (Portugal), Caravaggio (Italy) Untier of Knots (Germany), of Mercy (Spain), Schoenstatt (Germany), Mount Carmel (Israel), Lourdes (France), among others; and in Brazil, Aparecida (São Paulo). In these names, we see the identification of devotees, who came linked to this process of colonisation and join the 'person' of Mary, represented in this case by an image, in order to project a feeling of kinship between mother and son (Boff, 2006). This filial condition may come to clarify the fact that the Círio of Our Lady of Nazareth has taken place for more than two centuries in the city of Belém do Pará. It is one of the largest manifestations of Catholic devotion to Mary in Brazil. (Portal Círio de Nazaré, 2015).

The idea of the tourist-religious imagery of the city of Belém implies the Círio of Nazaré as the event that is most representative of religious dogmatism in the region. That is true, since Catholic religious manifestations experienced during the festival express subject's sense of belonging to the city (devotees) and an impact of admiration on those who visit the place during the festival. According to the scenario presented in the region, Our Lady of Nazareth is the Queen of the Amazon and Belém is the capital of Mariana faith in Brazil (Portal Círio de Nazaré, 2015). In short, that is what constitutes the heritage value assigned to Belém and Nazareth Círio.

The phenomenon of the Círio de Nazaré is a flagship event that allows us to understand the subjective and complex web that makes up the tourism context in Belém do Pará, mobilizing the entire Amazon region and, more than that, driving to that region a large number of pilgrims. Thus, the whole tourist ecosystem is set in motion, with grandiose changes that consolidate the heritage dimension of the event, but also point to the huge tourism potential of the region and the event itself. However, understanding the Círio is a challenge in order to extrapolate the obvious and descriptive readings and recover the historical marks of the construction of the ecosystem in which the phenomenon develops, and then consider the multiple intervening beams that delineate the original event and its link to Marian faith, but which interlaces, connects, puts various subjective worlds in touch, from the profane to the sacred.

Challenges for intertwining – or interlinking – of lovingness as relationship ethics are expressed in the daily life of the event. Thousands of people together in harmony, nested in the crowd, demonstrate the strength of faith and the value of processes – and processions – which have consolidated over time. The city grows, becomes a giant, tourism presents itself in its power for reinvention, for autopoiesis. With the strength of tourism provided by Círio de Nazaré, Belém reinvents itself every year while the ways for visiting and tourism, welcoming, receiving

well also undergo constant change. Tourism, lovingness and autopoiesis are also the marks of Belém in the pathways of faith.

References

- Alves, I. M. da S. (1980), *O carnaval devoto: um estudo sobre a festa de Nazaré, em Belém*. Petrópolis, Vozes.
- Arruda, E. S. (2003), *Porto de Belém do Pará: origens, concessão e contemporaneidade*. Dissertação de Mestrado em Planejamento Urbano e Regional. Programa de Pós-Graduação do Instituto de Pesquisa e Planejamento Urbano e Regional, Universidade Federal do Rio de Janeiro, Rio de Janeiro, available at: <http://www.ippur.ufrj.br/download/pub/EulerSantosArruda.pdf> (consulted on: 10.01.2016).
- Baptista, M. L. C. (2014), "Cartografia de Saberes na Pesquisa em Turismo: Proposições Metodológicas para uma Ciência em Mutação", *Revista Rosa dos Ventos – Turismo e Hospitalidade*, 6(3), 342-355, available at: http://www.uces.br/etc/revistas/index.php/rosadosventos/article/view/2647/pdf_273 (consulted on: 20.01.2016).
- Barthes, R. (1986), *Fragments do discurso amoroso*, 6ª ed., Rio de Janeiro, Francisco Alves.
- Boff, C. (2006), *Mariologia social: O significado da Virgem para a Sociedade*, São Paulo, Paulus.
- Capra, F. (1990), *O Tao da Física. Um paralelo entre a física moderna e o misticismo oriental*, São Paulo, Cultrix.
- Capra, F. (1991), *O Ponto de mutação. A ciência, a sociedade e a cultura emergente*, São Paulo, Cultrix.
- Capra, F. (1997), *A Teia da vida. Uma nova compreensão dos sistemas vivos*, São Paulo, Cultrix.
- CNBB (2009), *Pastoral do Turismo: desafios e perspectivas*, Conferência Nacional dos Bispos do Brasil, Brasília, Edições CNBB.
- Dias, C. S., Dias, S. I. S. (2007), "Belém do Pará: história, urbanismo e identidade", *Ensaios acadêmicos do CAUFAG*, available at: <http://www2.fag.edu.br/professores/solange/PRODUCAO%20CIENTIFICA/2007%205.ECCI/BEL%20c9M%20DO%20PAR%20c1%20-%20Caio.pdf> (consulted on: 10.02.2016).
- FAPESPA (2016), Fundação Amazônia de Amparo a Estudo e Pesquisa do Pará, available at: <http://www.fapespa.pa.gov.br/upload/ckfinder/userfiles/files/Apresenta%20C3%A7%C3%A3o%20Boletim%20de%20Turismo%2030-03-2016.pdf> (consulted on: 20.04.2016).
- Freire, P. (1987), *Pedagogia do oprimido*, 17ª ed., Rio de Janeiro, Paz e Terra.

- Freire, P. (1996), *Pedagogia da autonomia: saberes necessários à prática educativa*, São Paulo, Paz e Terra.
- Freire, P. (2003), *À sombra desta mangueira*, 5ª ed., São Paulo, Olho d'Água.
- Gastal, S. de A., Moesch, M. (2007), *Turismo, políticas públicas e cidadania*, São Paulo, Aleph.
- Gastal, S. de A. (2005), *Turismo, Imagens e Imaginários*, São Paulo, Aleph.
- Guattari, F., Deleuze, G. (1992), *O que é a Filosofia?*, 34ª ed., Rio de Janeiro, Editora 34.
- Guattari, F., Rolnik, S. (1986), *Cartografias do Desejo*, 2ª ed., Petrópolis, Vozes.
- Guattari, F. (1987), *Revolução Molecular. Pulsões Políticas do Desejo*, 3ª ed., São Paulo, Brasiliense.
- Guattari, F. (1990), "Linguagem, Consciência e Sociedade", in Antonio Lancetti, *Saúde Loucura*, 3(2), São Paulo, Hucitec.
- Guattari, F. (1992), *Caosmose. Um Novo Paradigma Ético-Estético*, Rio de Janeiro, Editora 34.
- Guattari, F. (1995), *Mil Platôs. Capitalismo e Esquizofrenia 1*, 34ª ed., Rio de Janeiro, Editora 34.
- Harvey, D. (2005), *O novo imperialismo*, 2ª ed., São Paulo, Loyola.
- Harvey, D. (2012), *O neoliberalismo: história e implicações*, São Paulo, Loyola.
- IBGE (2016), Instituto Brasileiro de Geografia e Estatística, available at: <http://cidades.ibge.gov.br/xtras/perfil.php?lang=&codmun=150140&search=para|belem>. (consulted on: 15.01.2016).
- IPHAN (2004), Instituto de Patrimônio Histórico e Artístico Nacional, available at: <http://portal.iphan.gov.br/pagina/detalhes/103>. (consulted on: 30.01.2016).
- Marcondes Filho, C. (2009), *Dicionário da comunicação*, São Paulo, Paulus.
- Marcondes Filho, C. (2010), *O princípio da razão durante: o conceito de comunicação e a epistemologia metapórica*, Nova Teoria da Comunicação III, tomo 5, São Paulo, Paulus.
- Marcondes Filho, C. (2013), *O Projeto "Nova Teoria da Comunicação" e suas aplicações na pesquisa comunicacional atual*, São Paulo, Paulus.
- Maturana, H. (1998), *Emoções e Linguagem na Educação e na Política*, Belo Horizonte, UFMG.
- Moesch, M. M. (2002), *A produção do saber turístico*, 2ª ed., São Paulo, Contexto.
- Morin, E. (1991), *Introdução ao pensamento complexo*, São Paulo, Instituto Piaget.
- Morin, E. (2013), *Ciência com consciência*, Rio de Janeiro, Bertrand Brasil.
- Oliveira, C. D. M. de (2004), *Turismo religioso*, São Paulo, Aleph.
- Panosso Neto, A. (2013), *O que é turismo*, São Paulo, Brasiliense, 1ª reimpressão.
- Portal Círio de Nazaré (2015), available at: <http://www.ciriodenazare.com.br/portal/>. (consulted on: 20.01.2016).
- Prigogine, I. (2000), *Carta para as futuras gerações*, Folha de São Paulo, Caderno Mais!.

- Prigogine, I. (2001), "Ciência, razão e paixão", in Carvalho, E. de A. and Almeida, M. da C. (org), *Ciência, razão e paixão*. Tradução Edgard de Assis Carvalho, Isa Hetzel, Belém do Pará, Eduepa.
- Prigogine, I. (2009), *Ciência, razão e paixão*, 2ª ed. verificada e ampliada, São Paulo, Editora Livraria da Física.
- Rocque, C. (1981), *Historia do Círio e da festa de Nazaré*, Belém do Pará, Mitograph.
- Rolnik, S. (1989), *Cartografia Sentimental*, São Paulo, Liberdade.
- Rolnik, S. (1992a), *Subjetividade e História*, Mesa Redonda no Curso de Psicanálise, São Paulo, Instituto Sedes Sapientiae.
- Rolnik, S. (1992b), *Cidadania e Alteridade*, Mesa Redonda no IV Encontro Regional de Psicologia Social da ABRAPSO.
- Rolnik, S. (1992c), *A Morte de Guattari*, Homenagem a Guattari, Rio de Janeiro, Colégio Filosófico Internacional de Estudos Interdisciplinares.
- Rolnik, S. (1993), *Memorial, Concurso para ascensão na Carreira para Professor Titular*, São Paulo, Pontifícia Universidade Católica.
- Santos, M. M. C., Baptista, I. (orgs) (2014), *Laços sociais: por uma epistemologia da hospitalidade*, Caxias do Sul, EDUCS.
- Sodré, M. (2006), *As estratégias sensíveis: Afeto, mídia e política*, Petrópolis, Vozes.
- Tavares, M. G. da C. (2008), "A formação territorial do espaço Paraense: dos fortes à criação de municípios", *Revista ACTA Geográfica*, 2(3), 59-83, available at: <http://revista.ufr.br/index.php/actageo/article/view/204>. (consulted on: 06.01.2016).

Chapter XXIV

Traditional Mexican Cuisine and Tourism: New Meanings of Heritage Cuisine and its Sociocultural Implications

Traditional Mexican Cuisine and Tourism: New Meanings of Heritage Cuisine and its Sociocultural Implications

HUMBERTO THOMÉ-ORTIZ¹⁷⁰

DANIEL DE JESÚS-CONTRERAS¹⁷¹

Abstract:

The purpose of this essay is to analyse the relationship between heritage cuisine and tourism, along with its sociocultural implications within the framework of contemporary food consumption. Through an analysis of the language used in tourism advertising platforms and tourism policies, contrasted with ethnographic data, this essay examines the interaction between the actors, products and territories in Mexico's eight gastronomic regions which have become attractions for tourists due to the inclusion of traditional Mexican cuisine in the UNESCO Intangible Cultural Heritage of Humanity List. We conclude that the tourist valuation of cuisine heritage promoted by Mexican institutions reflects a two-fold phenomenon, straddling the divide between economic valuation of agricultural food products and the cultural meaning of regional cuisines.

Keywords: Traditional Mexican Cuisine; Heritage Cuisine; Tourism; Consumption

Resumo:

O objetivo deste ensaio é analisar a relação entre a cozinha tradicional e turismo, juntamente com as suas implicações socioculturais, no âmbito do consumo de alimentos contemporâneo. Através de um conteúdo de plataformas de análise de promoção turística e do discurso das políticas de turismo, contrastando com dados etnográficos, este artigo analisa as interações entre atores, produtos e territórios das oito regiões culinárias do México que se tornaram atrações turísticas, a partir da inclusão de cozinha tradicional mexicana na lista de Património

¹⁷⁰ Institute for Agricultural and Rural Sciences (ICAR) of the Autonomous University of the State of Mexico, humbertothome@hotmail.com

¹⁷¹ Institute for Agricultural and Rural Sciences (ICAR) of the Autonomous University of the State of Mexico, djcontreras66@yahoo.com

Cultural Imaterial da UNESCO. Conclui-se que a valorização turística do património culinário por instituições mexicanas reflete um fenómeno ambivalente que está dividido entre o valor económico dos produtos alimentares e o significado cultural das cozinhas regionais.

Palavras-chave: Cozinha Tradicional Mexicana; Herança Culinária; Consumo; Turismo

Resumen:

El propósito de este estudio es analizar la relación entre patrimonio culinario y turismo, a partir de sus implicaciones socioculturales en el marco del consumo alimentario contemporáneo. A través del análisis de contenido de las plataformas de promoción turística y del discurso de las políticas turísticas, -contrastado con datos etnográficos-, esta investigación examina las interacciones entre actores, productos y territorios de las ocho regiones gastronómicas de México que se han convertido en atractivos turísticos, desde la inclusión de la Cocina Tradicional Mexicana dentro de la lista del Patrimonio Cultural Intangible de la Humanidad de la UNESCO. Se concluye que, la valorización turística del patrimonio culinario, -por parte de las instituciones mexicanas, refleja un fenómeno ambivalente que se debate entre la valorización económica de los productos agroalimentarios y los significados culturales de las cocinas regionales.

Palabras Clave: Cocina Tradicional Mexicana; Patrimonio Alimentario; Consumo; Turismo

1. Introduction

In 2010 traditional Mexican cuisine was declared an Intangible Cultural Heritage of Humanity by UNESCO (United Nations Educational, Scientific and Cultural Organization). This event was significant because it presented the opportunity to commercially capitalise on heritage cuisine (Laborde and Medina, 2015), and it served as a mechanism to promote Mexican cuisine on a global level; while at the same time represented the obligation to create policies for its preservation. Within these preservation efforts, tourism has been conceived as an effective tool for the valuation of this cuisine. Traditional Mexican cuisine is seen as a tourist attraction based on the resources and expertise of the country's principal regional cuisines. However, this tourism does not always integrate all the different social actors directly involved with heritage cuisine. On the contrary, the development of an elitist gastronomic tourism may be observed, directed to global or "world-class" markets.

This chapter is structured as follows: first, we address the relationship between tourism and cultural heritage; next we present the role of traditional cuisine within tourism; later we discuss, in three parts, the Mexican case from a regional perspective; and lastly we analyse public policy for culinary tourism implemented by the Mexican government. We conclude that a goal for the use of traditional Mexican cuisine in tourism is to influence the preservation of biocultural heritage, social integration and national economic growth. To achieve this, however, it is essential that tourism policy actions contemplate the social, economic and environmental dimensions by means of efforts directed to the equitable management of the culinary heritage of the Mexican people.

2. The relationship between tourism and cultural heritage

Addressing the concept of cultural heritage involves two basic elements. On one hand, what stands out is the material or tangible nature of cultural heritage, while on the other, the intangible aspects of its cultural goods. In addition to its material footprint, heritage involves traditions, knowledge, systems of meanings, skills, and symbolic forms of expression (Bonfil, 1997), which as a whole constitute the testimonies of the process of civilization and exert a referential function for society (Llull, 2005).

In addition to the economic importance of heritage, its role as a resource for humanity's future wellbeing stands out. Heritage has today become a strategic resource for its guardians insofar that it responds to the consumption needs of contemporary society (Rotman, 2006). Culinary tourism is situated within the what has come to be called heritage tourism (Timothy and Boyd, 2006), understood as travel to sites of historical importance, monuments, agricultural landscapes and ethnic communities. This type of tourism involves the integration of material and non-material cultural aspects that serve as settings for tourist activities and as interpretive perspectives of the travel experience.

Tourism activities can play an important role in the conservation of cultural heritage through its economic revitalization, while also representing a key to open doors to "other" cultures. In this regard, Almirón *et. al.* (2006) show that tourism is positioned as a strategy for the valuation of cultural heritage in the context of globalization (Timothy and Nyaupane, 2009). Paradoxically, however, tourism's appropriation of heritage can lead to its commercialization and banalization (Prats, 2003).

The use of cultural heritage for recreation is motivated by a desire for distinction, which is a marker of social status for the current patterns of tourist consumption (Timothy and Boyd,

2006). As a result, the analysis of heritage tourism centres on the place occupied by heritage objects as markers of identity in order to give meaning to the travel experience (Álvarez, 2008), since this type of tourism is distinguished by tourists' interest in the cultures of the destinations they visit.

Tourism can be thought of as a tool to legitimise heritage (Pérez, 2013). In the case of food, tourism represents a platform to enhance its value and promote it as a regional marker (Bessière, 1998). The demand for heritage tourism goods converts tourism into a practice that redefines its material and immaterial dimensions, by way of assigning new values in connection with its ability to satisfy contemporary leisure activities (Troncoso and Almirón, 2005).

3. Traditional cuisines in the tourism industry

Heritage cuisine contains a group of elements linked to food production, agriculture and regional collective heritage, including agricultural and livestock products, know-how, local dishes and social norms for consumption (Bessière, 1998; 2013). At the same time, traditional cuisines form part of heritage cuisine and refer to culinary systems that include autochthonous techniques, local systems of production, traditions, beliefs and social practices.

For Mintz (2003), the term "cuisine" is complex and confusing. First of all, because in the collective imagination there is not a sufficiently clear distinction between the acceptance of cuisine as a physical space and a socially-constructed space. Secondly, because what is usually called cuisine refers more to the generic way of designating certain practices related to the preparation and consumption of food, while the cuisine's relationship with the culture and the traditions of the place from which it originates is very tenuous. One problem in characterising and defining cuisines has to do with geographical and sociocultural criteria. The former makes it impossible to talk about a "national cuisine" since this is actually comprised of contributions from different regions that make up a country, which makes it more appropriate to speak of regional cuisines. Therefore, the term "national cuisine" is by definition more broad and is usually associated with emblematic dishes, while "regional cuisine" is a more specific term that allows for more precise appreciation of the diversity of the biological and cultural factors that make up the cuisine's representative dishes. For these reasons, food and cuisine are not from a country; they are from a place.

Appadurai (1988) maintains that national cuisines came about thanks to the creation of cookbooks and recipes, in which the rules and practices that are essential for the continuity of a nation's food culture are systematically shaped. Their value lies in that, upon being documented

with certain historical weight, their contents were gradually transmitted intergenerationally and hence legitimised, thus constituting the correct protocols on how to prepare and consume food. In this way, recipe books reveal a rhetoric about the construction of a national cuisine, which seeks to be a country's marker of distinction, revealing its personalised selection of the elements which act as identifying references (Laborde and Medina, 2015). Conversely, Mintz (2003) maintains that recipe books do not make cuisines, rather cuisines are made by common social roots, or in other words, "the food of a community". From the foregoing it may be asserted that cuisines are based on a foundation of numerous sources: some cuisines base their culinary model on autochthonous legacies, others are based on an emblematic dish prepared with local products, and others give specific importance to their preparation techniques (Juárez, 2008). Cuisine can be more precisely defined as "the ongoing foodways of a region within which active discourse about food sustains both common understandings and reliable production of the foods in question" (Mintz, 2003: 143). Currently, the diversity of national, regional and local cuisine is being used commercially in various economically productive sectors, including tourism.

The use of traditional cuisine in tourism illustrates the new ways that culinary heritage is being employed. Espeitx (2004) and Álvarez (2008) maintain that gastronomy's incursion into tourism is part of a broader development strategy based on the conversion of local products into interchangeable capital as a function of local, regional and international political agendas. One of the most significant trends in heritage tourism is the inclusion of traditional cuisine as a central element of the tourist experience, one example being the way in which heritage cuisine is used as a tool to promote a region (Espeitx, 2008).

In the past decades, a variety of concepts have emerged illustrating diverse facets of the same phenomenon: *gastronomic tourism*, *food tourism*, *gourmet tourism*, *culinary tourism*, *taste tourism* and *cuisine tourism*. Beyond the particularities of each area of focus, the common denominator in all of these is the role of food heritage as an element for tourism. Research in this subject has grouped into the following themes: i) studies of the motivations for tourist activity related to traditional food (Quan and Wang, 2004; Kivela and Crotts, 2006); ii) gastronomy's contribution to the formation of the image of tourist destinations (Ab Karim and Chi, 2010; de la Barre and Brouder, 2013); iii) the use of local gastronomy in marketing strategies (Boyne *et al.*, 2003; Du Rand *et al.*, 2003); iv) heritage cuisine in local development (Bessiére, 1998; Giampiccoli and Hayward, 2012); v) the use of local gastronomy for tourism (Teixeira and Ribeiro, 2013; Gyimóthy and Mykletun, 2009); and vi) the relationship between the markers of quality and rural tourism (Armesto and Gómez, 2004).

In a comparative study of the gastronomy of France, Italy and Thailand, Ab Karim and Chi (2010) show that the different national cuisines constitute actual tourist attractions. A similar result was found by Okumus *et al.* (2007) in the case of Hong Kong and Turkey, in which they highlight the influence of regions' local gastronomy as an element to promote tourism. Other authors have suggested that some initiatives to promote gastronomy for tourism fail since they focus on dishes that represent national culture, while the regional specialties are given little attention (Okumus *et al.*, 2007). Failure is also seen when highly stylised versions of cuisine are presented that do not correspond with the original culinary expressions (Hillel *et al.*, 2013), which was observed by Avieli (2013) in a province in Vietnam.

According to Richards (2002), the success of traditional cuisines within tourism is related to the phenomenon of food standardisation in a global world, an aspect that creates a desire to find authentic food at their places of origin. The urban consumption of emblematic dishes, meanwhile, represents a type of symbolic appropriation of food (Bessi re and Tibere, 2013). Gastronomy is a highly valued element for tourists, as it enables tourists to experience sensations that are different from those found in everyday life (Quan and Wang, 2004). Likewise, traditional cuisine is important for tourism since food consumption is a basic component in the basket of tourism goods and food is an element for intercultural dialogue between hosts and visitors ( lvarez and Sammartino, 2009).

Although the tourism potential of traditional cuisine has been considered a tool for economic development, in some cases this potential has not been seized upon. Such is the situation of traditional Mexican cuisine, which despite its distinction as a heritage site conferred by UNESCO, has not been taken advantage of to contribute to the diversification of national tourism and to the creation of wealth and wellbeing of its people.

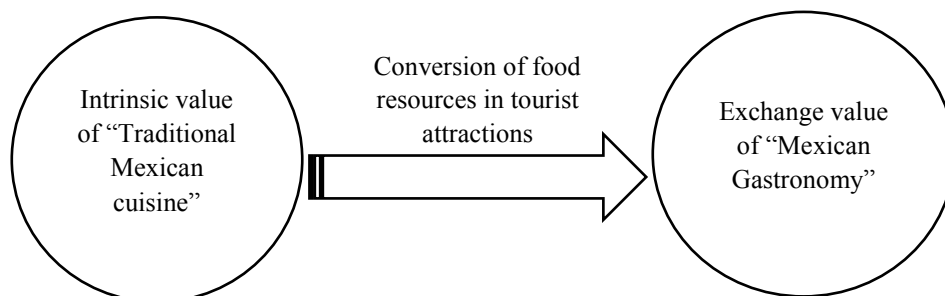


Figure 1. Valorization of culinary heritage in tourism

Source: Author

4. Traditional Mexican cuisine and tourism

Mexican gastronomy is composed of diverse ingredients, tools, knowledge, practices, beliefs, meanings and identities, which considered as a whole, create an ample repertoire of food preparation distributed throughout geographic regions. Since the pre-Hispanic era, Mexico has had its own cuisine made of three basic crops: corn (*Zea mays*), beans (*Phaseolus vulgaris*) and chili peppers (*Capsicum annum*). This triad of goods, along with other plant species such as squash (*Cucurbita maxima*), amaranth (*Amaranthus* spp.), tomatillo (*Physalis ixocarpa*), tomato (*Lycopersicon esculentum*) and nopal cactus (*Opuntia ficus-indica*), and some species of animals, birds, fish, batrachians, insects and reptiles, formed part of the diet of the ancient Mexicans (Vargas, 2007).

The supply of many of these food items was possible thanks to the development of agriculture and domestication, together with the preservation of practices such as hunting, fishing and gathering (Sugiura, 1998). The invention of cooking methods such as nixtamalization,¹⁷² the creation of devices such as the molcajete and metate¹⁷³ (Long, 2010), and even the development of ways of commercial exchange such as bartering¹⁷⁴ (Rovira, 2009), all played a decisive role in building the foundation of modern traditional Mexican cuisine.

The arrival of the Spanish initiated a process of culinary fusion between indigenous and European cultures, a process that was also influenced by cultures from Asia, Africa and the Caribbean. During the 16th century, commercial exchange between Mexico and the rest of the world began, which was made possible due to the establishment of ports in places such as Veracruz and Acapulco (Ranero, 2015). A significant variety of food resources were introduced during this exchange: different types of domesticated livestock and poultry; a huge variety of spices, legumes and grains; fruits and vegetables; a large variety of cured meats and milk products, among others. Likewise, the cultural-gastronomic teachings imparted by Catholic evangelists were essential to the development of the different regional cuisines (Romero *et al.*, 2010).

This cultural mix resulted in the gastronomic wealth of traditional Mexican cuisine that can be seen in the variety of nationally and internationally renowned dishes, drinks and products.

¹⁷² Nixtamalization is the process in which corn is cooked in alkaline water, which removes a thick membrane that covers the seed and eases digestion of the seed (Long, 2010). The resulting cooked corn is known as nixtamal.

¹⁷³ A *molcajete* is a mortar made from volcanic rock that is used to grind numerous ingredients. A *metate*, also carved from rock, is a long, tilted device with three short legs (Long, 2010) used in some rural areas of Mexico to grind the nixtamal or other ingredients used for preparing salsas.

¹⁷⁴ Barter refers to the exchange of one good for another of an equivalent value, without the exchange of currency (Rovira, 2009).

Beyond the stereotypes of tequila and spicy food, Mexican gastronomy is a complex labyrinth represented by its types of regional and local cuisine, which boast unique identifying dishes. The history of traditional Mexican cuisine has been the history of a nation searching for its definition and place in the world, and in order to be consolidated as one of the best in the planet, has to overcome a series of political, economic, social, cultural and ecological fluctuations, surviving thanks to its roots in the identity of Mexicans (Pilcher, 2001).

Due to the inclusion of traditional Mexican cuisine to UNESCO's representative list, this culinary wealth is being considered as a tool for tourism. However, since the beginning of the 1960s, the Mexican Government, through its then-called Department of Tourism, organised the *First Congress, Competition and Exhibition for Mexican Cuisine*, which had three fundamental goals: i) conserving the classic dishes of Mexican cuisine, ii) promoting its consumption among domestic, but above all, foreign, tourists, and iii) encouraging eating-out at high-end restaurants as a means to discover Mexican cuisine. The government's intention was for traditional Mexican cuisine to gain international recognition and for it to act as a mechanism to convert the country into an elite tourist destination, a goal demonstrated by the aggressive marketing campaigns launched since 1966 (Juárez, 2008).

In the years that followed, Mexican gastronomy began to be increasingly considered as a bastion of Mexican folklore. Surprisingly however, it was not until the 1980s that gastronomy began to appear in tourist brochures, and which was picked up again later with the publication of *The National Directory of Gastronomy*, which served as a guide on the culinary diversity of Mexico's different regions (Juárez, 2008).

Currently, as has been the case for many years, marketing Mexican food in the tourism industry has been based on haute cuisine, which adapts the most emblematic dishes to the aesthetic and functional needs of differentiated niche markets. Numerous initiatives by the Ministry of Tourism (SECTUR, acronym as given in Spanish), such as the campaign *Live it to Believe it*, display gastronomy in connection with hotels and restaurants. What stood out about another campaign named *Come to Eat*³⁷⁵, which marketed Mexico as a food destination, is the image of a foodie paradise. Unlike the earlier campaign, *Come to Eat* promoted the culinary richness of regional cuisine and the region's different products. However, a deeper analysis shows that in reality the same type of haute cuisine was being marketed: returning to the most emblematic agricultural food products, but eliminating the image of those who produce and transform them.

³⁷⁵ More information available at: <http://venacomer.com.mx/>

Other locally-oriented initiatives highlighted the wealth of regional cuisines, for example: the state of Morelos implemented a tour of Franciscan, Augustine and Dominican convents, which highlights a visit to the convents' kitchens, with an emphasis on the influence of Mexico's vice-regal period in creating the state's heritage cuisine.¹⁷⁶ In the state of Puebla, tours have been created that include a visit to restaurants for tastings of typical dishes. Likewise, the so-called Magical Gastronomic Tour was created, which includes food from rural areas and focuses on indigenous cuisine and exotic local products.¹⁷⁷

Some emblematic products from different regions of the country have been marketed through the creation of food tours. The most representative of these are the wine tours in the states of Querétaro and Baja California (Thomé *et. al.*, 2015), the cocoa tour in Tabasco, the vanilla tour in Veracruz, the coffee tour in Chiapas and the tequila tour in Jalisco.¹⁷⁸ The common denominator for these tours is that they are linked to large agro-industrial conglomerates that are not uncommonly financed by capital from transnational companies.

5. Methodology

This work is a case study based on qualitative data (Stake, 2000; Eisenhardt, 1989; Eisenhardt and Graebner, 2007) with the purpose of understanding the sociocultural impact of tourism on traditional Mexican cuisine. The following research question was used to carry this out: are culinary tourism policies favourable tools for the development of the communities that possess the regional expressions of traditional Mexican cuisine?

To answer this question, the work was divided into four phases. First, we performed a documentary investigation on the relationship between traditional cuisine and tourism which looked at some of the most relevant works from the latter part of the 20th century to the present day. Second, we selected our case by means of theoretical sampling by seeking a phenomenon that specifically illustrates the challenges and opportunities of traditional cuisine as tourism resources. In the third phase, we performed a deductive investigation, by obtaining empirical data from official websites that market culinary tourism in Mexico. These were compared with the results from qualitative research done between 2010 and 2015 that studied

¹⁷⁶ More information available at: <http://www.visitmexico.com/es/historica-ruta-del-convento-cuernavaca-morelos>

¹⁷⁷ More information available at: <http://www.puebla.travel/es/experiencias/sierra-magica/item/ruta-magica-de-la-gastronomia>

¹⁷⁸ More information available at: <http://www.rutadeltequila.org.mx/>;
<http://www.descubrebajacalifornia.com/index.php/destinos/descubre-la-ruta-del-vino>;
<http://www.turismochiapas.gob.mx/sector/ruta-del-caf>.

agricultural food tourism and its social and economic impacts on rural communities (Renard and Thomé, 2010; Thomé et. al, 2014; Thomé et. al, 2015; Thomé, 2015; De Jesús *et al.*, 2016). In the fourth phase we analysed the data using the process of category analysis which included three fundamental aspects: i) the sources and products and ii) the social inequality in culinary tourism

The data was analysed using content analysis (Hsieh and Shannon, 2005), centred on an interpretive focus of the ways in which Mexican cuisine is promoted as a tourism resource in the discourse found in tourism marketing platforms. We compared this with the empirical experience of the social actors who preserve and reproduce Mexican heritage cuisine. This paper is part of a larger trend within tourism studies associated with the analysis of mechanisms of appropriation of gastronomy in policy actions, programmes and the media (V. Boyne *et al.*, 2003; Du Rand *et al.*, 2003; Frochot, 2003; Kim *et al.*, 2009). The disciplines used with the interpretive perspectives were rural sociology and the anthropology of food.

6. Mexico's gastronomic regions from their traditional cuisines

For several years there have been efforts to divide Mexico's traditional cuisines into regions, however no consensus has been reached regarding its boundaries, due to the difficulty in unifying similarities with regards to the food's geographical, social, cultural, political and governmental aspects. At the end of the 1980s, the National Institute of Anthropology and History (INAH, acronym as given in Spanish) published a collection of Cultural Atlases, which included a special edition for Mexican gastronomy (Ávila *et al.*, 1998).

The atlas grouped Mexico's principal gastronomic resources into 12 regions. Each regional group contains a short description of the principal ingredients, dishes, drinks, products, tools and knowledge that comprise its traditional cuisine. In 2000, the National Council for Culture and the Arts (CONACULTA, acronym as given in Spanish) edited a map of Mexico's regional cuisines illustrating the locations of the principal dishes. But the map was limited to a graphic representation and did not address the cultural division of the regional cuisines. Later, the special edition number 12 of the magazine *Arqueología Mexicana (Mexican Archaeology)* focused on pre-Hispanic cuisine, and classified gastronomy into eight regions: Northeast, Northwest, West, Centre, Altiplano, Oaxaca, Gulf and Southeast. In the end, this classification would turn out to be one of the most accepted ways of dividing Mexico's gastronomy. This classification was used in the first and second applications submitted to the UNESCO to claim traditional Mexican cuisine's place as Heritage of Humanity. For purposes of this essay, we will use this

classification, since it is considered to be the most precise assembly of the culinary diversity of Mexico's regional cuisines.

7. Mexico's gastronomic regions as tourism capital

Heritage tourism starts with the existence of natural and cultural resources that act as a base for the development of new experiences. In the case of culinary tourism, its success depends on an eventual synergy between culinary resources and other attractions that generate recreational options. Mexico's biological and cultural diversity have produced a gastronomic richness concentrated in eight culinary regions (CONACULTA, 2004), enumerated below:

- Northeast

Includes the states of Coahuila, Nuevo León, Zacatecas, Durango, San Luis Potosí and part of Tamaulipas. As with the rest of Mexican cuisines, it is strongly influenced by ingredients such as corn, beans and chili pepper, with its main ingredient being beef. The principal actors of the Northeast are the farmers and ranchers of the region.

- Northwest

Includes the states of Baja California, Sonora and Chihuahua. Its culinary system shows a variety of very diverse ingredients such as fish, seafood, beans, corn, cactus and meats. The region is recognised for its blends of wines. The fundamental actors of the agricultural food system are the farmers, fishermen, winemakers and professional cooks. Recently, it has gained an international reputation as a destination for wine and gourmet cuisine, especially based in its seafood.

- West

Includes the states of Jalisco, Sinaloa, Nayarit, Michoacán, Guerrero and Colima. The region has elements from the land and sea, along with emblematic products such as tequila and mezcal. This region has the traditional Michoacán cuisine which was the reference that made up the application for UNESCO to allow traditional Mexican cuisine to be considered Intangible Cultural Heritage of Humanity. The region's central actors are the farmers, fishermen, traditional cooks and distillers.

- Centre

Includes the states of Aguascalientes, Hidalgo, Guanajuato and Querétaro. This is a semi-arid region whose cuisine includes the use of cactus and insects in different traditional dishes. The

region produces wines and cheeses, which is its main tourist attraction. Its central actors are farmers, ranchers, harvesters and gatherers, traditional cooks and winemakers.

- Altiplano

Comprised of the states of Puebla, Mexico City, Tlaxcala, Morelos and Mexico State. It is structured around the crops of corn, beans, chili peppers, squash and amaranth, along with lacustrine food products, which together form part of Mesoamerican gastronomy. Its main actors are the farmers, harvesters and gatherers and traditional cooks.

- Oaxaca

Due to its culinary richness, this state makes up its own gastronomic region. Oaxacan cuisine consists of a wide range of ingredients, dishes and knowledge that have been protected by the traditional cooks from different regions within the state.

- Gulf

Includes the states of Veracruz and part of Tamaulipas. Its name comes from these states' proximity to the Gulf of Mexico, which has influenced its cuisine with a significant amount of fish and seafood in its traditional dishes. Its principal actors are the fishermen and traditional cooks.

- Southeast

Consists of the states of Chiapas, Yucatán, Tabasco, Campeche and Quintana Roo. The region has the most biodiversity in the country, therefore its gastronomy has a variety of food resources that, combined with the cultural diversity of the native ethnic groups, result in a complex and distinctive cuisine. The region's principal actors are the farmers, fishermen and traditional cooks.

As seen above, the Mexico's gastronomic wealth is a bio-cultural construction that expresses historical coevolutionary processes between cultural groups and specific ecosystems. One of the aspects observed in Mexico's culinary tourism policies is its strong emphasis on gastronomy. This runs the risk of ignoring the resources and actors linked to traditional cuisines, which is why a tourism policy is needed that is oriented towards the development of the communities which have maintained the biotic and cultural resources that sustain this patrimony.

8. Tourist activities in Mexico's gastronomic regions

Following the recognition of traditional Mexican cuisine as Heritage of Humanity, Mexico's federal government implemented a series of actions to promote Mexico's cuisine by means of

tourism. The first application submitted to UNESCO acknowledges that “in Mexico, for the farmer, the vendor, the artisan, the industrialist, the restaurant and hotel owner, for these people popular gastronomy is a powerful economic resource that drives other cultural industries such as tourism” (CONACULTA, 2004). Because of this, SECTUR carried out numerous actions based on ten thematic core concepts, where the principal good was heritage cuisine, but where the existence of attractions, infrastructure and services was also essential to attract tourism.

The proposal was based on the following thematic areas:

- 1) Wine regions
- 2) Ethnic cuisine
- 3) Traditional gastronomy of markets
- 4) Corn gastronomy
- 5) Tequila culture
- 6) Seafood cuisine
- 7) Ancestral Mayan gastronomy
- 8) Mestizo cuisine
- 9) Mexican haute cuisine
- 10) Contemporary Mexican cuisine



Figure 2. The Gastronomic Routes of Mexico

Source: <http://rutasgastronomicas.sectur.gob.mx/>

Thus the interaction between tourism and traditional cuisine had dual purposes: to position the nation’s culinary diversity and stimulate competition in tourist destinations. However, the thematic areas shown above reveal a tourism policy that emphasises the role of food resources as an asset for economic growth, while overlooking its social and historical aspects and its

symbolic value for the producing communities. In this way, tourism becomes an elitist mechanism for the appropriation of heritage, as those whom benefit have the best conditions to provide for the need of tourists. This has made the gastronomic tourism industry a disputed field among very heterogeneous actors (Álvarez and Sammartino, 2009).

The tourism valuation of heritage food tends to promote haute cuisine, even though heritage cuisine is sustained by autochthonous ingredients and techniques. In the *Come to Eat* campaign, “traditional Mexican cuisine” was marketed using dishes such as *pork belly tacos* or *carrot soup with partridge*, dishes with names, presentations and prices which create exclusion of the true producers and ingredients of traditional Mexican cuisine. In that regard, Espeitx (2011) and Jordana (2000) propose that in order for a dish to be considered “traditional”, it should have historical roots, be tied to a region and form part of a community’s identity, criteria which the abovementioned dishes in the *Come to Eat* campaign do not satisfy.

The transformation of cuisine into a tourism resource should occur with an appropriate balance between tradition and innovation, between local knowledge associated with the cultural heritage of specific regions (Amaya and Aguilar, 2012) and the current uses of this heritage. According to Espeitx (2008), the use of gastronomy in tourism must renovate and reinterpret the values of the past by means of actions that promote its recovery and conservation.

9. The policy actions of gastronomic valuation

The inclusion of traditional Mexican cuisine in the representative list of Intangible Cultural Heritage of Humanity was a significant event that obligated the Mexican government to protect this bastion for humanity. That was the starting point for the *Plan to Safeguard the Gastronomic Heritage*, with the purpose of protecting and revitalizing traditional cuisine. The plan focussed on three regions in Mexico: the Purépecha Plateau in Michoacán, the Central Valleys of Oaxaca, and the Sierra Norte Mountain range of Puebla. Investments and training programmes were carried out in these three regions, for the purpose of preserving gastronomic heritage (CONACULTA, 2005).

In the case of Michoacán,¹⁷⁹ models were supported for learning exchange programmes between traditional cooks, for the cooks to acquire knowledge for domestic and commercial uses (CONACULTA, 2005). Our attention is drawn to the fact that these efforts centre on

¹⁷⁹ This case refers to the Gathering of Traditional Cooks of Michoacán, an annual event since 2002 (<http://www.visitmichoacan.com.mx/cocineras2015/index.html>).

traditional cooks, which appears to be a positive aspect. However, not all the cooks have benefitted from tourism, rather, those who most benefit are linked to the ruling political class and economic elites, who receive more media attention and are included in the marketed tourism events that are financed with public resources. The same phenomena occurred with cooks in the state of Oaxaca and other regions in Mexico.

From a critical perspective, the role of traditional cooks is two-fold. As in the case mentioned above, their role is not entirely inclusive and it responds to the necessity of a social class that constructs references of exoticism and otherness for an affluent and cosmopolitan urban segment. On the other hand, it is undeniable that heritage gastronomy must be showcased as the only way to pursue its commercial and symbolic reproduction. Both of these aspects bring us to believe that traditional cuisine is a dual-faceted space which creates asymmetrical power relationships.

Following the government's safeguarding policy action, the *Policy to Promote National Gastronomy* was implemented. This policy's goal was to recover, stimulate, safeguard and promote Mexican gastronomy by means of protecting the bearers of heritage, the transfer and stimulation of knowledge, training, certification in service standards, adapting educational plans, innovation and research (SECTUR-SHCP, 2015).

This policy sought to integrate the actors involved in the regional cuisines' chain of production. But that "integration" was done without considering the asymmetries in cultural and economic capital among a very heterogeneous group of actors. The unequal integration of actors results in the hegemony of one group over the others, which creates new social asymmetries. For example, the rural producers can integrate themselves into the tourism industry through a false participation that only converts them into suppliers of labour or raw materials.

Instead of the cultural valuation of heritage food, it helps with a simple economic valuation that pushes aside the sociocultural importance in the interest of a supposed development. The coupling of tourism and gastronomy certainly can stimulate local development (Bessi re, 1998), the integration of diverse social sectors (Espeitx, 2008) and the preservation of heritage food (Teixeira and Ribeiro, 2013). However, this does not always occur since local actors do not take ownership of the tourism projects and traditional cuisine risks becoming a commodity (Baldacchino, 2015), which has happened in other countries in Latin America (V.  lvarez and Sammartino, 2009).

10. Conclusions

The declaration of traditional Mexican cuisine as cultural heritage has led to the challenge of finding new meanings for culinary heritage within the context of globalization. Its valuation by means of tourism has revealed unprecedented mechanisms of the construction, appropriation and consumption of food that is not always compatible with the practices and values associated with traditional cuisine. In this way, many efforts to showcase traditional Mexican cuisine in fact involves adapting the cuisine in order to satisfy the demand from cosmopolitan consumers. While it is true that many autochthonous elements of regional cuisines are recovered, this adaptation implies an excessive aestheticisation and alteration of the cuisine, to the detriment of its attributes of authenticity and tradition. This phenomenon creates an obvious exclusion of the social actors with less possibilities of “adapting” to the changes required for involvement in the tourist industry. Thus the goals of development, equality and social well-being, implicit in this strategy, are not reached.

The policy actions for tourism that we have addressed have a dual character that falls in between economic (gastronomic tourism) and cultural (heritage gastronomy) logic (López, 2014). There is an opportunity to showcase traditional cuisine via tourism (Espeitx, 2008), but this must be analysed within the framework of the social, political and economic structures which become involved in the tourism projects. The farmers, ethnic groups and small businesses are coincidentally always excluded from the primary benefits of tourism. Future research needs to consistently address the sociocultural impacts of tourism on the different gastronomic regions of Mexico.

References

- Ab Karim, S., Chi, C. (2010), “Culinary tourism as a destination attraction: an empirical examination of destination’s food image”. *Journal of Hospitality Marketing and Management*, 6(19), 531-555.
- Álvarez, M., Sammartino, G. (2009), Empanadas, tamales y carpaccio de llama. Patrimonio alimentario y turismo en la Quebrada de Humahuaca-Argentina. *Studies and Perspectives in Tourism*, 18, 161-175.
- Álvarez, M. (2008), “El patrimonio ya no es lo que era. Los recursos alimentarios entre la diferencia cultural y la desigualdad social (Heritage isn’t what it used to be. Food Resources among Cultural Differences and Social Inequality)”, in Álvarez, M. and Medina, F.X. (eds),

- Identidades en el plato. El patrimonio cultural alimentario entre Europa y América (Identities on a plate. Cultural food heritage between Europe and the Americas)*, Icaria, Spain, 25-44.
- Amaya, S., Aguilar, E. (2012), Sabores locales, tradición e innovación: el caso del jamón ibérico de bellota. *New Trends in Anthropology*, 3, 109-136.
- Appadurai, A. (1988), How to make a national cuisine: cookbooks in contemporary India. *Comparative Studies in Society and History*, 30(1), 3-24.
- Armesto, X.A., Gómez, B. (2004), Productos agroalimentarios de calidad, turismo y desarrollo local: el caso del Priorat. *Cuadernos Geográficos*, 1(34), 83-94.
- Avieli, N. (2013), What is local food? Dynamic culinary heritage in the World Heritage Site of Hoi An, Vietnam. *Journal of Heritage Tourism*, 2-3(8), 120-132.
- Ávila, D. et al. (1988), Atlas cultural de México. *Gastronomía*, Mexico, SEP-INAH-Planeta.
- Baldacchino, G. (2015), Feeding the rural tourism strategy? Food and notions of place and identity. *Scandinavian Journal of Hospitality and Tourism*, 1-2(15), 223-238.
- Bessièrè, J., Tibère, L. (2013), Traditional food and tourism: French tourist experience and food heritage in rural áreas. *Journal of Science Food and Agriculture*, 93, 3420-3425.
- Bessièrè, J. (1998), Local development and heritage: traditional food and cuisine as a tourist attractions in rural áreas. *Sociologia Ruralis*, 1(38), 21-34.
- Bessièrè, J. (2013), "Heritagisation", a challenge for tourism promotion and regional development: an example of food heritage. *Journal of Heritage Tourism*, 4(8), 275-291.
- Bonfil, G. (1997), Nuestro patrimonio cultural: un laberinto de significados, in Florescano, E. (coord.), *El patrimonio nacional de México Tomo I*, Fondo de Cultura Económica/CONACULTA, Mexico, 28-56.
- Boyne, S.; Hall, D., Williams, F. (2003), Policy, support and promotion for food-related tourism initiatives. *Journal of Travel and Tourism Marketing*, 3-4(14), 131-154.
- CONACULTA (2004), *Pueblo de maíz: la cocina ancestral de México. Ritos, ceremonias y prácticas de la cocina de los mexicanos*, Mexico.
- CONACULTA (2005), Patrimonio cultural y turismo. *Cuadernos*, 10, Mexico.
- De Jesús, D.; Ramírez, I., Thomé, H. (2016), Entre el desarrollo económico y la apropiación cultural. Apuntes para el debate sobre la valorización de alimentos emblemáticos. *Estudios Sociales*, 47(25), 327-347.
- de la Barre, S., Brouder, P. (2013), Consuming stories: placing food in the arctic tourism experience. *Journal of Heritage Tourism*, 1-11.
- Du Rand, G.; Heath, E., Alberts, N. (2003), The role of local and regional food destination marketing. *Journal of Travel and Tourism Marketing*, 3-4(14), 97-112.

- Eisenhardt, K., Graebner, M. (2007), Theory building from cases: Opportunities and challenges. *Academy of Management Journal*, 50, 25-32.
- Eisenhardt, K. (1989), Building theories from case study research. *The Academy of Management Review*, 14, 532-550.
- Espeitx, E. (2004), Patrimonio alimentario y turismo: una relación singular. *Pasos*, 2(2), 193-213.
- Espeitx, E. (2008), Los sentidos del patrimonio alimentario en el sur de Europa, in Álvarez, M. and Medina, F.X. (eds.), *Identidades en el plato. El patrimonio cultural alimentario entre Europa y América*, Icaria, Spain, 45-61.
- Espeitx, E. (2011), Productos de la tierra y alimentos transgénicos: tradición e innovación como atributos valorados y como factores de riesgo, in Espeitx, E. and Cacéres, J. (coords), *Sabores culturales, ensayos sobre alimentación y cultura*, Spain, Montesinos, 118-158.
- Frochot, I. (2003), An analysis of regional positioning and its associated food images in French tourism regional brochures. *Journal of Travel and Tourism Marketing*, 14(3-4), 77-96.
- Giampiccoli, A., Hayward, J. (2012), Tourism, food and culture: community-based tourism, local food and community development in Mpondoland. *Culture, Agriculture, Food and Environment*, 2(34), 101-123.
- Gyimóthy, S., Mykletun, R.J. (2009), Scary food: commodifying culinary heritage as meal adventures in tourism. *Journal of Vacation Marketing*, 3(15), 259-273.
- Hillel, D.; Belhassen, Y., Shani, A. (2013), What makes a gastronomic destination attractive? Evidence from the Israeli Negev. *Tourism Management*, 36, 200-209.
- Hsieh, H.F., Shannon, S. (2005), Three approaches to qualitative content analysis. *Qualitative Health Research*, 15(9), 1277-1288.
- Jordana, J. (2000), Traditional foods: challenges facing the European food industry. *Food Research International*, 33, 147-152.
- Juárez, J.L. (2008), *Nacionalismo culinario: La cocina mexicana en el siglo XX*, Mexico, CONACULTA.
- Kim, Y.; Yuan, J.; Goh, B., Antun, J. (2009), Web marketing in food tourism: a content analysis of web sites in west Texas. *Journal of Culinary Sciences and Technology*, 7, 52-64.
- Kivela, J., Crotts, J. (2006), Tourism and gastronomy: gastronomy's influence on how tourists experience a destination. *Journal of Hospitality and Tourism Research*, 3(30), 354-377.
- Laborde, G., Medina, F.X. (2015), De los recetarios nacionales a los expedientes patrimoniales. Una confrontación de identidades y políticas culturales, in Ávila, R., Álvarez, M. and Medina, F.X. (coords.) *Alimentos, cocinas e intercambios culinarios. Confrontaciones culturales, identidades, resignificaciones*, Mexico, Universidad de Guadalajara, 89-104.

- Lull, J. (2005), Evolución del concepto y de la significación social del patrimonio cultural. *Arte Individuo y Sociedad*, 17, 177-206.
- Long, J. (2010), Invenciones e innovaciones. La evolución de la tecnología alimentaria mesoamericana. *Investigación y Ciencia*, 46, 4-9.
- López, A. (2014), La gastronomía mexicana como industria patrimonial. *Culinaria*, 8, 68-73.
- Mintz, S. (2003), *Sabor a comida, sabor a libertad. Incursiones en la comida, la cultura y el pasado*, Mexico, Ediciones de la Reina Roja, CIESAS, CONACULTA.
- Okumus, B.; Okumus, F., McKercher, B. (2007), Incorporating local and international cuisines in the marketing of tourism destinations: the case of Hong Kong and Turkey. *Tourism Management*, 28, 253-261.
- Pérez, C. (2013), Patrimonialización, turistificación y autenticidad en Exaltación de la Cruz, Argentina. *Estudios y Perspectivas en Turismo*, 22, 785-804.
- Pilcher, J. (2001), *¡Vivan los tamales! La comida y la construcción de la identidad Mexicana*, Mexico, Ediciones de la Reina Roja, CIESAS, CONACULTA.
- Prats, Ll. (2003), Patrimonio+Turismo= ¿desarrollo? *Pasos*, 2(1), 127-136.
- Quan, S., Wang, N. (2004), Towards a structural model of the tourist experience: an illustration from food experiences in tourism. *Tourism Management*, 25, 297-305.
- Ranero, M. (2015), "Sabores compartidos del Caribe afroandaluz. Veracruz y La Habana", in Ávila, R., Álvarez, M. and Medina, F.X. (coords.), *Alimentos, cocinas e intercambios culinarios. Confrontaciones culturales, identidades, resignificaciones*, Mexico, Universidad de Guadalajara, 67-88.
- Renard, M.C., Thomé, H. (2010), La Ruta de la Sal Prehispánica. Patrimonio alimentario, cultural y turismo rural en Zapotitlán de las Salinas, Puebla, México. *European Association of Agricultural Economists*, Parma.
- Richards, G. (2002), "Gastronomy: an essential ingredient in tourism production and consumption?", in Hjalager, A. and Richards, G. (eds), *Tourism and Gastronomy*, Routledge, Londres, 3-20.
- Romero, T.; Viesca, F.C., Hernández, M. (2010), Formación del patrimonio gastronómico del Valle de Toluca, México. *Ciencia Ergo Sum*, 3(17), 239-252.
- Rotman, M. (2006), Patrimonio cultural y prácticas artesanales. Concepciones gubernamentales locales y definiciones institucionales internacionales. *ILHA Revista de Antropología*, 1-2(8), 97-115.
- Rovira, R. (2009), Comercio y mercado en Mesoamérica: apuntes metodológicos para su análisis arqueológico. *Boletín Americanista*, 59, 223-237.

- SECTUR-SHCP (2015), Política de Fomento a la Gastronomía Nacional, Mexico, available at: (http://www.cultura.gob.mx/turismocultural/documentos/pdf/Politica_de_fomento_a_la_gastronomia_nacional.pdf) (consulted on: 18.01.2016).
- Stake, R. (2000), "Case Studies", in Denzin, N. and Lincoln, Y. (eds), *Handbook of Qualitative Research*, Sage Publications, London, 435-454.
- Sugiura, Y. (1998), *La caza, la pesca y la recolección. Etnoarqueología del modo de subsistencia lacustre en las ciénagas del Alto Lerma*, Mexico, UNAM.
- Teixeira, V.A., Riberio, N.F. (2013), The lamprey and the partridge: a multi-sited ethnography of food tourism as an agent of preservation and disfigurement in Central Portugal. *Journal of Heritage Tourism*, 1-20.
- Thomé, H. (2015), Turismo agroalimentario y nuevos metabolismos sociales de productos locales. *Mexican Journal of Agricultural Sciences*, 6(6), 1373-1386.
- Thomé, H.; Renard, M.C.; Nava, G., De Souza, A. (2014), La Ruta del Nopal (Opuntia Spp.). Turismo y Reestructuración Productiva en el Suelo Rural de La Ciudad de México. *Rosa Dos Ventos*, 6(3), 390-408.
- Thomé, H.; Vizcarra, I., Espinoza, A. (2015), Performance and fractalization as metabolization tools of rural spaces. The case of the Querétaro Cheese and Wine Route. *Spanish Journal of Rural Development*, 6(Special 1), 29-44.
- Timothy, D.J., Boyd, S.W. (2006), Heritage tourism in the 21st century: valued traditions and new perspectives. *Journal of Heritage Tourism*, 1(1), 1-16.
- Timothy, D.J., Nyaupane, G.P. (eds) (2009), *Cultural heritage and tourism in the developing world: a regional perspective*, New York, Routledge.
- Troncoso, C.A., Almirón, A.V. (2005), Turismo y patrimonio. Hacia una relectura de sus relaciones. *Aportes y Transferencias*, 9(1), 56-74.
- Vargas, L.A. (2007), El alimento básico en las cocinas de la humanidad. El caso de Mesoamérica. *Itinerarios*, 6, 36-53.

Chapter XXV

Portugal: UNESCO Creative Cities Network

Portugal: UNESCO Creative Cities Network

ANA MAFÉ GARCÍA¹⁸⁰ ¹⁸¹

Abstract:

This text deals with the importance of reference management strategies in tourism policy related to Heritage, based on the recommendations that have been carried out in the second half of the 20th century in terms of sustainability. Specifically, this study is focused on the work done by UNESCO in terms of cultural tourism by their programme launched in 2004, Creative Cities Network and its implementation in Portugal.

ICOMOS (International Council on Monuments and Sites) is linked to the UN through UNESCO; both are directly related to Heritage and, therefore, we can define two key pillars in the development of cultural tourism. In this article, it is referred only the UNESCO programme applied to two Portuguese cities. However, it is necessary to know the letters and recommendations promoted by ICOMOS in matters of heritage, sustainability and knowledge, in order to be able to carry out proper heritage and tourism management.

The status of the issue raised by UNESCO with regard to direct implementation programmes dealing with heritage and tourism are summarized in two very interesting initiatives. The approach taken in our research shows the path that has led to UNESCO recognising the union of synergies between public institutions and the University, through UNESCO Chairs and UNITWIN Networks, and how there is an increasingly growing interest in developing and implementing these studies in which, in the long run, manages the heritage subject to be turned into a “tourism product”.

A brief presentation on the Creative Cities programme introduces two examples of initiatives within the sustainable tourism efforts carried out in Portugal through the UNESCO Creative Cities Network, such as Idanha-a-Nova as the Creative City of Music and Obidos as a Creative City of Literature, also both included in the year 2015.

The methodology in this paper has consisted of a search in the web for two cities and a discovery of how they relate to the UNESCO programme on the network. Additionally, of a search of the most used web portal in Europe in order to observe the work of heritage

¹⁸⁰ University of Valencia, encuva@gmail.com

¹⁸¹ This work is part of the Doctorate on Cultural Tourism and the subject of History of Art, the PhD student Ana Mafé García. PhD Scholarship by the CENTRO ÓPTICO LOSAN, Valencia

management and cultural dynamization that appear on the network, in real time. The initiatives carried out in a city to implement tourism products related to culture and heritage should be supported by a verifiable and truthful information in the digital network. Many of the users of those tourist services and activities used the information of the network to choose their destinations, hence the importance of position in the network.

Finally, a concluding summary contains the main lines that we believe to be necessary in the enhancement of the heritage as a generator of tourist products online.

Keywords: Cultural Tourism; Heritage; UNESCO; Creative Cities; Idanha-a-Nova; Óbidos

Resumo:

Este texto aborda a importância das estratégias de gestão de referência no turismo relacionadas com o Património, com base nas recomendações que foram realizadas na segunda metade do século XX em termos de sustentabilidade. Especificamente, este estudo centra-se no trabalho realizado pela UNESCO em termos de turismo cultural através do seu programa lançado em 2004, a Rede de Cidades Criativas e a sua implementação em Portugal.

O ICOMOS (Conselho Internacional de Monumentos e Locais) está ligado à ONU através da UNESCO; ambos estão diretamente relacionados ao Património e, portanto, podemos definir dois pilares fundamentais no desenvolvimento do turismo cultural. Neste artigo é referido apenas o programa da UNESCO aplicado a duas cidades portuguesas. Contudo, é necessário conhecer as cartas e recomendações promovidas pelo ICOMOS em matéria de património, sustentabilidade e conhecimento, a fim de poder realizar uma gestão adequada do património e do turismo.

A situação da questão levantada pela UNESCO em relação aos programas de implementação direta que tratam do património e do turismo é resumida em duas iniciativas muito interessantes. A abordagem da nossa pesquisa mostra o caminho que levou a UNESCO a reconhecer a união de sinergias entre as instituições públicas e a Universidade, através das cadeiras UNESCO e redes UNITWIN, e como há um crescente interesse em desenvolver e implementar esses estudos nos quais, a longo prazo, se gere o património sujeito a ser transformado num "produto turístico".

Uma breve apresentação sobre o programa Cidades Criativas introduz dois exemplos de iniciativas no âmbito dos esforços de turismo sustentável realizados em Portugal através da Rede de Cidades Criativas da UNESCO, como Idanha-a-Nova como Cidade Criativa da Música e Óbidos como Cidade Criativa da Literatura, também ambas incluídas no ano de 2015.

A metodologia utilizada neste trabalho consistiu numa pesquisa na internet sobre duas cidades e uma descoberta de como elas se relacionam com o programa da UNESCO na rede. Adicionalmente, de uma busca pela internet do portal mais utilizado na Europa, a fim de observar o trabalho de gestão do património e dinamização cultural que aparecem na rede, em tempo real. As iniciativas levadas a cabo numa cidade para implementar produtos turísticos relacionados com a cultura e o património devem ser apoiadas por uma informação verificável e verdadeira na rede digital. Muitos dos utilizadores desses serviços turísticos e atividades usaram as informações da rede para escolher os seus destinos, daí a importância da posição na rede.

Finalmente, um resumo final contém as principais linhas que acreditamos serem necessárias no aprimoramento do património como gerador de produtos turísticos on-line.

Palavras-chave: Turismo Cultural; Património; UNESCO; Cidades Criativas; Idanha-a-Nova; Óbidos

Resumen:

El presente texto trata de la importancia de las estrategias de gestión de referencia en la política turística relacionada con el Patrimonio, en base a las recomendaciones que se han llevado a cabo en la última mitad del siglo XX en términos de sostenibilidad. En concreto, este estudio se centra en el trabajo realizado por la UNESCO en materia de turismo cultural por el programa lanzado en 2004, la Red de Ciudades Creativas y su implementación en Portugal.

El ICOMOS (Consejo Internacional de Monumentos y Sitios) está vinculado a la ONU, a través de la UNESCO, ambos están directamente relacionados con el Patrimonio y, por lo tanto, los encontramos como dos pilares fundamentales en el desarrollo del turismo cultural. En este artículo nos referimos únicamente al programa de la UNESCO aplicado a dos ciudades portuguesas. Sin embargo, es necesario conocer las cartas y recomendaciones promovidas por el ICOMOS en materia de patrimonio, sostenibilidad y conocimiento, para poder llevar a cabo una adecuada gestión patrimonial y turística.

El estado de la cuestión planteada por la UNESCO en relación con los programas de ejecución directa relativos al patrimonio y al turismo se resume en dos iniciativas muy interesantes. El enfoque adoptado en nuestra investigación muestra el camino que ha llevado a la UNESCO a la unión de sinergias entre las instituciones públicas y la Universidad a través de las Cátedras UNESCO y las Redes UNITWIN y cómo cada vez, hay más interés en desarrollar e implementar estos estudios en el tejido productivo, para ayudar a convertir los recursos patrimoniales susceptibles de ello, en un "producto turístico".

Una breve introducción sobre el programa Ciudades Creativas presenta dos ejemplos de iniciativas dentro de los esfuerzos de turismo sostenible llevados a cabo en Portugal a través de la Red UNESCO de Ciudades Creativas como Idanha-a-Nova, Ciudad Creativa de la Música y Obidos como Ciudad Creativa de la Literatura , ambas incluidas en el año 2015 dentro del listado.

La metodología de trabajo ha consistido en una búsqueda en la red de las dos ciudades y descubrir cómo se relacionan con el programa de la UNESCO en internet. Se ha utilizado como búsqueda, el portal web más utilizado en Europa para observar el trabajo de gestión patrimonial y dinamización cultural que aparece en la red en tiempo real. Las iniciativas llevadas a cabo en una ciudad para implementar productos turísticos relacionados con la cultura y el patrimonio, han de estar sostenidas por una información veraz y contrastable en la red digital. Porque muchos de los usuarios de los servicios y actividades turísticas utilizan la información de la red para elegir sus destinos. De ahí la importancia de posicionar en la red la información.

Finalmente, un resumen a modo de conclusión, contiene las líneas principales que creemos necesarias en la valorización del patrimonio como generador de productos turísticos.

Palabras Clave: Turismo Cultural; Patrimonio; UNESCO; Ciudades Creativas; Idanha-a-Nova; Óbidos

1. Introduction

This research aims to analyse different programmes implemented at an international level by UNESCO and their recommendations launched to the public and to political entities since the end of World War II. It is, therefore, an evaluation of the issue regarding cultural tourism from the study and theorization of this institution.

If in Spain tourism began to grow in the 50's as a source of foreign exchange earnings, given the American refusal to contribute to the reconstruction of the country after its Civil War with the Marshall Plan¹⁸², and as a result of not being an autarky economically sufficient to take Spain

¹⁸²"(...), there was no alternative to the autarky, (year 1945), by the will of the Franco regime. Spain was thus lost the ability to take advantage of the international division of labor and benefit operations like the Marshall Plan that would have enabled several years of forward economic takeoff and save numerous hardships to a large part of its inhabitants". (Ferrer, J.A.B.,1989: 68-69) This social situation, the Valencian director Luis Garcia Berlanga picked up in his film "Bienvenido Mister Marshall" from the year 1953. A masterpiece of Spanish cinema won the international Cannes Film Festival (best comedy and special mention by the script).

forward¹⁸³, Portugal was in a similar scenario, at that time, with the difference of its good relations with the US¹⁸⁴.

In this scenario, in order to develop, Southern Europe had to become the tourist destination for a whole raft of Central Europeans workers who, after the established peace and the relevant aid for the reconstruction of their nations, needed a place to rest and escape to their routines, and ultimately, to enjoy the summer.

Thus, on one hand, this region began to build hotels at the request of the tour operators, who covered the costs which were agreed with the owners of the land¹⁸⁵, whilst on the other hand, there was an inadequate awareness of the environmental consequences and sustainability that would occur in the territories occupied by this new social class of migrants, attracted by the sun and the beaches, known outside of Spain for the three "s": "sun, sea and sand".

At this point of our initial reflection, UNESCO and ICOMOS provide a necessary tool for any policy or tourist action which wants to become detached from any of these old policies which are so aggressive to the environment, and which give too little attention to sustainability.

Consequently, firstly, we present the activity that UNESCO¹⁸⁶ offers to different managers whom are involved in the construction of cultural tourism products by the programmes UNITWIN/UNESCO Chairs Programme and Creative Cities Network. We must not ignore that the main mission of this organization is the development of educational, cultural and scientific relations between all people, in order to achieve world peace. And that cultural heritage is a nexus of union between citizens.

This sublime aim means that for all those who work in tourism there is a fundamental paradigm in a world that is so globalised and full of political interests. "Peace" means, first and foremost, the respect towards human life and the dignity of society itself and its culture. Hence, it is evident that the peace-building should be orchestrated and induced by supranational bodies that ensure global welfare through the human and most important tools we have: education, the transmission of culture in values and solidarity among peoples.

As an example of initiative in tourism marketing on-line, in relation to culture and heritage, we wanted to make an approach to the UNESCO Creative Cities Programme, since its

¹⁸³ In Spain, tourism outlined as the only activity capable of making our country internationally competitive, since the industry was located at international level in Central Europe and the technology came from Japan and the USA.

¹⁸⁴ Portugal joined NATO in 1949, Spain did not do so until 1982.

¹⁸⁵ So, at the island of Mallorca, most hotels were built in the decades of the 60s and 70s. (Barceló i Pons, B., 2000: 31-55).

¹⁸⁶ UNESCO (2016). Building peace in the minds of men and women, UNESCO, available at: <http://www.unesco.org/new/es> (consulted on: 03.02.2016).

implementation in the cities of Idanha-a-Nova and Óbidos, little known in the traditional circuits of the foreign tour operators, for whom the image of Portugal is reduced to Lisbon and Oporto, implies an opportunity to appear at the international level related to one of these seven cultural resources: Crafts and Folk Art, Design, Film, Gastronomy, Literature, Digital Art and Music.

In the last part of this document, we make a series of reflections that may well serve as a starting point in future studies on heritage and cultural tourism.

2. UNESCO: Programmes related to cultural tourism

Publications found in this organization are mainly of two types; there are documents containing data and analyses that are published on a regular basis, such as the analysis of case studies; and its own Statistical Yearbook, collecting innumerable statistics carried out by the UNESCO Statistical Institute in different areas such as education, technology and culture.

Apart from this statistical data, UNESCO fosters studies conducive to stimulating the reflection on today's world worries, such as the environment, human rights, Nature and its resources, world peace, the role of education or the relations between knowledge and society.

Precisely in this last point of reflection, UNESCO promotes a programme dedicated to the study through the Inter-University international cooperation. It arose in 1992 and is called the *UNITWIN/UNESCO Chairs Programme* and aims to promote international cooperation between universities and the creation of networks that enhance institutional capacities through knowledge exchange and collaborative work. On its website, you can read briefly its history:

The UNITWIN programme aims to be pertinent, forward-thinking and to impact socio-economic development effectively. So far UNESCO Chair and UNITWIN Network projects have proven useful in establishing new teaching programmes, generating new ideas through research and reflection, and facilitating the enrichment of existing university programmes while respecting cultural diversity. (...)

Since the adoption of new strategic orientations for the UNITWIN Programme by the Executive Board at its 176th session in April 2007, emphasis has been placed on: the dual function of UNESCO Chairs and UNITWIN Networks as “think tanks” and “bridge builders” between the academic world, civil society, local communities, research and policy-making; realignment with UNESCO's priorities; readjust geographic imbalance which is now in favour of the North; stimulate triangular North-South-South cooperation; creation of regional or sub-

regional poles of innovation and excellence; Closer cooperation with the United Nations University (UNU).¹⁸⁷

These chairs have proven to be useful to assist the political decision-making, generating innovation through research and contributing to the enrichment of existing university programmes, promoting further cultural diversity.

In areas affected by the scarcity of expertise, these programmes and networks have become beacons of excellence and innovation at a regional or subregional level. They also contribute to the strengthening of North-South cooperation, currently participating in the programme with more than 850 institutions in 134 countries¹⁸⁸.

For example, France welcomes 25 UNESCO Chairs among which we highlight the *Chaire UNESCO de Tourisme Culturel* (created in 1999), whose headquarters are located at the *Université de Paris I (Panthéon - Sorbonne), Paris*.

Spain has 72 chairs and those related to tourism, culture and heritage are the following:

19. *Chaire UNESCO de Planification Touristique et Développement Durable (1991), Universidad de Las Palmas de Gran Canaria (ULPGC), Las Palmas de Gran Canaria.*

38. *Chaire UNESCO en matière de Politiques et de Coopération Culturelles (2001), Universitat de Girona, Girona.*

54. *Chaire UNESCO d'Innovation et gestion de la culture entrepreneuriale dans le cadre universitaire (2006), Université de Santiago de Compostelle.*

73. *Chaire UNESCO sur Forum Université et Patrimoine (2013), Universitat Politècnica de València.*

Portugal has two chairs¹⁸⁹, one devoted to Bioethics and the following dedicated to Heritage:

2. *UNESCO Chair in Intangible Heritage and Traditional Know-How: Linking Heritage (2013), University of Évora.*

Regarding the definition of cultural tourism and the policies that this international organization preaches on this subject, it should be emphasized that this way of understanding

¹⁸⁷ UNESCO, available at: <http://www.unesco.org/en/university-twinning-and-networking/university-twinning-and-networking/> (consulted on: 03.02.2016).

¹⁸⁸ Data that remain on the web since April, 2014.

¹⁸⁹ UNESCO (2013). 763 UNESCO CHAIRS as at 10/06/2013 / 763 CHAIRES UNESCO au 10/06/2013 – UNESCO (<http://www.unesco.org/es/university-twinning-and-networking/university-twinning-and-networking/>), (Web accessed 3 February, 2016).

the tourist activity has become increasingly important. Their study and performances across the globe are being supported with large budgets.

One of the proposed examples is the so-called *Programme 6: promoting heritage through cultural tourism and the commitment of cities* in Latin America¹⁹⁰. In that document, we can observe the priorities of management in the field of cultural tourism. It transmits that cultural tourism is an enormously favorable resource to mutual recognition, knowledge of Latin America as a region, the promotion of tangible and intangible cultural heritage and the economic development of a region or locality. And although it should be stressed that heritage must not serve tourism, we cannot fail to acknowledge its value for fostering the development, create employment and promote the meeting between people of different cultures.

This text is key, because it contains the following thought:

UNESCO (2010): a type of tourism that seeks authenticity is emerging with growing strength and is motivated by the desire to meet other people and cultures in their natural and social spaces. According to data from the World Tourism Organization (2008), cultural tourism accounted for around 42% of travel in 2006, making this sector one of the fastest growing in the world.

It is clear, therefore, the need to forge partnerships between professionals of art history and culture in general with political actors and the productive sector linked to the management of cultural tourism, as occurred in the conference on culture and tourism, in Siem Reap, Cambodia,¹⁹¹ in 2015.

As quoted in the news, more than 900 participants - including more than 45 ministers and Deputy Ministers of Tourism and Culture-, international experts and guests from 100 countries gathered at the World Conference on tourism and culture of the UNWTO / UNESCO held in Siem Reap (Cambodia) to explore and promote new models of association between tourism and culture.

This growing interest of UNESCO in world tourism is thus evident. Not only in regards to the creation of chairs in different universities around the world, but also as creative agents of stimuli

¹⁹⁰ CARTA CULTURAL IBEROAMERICANA (2011) (<http://www.culturasiberoamericanas.org/spip.php?article8>), (Web accessed 3rd February 2016). Translated by the author.

¹⁹¹ World Tourism Organization (UNWTO) (2015) on tourism and culture of the UNWTO / UNESCO World Conference brings together for the first time Ministers of Tourism and Culture - organization (<http://media.unwto.org/es/press-release/2015-02-09/la-conferencia-mundial-sobre-turismo-y-cultura-de-la-omt-y-la-unesco-reune->), (Consulted on 3rd February 2016).

and ideas that need to be connected and interconnected between the sphere of tourism management and the field of cultural management.

3. UNESCO Creative Cities Network

On the UNESCO website, in an article¹⁹² edited in Paris, on 11 December 2015, we can read General Director of UNESCO, Irina Bokova, announcing the designation of 47 cities of 33 countries as new members of the Creative Cities network.

This massive designation is due to the growing interest shown by loads of cities in being positioned on the tourist world-wide map thanks to international agencies. Since UNWTO¹⁹³ estimated an average of one billion foreign tourists for 2014.

The results of this year's UNESCO call are testimony to the richer diversity of the network and the wider geographical representation with 22 cities in countries not previously represented.

These new creative cities are framed in seven creative fields: Crafts and Folk Art, Design, Film, Gastronomy, Literature, Digital Art and Music. Alphabetical order would be:

- Adelaide (Australia) – Music
- Al-Ahsa (Saudi Arabia) – Crafts and Folk Art
- Austin (United States of America) – Media Arts
- Baghdad (Iraq) – Literature
- Bamiyan (Afghanistan) – Crafts and Folk Art
- Bandung (Indonesia) – Design
- Barcelona (Spain) – Literature
- Belém (Brazil) – Gastronomy
- Bergen (Norway) – Gastronomy
- Bitola (Macedonia) – Film
- Budapest (Hungary) – Design
- Burgos (Spain) – Gastronomy
- Denia (Spain) – Gastronomy

¹⁹² UNESCOPRESS. (2015). 47 cities join the UNESCO Creative Cities Network - UNESCO (http://www.unesco.org/new/en/media-services/single-view/news/47_cities_join_the_unesco_creative_cities_network/#.VrTey572YUh), (Consulted on 3rd February 2016).

¹⁹³ World Tourism Organization (UNWTO) (2014). More than 1.1 billion tourists traveled abroad in 2014. ORGANIZATION (<http://media.unwto.org/es/press-release/2015-01-27/mas-de-1100-millones-de-turistas-viajaron-al-extranjero-en-2014>), (Consulted on 3rd February 2016).

- Detroit (United States of America) – Design
- Duran (Ecuador) – Crafts and Folk Art
- Ensenada (Mexico) – Gastronomy
- Gaziantep (Turkey) – Gastronomy
- Idanha-a-Nova (Portugal) – Music
- Isfahan (Iran (Islamic Republic of)) – Crafts and Folk Art
- Jaipur (India) – Crafts and Folk Art
- Katowice (Poland) – Music
- Kaunas (Lithuania) – Design
- Kingston (Jamaica) – Music
- Kinshasa (Democratic Republic of the Congo) – Music
- Liverpool (United Kingdom of Great Britain and Northern Ireland) – Music
- Ljubljana (Slovenia) – Literature
- Lubumbashi (Democratic Republic of the Congo) – Crafts and Folk Art
- Lviv (Ukraine) – Literature
- Medellin (Colombia) – Music
- Montevideo (Uruguay) – Literature
- Nottingham (United Kingdom of Great Britain and Northern Ireland) – Literature
- Obidos (Portugal) – Literature
- Parma (Italy) – Gastronomy
- Phuket (Thailand) – Gastronomy
- Puebla (Mexico) – Design
- Rasht (Iran (Islamic Republic of)) – Gastronomy
- Rome (Italy) – Film
- Salvador (Brazil) – Music
- San Cristobal de las Casas (Mexico) – Crafts and Folk Art
- Santos (Brazil) – Film
- Sasayama (Japan) – Crafts and Folk Art
- Singapore (Singapore) – Design
- Tartu (Estonia) – Literature
- Tongyeong (Republic of Korea) – Music
- Tucson (United States of America) – Gastronomy
- Ulyanovsk (Russian Federation) – Literature
- Varanasi (India) – Music

Launched by UNESCO in 2004, the network now comprises 116 cities¹⁹⁴ in 54 countries. Its goal is to promote international cooperation “with and between” cities committed to invest in creativity, as the engine of sustainable urban development, social inclusion and cultural vitality.

I.e., throughout the text of the Creative Cities Network Mission Statement, creativity appears as a strategic factor of sustainable development in the economic, social, cultural and environmental aspects. To join the network, cities recognise their commitment to sharing best practices, developing precisely those things in which are more creative and active.

These answers help in associations and cultural industries to encourage creativity, strengthens participation in city cultural life and integrating culture into urban growth programmes.

The Creative Cities Network goals are:

- Strengthening international cooperation among cities that have recognised creativity as a strategic factor of sustainable development.
- Stimulate and promote the initiatives led by Creative Cities’ members to make creativity an essential component of urban development, specially through associations, public and private sectors participation and civil society, in general.
- Strengthen the creation, production, distribution and dissemination of goods and service activities.
- Develop creativity and innovation centres in the cities.
- Expanding opportunities for creators and professionals in the cultural sector. To improve access and participation in cultural life, as well as the enjoyment of cultural goods and services to all citizens, in particular for groups and marginalized or vulnerable individuals.
- Integrate fully the culture and the creativity in the strategies and plans of local development.

The objectives of the UNESCO Creative Cities Network apply both at the city level members as at the international level, specially through the following areas of action:

- Exchange of experiences, knowledge and improving cultural practices.
- Creation of a pilot project and initiatives in the public and private sectors, in all civil society’s areas.

¹⁹⁴ UNESCO. Creative Cities, UNESCO, available at: <http://en.unesco.org/creative-cities/> (consulted on: 03.02.2016).

- Creation of exchange networks and professional and artistic programmes.
- Studies, investigations and evaluations of the Creative Cities experience.
- Incentive to the policies and measures for the sustainable urban development.
- Activities of communication and awareness-raising within the same cities.

The Creative Cities Network represents a huge potential for asserting the role of culture as a real engine of the sustainable development.

The 2030 Agenda for Sustainable Development¹⁹⁵, adopted by the international community, noted in September 2015 that culture and creativity are two key factors to sustainable urban development. As an example would be enough to mention Goal 11. "Ensure that the cities and human settlements are inclusive, safe, resilient and sustainable".

A network of these cities precisely works as an essential platform to contribute to the implementation and achievement of this international programme. By joining the network, cities commit to cooperate and develop partnerships to promote creative and cultural industries, share better practices, strengthen participation in cultural life and integrate culture into economic and social development plans and strategies.

4. Creative Cities Network in Portugal¹⁹⁶

The Creative Cities Network in Portugal aims to develop international cooperation among cities that have identified creativity as a strategic factor for sustainable development. The Creative Cities develop initiatives through collaborations between the public and private sectors, i.e.; professional organizations, communities, civil society and cultural institutions joined in a common project to enhance the cultural resources and present them as cultural products, so citizens and visitors to the city enjoy the same.

The network facilitates the exchange of experiences, expertise and resources between cities members as a mean to promote the local creative industries and promote global cooperation for sustainable urban development. Hence, presently, it is implementing activities, locally in each one of the Portuguese cities that belong to the network of sites created with the objective of:

¹⁹⁵ UNITED NATIONS. General Assembly. (UN) (2015), Draft final document of the United Nations Summit for the Adoption of the Development Agenda after 2015. - United Nations, available at: http://www.cooperacionespanola.es/sites/default/files/agenda_2030_desarrollo_sostenible_cooperacion_espanola_12_ago_2015_es.pdf (consulted on: 04.02.2016).

¹⁹⁶ UNESCO PORTUGAL, available at: <https://www.unescoportugal.mne.pt/pt/noticias/345-dia-internacional-do-jazz-2014-30-de-abril> (consulted on: 04.02.2016).

- a) Strengthen the creation, production, distribution and enjoyment of the cultural goods and services at a local level; promoting creativity and creative expression, - specially among vulnerable groups, including women and young people.
- b) Improving access and participation in cultural life and the enjoyment of cultural property.
- c) Integrate the cultural and creative industries into local development plans.

The first two Portuguese cities included in the Creative Cities Network are: Idanha-a-Nova, as the Creative City of Music and Óbidos as a Creative City of Literature.



Figure 1. Idanha-a-Nova and Óbidos¹⁹⁷ logos as Creative Cities, 2015

Source: <https://www.unescoportugal.mne.pt/pt/noticias/345-dia-internacional-do-jazz-2014-30-de-abril> (consulted on 4th February 2016)

The study methodology used focuses on using the Google portal in order to initially check what information is available.

This article is intended to show the three first references of indexing, to know if these cities positioning and communication strategies are being followed online. Since recent studies of tourists and visitors' behaviour, it is known that the information in portals is really important to show that information that is in the network is essential to arrange trips.

We have referenced the information of the places referenced as listed in web. Note that the reader may find errors in this information¹⁹⁸, as precisely this article attempts to highlight the

¹⁹⁷ Óbidos contact: Cláudio Rodrigues, Secretary of the City Councillor, claudio.rodrigues@cm-obidos.pt Contact Idanha-a-Nova: Paulo Longo dos Santos, Head of Division, Municipality of Idanha-a-Nova, paulo.plongo@gmail.com

¹⁹⁸ Several web pages consulted in Spanish language, related to these two cities, contain grammatical errors. It is the same in the pages consulted in English. The reader will find them in the text, marked in red and in italics.

importance of working with the content of tourist destinations on the network with experts and with a development plan.

5. Idanha-a-Nova as the Creative City of Music

Presenting “UNESCO Creative City IDANHA A NOVA” in Google, there are approximately 461 results (0.32 seconds). In the first ten posts, there appears a blogger’s overview, on 1st of February 2016, where Laureana, a Fado artist, speaks about the UNESCO programme in his blog.

Simply looking for “IDANHA-A-NOVA” provides approximately 472.000 results (0.66 seconds). It is represented in first place in Wikipedia, followed by the City Hall and Tripadvisor pages.

In Wikipedia, written in Portuguese, Spanish and French, only makes reference to the festival summer called Boom Festival. This absence of information in a such a strategic search position shows that the actions carried out to position the city strategically in search rankings have largely been unsuccessful.

Opportunities are lost. We must recall this maxim; “If you are not on the net, you do not survive”.

Nevertheless, the City Hall institutional page receives the visitor with an extensive banner in where we can read: IDANHA-A-NOVA Cidade Criativa Da Música UNESCO. With a link to the web page of the programme *Idanha-a-nova candidata-se à Rede de Cidades Criativas da UNESCO, a cidade da Música, em 2015*.



Figure 2. Idanha-a-Nova City Hall's webpage

Source: <http://www.com-idanhanova.pt/>

The magnificent positioning of this website in Google suggests that there is a full team managing their web presence and, therefore, the visitor receives the information in first hand from the appropriate public authority. The site offers easy access to the appropriate information using a banner, indicating clearly where to find information regarding music.

It would be necessary to enhance the information that is online through sites as Tripadvisor or even on Wikipedia, in order to maximize visibility and to take advantage of the prominent position that Google provides to the virtual encyclopedia.

Otherwise, to emphasize that we have not found results relating to tourist portals of the state or the municipal in the principal search. When a programme like Creative Cities Network is implemented, it must exist a strategy of distributing content on the net, in a "cross" shape with the agencies responsible to bear out these network initiatives - whether being associations or public entities, with the purpose of giving visibility to the city.

6. Óbidos Villa Literaria

Using the web search engine Google, the following descriptor in Spanish "Óbidos, Portugal" renders approximately 421.000 results (0.63 seconds), in this order: Wikipedia, Tourism of Portugal and TripAdvisor.

In the Wikipedia, the Spanish, English or French versions do not reference to the Creative City programme, while in the Portuguese version it appears with the following quotation¹⁹⁹:

¹⁹⁹ ÓBIDOS. WIKIPEDIA, available at: [https://pt.wikipedia.org/wiki/%C3%93bidos_\(Portugal\)](https://pt.wikipedia.org/wiki/%C3%93bidos_(Portugal)) (consulted on: 10.06.2016).

"47 cities join the UNESCO Creative Cities Network"». UNESCO. 11-12-2015. (Consulted on 11th December 2016)".

Tourism of Portugal²⁰⁰, webpage in Spanish, nor make any reference to the category of Creative City. In particular, it makes reference to the walled city and its historic centre, chapels, beach and several memorials. Simply there is no special approach which connects the urban centre with its literary power.

TripAdvisor positions the city in an interesting way, however, we do not find reference to being a town of the creative cities network. The information that visitors and tourists receive refers to the pleasure of walking in its medieval urban layout.

All the information analysed in the different links indicate that, behind every action to publicize the online UNESCO programme, a study must be made on how to show the city on the net.

In a second search on the net using Google, a search for: "Creative City Óbidos UNESCO Portugal", rendered 1,770 results in approximately (0.66 seconds). There were no results relating to the Portuguese city until the seventh result. The portal of the TCP / ARPT Centre of Portugal offers the most detailed and accurate information about the city, regarding this search.

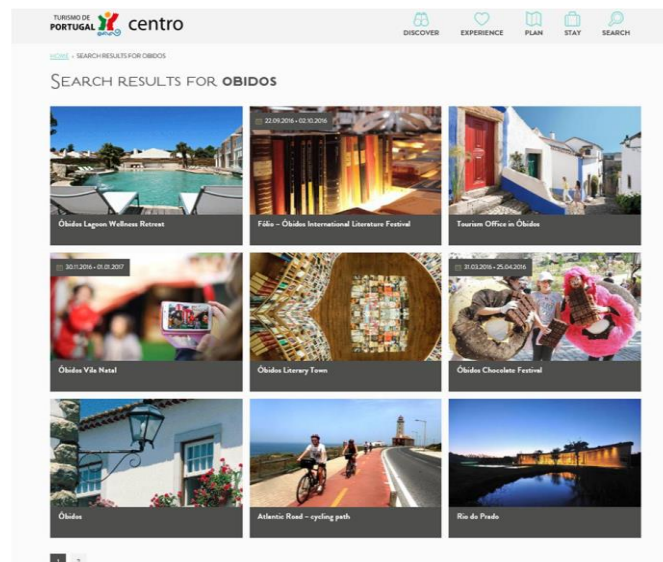


Figure 3. Turismo de Portugal webpage

Source: <http://www.visitcentrodeportugal.com.pt/?s=obidos>

²⁰⁰ TURISMO EN PORTUGAL, available at: <http://www.turismoenportugal.org/obidos-portugal> (consulted on: 10.06.2016).

In the link 'Óbidos Literary Town', there is a presentation written in English, which says:

Opening a bookshop nowadays may seem a bit risky. Now imagine opening several bookshops in a small town with a bit more than 3000 inhabitants, 45 minutes away from Lisbon by car.

The project Óbidos Literary Town is an initiative of Óbidos City Hall and the book store Ler Devagar. See the town of Óbidos as you have never seen it before. A magical place where the book is the main character!

This project consists on the promotion of the culture of writing and reading through the organisation of festivals, presentations, meetings, representations, projections, concerts, reading and writing sessions.

Here you can find a living catalog of available books in Portuguese edition, including general or specific themes, such as Poetry, Photography, Children Literature, Design and Creativity, Travel, Adventure and Nature, Gastronomy, Wines and Addictions, Heritage and Religion, among others.

In this paper, information is furnished on the sites and the cultural dynamization that is offered. But the reader may find mistakes in this transcription of the information, which shows that sometimes is necessary to have a really good team on-line which is able to write good English (or Spanish, French, etc) to avert this²⁰¹.

Places

1. Santiago Bookshop

The Church of Santiago, a temple that dates back to the 13th century and one of the most emblematic buildings of the town, is nowadays the bookshop Grande Livraria de Santiago.

Situated inside the town walls, in Cerca Velha, next to the castle entrance, this bookshop has a great variety of books, and it organises movie sessions, book releases and exhibitions. You can also have a tea or a coffee here.

2. Biological Market

Óbidos Biological Market is housed in the former refectory of the Óbidos Town Hall. This place also sells several biological products of the region.

Here you can find old and rare books, as well as Travel, Gastronomy and Wine books.

²⁰¹ This information has been contrasted to the information on the page created specifically to highlight the city: <http://vilaliteraria.com/> and there are clear discrepancies between both information. But our task in this study is to precisely indicate the need to work together on a project of dissemination and information that carries the brand image supported by a real content management initiative and cultural projects. (Web accessed 10th June 2016).

3. Municipal Museum

The Museum was opened on June 15th 1970. Here you will find books on History.

4. Abílio Museum

The Arch House, today Casa Museu Abílio de Mattos e Silva, was donated to the Óbidos Town Hall by Maria José Salavisa. This was the old Óbidos prison, bought by a meaningless price by Abílio de Mattos e Silva around 1965. Maria José Salavisa once saw this house in ruins only with an arch over the street and fell in love with it, decorating it according to the spirit of the place, strongly influenced by the Medieval era.

Here you can find books on Illustration, Heritage and Old Books.

5. Nova Ogiva Gallery

Known as Galeria Ogiva, this venue was created in 1970 in Óbidos. The Gallery plays a very important role in the history of Óbidos and its museums. It is the starting point for exhibitions and other cultural expressions associated with contemporary works.

Here you will find a bookshop, exhibitions, projections and performances.

6. Interior Design Centre

The main goal of the Interior Design Centre, located next to the tower Torre do Facho, is to develop design, by promoting exhibitions, seminars, conferences and theme-related meeting and thus bringing creators and public together. It has an auditorium, a bar, a design documentation archive, where you can see the Maria José Salavisa's works, the forerunner of interior design in Portugal.

7. Histórias com bicho

8. "O Bichinho do Conto" is a literary project designed to welcome readers from 0 to 200 years-old. This was a former primary school, built during the dictatorship from the 40's to the 60's of the 20th century. Children Books available.

9. Livraria da Adega

Housed in a wine cellar ("adega"), this bookshop is the perfect place to drink a literary coffee, a glass of wine or a comforting tea amidst old and new books.

Thanks to the page TCP/ARPT Centro de Portugal, we can discover the connection of the revival of the city inside the UNESCO programme, with the places most involved in the programme:

- Livraria de Santiago
- Galeria Pelourinho
- Residência Josefa de Óbidos
- Museu Municipal
- Museu Abílio
- Galeria Nova Ogiva
- Mercado
- Centro de Design de Interiores
- Livraria da Adega (Espaço Ó)
- Edifício dos Correios (sede)
- Histórias com Bicho

There are no visible references to activities from August 2015. There is a lack of really important information about this Creative City. And public exposure via web is fundamentally of the world of Tourism. Why do not talk about culture in general?

7. Conclusions

In response to the mounting interest in development studies from the University towards Cultural tourism at the end of 20th century, as well as the UNESCO commitment to training pertaining to Heritage, the UNITWIN/UNESCO Chairs Programme was born in 1992. Therefore, there is a willingness in UNESCO to facilitate "knowledge" and "study" on sustainability and on research issues related to culture and heritage through the University.

It proposes a programme capable of uniting cities in different artistic fields. Through proposals of public entities that work together with private associations of local character.

The perfect management in the implantation of the Creative Cities network necessarily has to have a plan of action in the long term. This action plan must be reflected in the network. That is, in the portals which announce the city and the municipality as an example of a city of music or literature. It is very important to have a plan to disseminate and value the city on the internet. And in this reflection, it is necessary to know and put into practice the principles proposed by UNESCO and ICOMOS.

Grounded on this approach, i.e.; the foundation of the fundamental mechanisms to acquire knowledge, assessment, security, preservation and management of heritage, whether real or intangible, we can establish the guidelines, rules and basic standards for a correct implementation of them as resources for sustainable social and economic development; respecting their authenticity and integrity, its adequate conservation and its historical significance.

Connecting the local agents' collaborative synergies with these principles, good information planning can be carried out on the internet, which helps the visitor to learn about all the recreational and cultural activities of the cities covered by the UNESCO programme, because there is a real continuity to all the effort made to get within the network of cities. Being in the programme and not taking advantage of the opportunity offered by the new information technologies means not implementing the programme with sufficient guarantees of survival.

With the different research works carried out about the cultural tourism and the history of art, we have arrived to the conclusion that if the development on tourist is left unreservedly random, without approaches or horizons, personal and idiosyncratic cultural heritage will end generating new impoverishment, because the influence of globalization is very powerful (Mafe Garcia, 2014). Therefore, the authorities must know how to value the remarkable and unique features of each region. They must know the history of each place with emotion and wisdom, with "content and heart".

All the information has to be in the network. Cities must have professional experts who know how to coordinate information and position it in the network. Otherwise, UNESCO's Creative Cities Network is not sufficient to position a city as a tourist destination, as has been demonstrated in this study.

To finish, I would like to explain that as all their applications to the conventions and the programmes of UNESCO, the proposals to join to the Creative Cities network are coordinated by the UNESCO National Commission. In the example of Portugal, the Commission itself, according to its site, welcomes this new contribution of Idanha-a-Nova, as the Creative City of Music and Óbidos as a Creative City of Literature. But it leaves in their "agents" the responsibility for managing data and create implementation activities in value in each of the urban centres.

As we have indicated, adherence to the programme is a work and management tool that must be promoted and worked within society as a whole, without losing sight of the important showcase posed by the internet and the globalization of the information.

The following meeting of the Creative Cities network was adjudged in the city of Ostersund, Sweden, between 14th and 16th of September, 2016. The main aims of the annual meeting were the following:

- Updated info on the activities carried out by the cities, to implement the network objectives, both locally and internationally, by forging new initiatives of partnership between the metropolises.
- Determine the strategy and operations of the network, to agree on important topics related to future developments, including the network priorities for the next year.
- Supply a central platform of dialogue between Creative Cities and UNESCO, with respect to the priorities of the Organization on culture, evolution and other issues of common involvement.

This article aims to demonstrate the importance of having, within the internet network, a long-term monitoring and an action plan, in the implementation of UNESCO's Creative Cities programme, because, as has been shown with a simple Google search, the information that appears from the only two cities on the net, is very poor. It is fundamental this idea to managers of destination tourism.

Today, more and more tourists are searching for their own trips through the network, so it is so fundamental to put quality content and to carry out information follow-ups.

References

- Barceló, I, Pons, B. (2000), Historia del turisme a Mallorca. *Treballs de la Societat Catalana de Geografia*, 50, 31-55.
- Culturas Iberoamericanas. Carta Cultural Iberoamericana (2011), available at: <http://www.culturasiberoamericanas.org/spip.php?> (consulted on: 03.02.2016).
- Ferrer, J.A. (1989), La economía española durante el periodo franquista. *Gerónimo de Uztariz*, 3, 65-76.
- ICOMOS (1965), *Carta Internacional sobre la Conservacion y la Restauracion de Monumentos y Sitios* (Carta de Venecia 1964), available at: http://www.icomos.org/charters/venice_sp.pdf (consulted on: 03.02.2016).
- ICOMOS (2005), Carta De Itinerarios Culturales – ICOMOS, available at: http://international.icomos.org/charters/culturalroutes_sp.pdf (consulte don: 03.02.2016).

- ICOMOS, *ICOMOS: Objetivos Y Actividades*. Available at: http://www.esicomos.org/nueva_carpeteta/info_ICOMOS.htm (consulted on: 03.02.2016).
- Instituto del Patrimonio Cultural de España (IPCE), *Carta de Turismo Cultural*. Adoptada por ICOMOS en noviembre de 1976. IPCE, available at: http://ipce.mcu.es/pdfs/1976_Carta_turismo_cultural_Bruselas.pdf (consulted: 03.02.2016).
- LAUREANA. Adufe de Idanha-a-Nova (2016), available at: <http://www.laureanafado.com/adufe-de-idanha-a-nova/> (consulted on: 10.06.2016).
- Mafé García, A. (2014), *El Turismo Cultural desde la Disciplina de la Historia del Arte*. Trabajo de Final de Máster Historia del Arte y Cultura Visual, available at: https://www.academia.edu/7693948/EL_TURISMO_CULTURAL_DESDE_LA_DISCIPLINA_DE_LA_HISTORIA_DEL_ARTE (consulted on: 03.02.2016).
- Mafé García, A. (2016), The cultural tourism: an approximation to the term from the discipline of the history of the art. *International Journal of Scientific Management and Tourism*, 1(4), 193-199.
- Naciones Unidas. Asamblea General (ONU) (2015), *Proyecto de documento final de la cumbre de las Naciones Unidas para la aprobación de la agenda para el desarrollo después de 2015*. Naciones, available at: http://www.cooperacionspanola.es/sites/default/files/agenda_2030_desarrollo_sostenible_cooperacion_espanola_12_ago_2015_es.pdf (consulted on: 04.02.2016).
- Óbidos, Vila Literária, available at: <http://vilaliteraria.com/> (consulted on: 10.06.2016).
- Óbidos, WIKIPEDIA, available at: [https://pt.wikipedia.org/wiki/%C3%93bidos_\(Portugal\)](https://pt.wikipedia.org/wiki/%C3%93bidos_(Portugal)) (consulted on: 10.06.2016).
- Organización Mundial del Turismo (OMT) (2014), *Más de 1.100 millones de turistas viajaron al extranjero en 2014*, Organización, available at: <http://media.unwto.org/es/press-release/2015-01-27/mas-de-1100-millones-de-turistas-viajaron-al-extranjero-en-2014> (consulted on: 04.02.2016).
- Organización Mundial del Turismo (OMT) (2015), *La Conferencia Mundial sobre Turismo y Cultura de la OMT y la UNESCO reúne por primera vez a ministros de Turismo y de Cultura*, Organización, available at: <http://media.unwto.org/es/press-release/2015-02-09/la-conferencia-mundial-sobre-turismo-y-cultura-de-la-omt-y-la-unesco-reune-> (consulted on: 03.02.2016).
- Santos, J. F. (2012), *As cidades criativas como modelo dinamizador do destino turístico*, Doctoral dissertation, available at: <http://comum.rcaap.pt/bitstream/10400.26/5733/1/As%20Cidades%20Criativas%20como%2>

omodelo%20dinamizador%20do%20destino%20tur%C3%ADstico.pdf (consulted on: 03.02.2016).

TCP/ARPT Centro de Portugal, available at: <http://www.visitcentrodeportugal.com.pt/es/obidos-villa-literaria/> (consulted on: 10.06.2016).

Turismo En Portugal, available at: <http://www.turismoenportugal.org/obidos-portugal> (consulted on: 10.06.2016).

UNESCO (2013), 763 UNESCO CHAIRS as at 10/06/2013, UNESCO, available at: <http://www.unesco.org/es/university-twinning-and-networking/university-twinning-and-networking/> (consulted on: 03.02.2016).

UNESCO (2016), Construir la paz en la mente de los hombres y de las mujeres, UNESCO, available at: <http://www.unesco.org/new/es> (consulted on: 03.02.2016).

UNESCO PORTUGAL, available at: <https://www.unescoportugal.mne.pt/pt/noticias/345-dia-internacional-do-jazz-2014-30-de-abril> (consulted on: 04.02.2016).

UNESCO, Ciudades Creativas, UNESCO, available at: <http://en.unesco.org/creative-cities/> (consulted on: 03.02.2016).

UNESCOPRESS (2015), *47 cities join the UNESCO Creative Cities Network*, UNESCO, available at: http://www.unesco.org/new/en/media-services/single-view/news/47_cities_join_the_unesco_creative_cities_network/#.VrTey572YUh (consulted on: 04.02.2016).

UNITWIN (2013), *Hermanamiento e Interconexión de Universidades*, UNESCO, available at: <http://www.unesco.org/es/university-twinning-and-networking/university-twinning-and-networking/> (consulted on: 03.02.2016).

Chapter XXVI

Tourism in the Biosphere Reserve of Serra do Espinhaço: Opportunities and Threats to the Cultural and Natural Heritage

Tourism in the Biosphere Reserve of Serra do Espinhaço: Opportunities and Threats to the Cultural and Natural Heritage

SOLANO DE SOUZA BRAGA²⁰²

BERNARDO MACHADO GONTIJO²⁰³

MARINA FURTADO GONÇALVES²⁰⁴

GUILHERME AUGUSTO PEREIRA MALTA²⁰⁵

MARIA FLÁVIA PIRES BARBOSA^{206 207}

Abstract:

The Biosphere Reserve of Espinhaço (RBSE), *locus* of reflexion of this study, is the geographic platform of a process that encompasses an area rich in biodiversity and with a significant historical and cultural heritage. It is therefore an area of high ecological, social, cultural and economic importance. Established in 2005, it is considered one of the richest and most diverse regions of the world. With all this being presented, the area of Serra do Espinhaço eventually became an important destination for tourists. However, numerous studies have shown that the environmental heritage of the region has been systematically threatened by practitioners and tourism promoters. In a broader view of what is happening in the region in terms of tourist pressure, there is a pattern of socio-spatial transformation observed in different places and communities over time. Thus, in an exercise of understanding of how the tourist activity is occurring in the RBSE, this article seeks to examine how the historical and geographical aspects of the Reserve were appropriate and helped the region become the tourist hub that it is today. Later, it aims to reflect on the opportunities and threats that this activity has brought to the

²⁰² Department of Applied Social Sciences, State University of Minas Gerais (UEMG), Carangola, Brasil, solanobraga@yahoo.com.br

²⁰³ Department of Geography, Institute of Geosciences, Federal University of Minas Gerais (IGC/UFMG), Belo Horizonte, Brasil, gontijobm@yahoo.com.br

²⁰⁴ Post-Graduation Programme on Social History of Culture, Faculty of Philosophy and Human Sciences, Federal University of Minas Gerais (FAFICH/UFMG), Belo Horizonte, Brasil, marinaufmg@yahoo.com.br

²⁰⁵ Post-graduation programme on Geography, Geosciences Institute, Federal University of Minas Gerais, (IGC/UFMG), Belo Horizonte, Brasil, guilherme.malta@gmail.com

²⁰⁶ Post-graduation programme on Geography, Institute of Geosciences, Federal University of Minas Gerais (IGC/UFMG), Belo Horizonte, Brasil, pires_flavia@yahoo.com.br

²⁰⁷ We would also like to thank to CNPq and FAPEMIG for funding part of this research and to UFMG for hosting the GIPE.

cultural and natural heritage of the region. For this, it was adopted as a methodological path, essentially qualitative, the consulting of works and researches on the RBSE, focusing especially on those that involve the tourist context of the region. It was noted that the appropriation of the territory of the RBSE by tourism is a reality full of conflicts and challenges.

Keywords: Tourism; History; Heritage; Biosphere Reserve; Serra do Espinhaço

Resumo:

A Reserva da Biosfera da Serra do Espinhaço (RBSE), *locus* de reflexão deste estudo, é a plataforma geográfica de um processo que engloba uma área rica em biodiversidade e com significativo patrimônios histórico e cultural. É, portanto uma área de grande importância ecológica, social, cultural e econômica. Fundada em 2005, é considerada uma das regiões mais ricas e diversificadas do mundo. A partir do cenário apresentado, a área da Serra do Espinhaço acabou por se tornar um importante destino para os turistas. No entanto, numerosos estudos têm demonstrado que o patrimônio ambiental da região tem sido sistematicamente ameaçado por profissionais e promotores do turismo. Em uma visão mais ampla do que acontece na região em termos de pressão turística, há um padrão de transformação sócio-espacial observado em diferentes locais e comunidades ao longo do tempo. Assim, em um exercício de compreensão de como a atividade turística está ocorrendo na RBSE, este artigo procura examinar como os aspectos históricos e geográficos da Reserva foram apropriados e ajudou a região a se tornar o centro turístico que é hoje. Em seguida, pretende-se refletir sobre as oportunidades e ameaças que esta atividade trouxe para o patrimônio cultural e natural da região. Para isso, adotou-se como percurso metodológico, essencialmente qualitativo, a consulta de trabalhos e pesquisas que contemplam a RBSE, focando especialmente naqueles que envolvem o contexto turístico da região. Observou-se que a apropriação do território da RBSE pelo turismo é uma realidade cheia de conflitos e desafios.

Palavras-chave: Turismo; História; Patrimônio; Reserva da Biosfera; Serra do Espinhaço

Resumen:

La Reserva de la Biosfera de la Sierra de Espinhaço (RBSE), *locus* de reflexión de este estudio, es la plataforma geográfica de un proceso que abarca una zona rica en biodiversidad y en patrimonio histórico y cultural. Por lo tanto, es una zona de gran valor ecológico, social, cultural

y económica. Desde su fundación en 2005, se ha considerado una de las regiones más ricas y diversas del mundo. A partir del contexto presentado, el área de la Sierra de Espinhaço se ha convertido en un importante destino para los turistas. Sin embargo, numerosos estudios han demostrado que el patrimonio ambiental de la región ha sido sistemáticamente amenazado por los profesionales y promotores de turismo. En una visión más amplia de lo que sucede en la región en términos de la presión turística ejercida, hay un patrón de transformación socio-espacial observado en diferentes espacios y comunidades a lo largo del tiempo. Así, en un ejercicio de comprensión de cómo se desarrolla la actividad turística en RBSE, este artículo examina cómo los aspectos históricos y geográficos de la Reserva fueron apropiados y ayudaron a la región a convertirse en el centro turístico que es hoy. A continuación, se pretende reflexionar sobre las oportunidades y amenazas que esta actividad ha traído para el patrimonio cultural y natural de la región. Para ello, se adoptó como senda metodológica, -fundamentalmente cualitativa-, la consulta de trabajos e investigaciones que contemplan la RBSE, centrándose especialmente, en los relacionados con el contexto turístico de la región. Se observó que la apropiación del territorio de RBSE por el turismo es una realidad cargada de conflictos y desafíos.

Palabras Clave: Turismo; Historia; Património; Reserva de la Biosfera; Sierra de Espinhaço

1. Introduction

Fully inserted within the limits of Minas Gerais, the Biosphere Reserve of Espinhaço (RBSE) is the *locus* of reflection of this article. It is the geographic platform of a process that encompasses an area rich in biodiversity and a significant historical and cultural heritage. It is, therefore, an area of high ecological, social, cultural and economic importance.

The Biosphere Reserve is a conservation tool, being formed by a set of representative ecosystems of the region in which it operates. According to the United Nations Educational, Scientific and Cultural Organization (UNESCO, 2016), the reserves strives to: (1) contribute to the conservation of biodiversity, including ecosystems, species and varieties, as well as the landscapes where they are located; (2) foster economic development that is sustainable in a socio-cultural and ecological point of view; (3) create logistical conditions for the execution of demonstration projects for the production and dissemination of knowledge, as well as the environmental education, scientific research and monitoring in conservation and sustainable

development fields²⁰⁸. Its management, according to the Ministry of Environment, is a joint work of government and non-governmental organizations as well as research centres. This integration between different agencies has as main focus the search for meeting the needs of its inhabitants in an attempt to ensure good Man-Nature harmony.

Created by UNESCO, the Biosphere Reserves have their support in the programme "Man and the Biosphere" (MAB), a project that is part of the United Nations Environment Programme (UNEP), the International Union for Conservation of Nature (IUCN), and various international development agencies.

The Biosphere Reserve of Espinhaço, established in 2005, is currently one of the seven biosphere reserves created in Brazil. It is considered one of the richest and most diverse regions of the world. Espinhaço has relevance of water view in Brazil, since it is an important watershed of the Rio Doce's basins and the São Francisco River. Allied to this, ecosystems found there are extremely fragile, with endemic and endangered species, like the rocky fields, for example. In this sense, interest in conservation is justified not only by its biological importance, but also on the importance of conservation of its historic and scenic heritage, and the need to ensure the survival and permanence of its residents.

Before this whole scenario and taking advantage of the physical and landscape attributes, combined with the remarkable cultural and historical features, the set of Espinhaço eventually became an important pole of tourist destination. However, numerous studies carried out by research groups, including the Integrated Research Group of Espinhaço (GIPE), coordinated by Bernardo Machado Gontijo of the Geography Department, Minas Gerais Federal University (UFMG), have shown that the region's environmental heritage has been systematically threatened by practitioners and tourism promoters. In a broader reading of what is happening in the region in terms of tourist pressure, there is a pattern of socio-spatial transformation observed in different places and communities over time. In Serra do Cipó, for example, which includes the southern portion of Espinhaço, this pattern has been dictated by what primarily was observed in the district of Cardeal Mota, belonging to Santana do Riacho, since it was from this location that other regions of Serra do Cipó were being appropriated by tourism (Gontijo, 2007).

The creation of the Biosphere Reserve of Espinhaço comes in the midst of discussions on conservation alternatives for that territory. The UNESCO seal was supposed to guarantee a

²⁰⁸ The MAB Programme and the Biosphere Reserve of UNESCO, available at: http://www.rbma.org.br/mab/unesco_01_oprograma.asp (consulted on: 16.06.2016).

support for actions aimed at this purpose. However, what is observed is that the seal and the official heritage listing of Serra have much greater effect on its dissemination and promotion than in its preservation.

Thus, in an exercise of understanding of how the tourist activity is occurring in the RBSE, this article seeks to analyse how the historical and geographical aspects of the Reserve were appropriate and helped the region become the tourist hub it is today. Later, it aims to reflect on the opportunities and threats that this activity has brought to the cultural and natural heritage of the region.

2. Methodology

For the elaboration of this article, essentially with a qualitative nature, the methodological choice was to consult works and researches that address the RBSE theme, including the report entitled "First Periodic Review of the Biosphere Reserve of Espinhaço" (Andrade *et al.*, 2015).

The performance of GIPE, which most of the authors are part of, also allowed the construction of this proposal, which includes the data and analysis previously undertaken in the region, specially on the dissertations of Scalco (2009), Barbosa (2011), Braga (2011), Moss (2014) and Souza (2014), and the theses of Gontijo (2003), Morais (2014), Ribas (2015) and Santos (2016).

The "Regional Strategic Plan around Major Mining Projects of the Middle Espinhaço" conducted in 2013 by the Centre for Development and Regional Planning (CEDEPLAR) of the UFMG, which also addressed the study area, served as the basis for understanding the geographical and the historical features of the RBSE associated with the promotion of regional tourism. The secondary researches conducted by the Tourism State Department of Minas Gerais (SETUR-MG) regarding the demand profile of tourists visiting the region were also considered when characterising the tourism in part of the area lying within the territory of RBSE.

3. The Biosphere Reserve of Serra do Espinhaço

Serra do Espinhaço was recognised as a Biosphere Reserve in June 27th, 2005, to be an extremely important watershed in Central Brazil, having species of endemic flora and fauna and for being one of the largest formations of grasslands in Brazil. In addition to that, Espinhaço is considered one of the richest and most diverse regions of the world. For Andrade *et al* (2015),

with the recognition of the Reserve by UNESCO, the name “Serra do Espinhaço” gained greater notoriety in academic circles, media, governments, and also to the general public.

The RBSE comprises an area of 3.07 million hectares. Its coverage area, according to the Biodiversitas Foundation (2009), begins with the Ouro Preto and Ouro Branco ridges, in the central-south region of the state of Minas Gerais, also reaching the mountains of Caraça, Catas Altas and Barão de Cocais. Near Belo Horizonte are the Serra of Piedade, Moeda, Curral and Cipó. The Serra of Cabral is in the Alto São Francisco region, and Diamantina, Serro and Itambé are located in Alto Jequitinhonha region. The RBSE comprises a total of 94 municipalities²⁰⁹.

According to information provided by the state committee of the RBSE²¹⁰, protecting the RBSE is justified, for example, because the share in Minas Gerais, specially Serra do Cipó, houses 67% of the endangered plants species, which comprises the largest number in Brazil of endemic species of flora and fauna that can be associated with these plants. The “Zoning synthesis of the RBSE” (Figure 2) has a total area of 3.076.457,8 ha, with core zones areas of 204.522,14 ha, buffer zone areas of 1.979.996,65 ha and the area of transition zone of 991.939,01 ha.

On the historical/archaeological point of view, the roads that now cut Serra do Espinhaço began to be drawn about 12000 to 8000 BC by the first inhabitants of the region, ie Negroid people, who were followed by ameridians (Goulart, 2001). The Amerindians, who also had great presence in the Serra, were the second wave of settlement begun around 8000 BC, and left numerous archaeological sites and scattered cave paintings in almost all the region, of which we can highlight the “Grande Abrigo” and the Lapas dos Gentios and Sucupira, in Serra do Cipó. Travelers’ destination since the 18th century, Serra do Espinhaço has strong marks in its landscapes formed from the discovery and settlement process of the region to the present day.

In the eastern edge, as a part of the Atlantic Forest Biome and the Doce River Basin, it was formed the “Caminho do Mato Dentro”, part of the extensive Royal Road. Through this path

²⁰⁹Diogo de Vasconcelos, Dom Joaquim, Engenheiro Navarro, Felício dos Santos, Ferros, Francisco Dumont, Gouveia, Ibirité, Igarapé, Itabira, Acaiaca, Alvinópolis, Alvorada de Minas, Augusto de Lima, Baldim, Barão de Cocais, Barra Longa, Belo Horizonte, Belo Vale, Betim, Bocaiúva, Bom Jesus do Amparo, Brumadinho, Buenópolis, Caeté, Carmésia, Catas Altas, Catas Altas da Noruega, Claro dos Poços, Coluna, Conceição do Mato Dentro, Itabirito, Itamarandiba, Itambé do Mato Dentro, Itatiaiuçu, Itaverava, Jaboticatubas, Jeceaba, Jequitaiá, Joaquim Felício, Lamim, Lassance, Mariana, Mário Campos, Materlândia, Moeda, Monjolos, Morro do Pilar, Nova Lima, Congonhas, Congonhas do Norte, Conselheiro Lafaiete, Contagem, Corinto, Couto de Magalhães de Minas, Curvelo, Datas, Diamantina, Nova União, Olhos D’Água, Ouro Branco, Ouro Preto, Passabém, Piranga, Presidente Juscelino, Presidente Kubitschek, Queluzito, Raposos, Rio Acima, Rio Manso, Rio Piracicaba, Rio Vermelho, Sabará, Sabinópolis, Santa Bárbara, Santa Luzia, Santa Maria de Itabira, Santana de Pirapama, Santana do Riacho, Santana dos Montes, Santo Antônio do Itambé, Santo Antônio do Rio Abaixo, Santo Hipólito, São Brás do Suaçuí, São Gonçalo do Rio Abaixo, São Gonçalo do Rio Preto, São Joaquim de Bicas, São Sebastião do Rio Preto, Sarzedo, Senador Modestino Gonçalves, Serra Azul de Minas, Serro, Taquaraçu de Minas, Várzea da Palma.

²¹⁰ More information available at: <http://rbse-unesco.blogspot.com.br/> (consulted on: 17.02.2016).

has passed the majority of travelers and naturalists²¹¹ of the Post-Joanino period and on the notes of the travelers it was common to mention the beauty of the Serra. The traces of Portuguese architecture still mark the landscape of historical cities on this part of the Serra, being, the path itself, also very representative. In the western portion, where the Cerrado prevails, the softer relief traits are marked by some waterways of São Francisco River Basin. With the indians' decimation, the Afro-American slaves were scattered in various quilombos.

Regarding the settlement of Portuguese origin, the first records, according to the ICMBio (2009), are from the 16th century, when, in search of alternatives to generate resources in the Cologne against sugarcane crisis, Portugal encouraged several expeditions to the interior of Brazil in search of precious metals and stones. The first record is from 1572, when the scout of Sebastião Fernandes Tourinho would have gone through the East edge of Espinhaço, with about 400 men, to make the journey between the captaincies of Bahia and São Paulo.

With the decline of gold and diamonds mining in the late 19th century, the region was gradually falling by the wayside. The lack of passable roads and the difficulty in moving the rough terrain of the Serra worked as attractive only to some former slaves groups that, after the abolition of slavery, migrated to the west edge of the Serra, where they established some villages. The period between the 19th and the 20th centuries was marked not only by economic stagnation, but also by constant territorial rearrangements between the municipalities that form this region. The stagnation was most striking in the West edge, marked mainly by the geographical isolation due to the lack of access, and this is a visible fact in the landscape today.

From a touristic point of view, this activity is highlighted on the RBSE, mainly due to its privileged location regarding the main emitting centres, which present considered reasonable distances from the urban centres and because of the proximity to the Confins Airport (Andrade *et al.*, 2015). Associated with physical and landscape features of the region, the cultural aspects, such as crafts, cooking, literature, music, among others, also contribute to making RBSE a potential area for tourism. Thus, its biological, geomorphological and historical importance justify the adoption of urgent measures for the conservation, development and promotion of the entire mountain complex in question.

²¹¹ Among the naturalists who visited the area it can be highlighted: B. von Spix and Carl Friedrich Philipp von Martius, Johann Jakob von Tschudi, Auguste Saint Hilaire, Peter Lund, Wilhelm Ludwig von Eschwege, Eugenius Warming, Louis Agassiz, Richard Burton, Georg Heinrich von Langsdorff, John Malwe and Johann Baptist Emanuel Pohl.

4. Tourism in the RBSE

Tourism, broadly understood, represents a great potential phenomenon in (re)structuring of areas and, therefore, capable of interfering with the environmental dynamics of a given destination. Said this, it is able to streamline and/or coordinate various economic activities and branches, without, however, omit to reflect society's determinations in which it operates. Said that, it is able to streamline and/or coordinate various economic activities without omitting to reflect society's determinations, that can be characterized as a contradictory, full of conflicts, controversial and uneven society: a result of a reflection of the present historical moment with globalization and/or capitalism and also with a discourse of ecological and sustainable views (O'Connor, 1988).

In the specific context of the tourism developed in the RBSE, 8 of the 45 existing certificated circuits in the state of Minas Gerais are fully within or intersect the area of the Reserve, namely: Serra do Cabral, Diamantes, Guimarães Rosa, Serra do Cipó, Ouro, Veredas do Paraopeba, BH e Vilas and Fazendas of Minas. The touristic elements developed in all circuits and found in the RBSE correspond mainly to the cultural and natural heritage, with the presence of nationally and internationally recognised destinations.

Regarding the cultural attractions, it is possible to highlight all the aspects that include the historical and cultural heritage, as well as great cultural events, which value and promote the tangible and intangible assets of culture, present mainly in the circuits of Diamantes, do Ouro, Guimarães Rosa, Veredas do Paraopeba and Vilas and Fazendas of Minas. It can be mention, in this sense, the presence of traditional communities in the region, as well as a variety of cultural events, such as parties, rural way of life, Baroque culture, crafts and typical cuisine. Despite being recognised specially by the great diversity of natural attractions, the area of the RBSE features, on the other hand, a great number of historical and cultural attractions. Among the historical and cultural attractions in the region, it is considered as with a great turistic potential the following: the history of the municipalities, religious architectural heritage, houses, religious festivals, crafts and local cuisine, music bands and listed items (Noronha *et al.*, 2007). It is noteworthy that the "musealization" of historic and prehistoric archaeological sites is still a challenge with an effort to respect the cultural development of the region, as a challenge and respect for the cultural development of the region (Paula, 2011).

Regarding the natural heritage, due to the high incidence of natural attractions, such as rivers, canyons, waterfalls, mountains, etc, it is notorious the tourist vocation around the landscape aspects of the region, highlighting in this sense the circuits of Serra do Cipó and Serra

do Cabral. Because it houses beautiful natural landscapes in a space marked by the grandeur of the mountains and by the mountainous complex existence, it is possible to identify the predominance of tourism regarding nature, with activities that take advantage of these features, such as ecotourism and adventure tourism. It can be mention the trails and nature walks, adventure sports and contemplation of the region's typical landscaping. Another element that contributes to the shaping of a motivation focused on the contact with nature is the creation and demarcation of several Conservation Units (UC) in the area covering Espinhaço. As an example, we have Serra do Cipó National Park (Parna Cipó) of 33.400 ha, the Federal Environmental Protection Area Morro da Pedreira, as well as other state, municipal and private protected areas scattered throughout the territory of the RBSE.

Among the economic activities, mining and tourism are presented as the two main driving economic development activities in the territory of the RBSE. There are present in this area large companies with high potential for investment as the mining industry, the energy production, forestry, among others. Here we highlight the Royal Road Project, the State Department of Tourism, which since 1999 has the objective to establish itself as a major tourist route of the country and introduced itself as a motivator circuit of the tourist flow in the region (Becker, 2009). Covering more than 1630 km, the Royal Road runs through the states of Minas Gerais, Rio de Janeiro and São Paulo in four main ways, to know: Sabarabuçu, Velho, Novo and Diamantes. Although all paths fit within the space encompassed by the RBSE, as can be seen on the first map (Figure 1), only the paths of Diamantes and Sabarabuçu are entirely within the limits. However, it should be noted that Serra do Espinhaço, for playing the role of major inducer of the official settlement axis in the mineiro territory, especially in the period of greatest mining exploration of gold and diamonds in Brazil, has an intrinsic relation with the existence of the Royal Road. From the point of view of tourism development in the region, for rescuing cultural traditions and enhance the existing natural beauty along its route, the project adds value and contributes to shaping and strengthening the tourist identity of the RBSE.

It is also important to present some quantitative data related to tourist demand visiting the territory encompassed by the RBSE. According to the market study conducted by The Epler Wood International (EWI, 2007) regarding the destination of Serra do Cipó, 125.000 tourists visited the region in 2007. The celebration of the Jubilee that takes place annually in Conceição do Mato Dentro brings a significant number of tourists to the city (about 70.000), was not included in the analysed statistics. The data were calculated using as a basis the hotel offer and camping sites, presenting, at that time, an average occupancy rate of 30%. There was a higher concentration in Santana do Riacho, Jaboticatubas and Conceição do Mato Dentro, the latter

being the only municipality that belongs to the studied region, along with Pilar Morro municipality, that was the least visited. It should be mentioned that there are not consistent and updated data regarding the visitation in the East area of Espinhaço, as well as the destination of Serra do Cipó.

Regarding the profile of tourists visiting the region, according to the demand survey conducted by SETUR-MG, in 2011, it is observed that most of the tourists visiting the circuits of Serra do Cipó and of Diamante, specially the municipalities of Serro (São Gonçalo do Rio das Pedras and Milho Verde districts; 118 interviewed people) and Conceição do Mato Dentro (80 interviewed people), had primary motivation for leisure or touring (54.4% and 80.9%, respectively). Among these tourists, specifically, it was found that in the circuits of Serra do Cipó and Diamantes, ecotourism stood out as the main factor in attracting people to these locations. However, it appears that in the circuit of Serra do Cipó, because of the immense range of natural attractions such as waterfalls, mountains and rivers, as well as carrying out activities regarding the contact with Nature, the proportion of tourists who sought ecotourism as a main motivation is more significant compared with the circuit of Diamantes.

In the case of the latter circuit, it can be noticed an almost equal ratio among those interested in activities focused on eco-tourism (39.4%) and for cultural tourism (35.9%) (Minas Gerais, 2013). The tourist demand for the region's natural attractions reinforces the vocation of the RBSE and its surrounding area to the development of activities related to ecotourism and practices for Nature. On the other hand, attention is drawn to the current context in which this vocation is in conflict in relation to other economic activities in the municipality, in particular the mining activity. In this regard, Becker and Pereira (2011) draw attention to the context in which the mining activity, even though it represents the potential of allocating resources for investment in the consolidation and expansion of core areas of the RBSE, creates, on the other hand, "(...) tensions and conflicts with communities that depends of economic activities related to the traditional use of the territory and recently also linked to tourist use of the transition zone" (Becker and Pereira, 2011: 246). Therefore, the finding of the tourist vocation of the RBSE anchored in natural attractions must be accompanied by conservation of water resources for the maintenance of tourism in the region.

Finally, it is pointed out that by the cultural perspective, the region encompassed by Serra do Espinhaço is characterised by the variety of cultural events, expressed in popular and religious festivals, beliefs and cults of intense religiosity, the simple life of the centennial farms and small rural communities of the ridge (Becker, 2009). Thus, regarding the construction of tourism image bound, greatly, to the existing natural attributes, one must realise that, despite the

potential associated with this “vocation” of the region, the traits and sociocultural characteristics should be considered and strengthened.

5. Reflections on tourism in the RBSE

Geology, relief, water, climate and biota give the RBSE characteristics and landscape features that are now highly valued/sought as a tourist destination. To this “natural package” it can be added the prehistory of the region (very rich and yet to be revealed in all its real dimension²¹²) and, specially, the history of its recent occupation, since the 18th century. This occupation has defined a whole process of urbanization, so unprecedented in the Portuguese colony, on the southern region of the RBSE, where is the so-called Quadrilátero Ferrífero. The colonial occupation also set a single management model, which was the delimitation of the entire northern part of what is now RBSE as an administrative enclave within the colony, in what became known as the demarcation of the Diamantina district²¹³. Elements of this model of occupation were screened by Moss (2014) when she analysed the differences in urban models of three villages located in the RBSE, namely Lavras Novas (near Ouro Preto), Cardeal Mota (in Serra do Cipó) and Milho Verde (between Serro and Diamantina).

Besides the differences between the historic and prehistoric process of occupation, the macroecological differences²¹⁴ and how they have defined and define the current vocations and tourism potential, allow the definition of three tourist sub-regions for the RBSE, namely the Quadrilátero Ferrífero, the south region of Souther Espinhaço (or region of Serra do Cipó) and the northern part of the Southern Espinhaço (or Diamantina region)²¹⁵. In all of them, we can see a mass tourist pressure (totalising in the words of Gontijo and Rego, 2003), which has jeopardise all educational/interpretative, environmental and heritage opportunity window, open because of the creation of the biosphere reserve. Therefore, it can be noticed ecotourism forays into real and profound sense of the term²¹⁶, but in a tenuous, fragmented and spread across the region form, specially in the various conservation units existing there.

²¹² According to Gontijo (2003), Knegt (2015) and Gomes (2014), all of them GIPE researchers.

²¹³ According to an exhaustive study carried out by Lacerda (2014) showing the correlation between the mining culture and tourism in the region.

²¹⁴ According to Gomes, Abreu and Gontijo (2014).

²¹⁵ All the RBSE is inserted in what Saadi (1995) has defined as Southern Espinhaço. The Northern Espinhaço is an extension of the Espinhaço range from northern Diamantina region to the north-central Bahia.

²¹⁶ According to the analysis on Gontijo (2003) and Gontijo (2008) thesis.

The natural and cultural heritage are a unique amalgam when we refer to the RBSE, and it is fully observable in each of its three sub-regions. It is one of the few biosphere reserves on the planet where this correlation can be verified as sharp form – this is perhaps its major tourist differential, remaining to know until which point the tourists who attend this place (in increasing numbers) really know this feature/wealth/potential in order to appreciate it as what it really is.

The region of Quadrilátero Ferrífero attracted thousands of settlers in the 18th century, due to the huge gold deposits present there – the gold was associated with the extracted iron (and extract) today. Cities and small villages that were erected, with all the vigor of the baroque, which then appeared, constitute the national tourist destinations and internationally known. Both Ouro Preto as the Sanctuary of Bom Jesus de Matozinhos de Congonhas do Campo are considered World Heritage Sites. Other villages and cities originated in that time still retain much of their cultural/architectural heritage, all located in the midst of a hilly landscape, rich in waterfalls and even preserved vegetation. According to the GIPE, Scalco (2009) and Murta (2012) evaluated a neighbouring region to Ouro Preto, correlating the mosaic composed by numerous small conservation units present there with tourism and urban pressure exerted by the attractiveness of Ouro Preto.

As for the southern portion of the Southern Espinhaço, it lies at west on the Royal Road and the Atlantic Forest, in the stretch between Quadrilátero Ferrífero and Diamantina, and at east of the cerrado and the karst region of the Middle Rio das Velhas. This sub-region is embraced throughout Serra do Cipó and points to a more sparse occupation model, with many farms at the base of the mountain range and large population voids on the tops. Archaeological sites are abundant and signal to an ancient settlement, whose paths were also driven by the settlers who followed the Royal Road and its derivations. The altitudes are populated by rock, rich fields in endemic and endangered species and constitute a major aquifer recharge area, a factor that defines the occurrence of numerous waterfalls, the main tourist attraction in the region, including there the biggest waterfall of Minas Gerais: the waterfall of Tabuleiro. The tourist pressure there occurs in a scattered way and some bordering urban centres act as tourist influx centres (specially in Cardeal Mota, Conceição do Mato Dentro, Itabira and their districts) ²¹⁷.

The northern portion of the RBSE, on the other hand, corresponds to what was for a long time, during the 18th and the 19th centuries, the Diamantina district. A region with a cultural and architectural baggage among a rich and lush mountainous landscape with several landmarks

²¹⁷ The history, geography and tourism in the region of Serra do Cipó were well analysed by Braga (2011) and its penetration axes were analysed by Ferreira (2010), both GIPE researchers.

that helped define the territory to be controlled by the crown. Such isolation led to the conservation of cultural and natural resources of the region, which today is a factor of great tourist attraction. There are also present the rocky altitudes fields, rich in flowers called evergreens and numerous waterfalls framed by high rocky jetties, including the highest peak of Espinhaço, Pico do Itambé, omnipresent landmark in the region's landscape. The city of Diamantina was also listed as a World Heritage Site and polarises a number of other cities and villages, all harbouring relevant and unique architectural heritage. Barbosa (2011), Morais (2014) and Goulart (2014) developed researches in which the issue of tourism was analysed in some of its interfaces with the districts and conservation units in the region.

As already pointed out, a number of researches conducted under the GIPE signal to the fact that the tourist flow in the RBSE is eminently mass tourism, not concerned to the appreciation/recognition of the rich heritage in which the reserve was recognised in 2005. The dissertation of Moura (2000) is clear on this finding, considering here only the gateway to Serra do Cipó (Gontijo, 2007). Searching another village in the same Serra do Cipó, Gontijo (2003) referred to this tourist inflow as "illusory" in a matter of the term ecotourism began to be increasingly used as a euphemism that masked the provoked anti-ecological pressure for this movement.

One of the territorial organization way that has contributed to minimise the pressure exerted by this mass tourism is the demarcation, creation and institutionalization of Conservation Units (UCs), as can be seen in the second map (Figure 2), specially those with full protection, in which the public use activities (read ecotourism) would take place in an orderly and controlled manner. The very conception of the RBSE predicted the coordinated management of several protected areas on the inside, and the creation of new ones, a fact that has been occurring in a shy way since 2005. What has been observed in practice, however, is that few full protection UCs (especially national, state and municipal natural parks) are properly equipped to receive large flows of tourists. An aggravating factor is that some of these protected areas are neighbouring cities/towns that are also the subject of tourist attraction as historical and cultural heritage treasures they are. The tourist influx to the cities and villages, specially on long weekends and during school holidays, enhances the pressure on the natural attractiveness of the adjacent regions, and most of them are within protected areas.

The difficulties in the effective implementation of many of these UCs lead to intense and uncontrolled flows of tourists, what jeopardises the opportunity of valuing the natural heritage of these protected areas, many of them also with several relics of historic and prehistoric heritage in its facilities. In officially open UCs for public viewing, the problem is minimized, but

not necessarily solved, once several tourists enter the protected areas without the knowledge of visitation control instances.

For example, Ouro Preto and Mariana are neighbours to the State Park (PE) of Itacolomi. Even officially opened, many tourists and nearby residents enter the park area without going through the concierge control. In PE Serra do Rola Moça, south of Belo Horizonte, there is a large flow of tourists moving to neighbouring villages, as well as the invasions, which are frequent, considering those areas adjacent to the urban area of the state capital. At the other end, the PE of Biribiri, which is not officially open, receives a huge flow of tourists coming from the neighbouring Diamantina, and has failed to discipline the high mass pressure. Pico do Itambé, which is located in the eponymous PE, has also received many tourists, despite the UC not be officially open. This problem is repeated in relation to the PEs Ouro Branco (Ouro Branco) and Serra do Intendente (Conceição do Mato Dentro), which have received many tourists, despite the unofficial opening of the same. Regarding the PE Serra do Intendente, it is developing a partnership with the municipality of Conceição do Mato Dentro within since it manages the neighbouring Municipal Natural Park of Tabuleiro, officially opened and that houses the largest waterfall of Minas Gerais, whose visit is increasing. In the National Park (PARNA) of Serra do Cipó and the PE of Rio Preto (in Diamantina region), both officially open and with proper visitation control, tourist pressure is reduced and ends up turning to the neighbouring regions, specially in the case of the Serra do Cipó.

In other protected areas spread across the RBSE, specially other management categories such as environmental protection areas (APAs) and natural monuments (MNs), there is an equal tourist movement. This movement, however, is more difficult to assess, regarding the category of management of its pairs, more fluid in terms of control and fiscalization, although the landscape potential of the RBSE is also verifiable and exploit for tourism. This is what has happened in the APA Morro da Pedreira (which involves Serra do Cipó National Park²¹⁸), the APA Águas Vertentes (involving both PE Pico do Itambé and the State MN Várzea do Lajeado and Serra do Raio²¹⁹) and APA Sul de Belo Horizonte (which involves the PE of Serra do Rola Moça and the Private Natural Heritage Reserve of Sanctuary of Caraça²²⁰).

The significant number of protected areas within the RBSE contrasts with the low asset value of their natural surroundings. The distinguished cultural and architectural assets that feature an

²¹⁸ According to Works of Lopes (2009), Nascimento (2010) and Santos (2016), GIPE's researches.

²¹⁹ According to analysis of Souza (2014) and Abreu (2015), GIPE's researches.

²²⁰ The case of the RPPN of Caraça is emblematic of the heritage amalgam that there occurs significantly, a fact that was analysed by Rodrigues (2014) in his dissertation. Its landscape was analysed by Lima (2013), a GIPE researcher.

unique historic and prehistoric heritage is little perceived in its various details on a mass tourism context. Landscapes are enjoyed without having notion of the historical importance of the same; waterfalls are enjoyed in an intensive and impactful way, without the appreciation and preservation of its springs and waterways. Towns and villages are visited without correlating their stories and heritage with Nature and the landscape in which they live. Lost visitation opportunities to natural attractions are not rare because of misinformed tourists or they are induced to remain in overcrowded urban sites as neighbouring protected areas are relatively empty (a verifiable fact in PE Itacolomi, PE Rio Preto and PARNA Serra do Cipó, all officially open but with visitation data that contrast with the volume of tourists staying in the surrounding towns of Ouro Preto, Diamantina and Cardeal Mota, respectively).

Even considering such missed opportunities, deep ecotourism initiatives and “personal” (also in the sense espoused by Gontijo and Rego, *op.cit.*) are possible and there occur. Opportunities of carrying out long trail journeys are not uncommon, and some routes already have been established, as the tracks of Lapinha to Tabuleiro and from Serra dos Alves to São José da Serra (both in the Serra do Cipó region), from Milho Verde and São Gonçalo do Rio das Pedras to Capivari and from the Itambé Peak to the PE Rio Preto (both in APA Águas Vertentes), in some stretches of the Royal Road near Ouro Preto, Itabira and Conceição do Mato Dentro, and also by the old railway road between Diamantina and Monjolos. Hiking constitutes an excellent immersion mechanism in which every tourist will have the opportunity to learn more about himself and thus be able to be open to know the space around him. If you can not do it, you can stay in remote places, in order to be able to establish this self-connection. There are several of these places in the vast RBSE territory, all interconnected by paths and that can be covered on foot or by any appropriate means of transport. The network of paths and trails of the RBSE is daily traversed by tourists, pilgrims, farmers, traders, extractivists, adventurous, drivers, although sparingly throughout its large territory. Those who travel by these paths are the true guides in the region, those with whom we must rely to learn to value all complexity assets of the RBSE.

Concerning the historical heritage, the lack of interpretation activities, little use and difficulty of access are common to the patrimonies of the RBSE. Even in historic centres listed by UNESCO, Diamantina, Ouro Preto and Congonhas, is common to find tourists wandering amid churches and monuments closed. In the municipalities less visited, this reality is even more present and helps increase the visitation flow that already exists around the destinations already cited as polarizing the flow of visitors to the region. The tourism held in the RBSE not truly acts as adding value to their natural and cultural heritage, once it does not allow the vast majority of

tourists the experience of experiences that integrate this heritage. It is noteworthy, therefore, that the existence of the attractive in isolation is not enough to ensure the development of tourism in these locations, specially if one considers that in the destination of Serra do Cipó, the focus of tourist supply is basically based on to the regional weekend demand, emphasising the waterfalls and the undervaluation of scenic, historical and cultural attractions (Minas Gerais, 2013).

6. Final considerations

The appropriation of the RBSE territory by tourism, as discussed and presented through data and previous reflections, is a reality full of conflicts and challenges. It is notorious the importance of what the environmental, landscape and socio-cultural heritage of the RBSE represents, although from the tourism point of view, the environmental characteristics are the main elements that attract visitors. The presence of numerous protected areas make clear the urgent need to preserve water, environmental and landscape resources of the area, and tourism is an important and inherent part in this process.

Data on the profile of the tourist and the demand for attractive features in the RBSE indicate the need for integration of cultural and environmental aspects that make up the supply of regional tourism. Despite the existence of numerous traits and cultural events of interest throughout the region, its adequate provision for the tourist experience is still limited and undervalued in contrast of natural and cultural attractions.

At the end, it is necessary to point out the context of conflict on the conservation of natural resources and the appropriation of the site by economic activities established in the region, specially mining. The real estate speculation encouraged by the appreciation of some areas for tourism is also a strong agent of impact on the natural and cultural heritage. Ecotourism is pointed out in several studies as a complementary alternative, however, without proper supervision and planning can bring more harm than benefits to the conservation of characteristic biodiversity of the RBSE.

References

- _____ (2008), "Um turismo que se quer sustentável", in OTTONI, C., Serra do Cipó, Sempre Viva.
- Abreu, M. M. de. (2015), *Territorialidade e Pertencimento: o olhar local sobre o Parque Estadual do Pico do Itambé – MG*. Dissertação de Mestrado, Rio de Janeiro, UFRJ.
- Andrade, M. A., Martins, C. S., Domingues, S. A. (org), et al. (2015), *Primeira Revisão Periódica da Reserva da Biosfera da Serra do Espinhaço*. Belo Horizonte, UNESCO.
- Barbosa, M.F.P. (2011), *Turismo e Desenvolvimento como Liberdade em Capivari/Serro (MG): possibilidades, limites e expectativas*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Becker, L. C. (2009), *Tradição e modernidade: o desafio da sustentabilidade do desenvolvimento na Estrada Real*. Tese de Doutorado em Ciência Política, Rio de Janeiro, Instituto Universitário de Pesquisas do Rio de Janeiro.
- Becker, L. C., Pereira, D. C. (2011), "O projeto Minas-Rio e o desafio do desenvolvimento territorial integrado e sustentado: a grande mina em Conceição do Mato Dentro (MG)", in Fernandes, Francisco Rego Chaves; Enriquez, Maria Amélia Rodrigues da Silva; Alamino, Renata de Carvalho Jimenez (eds), *Recursos minerais & sustentabilidade territorial: grandes minas*. Rio de Janeiro, CETEM/MCTI, 1, 163-198.
- Biodiversitas Foundation (2009), *Biota Minas: diagnóstico do conhecimento sobre a biodiversidade no Estado de Minas Gerais*, available at: <http://www.biodiversitas.org.br/index.htm> (consulted on: 11.02.2016).
- Braga, S. de S. (2011), *A Serra do Cipó: A complexidade de uma região moldada pelo Tempo, Turismo e a Geografia*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- CEDEPLAR/UFMG (2013), *Plano Regional Estratégico em torno de Grandes Projetos Minerários no Médio Espinhaço*. Brochura em 5 volumes, Belo Horizonte, FUNDEP.
- EWI (Epler Wood International) (2007), *Estudo de mercado, Relatório preliminar / abril 2007 turismo de natureza na Estrada Real Serra do Cipó (e Carrancas)*, available at: http://www.rmbh.org.br/sites/default/files/PDDI_173.pdf (consulted on: 17.02.2016).
- Ferreira, R. A. (2010), *A Serra do Cipó/MG e seus vetores de penetração turística - um olhar sobre as transformações socioambientais*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Gomes, W.M. (2014), *Territórios Pré-históricos da Cordilheira do Espinhaço*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Gontijo, B. M., Pereira, E. O., Abreu, L. G. A. C. (2015), "As ecorregiões da Reserva da Biosfera da Serra do Espinhaço: elementos para o fortalecimento da conservação da biodiversidade". *Caderno de Geografia, PUC/MG*, 25, 18-33.

- Gontijo, B.M. (2003), *A ilusão do Ecoturismo na Serra do Cipó/MG: o caso de Lapinha*. Tese de Doutorado, Centro de Desenvolvimento Sustentável, Brasília, Universidade de Brasília.
- Gontijo, B.M. (2007), "As portas abertas da serra do Cipó". *Cadernos Manuelzão*, 2(3), Belo Horizonte, 11-17.
- Gontijo, B.M., Rego, J. F. (2011), "Por uma atitude turística pessoalizante", in Faria, I. F. (org), *Turismo: sustentabilidade e novas territorialidades*. Manaus, EDUA, 1-16.
- Goulart, E. M. A. (2001), *Nos ermos e nas brumas da Serra do Espinhaço*. Belo Horizonte, COOPMED.
- ICMBio (Instituto Chico Mendes de Conservação da Biodiversidade) (2009), *Plano de Manejo do Parque Nacional da Serra do Cipó*. Brasília, Governo Federal.
- Knegt, L.M.P. de. (2015), *Indicadores da Paisagem para a Ocorrência de Sítios Arqueológicos na Área Arqueológica de Serra Negra, Face Leste do Espinhaço*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Lacerda, M. de O. (2014), *Paisagem da Terra dos Diamantes: passado e presente a favor de uma reflexão prospectiva*. Tese de Doutorado, Belo Horizonte, UFMG.
- Lima, C.X. de (2013), *Caraça, a porta do céu e seu entorno: o estudo da paisagem para a conservação da biodiversidade*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Lopes, C.G.F. (2009), *Diferença e Conflito: uma perspectiva teórica para análise do fenômeno do turismo a partir das transformações do/no modo de vida dos lapinhenses*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Minas Gerais, Secretaria de Estado de Turismo. Pesquisa de Demanda (2011), *Relatórios por regiões de planejamento*, available at <http://www.turismo.mg.gov.br/dados-do-turismo-mineiro> (consulted on: 20.04.2013).
- Morais, M. S. de. (2014). *A realidade socioambiental imposta às comunidades locais pela criação e implementação dos Parques Estaduais do Biribiri e Rio Preto*. Tese de Doutorado, Belo Horizonte, UFMG.
- Moss, M.C.B. (2014), *Terras Incógnitas do Turismo – Um olhar exploratório sobre o fenômeno urbano, seus desdobramentos e os territórios desconhecidos na Reserva da Biosfera da Serra do Espinhaço: os núcleos urbanos de Lavras Novas, Serra do Cipó e Milho Verde*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Moura, A. M. F. (2000), *Serra do Cipó - MG. Ecoturismo e impactos socioambientais*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Murta, I.B.D. (2012), *Representações sociais do ambiente protegido: estudo multicaso no município de Ouro Preto/MG*. Dissertação de Mestrado, Belo Horizonte, UFMG.

- Nascimento, J.S. do (2010), *Estudo da ecologia da paisagem e biologia da conservação como base para o desenvolvimento e monitoramento de estratégias de conservação, por geoprocessamento e análise multicriterial. Área de Proteção Ambiental Morro da Pedreira- Serra do Cipó/MG*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Noronha, I. O. et al. (org) (2007), *Construção da Agenda 21 local: a comunidade unida planejando o desenvolvimento sustentável*. Belo Horizonte, SENAC.
- O'Connor, J. (1988), "Capitalism, nature, socialism: theoretical introduction", in *Capitalism, Nature, Socialism*. London, 1,(1), 11-38.
- Paula, F. L. (2011), "Sítios arqueológicos em Conceição do Mato Dentro: ancestralidade e presente", in *História Viva*, Belo Horizonte, Anglo Ferrous Brazil, 45-59.
- RBSE (Reserva da Biosfera da Serra do Espinhaço), available at <http://rbse-unesco.blogspot.com.br/> (consulted on: 17.02.2016).
- Ribas, R. P. (2015), *Análise Espacial da Conectividade Estrutural na Paisagem: Uma Aplicação no Mosaico de Áreas Protegidas do Espinhaço: Alto Jequitinhonha - Serra do Cabral*. Tese de Doutorado, Belo Horizonte, UFMG.
- Rodrigues, B.B. (2014), *Efetividade da legislação e gestão do patrimônio natural e cultural: estudo da RPPN Santuário do Caraça*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Saadi, A. (1995), "A geomorfologia da Serra do Espinhaço em Minas Gerais e de suas margens". *Geonomos, Revista de Geociências*, III(1), 41-63.
- Santos, A. S. P. (2016), *Des-ordenamento Territorial e Unidades de Conservação*. Tese de Doutorado, Belo Horizonte, UFMG.
- Scalco, R.F. (2009), *Desafios, paradoxos e complexidade na gestão do Mosaico de Unidades de Conservação da Área de Proteção Ambiental Cachoeira das Andorinhas, Ouro Preto/MG*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- Souza, D.E. de (2014), *Aspectos Socioambientais e a Gestão da APA Estadual das Águas Vertentes - MG*. Dissertação de Mestrado, Belo Horizonte, UFMG.
- The MAB Programme and the Biosphere Reserve of UNESCO*, available at: http://www.rbma.org.br/mab/unesco_01_oprograma.asp (consulted on: 16.06.2016).

Chapter XXVII

What if Documentary Heritage Attracted Tourists? Thoughts on the Potential for Tourism of Historical Libraries and Archives

What if Documentary Heritage Attracted Tourists? Thoughts on the Potential for Tourism of Historical Libraries and Archives

GILBERTO CORALEJO MOITEIRO^{221 222}

Abstract:

Socially speaking, historical libraries and archives above all are linked to scientific research. Only rarely are they regarded as venues for leisure and tourism. Unlike monuments and museums, historical libraries and archives are usually perceived as repositories of written documents from the past. They are typically deemed of interest only to those looking for materials to support their interests in history. However, some of those institutions have met with success in society by developing programmes and activities that do not cater only for their usual patrons, but to other user groups too, targeting both formal and non-formal educational contexts. The motivation for the latter is also rooted in entertainment.

This paper offers some reflections on the potential of documentary heritage for tourism. It singles out the values ascribed to historical documents by contemporary societies throughout the process of classifying those documents as heritage; it highlights the procedures employed by the institutions responsible for preserving documentary heritage, so as to make the collections in their custody more visible; lastly, it underlines UNESCO's role in defining documentary heritage policies and the value ascribed to documents as cultural assets. The paper will mostly draw from examples in the Lusosphere.

Keywords: Documentary Heritage; Historical Libraries and Archives; Cultural Tourism; UNESCO

Resumo:

Nas representações sociais, as bibliotecas e arquivos históricos estão primordialmente associados à investigação científica. Estes equipamentos culturais só excepcionalmente são vistos como lugares privilegiados de visita em contexto de lazer e turismo. Ao contrário daquilo que

²²¹ Politechnic Institute of Leiria and Institute of Medieval Studies (FCSH-UNL), gilberto.moiteiro@ipleiria.pt

²²² This work has been financially supported by the Institute for Medieval Studies of the Nova University of Lisbon in the scope of its strategic project UID/HIS/00749/2013.

sucedem em relação aos monumentos e aos museus, as bibliotecas e arquivos históricos tendem a ser percebidos como repositórios de documentos escritos do passado, que interessam fundamentalmente a investigadores em busca de materiais capazes de satisfazer o seu interesse historiográfico. Há, no entanto, casos que revelam o sucesso social destas instituições, quando investem no desenvolvimento de programas e atividades destinados não apenas aos seus utentes habituais, como a públicos alternativos, quer estes se situem em âmbitos escolares, quer em contextos educativos não formais, motivados, também, por razões de ordem recreativa.

Neste texto, reflete-se acerca das potencialidades do uso turístico do património documental. Serão identificados os valores que as sociedades contemporâneas têm vindo a atribuir ao documento histórico no decurso do seu processo de patrimonialização; destacar-se-ão os mecanismos adotados pelas instituições responsáveis pela salvaguarda da herança documental com vista à difusão social das coleções que têm à sua guarda; sublinhar-se-á, finalmente, o papel da UNESCO na definição de políticas e na visibilidade concedida a este tipo de bem cultural à escala global. O mundo lusófono constituirá, nesta perspetiva, o espaço de observação privilegiado.

Palavras-chave: Património Documental; Bibliotecas e Arquivos Históricos; Turismo Cultural; UNESCO

Resumen:

En las representaciones sociales, las bibliotecas y los archivos están asociados principalmente con la investigación científica. Estas instalaciones culturales sólo excepcionalmente son vistas como el privilegio de visitar lugares en el contexto del ocio y el turismo. Al contrario de lo que ocurre en relación a los monumentos y museos, bibliotecas y archivos históricos tienden a ser percibidas como repositorios de documentos escritos del pasado con fundamental interés para los investigadores que buscan materiales capaces de satisfacer su interés historiográfico. Existen casos que revelan el éxito social de estas instituciones cuando invierten en el desarrollo de programas y actividades, - no sólo para sus visitantes regulares sino también para el público alternativo-, si éstos se encuentran en zonas escolares o en los centros educativos no formales, motivados, también, por razones de orden recreativo.

Este texto refleja el potencial del uso turístico del patrimonio documental. Los valores que las sociedades contemporâneas han sido atribuidos al documento histórico en el curso del proceso de patrimonialización serán identificados; se destacan los mecanismos adoptados por las instituciones responsables de la salvaguarda del patrimonio documental para la difusión social de las colecciones que tienen bajo su custodia; señalado en última instancia, el papel de la

UNESCO en la elaboración de políticas y la visibilidad dada a este tipo de bienes culturales a escala mundial. El mundo de habla portuguesa será, en esta perspectiva, el punto de vista.

Palabras Clave: Patrimonio Documental; Bibliotecas y Archivos Históricos; Turismo Cultural; UNESCO

1. Introduction

Among material heritage, documentary heritage may very well be the least eye-catching in terms of the general public. In Portuguese-speaking countries, searching the webpages of official bodies linked to tourism proves as much. Historical libraries and archives are seldom presented as attractions for cultural tourists. There are exceptions, of course, but even those are typically more valued for their architectural quality than for the documents harboured inside. However, other forms of heritage have deserved closer attention from public administration and agents in the tourism industry. Museums, monuments, archaeological sites and even events that celebrate intangible cultural heritage have all been used as a means to attract visitors. This prompts a question: why are historical libraries and archives overlooked in such a way by both public and private agents? It is beyond the scope of this paper to provide an answer to this highly complex issue. Rather, the paper will hypothesise that a deeply-rooted social and cultural framework has confined historical archives and libraries to a preservation role, making them appealing mainly to those with an interest in history.

Public institutions entrusted with cultural heritage mostly work individually, restricting themselves to familiar activities. They have struggled to apply principles of cooperation and policy coordination (Nabais, 2004: 102-105 and 110). This results from how the institutions responsible for heritage have developed, as well as from the factors modelling the cultural heritage management system as a result of that evolution. Since their own creation, the institutions involved in the preservation of heritage have gone down the path of scientific specialization. This has led to institutional individualism and to a conceptional break-up of heritage in its several facets. Eventually, this has left an indelible mark on societies, as these became aware of the division between cultural assets according to the criteria defined by successive public policies as part of a classification process. The consequences of this approach can be seen, for instance, in the way agents from the tourism industry usually perceive these institutions by ignoring them. In spite of the continuous restructuring over the last decades of public administration concerning heritage, the tendency to impose internal boundaries has remained unchanged. Institutions in charge of architecture, archaeology, museums and

immaterial heritage were kept separate from those responsible for archives and books.²²³ This division has had an impact on the types of approach taken by such agencies to the consumer public, in particular that seeking cultural heritage in a context of leisure travel. The first group of institutions is able to engage their public naturally and to expand its audience. Libraries and archives, however, seem to continue to cater almost exclusively to their traditional audience (researchers, above all), much like the first group did in the past.²²⁴

Social demand for institutions responsible for the preservation of documentary heritage reveals the same type of segmentation. From the viewpoint of what might be termed the "educational and recreational approach from the general public", priority is given to architectural and artistic forms of heritage. Such preference is similar to the long-standing supremacy of material and scholarly heritage – inextricably linked to the elites – over immaterial heritage of popular origins, such as oral tradition.²²⁵ There is a good reason to examine this issue in the context of tourism, especially considering the principles of cultural democratisation and universal access to cultural assets (Nabais, 2004: 88-99). Another factor to consider is the broadening of resources and products for the social and cultural enrichment of societies and, as a consequence, improvements in the quality of tourist sites in a sustainable fashion.

This paper will argue for the potential of documentary heritage in the tourism industry. It will single out the values which contemporary societies have ascribed to historical documents over the years; it will highlight the institutional procedures taken to preserve and improve the visibility of the documentary heritage in their custody; and it will underline the role of UNESCO in policy–definition regarding documentary heritage at a global scale.

²²³ In the United Kingdom, museums and archives are supervised by the same organisation, the *Museums, Libraries and Archives Council*. In Portugal, however, the approach to heritage management is quite different: the main museums, monuments and archaeological sites are supervised by the *Direção-Geral do Património Cultural* (DGPC) (Directorate-General for Cultural Heritage), while libraries and archives are managed by a different entity: the *Direção-Geral do Livro, dos Arquivos e das Bibliotecas* (Directorate-General for Books, Archives and Libraries). Both these agencies are part of the Ministry of Culture. In Brazil, the functions of the *Instituto do Patrimônio Histórico e Artístico* (Institute for Historical and Artistic Heritage) are similar to those of the DGPC (its Portuguese counterpart); bibliographical and documentary heritage are managed by the *Biblioteca Nacional* (National Library) foundation, both of which work under the Ministry of Culture; the same does not apply, however, to documentary heritage, which is overseen by the Ministry of Justice, via *Arquivo Nacional* (National Archive).

²²⁴ These assumptions should, however, be put into context. They are mainly supported on a general perception, and exceptions do occur, singular institutions belonging to one group or the other which go against the norm, as will be explored henceforth.

²²⁵ Over the last few years, the introduction of political measures has contributed to changing this paradigm. An effort has been made at a global scale to reinforce local identities. See Anico and Peralta (2004), Anico (2005), Peralta and Anico (2006).

2. Documentary heritage: concept and value

The concept of “heritage” has evolved over time. It is a social, geographic and historical construct, dependent on context. As such, objects now regarded as “heritage”, “legacy” or a “cultural asset” did not always belong to the same semantic group. The most direct links to the current concept of heritage come from the 17th and 18th centuries, and the scientific revolution in particular. As they lasted until the 19th century, earlier traces are not to be ignored, despite their lack of widespread social recognition.

An offshoot of 15th and 16th centuries humanism, the transformation of Man’s understanding of Nature in the 17th and 18th centuries has influenced the understanding of artifacts from the past greatly, as well as the methods employed by early historians. Such “antiquarians” (Choay 2000: 55-84) believed that documentary value of material culture was higher than that of narrative texts, so they carried out research on material remains from Classical Antiquity, as well as on national (Christian) antiquities, narrative record, undertook research of material remains from Classical Antiquity, as well as national (Christian) antiquities. They strove to catalogue, collect, compare and classify, especialising their research interests. For Ketelaar (2007), it was within this historical context that archives were first regarded as privileged containers of memory and culture. It was in the 17th century that the concept of administrative archive – as a living, utilitarian instrument – was replaced for that of the historical archive. Emphasis was then placed on the olden nature of records. This type of archive was placed within a new conceptual and behavioural perspective: the notions of “treasure”, “relic” and “testimony” or “evidence”, which must be preserved, bequeathed and promoted. The latter need was met by the publishing of documents supporting the historical foundations of Ancien Régime institutions: monarchy, aristocracy, religious and ecclesiastical institutes, cities and universities.

The trend stayed on during the enlightenment as an attempt to modernise society as a whole and later had an influence on both liberal and absolutist regimes. New forms of political, economic, social and cultural reasoning, which shared a common vision of progress, would infuse in antiquities a fresh significance, connected to the archetypes of “sublime”, “beautiful” and a “product of intelligence”. In addition to their traditional historical value, the enlightenment credited antiquities with artistic value. They began to be enjoyed for the aesthetic pleasure produced, each object being considered to be a unique, irreplaceable object. In consequence of

this approach, national museums were opened and made available to the audience.²²⁶ They were intended to educate, democratise culture and, soon enough, to provide leisure opportunities (Choay, 2000: 69-73). Those days of significant transformation also witnessed the advancement of two other institutions focused on the study of the past: libraries and archives (Malheiro da Silva, Ribeiro, Ramos and Real, 2002:100; Hedstrom and King, 2003). The two had much in common in terms of goals and the materials they were concerned with. On the emergence of national archives and libraries,²²⁷ an immediate separation (based on now scientifically questionable criteria) became clear: archives were given the custody of unpublished work, mainly manuscripts, while libraries provided access to published material. In spite of their distinct goals – cultural interest and everyday use – both archives and libraries would come to house archival collections (Hedstrom and King, 2003).

There was more than promoting science and education in the agenda behind the opening of countless national and regional cultural centres. Political and social concerns were also at stake. The ideals of liberalism, buttressed on the enlightenment and spawned by revolution, were infused with nationalistic and romantic influences that held the cultural assets of the past as material and symbolic instruments. These were integrated in the development of national identities and stimulated intellectual and material development. Industrialization and the notion of progress, so dear to liberals, deeply enhanced distance in time from such objects. The romantic movement was, at the heart of this project, glorifying those historical periods closest to the origins and greatness of nations. Surviving documents from those ages were therefore highlighted. The whole process resulted in the concept of heritage as it is understood to our day (Choay, 2000: 85-127).

Acquisitions of documentary collections were carried out by the liberals continuously. Archives were bought, donated or confiscated to be nationalised. From then on, the most

²²⁶ Examples include the British Museum, inaugurated in London, in 1753, the Musée du Louvre, Paris (1793), the Smithsonian Institution, Washington (1846) and the collections giving birth, from the 1830s onwards, to some of the museums located in the Museumsinsel, in Berlin, starting with the completion of the Altes Museum. In Portugal, the most notable museums include the Museu Nacional Soares dos Reis (Soares dos Reis National Museum), in Oporto (1836), the Museu Nacional de Arte Antiga (National Museum of Ancient Art) in 1884, and the Museu Nacional de Arqueologia (National Archaeology Museum), in 1893, both in Lisbon. In Brazil, the Museu Nacional de Belas Artes (National Museum of Fine Arts), in Rio de Janeiro (1837), and the Museu Paulista (Paulista Museum), in S. Paulo (1895).

²²⁷ Other international examples include the Bibliothèque et Archives Nationales de France (French National Library and Archives), in Paris (1789), the Library of Congress, in Washington (1800), and the Public Record Office, in London (1838). In Portugal, the Torre do Tombo National Archive, which served as the ancient royal archive, was transferred in 1755 from the Castelo de S. Jorge (St George Castle) to the Mosteiro de S. Bento (Monastery of St Benedict), where it stood until 1990, at which time it was relocated to the Cidade Universitária area, in Lisbon. The Biblioteca Nacional de Portugal (Portuguese National Library) was founded in 1796 as the Real Biblioteca Pública da Corte (Royal Public Library of the Court). In Brazil, the Arquivo Nacional do Brasil (National Archive of Brazil), in Rio de Janeiro, was inaugurated in 1838, while the Biblioteca Nacional (National Library) had been installed in the same city in 1810.

important public archives and libraries became responsible for incorporating, organising and preserving archival and published documents. Additionally, they were intended to promote public access. According to information scientists, the labour of historians would eventually lead to the current paradigm for custody and heritage (Ribeiro, 2001). These depositories of written documents became true laboratories of historical investigation. Deeply influenced by the romantic, historicist and positivist ideals, research required materials made available by the state and under its supervision, while also catering for the public administration's needs. Such archives had previously been preserved by institutions that had been producing records since the Middle Ages, sometimes continuously. Records were obtained from both public and private domains, including then-extinct religious institutions and noblemen persecuted by the new regime.

As observed from that cultural framework, from that moment onwards, national heritage came under the supervision of historical libraries and archives. Materials were organised into funds and collections recognised with historic, aesthetic, emotional and financial value. Like what happened with museums, objects preserved by librarians and archivists were perceived as cultural traits, an achievement of civilization on behalf of historical knowledge. According to Malheiro da Silva, documentary heritage was infused with new meanings and roles in a context that was both technical (sorting out the materials) and conservationist, focusing on material preservation and legal protection. This came as an attempt to (re)create, (re)enact and (re)present the past (Malheiro da Silva 2006: 37-41). Yet another distinction between historical records emerged, the way in which records were presented to the users. They were split in two groups: documents and monuments (Le Goff 2000: 103-106). Assets in the first group were selected by historians as their sources, that is pieces of evidence used for purposes of historiographical work. Those in the second group were perceived as signs of a past legacy, materialised in media and memory. While documents tend to present themselves as indisputable, objective facts, monuments are intended to commemorate something, and therefore aimed at enhancing social memory. During the 19th century, historical records consisted of these two layers: document and monument. Ancient texts were exalted not only for their documentary value, but also for their ability to overcome the passing of time. They reached closer to those who had produced and left their imprint on them – not as phantoms, but as proof of an actual act of communication between human beings (Malheiro da Silva, 2006: 50-51; Taylor, 1982-83: 122-123). The value(s) placed by contemporary societies on documentary heritage can be found in this web of meaning.

The axiomatic approach to heritage of our day is clear from national legislations. In tandem with the law itself, the criteria applied to inventorying and classifying cultural assets can be discerned. A sign of the inability of governments to preserve, manage and provide access to their entire heritage, legislation reflects the dominant meanings, attributes and values within society. The existing legislation mentions "archival and bibliographic heritage", instead of "documentary heritage". Still, Law 107/2001, setting out the framework for the preservation and valuation of cultural heritage policy,²²⁸ determined the following:

All culturally relevant archives created by Portuguese entities (are the object of this Law). An archive is defined as an organic set of documents, regardless of date, form and material support, whether produced or received by an individual or collective entity, public or private, in the course of their activity. These documents are preserved as sources of evidence or information. The category also includes inorganic document sets, such as factitious collections – sets of records artificially compiled according to various criteria, such as the mode of acquisition, their subject matter, psysical support or document type (art. 8o).

This law further determined that "bibliographical specimens, collections and funds in the ownership of public collective entities, regardless of their production or collection date, such as all literary collections" are to be considered bibliographical heritage (art. 85). Bibliographical heritage owned by private entities was not excluded from this bill. For classification purposes, it singles out manuscripts of outstanding importance, rare prints, autographs and documents showcasing the work of important figures in literature, art and science. The same applies to collections compiled by authors as well as third parties.

The diversity of objects that can fall in the category of "documentary heritage" is important, first of all in view of the value ascribed to them. Indeed, such value is the same of modern societies regarding all other forms of cultural heritage. Once again, law has systematised this distinction. Article 17 of the Portuguese Cultural Heritage Law sets down the criteria for the inventory and classification of cultural assets. Among those, the following are most adequate for the type of heritage that concerns us: the matrix nature of the asset; the genius of its creator; the relevance of the asset as a symbol or religious testimony; its interest as remarkable evidence of past experiences or facts; its intrinsic aesthetic, technical or material value; and its importance from a historical or scientific standpoint. Such criteria result from cultural, artistic, evidential,

²²⁸ This bill is also known as the Portuguese Cultural Heritage Law.

educational and scientific valuation. Still, an analysis of the bill lays further attributes of heritage assets, which bear relation to those mentioned. They include the following: memory value, age, authenticity, originality, rarity, singularity and exemplarity (art. 2). From the legislation also stands out the idea of a "shared cultural identity of the nation and its regional and local communities", which is intended to strengthen awareness of a people's historical participation in transnational cultural phenomena (art. 12). National identity as a value – not to be mistaken with nationalism – when integrated in a global framework of humanism, gives rise to a final value. This is of an economic nature and is directly connected to development. It should not be taken as strictly financial – as sometimes happens in politics – but as pertaining to the development of society as a whole. Libraries and historical archives are resources that would otherwise be wasted, and their role should not be discarded.²²⁹

3. Between culture and economy: horizons for cooperation

The values aforementioned are not exclusive to Portuguese law, nor even to the laws of western societies. They have been applied increasingly on a global scale. Appreciation for documental heritage may only occur given this understanding. Historical libraries and archives, on one hand, and public and private tour operators, on the other, cannot but consider this broader valuation approach. It provides an opportunity for accomplishing their missions through common platforms of understanding and taking better advantage of such global values.

Scotland is a recent yet perfect example of this potential partnership. *VisitScotland* directed a cultural tourism project called *Ancestral Tourism Initiative*. This involved several institutions with the goal of encouraging people of Scottish descent, most of them living in the USA, to return to their "homeland". Public as well as private institutions were involved, requiring the cooperation of national, regional and local archives, the assistance of a genealogy centre and the services of consultants specialised in library and archive research.²³⁰ The notion of "homecoming" was key for the project. On one hand, the campaign capitalised on the nationalism forged during the 19th century.²³¹ Its deepest roots lay in the highlander culture and its key symbol, the kilt,

²²⁹ For more information on the values ascribed to documental heritage, see Ivo Castro (1999-2000), Françoise Choay (2000), Josep Ballart (2002), Nascimento (2004-2005) and the essay by Elaine S. M. Penn (2014) on the axiology of archives in the context of archival theory and practice.

²³⁰ The project, which started in 2002, is still part of *VisitScotland's* strategy for the promotion of the country as a travel destination, as per their official website *VisitScotland – Scotland's National Tourist Organisation* (<https://www.visitscotland.com/see-do/research-your-ancestry/>) (accessed January 2016). The website includes a link to *Ancestry*, which provides users with a vast array of information, helping them to research their genealogy.

²³¹ On the development of Scottish traditions, see Trevor-Roper (2008).

associated the individual to a given clan. On the other hand, the campaign fed upon the sense of a dispersed community's diaspora. This focus on heritage encouraged strewn Scottish descendants to reunite with their origins. This they did by engaging, first-hand, with the historical landscapes of old Scotland, its ancient castles, musical traditions and, last but definitely not least, the attire of the old clans, thus completing the historical imagery. Archives played a major role in this, supporting visitors in their discovery. Documents proved ancestry provided a legitimate experience and combined physical document with the reader's perception and anticipation of it (Little 2007).

The Anglo-Saxon world, particularly the United Kingdom, has been much more effective than Portuguese-speaking countries at acknowledging the relevance of archives for social and economic development. In the United Kingdom, the entity which oversees museums, libraries and archives has promoted a number of studies in order to assess the impact of those institutions. The following is based on those studies and aims to establish the potential of historical libraries and archives for tourism.²³²

Every report analysed reveals an attempt to understand the impact of "memory institutions" from social and economic viewpoints. The social viewpoint comes in hand with the development of skills by school-age children as well as adults, in both formal and non-formal learning scenarios (Hooper-Greenhill, 2004). The economic viewpoint relates to the tourism system. Nevertheless, the two approaches intersect. Likewise, all reports confirm the scarcity of studies on the economic dimension of libraries and historical archives, while acknowledging the seminal role of the Scottish project, considered to be an excellent starting point for similar undertakings.

Norgrove and Mirchandani (2007) state that archival collections appear in three types of tourism: ancestral tourism; the promotion of "people, places and events"; and more generically in the framework of heritage-related tourism, contextualising both rural and urban destinations. Archival institutions never rely upon their own initiative, rather they depend on tourism industry agents (national and regional travel agencies and operators), combined as public-private partnerships. Projects currently underway show that the entities in charge of documental heritage do not – and will not likely – actively drive heritage tourism. However, given proper planning and professional support, there is significant promise in terms of developing markets with growth potential. From the cases analysed, there is a capacity to attract international

²³² Compiled between 2002 and 2009, these reports had a regional (East Midlands, South East, North East and Yorkshire) and nationwide focus and were commissioned to several firms and universities. They are freely available at The National Archives website (www.nationalarchives.gov.uk/archives-sector/research-reports.htm) (accessed January 2016). See Horton and Spence (2006), Norgrove and Mirchandani (2007), Tim *et al.* (2008), Taylor, Harrower, Mirchandani and Norgrove (2009) and *Tourism Strategy Scoping Project* (2009).

tourists, beyond the domestic market. This is particularly the case with visitors from countries that share a historical, linguistic and cultural relation.

These reports also foresee the possibility of archives providing textual and visual materials from their collections for marketing purposes. These would be aimed at a wide range of consumers interested not only in their own family history, but also in the history of important people in politics, science, literature, the arts, economics or religion. Such things as book collections, personal libraries, tools for intellectual labour and letter exchanges would thus be made relevant in that sense. In a similar way, documents can lay bare earlier stages of development of locations, landscapes, historical events, institutions or languages and dialects. Products more likely to be developed in this context include tourist routes, circuits and itineraries, as well as guided and self-guided themed visits, often as part of a travel package.

Authors have acknowledged that the institutions in charge of documentary heritage are underrepresented in travel packages for tourists at all levels, from onsite to online. Online resources could be developed in the way of reproducing digital copies of documents, hosting exhibitions and selling merchandise articles adapted to several customer groups.

Libraries and archives in Portuguese-speaking countries already employ some of these strategies. This can be seen on their websites. However, those websites are not designed to attract casual and local visitors, even less calling attention of tourists from abroad. This much can be inferred from the communication channels of national and regional travel agencies and travel operators, including local cultural agendas. These often miss out certain activities promoted by libraries and archives. The information directly communicated by such institutions regards essentially temporary displays, virtual exhibits and visits, conferences, the publication of catalogues, document reproductions in various media and support services for genealogy researchers.²³³

4. From local to global: the heritage of nations in the *Memory of the World*

Nations protect their heritage by resorting to the appropriate legal tools. Most often, they record cultural assets by identifying, characterising and registering them systematically. Assets in turn can be classified as being of particular cultural relevance, according to a hierarchy of

²³³ On the valuation strategies recommended for custodians of family archives, whose numbers have increased dramatically in Portugal over the last few years, see Sousa (2014).

importance.²³⁴ Much like what happens at a national level, the United Nations Educational, Scientific and Cultural Organization (UNESCO) enforce internationally adopted legal mechanisms of protection. Examples include the establishment of a *World Heritage* list (1972) and more recently – with the goal of identifying and safekeeping documentary heritage of global relevance – the *Memory of the World*. The programme was created in 1992 out of concerns with the damage inflicted upon historical documents, whether natural or man-made. It aims to preserve documentary heritage of global relevance by resorting to the best available practices. Its goals are to provide easier access to heritage, specially via modern technology, and to raise awareness worldwide of its importance, using the adequate means for promotion and valuation. The criteria defined for the inclusion of this type of documentary heritage in the UNESCO register include: authenticity, singularity, rarity, value in the context of world history – considering the time and place of production, the peoples and theme represented – as well as the risk of loss and the existence of an adequated management plan for conservation (Edmondson 2002). The documentary heritage registered in the *Memory of the World* list, effectively initiated in 1997, already includes 347 items. Between 1997 and 2015, new registers have now come to an average of 18, yearly. However, the decisions made by the committee responsible are published only every two years.²³⁵

It is worth looking at the Portuguese language assets in this list (see Table 1). The following numbers do not correspond to the actual number of registered assets, since some stand for registrations filed by more than one country, sometimes from different continents. The roots of this lay in the processes of colonisation, so the same cultural asset may well appear twice in different regions of the globe, or perhaps as a duplicate in the same zone.²³⁶ For example, the Treaty of Tordesillas, signed by Portugal and Spain, is included twice in the region “Europe and North America”. The Ndembu Archives are shared by Portugal and Angola and thus included in “Europe and North America” as well as “Africa”.

²³⁴ Portuguese Cultural Heritage Law, arts 16, 18 and 19.

²³⁵ According to data on the *Memory of the World* website (<http://www.unesco.org/new/en/communication-and-information/flagship-project-activities/memory-of-the-world/register/>) (accessed January 2016).

²³⁶ The concept and scope of the geographical regions identified in the following table are as in the UNESCO programme.

Region	Total	Lusosphere
Africa	19	1
Arab States	9	----
Asia and the Pacific	91	1
Europe and North America	213	7
Latin America and the Caribbean	74	6
	406	15

Table 1. Portuguese-speaking records in Memory of the World

Source: UNESCO – Memory of the World

The *Memory of the World* register includes but a few documentary heritage assets in the Portuguese language.²³⁷ These are mostly examples of the Portuguese-speaking peoples' contributions to an intercontinental linguistic community. They also emphasise the innovative character of technical and political achievements. Worth mentioning are indications of diplomatic relations and cultural exchanges between peoples for Europe, Africa, Asia and South America from the 15th century onwards. Included are documents portraying Iberian medieval culture, as well as everyday affairs, political culture, military conflicts, dictatorial regimes, autonomist movements and architecture from the 19th and 20th centuries (see Table 2).

Year	Title	Countries
2003	Photographic collection left to the National Library of Brazil by Emperor Pedro II, in 1891	Brazil
2005	Letter from Pêro Vaz de Caminha to King Manuel I about the discovery of Brazil, in 1500	Portugal
2007	Treaty of Tordesillas (1497)	Portugal and Spain
2007	Chronological Corpus, diplomatic collection, 15th to the 17th century	Portugal
2011	Ndembu Archives, 17th to the 20th century	Angola and Portugal
2011	Dutch West India Company Archives, 17th century	Brazil, Netherlands and others
2011	Information and counter-information during the military dictatorship in Brazil, 1964-1985	Brazil
2011	Reports from the first flight across the South Atlantic Ocean (Lisbon - Rio de Janeiro) made by Gago Coutinho and Sacadura Cabral, 1922	Portugal
2013	Max Stahl's audiovisual collection on the inception of East Timor	East Timor

²³⁷ About 4 per cent, including the quantification issues aforementioned.

2013	Report on Vasco da Gama's voyage to India, 1497-1499	Portugal
2013	The Oscar Niemeyer's archive	Brazil
2013	Documentation on the Pedro II's journeys, Emperor of Brazil, 1876	Brazil
2015	Medieval illuminated manuscripts and handwritten fragments representing the textual transmission of the <i>Commentary to the Apocalypse</i> , attr. the monk Beatus of Liébana, second half of the 8th century	Portugal and Spain
2015	Iconographic and cartographic representations of the River Plata during the War of the Triple Alliance, 1864-1870	Brazil, Uruguay, Paraguay and Argentina

Table 2. Memory of the World contributions from the Lusosphere

Source: UNESCO – Memory of the World

The inclusion of archival and bibliographical heritage in this list may be compared to the *World Heritage* list, whose contents include archaeological sites, urban landscapes, architectural monuments and intangible assets. It can be supposed that the documentary heritage listed as *Memory of the World* – whose reach is much narrower, given its comparatively recent start date – may reach greater visibility at both national and global levels. On their part, the libraries and archives having the custody of these documental sets may become of greater interest for certain tourists. This will require the development of an adequate cultural offer, as described earlier.

5. Conclusions and prospects

Looking back at the development of the concept of documentary heritage and the different values ascribed to it; considering the example of public-private enterprises as developed in Scotland addressing this type of heritage; and in view of the growing international concern for documentary assets, stimulated by UNESCO since the mid-20th century, it is inevitable to conclude that such cultural assets – at national, regional and local scales – have the potential to overcome national boundaries to attain global recognition. The examples quoted show that the essential conditions have been met for states to promote their historical contributions to the development of mankind through documentary heritage.

Tangible and intangible assets capable of both displaying and enhancing the dynamic nature of culture cannot be limited to traditionally conceived heritage institutions. The need arises for new products to be created around particular resources, in this case documental heritage. Aside schools and the educational community, such products should target the broader spectrum of non-formal education and leisure. The development of such an approach ascribes an important role to the entities responsible for preserving historical documents. Some of them are already

providing a variety of services targeting various audiences, but a systemic approach, integrated with market logic, is needed. This would enable entities to tap into new sources of funding, to properly promote assets and value them in social, cultural, and economic terms.

Still, it is not reasonable to expect memory institutions to be the sole drivers. That is not their “core business”. It is mostly with public entities that responsibility for the management and execution of economic and cultural activities should lay. These agencies should cooperate between themselves as well as with private companies active in the tourism and culture industries. Such actions should be based on know-how and involve the production of interdisciplinary studies, which, as previously mentioned, remain quite scarce.

It is necessary from the start to obtain minute knowledge of the heritage assets available and to assess their potential for information, in terms of both learning and leisure. In the same way, it is essential knowing in detail the educational services currently provided by historical libraries and archives, as well as the opinions of heritage professionals. This will ensure a better understanding of the latter contribution to the knowledge economy and simultaneously broaden and deepen their educational mission. This data will allow the evaluation of the present situation and to reflect upon the need for convergence between the practices of current educational services and a way of thinking more in line with Heritage Interpretation. A line of approach closer to the Anglo-Saxon praxis would allow more space for interpretive services. These are better able to respond to the leisure-education approach aforementioned. Besides, it is necessary to assess how the roles associated to these institutions are perceived by political, economic, social and cultural agents. This would raise awareness of their value and contribution to a fuller development of civilizations. It is essential also to survey consumers of cultural assets – current and potential – about their identity, motivations and expectations regarding documentary assets. Heritage tourism projects of a documentary nature will then follow.

References

- Anico, M., Peralta, E. (2004), As políticas culturais autárquicas num contexto de *glocalização*: processos e dinâmicas do património em Ílhavo e em Loures, in *VIII Congresso Luso-Afro-Brasileiro de Ciências Sociais – A questão Social no Novo Milénio*, Coimbra, Centro de Estudos Sociais, available at: <http://www.ces.uc.pt/lab2004/pdfs/MARtaAnico.pdf> (consulted on: 12.2015).
- Anico, M. (2005), A pós-modernização da cultura: património e museus na contemporaneidade. *Horizontes Antropológicos*, 11(23), 71-86.

- Ballart, J. (2002), *El Patrimonio Histórico y Arqueológico: Valor y Uso*. 2ª ed., Barcelona, Ariel.
- Castro, I. (1999-2000), A fascinação dos espólios. *Leituras – Revista da Biblioteca Nacional*, 5, 161-166.
- Choay, F. (2000), *A Alegoria do Património*, Lisbon, Edições 70.
- Edmondson, R. (2002), *Memoria del Mundo. Directrices para la Salvaguardia del Patrimonio Documental*, Revista, Paris, UNESCO.
- Hedstrom, M., King, J. L. (2003), *On the LAM: Library, Archive, and Museum Collections in the Creation and Maintenance of Knowledge Communities*. Paris: Organisation for Economic Co-operation and Development, available at: <http://www.oecd.org/edu/innovation-education/32126054.pdf> (consulted on: 01.2016).
- Hooper-Greenhill, E. (2004), Measuring Learning Outcomes in Museums, Archives and Libraries: The Learning Impact Research Project (LIRP). *International Journal of Heritage Studies*, 10(2), 151-174.
- Horton, S., Spence, J. (2006), *Scoping the Economic and Social Impact of Archives*. Department of Information Studies, University of Wales Aberystwyth, available at: <http://www.nationalarchives.gov.uk/archives-sector/research-reports.htm> (consulted on: 01.2016).
- Ketelaar, E. (2007), Muniments and monuments: the dawn of archives as cultural patrimony. *Archival Science*, 7, 343-357.
- Law 107/2001, 8 September – *Lei de Bases da Política e do Regime de Proteção e Valorização do Património Cultural*, *Diário da República*, I Série – A, n.º 209, 5808-5829.
- Le Goff, J. (2000), *História e Memória*, 2, *Memória*, Lisbon, Edições 70.
- Little, H. (2007), Archive Fever as Genealogical Fever: Coming Home to Scottish Archives. *Archivaria*, 64, 89-112.
- Malheiro da Silva, A. (2006), *A Informação. Da Compreensão do Fenómeno e Construção do Objecto Científico*, Porton Afrontamento.
- Malheiro da Silva, A., Ribeiro, F., Ramos, J., Real, M. L. (2002), *Arquivística – Teoria e Prática de uma Ciência da Informação*, 1, 2ª ed., Porto, Afrontamento.
- Nabais, J. C. (2004), *Introdução ao Direito do Património Cultural*, Coimbra, Almedina.
- Nascimento, A. A. (2004-2005), Em nome do livro manuscrito: por entre alheamento e valorização de um património privilegiado. *Leituras – Revista da Biblioteca Nacional*, 14/15, 103-132.
- Norgrove, K., Mirchandani, S. (2007), *The Role of Archives within Tourism. A review of current archives tourism activity and opportunities for tourism development involving archives in North East England*, Cultural Consulting Network, available at:

- <http://www.nationalarchives.gov.uk/archives-sector/research-reports.htm> (consulted on: 01.2016).
- Penn, E. S. M. (2014), *Exploring Archival Value: An Axiological Approach*, Doctoral thesis, University College London, available at: <http://discovery.ucl.ac.uk/id/eprint/1455310> (consulted on: 02.2016).
- Peralta, E., Anico, M. (org) (2006), *Patrimónios e Identidades – Ficções Contemporâneas*, Oeiras, Celta.
- Ribeiro, F. (2001), Archival Science and changes in the paradigm. *Archival Science*, 1(3), 295-310.
- Sousa, M. J. C. A. (2014), "Valorizar o seu arquivo de família", in Rosa, M. L. and Nóvoa, R. S. (coords), *Arquivos de Família: Memórias Habitadas. Guia para Salvaguarda e Estudo de um Património em Risco*, Lisbon, IEM-FCSH, 94-115, available at: <http://iem.fcsh.unl.pt/ebooks/instrumentos1/index.html> (consulted on: 02.2016).
- Taylor, C., Harrower, G., Mirchandani, S., Norgrove, K. (2009), *Ancestral and Literary Tourism in the East Midlands*. Cultural Consulting Network and Seabridge Consulting, available at: <http://www.nationalarchives.gov.uk/archives-sector/research-reports.htm> (consulted on: 01.2016).
- Taylor, H. A. (1982-83), The Collective Memory: Archives and Libraries as Heritage. *Archivaria*, 15, 118-130.
- Tim, R. et al. (2008), *Assessment of the contribution of museums, libraries and archives to the visitor economy*. MLA South East, available at: <http://www.nationalarchives.gov.uk/archives-sector/research-reports.htm> (consulted on: 01.2016).
- Tourism Strategy Scoping Project (2009), *DCResearch*, available at: http://www.dcresearch.co.uk/wp-content/uploads/2013/11/MLA-Tourism_AW.pdf (consulted on: 01.2016).
- Trevor-Roper, H. (2008), "A Invenção das Tradições: a Tradição das Terras Altas (*Highlands*) da Escócia", in Hobsbawn, E. and Ranger, T. (org), *A Invenção das Tradições*, 6ª ed., Rio de Janeiro, Paz e Terra, 25-51.
- UNESCO – *Memory of the World*, available at: <http://www.unesco.org/new/en/communication-and-information/flagship-project-activities/memory-of-the-world/register/> (consulted on: 01.2016).
- VisitScotland – Scotland's National Tourist Organisation, available at: <https://www.visitscotland.com/see-do/research-your-ancestry/> (consulted on: 01.2016).

The relationship between tourism and history based on the use of tangible and intangible cultural heritage for tourism has been growing stronger, potentiating encounters with 'the other' and related cultures in countries pertaining to the Ibero-American space. Concurrently, this trend includes an emphasis on cultural heritage classified by the United Nations Educational, Scientific and Cultural Organisation (UNESCO) as 'world heritage'.

Many touristic and cultural resources and products of Ibero-America can be understood in the context of common or shared historical and cultural roots from which – from the perspective of Braudelian global history and cultural studies – emerges the concept of 'Iberian globalisation'. This is associated with a network of exchanges, circuits and routes of people, ideas and goods throughout the world and, more specifically, Europe and the Americas.

Once the European world centred on the Mediterranean, but this subcontinent turned to the Atlantic Ocean because of the relationship that developed between the Iberian Peninsula and the Americas within the framework of what Sallmann calls the '*grande desbloqueio do mundo*' (great unlocking of the world). Recent historiography has thus emphasised not only what the Iberians took from, imposed on or received from other cultures but also primarily how the Iberians contributed to the spread of cultures and intercultural dialogues. These can now be seen as creators of identity, authenticity and distinctiveness in the global tourism market.

This book presents a set of 27 case studies anchored in the relationship between tourism and history based on cultural heritage classified as UNESCO World Heritage of Humanity. Monuments, buildings, landscapes, places, museums, battles, personalities, cuisine, dance and music, among other cultural elements, have an economic value that is discussed in the context of an Ibero-American identity. They are reflections of a common socioeconomic and cultural history that can be valued from the point of view of memorable tourist experiences that potentiate knowledge and intercultural dialogues. In addition, since other classifications are also growing in importance, this publication includes studies of UNESCO's Creative Cities Network, Memory of the World Register and Biosphere Reserves.

