

**Inventory and analysis of the main tools currently  
available to cultural sites and authorities with regard  
to sustainable cultural tourism on a transnational  
level (EU / Council of Europe / UN)**

F I N A L – V E R S I O N 3

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The aim of this report is to present an inventory and analysis of the main tools currently available at a transnational level (EU / Council of Europe / UN) to cultural sites and authorities with the aim of achieving sustainable cultural tourism. The report is divided into two chapters. The first chapter deals with the underlying principles of sustainable cultural tourism focussing on its comprehensive definition, the rapport between cultural heritage management and tourism development, the evolution of institutional agenda in this field, objectives and principles for integrating cultural management and sustainable tourism, and cultural tourism audience from the sustainability perspective. The second chapter addresses diverse tools for the sustainable management of cultural tourism adopting predominantly a top-down approach on a transnational level. Identified institutional tools are divided into three major groups: Providing assistance to local actors (guidelines, charters, toolkits, checklists, policy frameworks, codes, etc.); Raising awareness of tourism sustainability issues (education, encouraging responsible tourism); and Building partnership platforms (horizontal and vertical cooperation in destination management, networking).

## Summary

Cultural tourism has been recognised as the factor playing a major role in preserving and realising the value of cultural heritage. Cultural heritage generates substantial earnings for the tourism industry, while, on the other hand, tourism is good for culture, encouraging the display and conservation of cultural assets and generating revenue needed for their preservation<sup>1</sup>. However, when not appropriately managed the **rapport between cultural heritage and tourism** activities may involve several risks threatening cultural heritage preservation and its sustainability, or may fail to fully realise the mutual benefits. Therefore, ‘embracing the **sustainability** agenda’ has been defined as one of the three key priorities of UNWTO for the further tourism development.<sup>2</sup>

Sustainable tourism is considered to be rooted in sustainable development<sup>3</sup> and defined as ‘tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities’<sup>4</sup>. Sustainable tourism development has been attracting a significant attention from transnational institutions since 1990s. **Cultural aspects** have been included into the sustainable tourism debate from the very beginning pointing out ‘cultural integrity’<sup>5</sup>, ‘tourism as a contributor to the enhancement of cultural heritage’<sup>6</sup> and encouraging to ‘respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance’<sup>7</sup>. By 2012, culture was included in 70% of the UN Development Assistance Frameworks.<sup>8</sup>

Multiple definitions of sustainable tourism have been suggested encompassing generic, stakeholder or multi-dimensional perspective. Deriving from the multi-dimensional approach the following **definition of sustainable cultural tourism (SCT)** has been proposed:

*Sustainable cultural tourism implies joint management of cultural heritage and tourism activities involving interests and economic benefits of all stakeholders to benefit both tangible and intangible cultural heritage conservation and tourism development.*

*At the same time the SCT development should ensure:*

- *Accessibility of cultural heritage sites to diverse groups of visitors;*
- *Protection of local values and involvement of host communities;*
- *Minimisation of negative impact on diverse environments;*
- *Harmonisation of short-term industry goals with long-term sustainability concerns.*

Europe is one of the world’s regions with the largest concentration of **cultural heritage** and is also the top tourist destination in the world.<sup>9</sup> In addition, cultural heritage has been recognised as a strategic resource for a sustainable Europe<sup>10</sup>. Therefore, the promotion of cultural heritage appears to be a significant factor in current economic and social policies for sustainable development including the strategies concerning sustainable tourism development.

In line with the proposed definition of sustainable cultural tourism the management of SCT development should include several particular **objectives**:

- **Balance heritage sites protection with their visitation;**

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<sup>1</sup> European Parliament, 2015. *European Parliament resolution of 8 September 2015 towards an integrated approach to cultural heritage for Europe*

<sup>2</sup> UNWTO, 2017, p. 15

<sup>3</sup> Nasser, 2003, p. 474

<sup>4</sup> UNWTO/UNWFP. 2005. *Making Tourism More Sustainable*, p. 11-12

<sup>5</sup> UNWTO/McIntyre et al., 1993

<sup>6</sup> UNWTO, 2001. *Global Code of Ethics for Tourism*

<sup>7</sup> UNWTO/UNEP, 2005. *Making Tourism More Sustainable*

<sup>8</sup> UN, 2012a. *UN System Task Team on the Post-2015 UN Development Agenda*

<sup>9</sup> EC. 2010. *Europe, the world's No 1 tourist destination – a new political framework...*

<sup>10</sup> Council of Europe, 2014. *Conclusions on cultural heritage as a strategic resource for a sustainable*

- Include both tangible and intangible aspects of CH into SCT considerations;
- Involve diverse stakeholders within sustainable tourism planning and ensure equal and just distribution of benefits from the SCT development;
- Enable access of diverse groups of visitors to cultural heritage sites;
- Encourage responsible tourism via education towards sustainable consumption behaviour among tourists and other stakeholders.

Nine **principles** for integrating cultural management and sustainable tourism were suggested by the European Commission<sup>11</sup> (Take a holistic and integrated approach; Plan for the long term; Achieve an appropriate pace and rhythm of development; Involve all stakeholders; Use best available knowledge; Minimise and manage risk; Reflect impacts in costs; Set and respect limits; and Undertake continuous monitoring).

The term **audience** within the tourism industry usually means ‘tourists/visitors’. However, in view of sustainability (which takes into account all interest groups and considers diverse impacts) the understanding of audience encompassing all stakeholders (government, entrepreneurs, tourists, local community, cultural organisations and heritage sites, tourism association and other institutions) appears more appropriate.

Diverse solutions towards sustainable **management** of cultural tourism have been developing since 1990s. *Initiatives* on transnational and national levels were for the most part *top-down*, aimed at stimulating sustainable cultural tourism development by institutional means. *Solutions* based on best practices and academic research reflecting challenges of cultural heritage practitioners with respect to tourism development, on the other hand were largely *bottom-up in nature*. These different perspectives may give insight into the current accessibility and applicability of the solutions. In line with the focus of this report three major groups of institutional tools on a transnational level were identified:

1. **Assistance to local actors** (guidelines, charters, toolkits, checklists, policy frameworks...);
  - Design of guides and manuals for local actors operating in the field of cultural heritage and cultural tourism that shall assist them in implementing the principles of sustainable cultural tourism development at European, national, regional and local levels.
2. **Awareness-raising** (sustainability education, encouragement of responsible tourism);
  - Incorporating the value of sustainability into the education system at all levels with the aim to encourage sustainable behaviour in young generation, and foster creation of sustainable communities.
  - Educating tourists and emphasising the individual responsibility for sustainable tourism through the concept of sustainable consumption under the label of ‘responsible tourism’.
3. **Partnership platforms** (cooperation in destination management, networking).
  - Cultural routes, joint touristic itineraries, cross-regional and cross-sectorial cooperative projects, creative quarters, etc. These initiatives allow for better management of heritage sites maintenance, joint tourism management/marketing effort, and joint research aimed at sustainable tourism development.
  - Networking and knowledge sharing has become a widespread and useful practice both in the area of culture, as well as in tourism. Cooperation networks cover diverse areas related to sustainable cultural tourism and range from small-scale regional initiatives to well-established international projects.

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<sup>11</sup> EC, 2007. *Action for More Sustainable European Tourism*, p. 3-4

## Introduction

The term ‘sustainable tourism’ has been defined as ‘tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities’.<sup>12</sup> Sustainable tourism is rooted in sustainable development<sup>13</sup>, in the sense that if tourism is to contribute to sustainable development, it must be economically viable, environmentally sensitive, and culturally appropriate.<sup>14</sup>

However, there is certain ambiguity in the very term ‘sustainable tourism’, which lies in the potential conflict between the meaning of the two words: *Sustainable* implies a state that can be maintained, is ongoing, perhaps even unchanging, whereas *tourism* implies the dynamic process of change to suit consumer demands.<sup>15</sup> In addition, it has been suggested to distinguish between *sustainable tourism* and *tourism sustainability*, and that sustainable tourism should not become ‘an excuse for tourism to compete for scarce resources in order to sustain tourism; rather, it should be an approach that seeks the most appropriate and efficient shared use of resources, on a global basis, within overall development goals’.<sup>16</sup> Moreover, in view of the sustainable cultural tourism (STC) another angle needs to be considered – *the sustainability of cultural heritage*. This implies a need of safeguarding and preserving our CH for future generations. Yet, especially in cases of vulnerable CH sites, their sustainability requires the reduction of tourism rather than its development.

The interactions between different sustainability layers within the field of STC are manifested within *the paradox of sustainability and tourism*<sup>17</sup>. This appears when tourist destinations and CH sites are deliberately changing in anticipation of, or to reflect changes in, customer preferences brought on by the competitive nature of tourism. Such a pattern of induced change runs both counter to, and in sympathy with the principles of sustainable development.

Tourism is generally regarded as one of the world’s largest industries generating 10% of the world’s GDP, and as a key sector contributing to job creation, sustainable consumption and production, and the preservation of world’s natural and cultural resources. In 2016, tourism has grown above average, at around 4 % per year, for seven straight years. A comparable sequence of uninterrupted solid growth has not been recorded since the 1960s.<sup>18</sup> It is estimated that cultural tourism accounts for around 40% of all international tourist arrivals.<sup>19</sup>

From the European perspective, tourism is estimated to contribute €415 billion to the EU GDP and 3.4 million tourism enterprises account for 15.2 million jobs – many linked to heritage, directly or indirectly. Up to one third of EU travellers indicate that cultural heritage is a key factor in choosing a travel destination.<sup>20</sup> In addition, the expansion of cultural tourism over recent decades has played a crucial role in the promotion and protection of tangible and intangible heritage as well as the development of arts, crafts and creative activities.<sup>21</sup> This is particularly important for Europe which has been recognised as the world’s No 1 tourist destination<sup>22</sup>.

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<sup>12</sup> UNWTO/UNWP. 2005. *Making Tourism More Sustainable*, p. 11-12

<sup>13</sup> The term ‘sustainable development’ was introduced by the United Nations (UN) *World Commission on Environment and Development* and defined as ‘a development that meets the needs of the present without compromising the ability of future generations to meet their own needs’ (WCED, 1987, Brundtland Report, p. 41).

<sup>14</sup> Nasser, 2003, p. 474

<sup>15</sup> Nasser, 2003, p. 474

<sup>16</sup> Bramwell and Lane, 2005, p. 53

<sup>17</sup> Butler, 1997

<sup>18</sup> UNWTO, 2017. *UNWTO Annual Report 2016*, p. 7-11

<sup>19</sup> UNWTO, 2016a. *UNWTO congress to discuss the links between cultural heritage and creative tourism*.

<sup>20</sup> EC, 2014. *Towards an integrated approach to cultural heritage for Europe*

<sup>21</sup> UNWTO, 2016b. *UNWTO Annual Report 2015*, p. 18

<sup>22</sup> EC. 2010. *Europe, the world’s No 1 tourist destination – a new political framework...*

In general, discourses on tourism development have been oscillating between two broadly interpreted models of ‘top-down’ development characterised by infrastructural provision and inward investment, and ‘bottom-up’ approaches favouring facilitated integrated local development strategies.<sup>23</sup> This report focuses predominantly on ‘top-down’ initiatives and presents an inventory and analysis of the main tools currently available at a transnational level (EU / Council of Europe / UN) to cultural sites and authorities with the aim of achieving sustainable cultural tourism.

## 1 Underlying principles of sustainable cultural tourism

### 1.1 Definitions

As stated by the *World Commission on Environment and Development*<sup>24</sup> achieving sustainability goals involves balancing ecological, social, and economic development outcome. Within the tourism sector, the advent of ideas of sustainability has led to attempts to create alternative forms of tourism that have fewer impacts on the environment and communities.<sup>25</sup> Thus the effort of reducing the negative effects of tourism activities has become almost universally accepted as a desirable and politically appropriate approach to tourism development.<sup>26</sup>

Sustainable tourism development has been attracting a significant attention from transnational institutions, heritage sites, tourism practitioners, as well as, scientific community since early 1990s. Multiple definitions of sustainable tourism have been suggested focusing on different aspects of the rapport between tourism industry and sustainability concerns. In particular, several perspectives should be highlighted:

- **Generic perspective**

*...sustainable tourism stands for the tourism that meets the needs of current tourists and host populations, while enhancing opportunities for the future.*<sup>27</sup>

*...sustainable tourism describes tourism that occurs in any setting but aims to be responsible in line with sustainable development.*<sup>28</sup>

- **Stakeholder perspective**

*...sustainable tourism implies the effort to reconcile the tensions and friction created by the complex interactions between diverse stakeholders within tourism industry, and to ensure equilibrium in the long term.*<sup>29</sup>

- **Multi-dimensional perspective**

*...a condition of tourism based on the principles of sustainable development, taking full account of its current and future economic, social and environmental impacts.*<sup>30</sup>

*...an approach to tourism that influences:*<sup>31</sup>  
(1) economic health;

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<sup>23</sup> UNESCO, 2006. *Tourism, culture and sustainable development*, p. 27

<sup>24</sup> WCED, 1987

<sup>25</sup> Eadington and Smith 1992

<sup>26</sup> Sharpley, 2003

<sup>27</sup> UNWTO/McIntyre et al., 1993

<sup>28</sup> Pfueller, Lee and Laing, 2011, p. 735

<sup>29</sup> Bramwell and Lane, 1993

<sup>30</sup> UNEP/UNWTO, 2005. *Making tourism more sustainable*, p. 11-12

<sup>31</sup> Muller, 1994, p. 132

- (2) *subjective well-being of local peoples;*
- (3) *protection of natural resources;*
- (4) **healthy culture;** and
- (5) *optimum satisfaction of guest requirements*

*...the purpose of sustainable tourism is to make a balance between protecting the environment, maintaining **cultural integrity**, establishing social justice and promoting economic benefits, meeting the needs of the host population in terms of improved living standards both in the short and long term.*<sup>32</sup>

The multi-dimensional definitions of sustainable tourism explicitly address cultural aspects of sustainable tourism thus anticipate specific questions of sustainable cultural tourism. Moreover, according to OECD report *The Impact of Culture on Tourism*<sup>33</sup> the ‘culture in all its forms is likely to figure strongly in the tourism product and promotion of most regions, even those which have traditionally relied on their natural assets’. This suggests a growing importance of cultural resources currently within the tourism industry and raises a question about how to withstand the increasing visitation of cultural heritage sites in a sustainable manner.

Based on the above mentioned approaches a **comprehensive definition of sustainable cultural tourism** is suggested as:

*Sustainable cultural tourism implies joint management of cultural heritage and tourism activities involving interests and economic benefits of all stakeholders to benefit both tangible and intangible cultural heritage conservation and tourism development.*

*At the same time the SCT development should ensure:*

- *Accessibility of cultural heritage sites to diverse groups of visitors;*
- *Protection of local values and involvement of host communities;*
- *Minimisation of negative impact on diverse environments;*
- *Harmonisation of short-term industry goals with long-term sustainability concerns.*

## 1.2 Cultural heritage management and tourism development

The term ‘cultural heritage’ (CH) has been defined by UNESCO as ‘the legacy of physical artefacts and intangible attributes of a group or society that are inherited from past generations, maintained in the present and bestowed for the benefit of future generations’.<sup>34</sup> Cultural heritage encompasses *tangible cultural heritage*: movable cultural heritage (paintings, sculptures, coins, manuscripts), immovable cultural heritage (monuments, archaeological sites, and so on) and underwater cultural heritage (shipwrecks, underwater ruins and cities), and *intangible cultural heritage* (oral traditions, performing arts, rituals).<sup>35</sup> Cultural heritage sites can have both tangible and intangible components.<sup>36</sup>

Europe is one of the world’s regions with the largest concentration of cultural heritage and is also the top tourist destination in the world.<sup>37</sup> Cultural heritage became an EU priority with

<sup>32</sup> Liu et al., 2013

<sup>33</sup> OECD, 2009. *The Impact of Culture on Tourism*, p. 10

<sup>34</sup> UNESCO n.d. *Tangible cultural heritage*.

<sup>35</sup> UNESCO n.d. *What is meant by "cultural heritage"?*

<sup>36</sup> Swarbrooke, 2001

<sup>37</sup> EC. 2010. *Europe, the world's No 1 tourist destination – a new political framework...*

the *European Agenda for Culture in a globalizing world* in 2007<sup>38</sup>. In 2014, the European Council highlighted the social and economic benefits of heritage policies in its *Conclusions on cultural heritage as a strategic resource for a sustainable Europe*<sup>39</sup>. Therefore, the promotion of cultural heritage appears to be a significant factor in current economic and social policies for sustainable development including the strategies concerning sustainable tourism development.

### **Cultural heritage management**

Cultural heritage management involves the actions taken to identify, assess, decide and enact decisions regarding CH with the aim to actively protect culturally significant places, objects and practices in relation to the threats they face from a wide range of cultural or natural causes.<sup>40</sup> Decisions about the suitable use of CH sites for different kinds of development, including tourism, should be an integral part of cultural heritage management planning. In this context, seven styles of relationship between heritage managers and tourism managers have been identified. They range from *denial* to *partnership*, and include five moderating variables: *the independent nature of tourism and cultural heritage management; government policy and legislation; diversity of stakeholders with different levels of knowledge; diversity of heritage assets; and different types of heritage consumption*.<sup>41</sup> Obviously, from the sustainability perspective, the ‘partnership’ approach towards the relationship between CH and tourism shall be achieved.

In addition, cultural heritage and sustainability are perceived as entwined concepts which have both a backward- and forward-looking perspective seeing human activity as the sum of the legacy of the past and the potential of the future. Cultural tourism can be regarded as an example of the inter-relatedness of the two concepts.<sup>42</sup> European Parliament recognised that cultural tourism has a major role to play in preserving and realising the value of our cultural heritage, and that both sectors can be mutually beneficial. On the one hand, the cultural heritage generates substantial earnings for the tourism industry, while, on the other hand, tourism is good for culture, encouraging the display and conservation of cultural assets and generating revenue needed for their preservation.<sup>43</sup> However, when not appropriately managed, the rapport between CH and tourism activities may involve several risks.

### **Potential risks of tourism development for cultural heritage**

It has been observed that with the emergence of a greater number of destinations competing for unique tourist experiences, traditional historic places are undergoing a redefinition and reinterpretation of their cultural heritage in order to be competitive and attractive. By doing this, however, heritage places are responding to the commercial forces of consumer demand, and in many cases conservation and cultural values are being compromised.<sup>44</sup> The desire of quick profits, assessment of the tourism potential in historic towns is being limited, in many cases, to a large database of tourist sights (the ‘must see’ objectives), their image and promotion being considered as most important, while the assessment of their robusticity (the capacity to resist and absorb negative impacts from tourism) is considered a secondary issue to be solved afterwards.<sup>45</sup>

In 2013, a report entitled *Sustainable tourism as driving force for cultural heritage sites development* was published under the CHERPLAN project.<sup>46</sup> The report highlighted two main

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<sup>38</sup> EC, 2007. *European Agenda for Culture in a globalizing world*

<sup>39</sup> Council of Europe, 2014. *Conclusions on cultural heritage as a strategic resource for a sustainable*

<sup>40</sup> Ruoss and Alfarè, eds., 2013, p. 18

<sup>41</sup> McKercher, Ho, & DuCros, 2005

<sup>42</sup> Bennett et al., 2014

<sup>43</sup> European Parliament, 2015. *European Parliament resolution of 8 September 2015 towards an integrated approach to cultural heritage for Europe*

<sup>44</sup> Nasser, 2003, p. 468

<sup>45</sup> Bucurescu, 2012, p. 101

<sup>46</sup> CHERPLAN. n.d. *Enhancement of Cultural Heritage Through Environmental Planning & Management*

problems – ‘carrying capacity’ (the number of individuals a given area can support within natural resource limits and without degrading the natural, social, cultural and economic environment for present and future generations.), and ‘Hit-and-Run’ tourism (tourists visiting the site for few hours to continue their travel to other destinations with more attractive accommodation and recreational facilities). These problems generate negative impacts on heritage sites (dealing with increased waste generation, water consumption and traffic) while the income is almost absent.<sup>47</sup>

In addition, the sustainable development of cultural tourism is sometimes challenged by several specific phenomena:

- Contrasting perceptions of *cultural assets’ value* by tourists vs. local community.<sup>48</sup> While tourists tend to prioritize the extrinsic appeal of cultural heritage as a product to be consumed (economic value), the local community perceives cultural assets’ value rather as an embodied heritage of their past (cultural, symbolic and social value).
- *Conservation vs. commodification*<sup>49</sup> – due to increased competition among heritage sites, in many cases, cultural heritage managers prioritise destination image and promotion over the assessment of their robusticity (the capacity to resist and absorb negative impacts from tourism), which is considered a secondary issue to be solved afterwards.<sup>50</sup> Also, the profits of commodification do not always translate to a circular economy, with sustainable financing for investment and value creation.
- The risk of ‘*cultural appropriation*’<sup>51</sup> within the field of intangible cultural heritage connected with its increasing commodification for the tourism development. While certain facets of culture can be copyrighted, such as pieces of written music, artworks or other visible manifestations, the intangibles – ideas, meanings, collective identity attributes, oral and unwritten expressions, and the symbolism attached to these – cannot be easily protected.<sup>52</sup>

However, it should be emphasised that risks generated from numerous factors can be better managed through the shared responsibilities of heritage sites managers, authorities, tourism operators and the tourists themselves. Therefore, the effective policy planning is essential for the systematic development of tourism with a proper assessment and management of risks<sup>53</sup>, their impact on cultural heritage and opportunities for sustainable, mutual growth. Innovations in earning models and especially in the digital domain are often hailed as solutions for transforming threats to opportunities.

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<sup>47</sup> Ruoss and Alfarè, eds., 2013

<sup>48</sup> McKercher, Ho and Du Cros, 2004

<sup>49</sup> Du Cros, 2001, p. 168

<sup>50</sup> Bucurescu, 2012, p. 101

<sup>51</sup> Cultural appropriation was as ‘the taking – from a culture that is not one’s own – of intellectual property, cultural expressions or artefacts, history and ways of knowledge’ (Ziff and Rao, eds. 1997, p. 1).

<sup>52</sup> George, 2010, p. 381-387

<sup>53</sup> Hassan and Rahman, 2015, p. 213-214

### 1.3 Institutional agenda regarding sustainable cultural tourism and related cultural heritage initiatives on a transnational level

An institutional discourse on cultural heritage<sup>54</sup> on a transnational level has been developing since the Second World War by series of world heritage initiatives supported by UNESCO. It reached a significant landmark in 1972 by adopting the UNESCO *Convention for the Protection of the World Cultural and Natural Heritage*<sup>55</sup>. The Convention noted that ‘the cultural heritage and the natural heritage are increasingly threatened with destruction not only by the traditional causes of decay, but also by changing social and economic conditions’, and that ‘parts of the cultural or natural heritage are of outstanding interest and therefore need to be preserved as part of the world heritage of mankind as a whole’.

Besides others, the Convention established the UNESCO *World Heritage List (WH)* with the aim ‘to signal to the public that a property is so irreplaceable to humankind that its values must be sustained intact in perpetuity for the benefit of future generations’. Subsequently the WH branding was recognised also as a tool for the advancement of more sustainable forms of tourism compared with more consumptive activities, such as resort tourism.<sup>56</sup> Though UNESCO does not inscribe its cultural heritage sites as tourist attractions tourism demand is being generated by this label and WH sites are turning out to be major tourist attractions globally.<sup>57</sup>

Debates on sustainable tourism began emerging at series of local and international forums held by the UN beginning in the 1990s.<sup>58</sup> Cultural aspects have been included into sustainable tourism concerns from the very beginning of the debate. By January 2012, culture was included in 70% of the United Nations Development Assistance Frameworks.<sup>59</sup> In the following text we highlight main references to sustainable cultural tourism and related cultural heritage management within the agenda of transnational institutions during the last three decades.

**Table 1 Institutional agenda on sustainable cultural tourism and related CH initiatives**

Year	Initiatives, events and documents	Institution	Highlights
1985 1999	<i>The European Heritage Days (EHDs)</i> <sup>60</sup>	Council of Europe	A participatory cultural event shared by the citizens of Europe launched by the Council of Europe in 1985, and joined by the EU in 1999. It is held in September in 50 countries and attracts up to 20 million visitors every year via opened doors to numerous sites, allowing Europe’s citizens to enjoy free visits and learn about their shared cultural heritage and encouraging them to become actively involved in the safeguard and enhancement of this heritage for present and future generations.
1993	<i>Sustainable tourism development: A guide for local planners</i> <sup>23</sup>	UNWTO	Sustainable tourism...‘is envisaged as leading to the management of resources in such a way that economic, social, and aesthetic needs can be met while maintaining essential ecological processes, biological diversity, cultural integrity, and life support systems’.
2001	<i>Global Code of Ethics for</i>	UNWTO	It recognised ‘tourism as a factor of sustainable

<sup>54</sup> Since the primary focus of this report is sustainable cultural tourism in relation to cultural heritage – not the cultural heritage itself – we address only on those institutional initiatives which are related to sustainable tourism, or at least implicitly treat it in the framework of cultural heritage management. The list of main documents within institutional agenda on European and World heritage is included in the Annex 3.

<sup>55</sup> UNESCO, 1972. *The World heritage Convention*

<sup>56</sup> King and Halpenny, 2014, p. 768-769

<sup>57</sup> Hassan and Rahman, 2015, p. 213-223

<sup>58</sup> Edgell, 2015, p. 27

<sup>59</sup> UN, 2012a. *UN System Task Team on the Post-2015 UN Development Agenda*

<sup>60</sup> Council of Europe. n.d. *The European Heritage Days*

	<i>Tourism</i> <sup>61</sup>		development’, and highlighted tourism as ‘a contributor to the enhancement of cultural heritage’.
2003	<i>Convention for the Safeguarding of the Intangible Cultural Heritage</i> <sup>62</sup>	UNESCO	The Convention itself does not explicitly address tourism. However, the <i>Operational Directives for the implementation of the Convention for the Safeguarding of the Intangible Heritage (last updated in 2016)</i> <sup>63</sup> suggest to consider the ‘impact of tourism on the safeguarding of intangible CH and vice versa’ (VI.2.3), and to adopt appropriate measures and guidance to ensure participation of local community in management and benefits related to cultural tourism development.
2005	<i>The Framework Convention for the Value of Cultural Heritage for Society (The Faro Convention)</i> <sup>64</sup> Entered into force in 2006.	Council of Europe	The Convention does not explicitly mention tourism but it addresses the ‘Sustainable use of the cultural heritage’ (Article 9) and the relationship between ‘Cultural heritage and economic activity’ (Article 10), both of which relates to heritage tourism development.
2005	<i>Making Tourism More Sustainable: A Guide for Policy Makers</i> <sup>65</sup>	UNWTO/ UNEP	It emphasised the role of culture within the sustainable tourism agenda: ‘Sustainability – which originally referred to the natural environment – now also covers the social, economic and cultural spheres as well as the built environment’.
2006	<i>Tourism, Culture and Sustainable Development</i> <sup>66</sup>	UNESCO	Report within the Programme ‘ <i>Culture, tourism, development</i> ’, intended to open a debate on the complex questions that surround the relations between culture and tourism, tourism and development, tourism and dialogue among cultures; questions that every decision-maker and actor engaged in tourism should address before a tourism project is launched.
2007	<i>Action for more sustainable European Tourism</i> <sup>67</sup>	EU	Report of the <i>Tourism Sustainability Group</i> (established in 2004) intended to stimulate action to make European tourism more sustainable and to maintain this as a continuous process. It followed EC communication on <i>Basic orientations for the sustainability of European tourism</i> <sup>68</sup> .
2008	<i>Charter for the Interpretation and Presentation of Cultural Heritage Sites</i> <sup>69</sup>	ICOMOS	Principle 6: Inclusiveness – The Interpretation and Presentation of CH sites must be the result of meaningful collaboration between heritage professionals, host and associated communities, and other stakeholders. The multidisciplinary expertise of ... site managers..., tourism operators, and other professionals should be integrated in the formulation of interpretation and presentation programmes.
2012	<i>Rio+20 Conference on Sustainable Development</i> <sup>70</sup>	UN	A landmark in sustainable tourism debate where the UN’s sustainable tourism policy was formulated.
2012	<i>Post-2015 UN Development Agenda. Culture: a driver and an enabler of sustainable development</i> <sup>2471</sup>	UN	‘Cultural heritage, cultural and creative industries, sustainable cultural tourism, and cultural infrastructure’ were recognised as strategic tools for revenue generation, particularly in developing countries given

<sup>61</sup> UNWTO, 2001. *Global Code of Ethics for Tourism*

<sup>62</sup> UNESCO, 2003. *Convention for the Safeguarding of the Intangible Cultural Heritage*

<sup>63</sup> UNESCO, 2016. *Operational Directives for the implementation of the Convention for the Safeguarding of the Intangible Heritage*

<sup>64</sup> Council of Europe, 2005. *The Faro Convention*

<sup>65</sup> UNWTO/UNEP, 2005. *Making Tourism More Sustainable*

<sup>66</sup> UNESCO, 2006. *Tourism, culture and sustainable development*

<sup>67</sup> EU, 2007. *Agenda for a Competitive and Sustainable tourism*

<sup>68</sup> EC, 2003. COM(2003)716 - *Basic orientations for the sustainability of European tourism*

<sup>69</sup> ICOMOS, 2008. *The ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites*

<sup>70</sup> UN, 2012. *Rio+20 Conference on Sustainable Development*

<sup>71</sup> UN, 2012a. *UN System Task Team on the Post-2015 UN Development Agenda*

			their rich CH and substantial labour force.
2012	<i>Operational Guidelines for the Implementation of the World Heritage Convention</i> <sup>72</sup>	UNESCO	The guidelines do not explicitly mention tourism but they address ‘Protection and management’ including the ‘suitable use’ of WH Sites. A partnership approach towards management and the implementation of adequate management systems are suggested in order to ensure its safeguarding and sustainability.
2012	<i>UNESCO World Heritage and Sustainable Tourism Programme</i> <sup>73</sup>	UNESCO	The aim of the program is to facilitate the management and development of sustainable tourism at WH properties through fostering increased awareness, capacity and balanced participation of all stakeholders in order to protect the properties and their Outstanding Universal Value.
2013	<i>European Heritage Label</i>	EC	The label is given to sites selected for their symbolic value, the role they have played in the European history and activities they offer that bring the EU and its citizens closer together. The focus is on the promotion of the European dimension of the sites and providing access to them. So far, 29 sites have been designated.
2014	<i>The Sustainable Tourism Programme</i> <sup>74</sup>	UNWTO	As a part of the 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns.
2014	<i>Towards an integrated approach to cultural heritage for Europe</i> <sup>75</sup>	EC	<i>European Parliament resolution of 8 September 2015 towards an integrated approach to cultural heritage for Europe</i> <sup>76</sup> devotes a considerable attention to cultural tourism. It highlights CH resources as long-term assets to be promoted via tourism development. It calls for a Europe-wide dialogue involving all stakeholders; stresses the importance of CoE Cultural Routes and UNESCO sites; underlines macro-regional strategies; new technologies; and addresses sustainability questions by developing less invasive and higher value-added forms of tourism.
2014	<i>Nara +20: On heritage practices, cultural values, and the concept of authenticity</i> <sup>77</sup>	ICOMOS	The document does not explicitly treat tourism. It recalls the achievements of the 1994 Nara Document on <i>Authenticity in setting principles of respect and tolerance for cultural and heritage diversity around the world</i> , and highlights the continuous evolution of CH in the last 20 years creating challenges for heritage management. It suggests ‘the social processes by which cultural heritage is produced, used, interpreted and safeguarded to be increasingly taken into consideration’.
2015	<i>First World Conference on Tourism and Culture: Building a New Partnership</i> <sup>78</sup>	UNWTO/ UNESCO	Held in Siem Reap, Cambodia with the aim to explore and advance new partnership models between tourism and culture.
2015	<i>The 2030 Agenda for Sustainable Development</i> <sup>79</sup>	UN	A significant landmark with respect to sustainability issues by the adoption of the 17 universal <i>Sustainable Development Goals</i> . Tourism has been included in Goals # 8, 12 and 14, for its capacity to contribute to inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of

<sup>72</sup> UNESCO World Heritage Centre. 2012. *Operational Guidelines for the Implementation of the World Heritage Convention*

<sup>73</sup> UNESCO, 2012. *UNESCO World Heritage and Sustainable Tourism Programme*

<sup>74</sup> UNWTO, 2014. <http://sdt.unwto.org/about-10yfp-stp>

<sup>75</sup> EC, 2014. *Towards an integrated approach to cultural heritage for Europe*

<sup>76</sup> European Parliament, 2015. *European Parliament resolution of 8 September 2015 towards an integrated approach to cultural heritage for Europe*

<sup>77</sup> ICOMOS. 2014. *Nara +20: On heritage practices, cultural values, and the concept of authenticity*

<sup>78</sup> UNWTO/UNESCO, 2015. *First UNWTO/UNESCO World Conference on Tourism and Culture*

<sup>79</sup> UN, 2015. UN. 2015. *Transforming our world: The 2030 Agenda for Sustainable Development*

			oceans and marine resources.
2016	<i>Cultural Heritage, the UN Sustainable Development Goals, and the New Urban Agenda</i> <sup>80</sup>	ICOMOS	Target 8.9 on sustainable tourism ‘...by 2030 devise and implement policies to promote sustainable tourism which creates jobs, promotes local culture and products’. It points out both benefits and threats of tourism activities for CH: ‘Tourism can introduce or accelerate social change and revive folk arts but also exacerbate commodification’.
2016	<i>European Tourism Day – 29/11/2016</i> <sup>81</sup>	EU	Cultural tourism was chosen as a key topic for the year 2016 entitled as ‘Enhancing synergies between tourism and cultural and creative industries. Innovative solutions as the driver for jobs and growth’.
2016	<i>Tourism communication campaign ‘Europe. Wonder is all around.’</i> <sup>82</sup>	EC	The campaign aimed to entice European citizens to discover the hidden wonders of Europe via sharing their favourite destinations and motivate them to travel to the diverse, sustainable and high-quality tourist destinations in Europe.
2017	<i>The International Year of Sustainable Tourism for Development 2017</i> <sup>83</sup>	UNWTO	The aim is to raise awareness on the contribution of sustainable tourism to development. Cultural values, diversity and CH were set as one of the five key areas.
2017	<i>Second World Conference on Tourism and Culture: Fostering Sustainable Development</i> <sup>84</sup>	UNWTO/UNESCO	Held in Muscat, Oman as an official event of the IY2017 with the aim to explore ways to build and strengthen partnerships between the tourism and Culture sectors and enhancing their role in the <i>UN’s 2030 Agenda for Sustainable Development..</i>
2018	<i>The European Cultural Heritage Year 2018</i> <sup>85</sup>	EC	One of the objectives is increasing and diversifying cultural tourism by mapping out shared paths, axes and swathes, melting pots and interfaces and border regions.

## 1.4 Objectives and principles

### Objectives

The main objective of sustainable tourism is ‘creating the right balance between the welfare of tourists, the needs of the natural and cultural environment and the development and competitiveness of destinations and business audience’.<sup>86</sup> In 2005 the *World Tourism Organization* and *United Nations Environment Programme* (UNEP) identified an agenda of 12 aims for sustainable tourism, which included economic viability, local prosperity, employment quality, social equity, visitor fulfilment, local control, community wellbeing, cultural richness, physical integrity, biological diversity, resource efficiency, environmental purity.<sup>87</sup>

In view of sustainable tourism development, the sustainable heritage management shall answer two basic questions:<sup>88</sup>

- Which are the most appropriate cultural heritage places for tourism development?
- What is the best way to manage those heritage places for sustainability?

<sup>80</sup> ICOMOS. 2016. *Cultural Heritage, the UN Sustainable Development Goals, and the New Urban Agenda*

<sup>81</sup> EC. 2016. *European Tourism Day*

<sup>82</sup> EC. 2016a. ‘*Europe. Wonder is all around*’

<sup>83</sup> UNWTO, 2016. *2017 is the International Year of Sustainable Tourism for Development.*

<sup>84</sup> UNWTO/UNESCO, 2017. *Second UNWTO/UNESCO World Conference on Tourism and Culture*

<sup>85</sup> EC, 2016b. *European Cultural Heritage Year 2018*

<sup>86</sup> EU, 2007. *Agenda for a Competitive and Sustainable tourism*, p.3

<sup>87</sup> UNWTO/UNEP, 2005. *Making Tourism More Sustainable*

<sup>88</sup> Du Cros, 2001, p. 166

In line with the proposed definition of sustainable cultural tourism the management of SCT development should include these particular objectives:

1. To balance cultural heritage sites protection with their visitation and cultural value;
2. To include both tangible (sites, artefacts, etc.) and intangible aspects (traditions, local values, etc.) of cultural heritage into sustainable cultural tourism considerations;
3. To involve diverse stakeholders within sustainable tourism planning and ensure equal and just distribution of benefits from the sustainable tourism development, including benefits for heritage management;
4. To enable access of diverse groups of visitors to cultural heritage sites – by adjusting facilities (access for physically disabled), economic measures (differentiated pricing) or communication (diverse communication channels).
5. To encourage responsible tourism via sustainable consumption behaviour among tourists and other stakeholders.

### **Principles**

To achieve a competitive and sustainable tourism the *European Commission* suggested following principles by all actors within the tourism industry.<sup>89</sup>

1. *Take a holistic and integrated approach* to tourism, heritage management and spatial planning– All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.
2. *Plan for the long term* – Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.
3. *Achieve an appropriate pace and rhythm of development* – The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.
4. *Involve all stakeholders* – A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.
5. *Use best available knowledge* – Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.
6. *Minimise and manage risk* (the precautionary principle) – Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.
7. *Reflect impacts in costs and benefits* (user and polluter pays, circular economy) – Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them. Sustainability should also translate to sustainable benefits and even growth.
8. *Set and respect limits*, where appropriate – The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

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<sup>89</sup> EC, 2007. Action for More Sustainable European Tourism, p. 3-4.

9. *Undertake continuous monitoring* – Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.

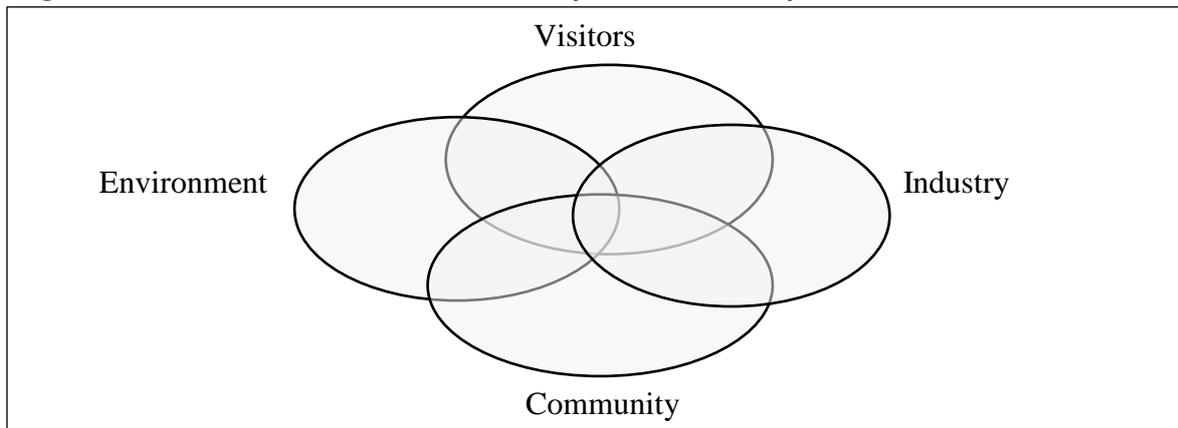
## 1.5 Audiences/Stakeholders

In the cultural tourism context, the term ‘audience’ is usually understood as ‘tourists/visitors’. However, from the sustainability perspective – which encompasses interactions and impacts of different actors in the tourism sector and cultural heritage (not only tourists) – the understanding of audience should be enlarged. It appears more appropriate to consider diverse audiences within SCT in view of stakeholders.<sup>90</sup>

According to the *EU Sustainable Tourism Guidelines*<sup>91</sup> the sustainability embraces social, environmental and economic matters and for cultural tourism involves a consideration of each of the components through:

- *Visitors* – their needs, aspirations and wellbeing;
- *Industry* – need for tourism businesses to be profitable, have a long-term future;
- *Community*<sup>92</sup> – respecting the values, needs and QoL (Quality of life) of the local community;
- *Environment* – conserving the cultural and physical environments, local identity and sense of place.

**Figure 1 The interests of visitors, industry the community and the environment overlap**



Source: EU Sustainable Tourism Guidelines, 2009, p. 9.

In line with the above cited EU guidelines, seven principal stakeholders can be identified in the cultural tourism industry, each of which can either influence or be influenced by the sustainable tourism development:

- Government (public sector),
- Entrepreneurs (private sector),
- Tourists (consumers),
- Local population (community),
- Cultural organisations and heritage sites (cultural resources),
- Tourism associations (civil sector),
- Specific institutions (educational institutions, churches).

<sup>90</sup> The term ‘stakeholder’ was first defined as ‘any group or individual who can affect or is affected by the achievement of an organisation’s objectives’ (Freeman, 1984).

<sup>91</sup> EU, 2009. *EU Sustainable Tourism Guidelines*, p. 9

<sup>92</sup> The outstanding role of communities with respect to cultural heritage management was recognised by the *UNESCO 2003 Convention* emphasising that only the communities possess specific intangible cultural heritage – it is not the property of States, nations neither humanity.

The most emphasised actor in SCT is the *government* that holds a key role in socio-economic development.<sup>93</sup> At the level of *entrepreneurs*, the balance between short-term tourism industry business concerns and long-term goals of sustainability has to be achieved. *Tourists* can be involved into sustainability agenda through education and the encouragement of sustainable consumption patterns. *Host communities* (local population) should economically benefit from cultural heritage tourism what should motivate them to manage their CH and continuing traditions.<sup>94</sup> The role of *cultural organisations and heritage sites* lies in adopting appropriate management methods ensuring the preservation of cultural resources when exposed to tourism. *Tourism associations*, as well as, other *specific institutions* may influence the perception, awareness and knowledge of sustainability issues with respect to tourism and CH and thus contribute to the enhancement of sustainable tourism development. However, a co-operation between the stakeholders is a basic necessity for SCT development in order to support the protection of CH for future generations of the host community and visitors.<sup>95</sup>

## 2 Tools for sustainable management of cultural tourism

Diverse solutions towards sustainable management of cultural tourism activities have been developing since 1990s. *Initiatives* on transnational and national levels were for the most part *top-down*, aimed at stimulating sustainable cultural tourism development by institutional means. *Solutions* based on best practices and academic research reflecting challenges of cultural heritage practitioners with respect to tourism development, on the other hand were largely *bottom-up in nature*. These different perspectives may give insight into the current accessibility and applicability of the solutions. In line with the focus of this report three major groups of institutional tools on a transnational level were identified:

1. **Assistance to local actors** within cultural tourism industry (guidelines, charters, toolkits, checklists, policy frameworks, codes, etc.);
1. **Awareness-raising** of sustainable cultural tourism issues among population (education, encouraging responsible tourism);
2. **Partnership platforms** building in order to ensure better coordination of the effort in sustainable cultural tourism development (horizontal and vertical cooperation in destination management, networking).

In the next section a classification of top-down tools for sustainable management of cultural tourism on a transnational level is presented. The tools are classified by their objectives, type, brief description and target audience (users of tools). This overview is further followed by a short explanation of each category of tools. It should be noted that certain overlaps between categories may appear as institutional top-down tools may inspire local actions and vice versa.

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<sup>93</sup> Miočić, Razović, Klarin, 2016.

<sup>94</sup> DuCros, 2001.

<sup>95</sup> ICOMOS, 1998.

**Table 2 Classification of top-down tools for sustainable management of cultural tourism**

Objective	Tool	Brief description	Audience (Users of tools)
To provide assistance to local actors	Guidelines, charters, toolkits, checklists, codes, etc.	Design of guides and manuals for local actors operating in the field of cultural heritage and cultural tourism that shall assist them in implementing the principles of sustainable cultural tourism development at European, national, regional and local levels.	Policy makers/ CH sites managers/ tourism practitioners
To raise awareness of tourism sustainability issues among population	Sustainability education	Incorporating the value of sustainability into the education system at all levels with the aim to encourage sustainable behaviour in young generation, and foster creation of sustainable communities.	Governments/ Educational institutions/ Pupils and students
	Encouraging responsible tourism	Educating tourists and emphasising the individual responsibility for sustainable tourism through the concept of sustainable consumption under the label of 'responsible tourism'.	Governments/ Tourism organisations/ Tourists
To build partnership platforms	Horizontal and vertical cooperation in destination management	Cultural routes, joint touristic itineraries, cross-regional and cross-sectorial cooperative projects, creative quarters, etc. These initiatives allow for better management of heritage sites maintenance, joint tourism management/ marketing effort, joint research aimed at sustainable tourism development.	CH sites, tourism destinations
	Networking	Networking and knowledge sharing has become a widespread and useful practice both in the area of culture, as well as in tourism. Cooperation networks cover diverse areas related to sustainable cultural tourism and range from small-scale regional initiatives to well-established international projects.	Organizations within CH and tourism/ Tourism destinations/ Experts

## 2.1 Assistance to local actors

Starting with the pioneer initiative by UNWTO entitled *Sustainable tourism development: A guide for local planners* (1993)<sup>96</sup>, further guidelines, charters, toolkits, checklists, policy frameworks and declarations, codes, etc. for sustainable tourism development have been published over the last two decades. These tools include:

- *International Cultural Tourism Charter – Managing Tourism at Places of Heritage Significance*, ICOMOS (1999)<sup>97</sup>
- *The Burra Charter*, ICOMOS Australia (1999)<sup>98</sup>
- *World Tourism Organisation Global Code of Ethics for Tourism* (2001)<sup>99</sup>
- *Indicators of Sustainable Development for Tourism Destinations. A Guidebook*, UNWTO (2004)<sup>100</sup>
- *Making Tourism More Sustainable: A Guide for Policy Makers* (2005)<sup>101</sup>
- *The Malta Declaration on Cultural Tourism: Its Encouragement and Control*, Europa Nostra (2006)<sup>102</sup>
- *The Dubrovnik Declaration*, Council of Europe (2006)<sup>103</sup>

<sup>96</sup> UNWTO/McIntyre et al., 1993

<sup>97</sup> ICOMOS, 1999. <http://www.icomos.org/tourism/charter.html>

<sup>98</sup> ICOMOS, 1999. <http://www.nsw.nationaltrust.org.au/burracharter.html>

<sup>99</sup> UNWTO, 2001. <http://ethics.unwto.org/en/content/full-text-global-code-ethics-tourism>

<sup>100</sup> UNWTO, 2004. <http://www.adriaticgreenet.org/icareforeurope/wp-content/uploads/2013/11/Indicators-of-Sustainable-Development-for-Tourism-Destinations-A-Guide-Book-by-UNWTO.pdf>

<sup>101</sup> UNWTO/UNEP, 2005. <http://www.unep.fr/shared/publications/pdf/DTIx0592xPA-TourismPolicyEN.pdf>.

<sup>102</sup> Europa nostra. 2006. [http://www.europanostra.org/OS/lang\\_en/index.html](http://www.europanostra.org/OS/lang_en/index.html)

<sup>103</sup> Council of Europe, 2006. <https://wcd.coe.int/ViewDoc.jsp?id=1044795&BackColorInternet=e0cee1&BackColorIntranet=e0cee1&BackColorLogged=FFC679>

- *ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites* (2008)<sup>104</sup>
- *Guidelines for Sustainable Cultural Tourism in Historic Towns and Cities* (2009)<sup>105</sup>
- *Operational Guidelines for the Implementation of the World Heritage Convention* (2012)<sup>106</sup>
- *Managing Tourism at World Heritage Sites: A Practical Manual for World Heritage Site Managers* (2002)<sup>107</sup>
- *UNESCO World Heritage Sustainable Tourism Toolkit* (2015)<sup>108</sup>
- *EUROPEANA Brand Guidelines* (2015)<sup>109</sup>
- *Thessalia Charter for Sustainable Cultural Tourism* (2016)<sup>110</sup>

In the following text we describe the most recent initiatives:

**UNESCO World Heritage Sustainable Tourism Toolkit (2015)** – the guide reacts on challenges concerning the future of the *World Heritage Convention* today and is the focus of the *UNESCO World Heritage and Sustainable Tourism Programme*. The aim is to provide the first of their kind 'How To' guides for World Heritage Site managers and other key stakeholders to help identify the most suitable solutions for managing tourism development. The goal is to stimulate local solutions in communities through capacity-building in best practice. It is structured as a step-by-step process for site managers (Figure 2, see Annex): *Guides 1-4* establish the basic foundations for sustainable tourism (Understanding, Strategy, Governance, Engagement). *Guides 5-10* are tailored to more specific issues, which will have greater relevance at some sites than at others (Communication, Infrastructure, Value, Behaviour, Investment, Monitoring).<sup>111</sup>

**EUROPEANA Brand Guidelines (2015)** – EUROPEANA is the EU digital platform for cultural heritage established in 2008 that cooperates with more than 3,000 cultural institutions (museums, galleries, libraries and archives) in public sharing of digitised collections, as well as, music, books, films, art or social history. The platform cooperates with partners from cultural sector to develop frameworks, standards, strategy and policy relevant to digital cultural heritage, and to raise funds. It also encourages the use of digitized cultural heritage in education, research and the creative industries through partnerships and international engagement campaigns.<sup>112</sup> *EUROPEANA Brand Guidelines* is a practical manual providing mainly technical assistance with design elements (logo, fonts, colours, imagery, etc.) when using EUROPEANA brand within print or on-line presentations (web site, web banner, flyer, folder, poster, roll-up banner and presentation).

**ENUMERATE 2011-2014** – Prior to EUROPEANA, the EU launched the ENUMERATE project, the aim of which was to support the European Commission's ambition for smart, sustainable growth by developing the first comprehensive body of evidence about the scale, cost and impact of culture-sector digitisation.<sup>113</sup> The core objective of ENUMERATE was to create a reliable baseline of statistical data about digitization, digital preservation and online access to cultural heritage in Europe in order to create an evidence base for making strategic decisions on investments in digitisation. ENUMERATE brought about several improvements

<sup>104</sup> ICOMOS. 2008. *The ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites*

<sup>105</sup> European Association Historic Towns & Regions. 2009. <http://www.historic-towns.org/documents/downloads/SustainableTourismGuidelines.pdf>

<sup>106</sup> UNESCO World Heritage Centre. 2012. *Operational Guidelines for the Implementation of the World Heritage Convention*

<sup>107</sup> Pedersen, 2002. <http://whc.unesco.org/uploads/activities/documents/activity-113-2.pdf>

<sup>108</sup> UNESCO. 2015. <http://whc.unesco.org/sustainabletourismtoolkit/welcome-unesco-world-heritage-sustainable-tourism-toolkit>

<sup>109</sup> EUROPEANA. 2015. [https://pro.europeana.eu/files/Europeana\\_Professional/Resources\\_and\\_PR\\_tools/Brand%20Guidelines/europeana\\_brand\\_guidelines.pdf](https://pro.europeana.eu/files/Europeana_Professional/Resources_and_PR_tools/Brand%20Guidelines/europeana_brand_guidelines.pdf)

<sup>110</sup> ECTN. 2016. <http://www.tourism4development2017.org/wp-content/uploads/2017/01/thessalia-charter-second-edition-v3-1.pdf>

<sup>111</sup> UNESCO. 2015. <http://whc.unesco.org/sustainabletourismtoolkit/welcome-unesco-world-heritage-sustainable-tourism-toolkit>

<sup>112</sup> EUROPEANA, 2015a. <https://pro.europeana.eu>

<sup>113</sup> ENUMERATE, 2014a. <http://www.enumerate.eu/>

in the quality and availability of intelligence about digital heritage. The ENUMERATE 'Thematic Network' initiated a Europe-wide community of practice to share statistical data and knowledge on the progress of digitisation.

**Thessalia Charter for Sustainable Cultural Tourism (2016)** – prepared by the European Cultural Tourism Network, ECTN (the 1st edition was published in 2014). The purpose of the Charter is to bring together in a single, comprehensive and integrated document the main principles, features, findings, conclusions and recommendations on good practices regarding 'Culture & Heritage Added-value to Regional policies for Tourism Sustainability' (CHARTS). The 'CHARTS Charter' aims to build on all relevant previous initiatives, declarations, resolutions, opinions and charters, to exploit synergies and facilitate implementation of the recommendations by the national, regional and local destinations authorities responsible. The overall aim is to encourage sustainable and responsible tourism policies and actions across Europe and beyond, through engaging culture and heritage with innovation and cohesion.<sup>114</sup>

## 2.2 Awareness-raising

### 2.2.1 Sustainability education

The 1987 Report by the *World Commission on Environment and Development* and the 1992 *Earth Summit* identified education as a major tool for achieving sustainable development. Following this, the 2002 *Johannesburg Summit* broadened the vision of sustainable development and re-affirmed the educational objectives of the *UN Millennium Development Goals and the Education for All Framework for Action* (Dakar, 2000). The United Nations General Assembly in its 57th Session in December 2002 proclaimed the *Decade of Education for Sustainable Development (EDS)* for the period 2005 – 2014<sup>115</sup> and designated UNESCO as the lead agency for the promotion of the Decade<sup>116</sup>.

The *UN Decade of Education for Sustainable Development (EDS) 2005–2014*, called for the incorporation of sustainability questions into the education system at all levels with the aim to encourage sustainable behaviour in young generation, and foster creation of sustainable communities. As a reaction to the UNESCO recommendation several national initiatives and programs of EDS were launched (e.g. *Learning for our Future* with a follow up *Learning for Change* in Scotland, *Caring for Our Future* in Australia). In addition, numerous higher education institutions around the globe have developed course content and built partnerships to advance ESD. However, recent studies on sustainable tourism education revealed the lack of a coherent learning system, lack of resources for sustainability education in tourism, tendency to apply an ad hoc education schemas, narrow vocational style, or education for jobs and marketability – what does not correspond with the needs of the education for sustainability.<sup>117</sup>

### 2.2.2 Encouraging responsible tourism

It is assumed that the idea of sustainable tourism is best served by implementing the principles of 'responsible tourism'<sup>118</sup>. This is related to the phenomenon of 'sustainable consumption'<sup>119</sup> and its implementation within the field of cultural tourism. Consequently, responsible consumption patterns of tourists and other stakeholders shall be helpful in reaching the goals of sustainable cultural tourism.<sup>120</sup> A practical manifestation of responsible

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<sup>114</sup> ECTN. 2016. <http://www.tourism4development2017.org/wp-content/uploads/2017/01/thessalia-charter-second-edition-v3-1.pdf>

<sup>115</sup> UN, 2003. *United Nations Decade of Education for Sustainable Development (2005-2014)*

<sup>116</sup> UNESCO, 2006. *Tourism, culture and sustainable development*. p. 36.

<sup>117</sup> Hatipoglu et al., 2014

<sup>118</sup> Leslie, 2012; Jamal, Camargo and Wilson, 2013

<sup>119</sup> Hertwich and Katzmayer, 2003

<sup>120</sup> Barthel-Bouchier, 2013; Edgell, 2015.

tourism includes checklists, guidelines and campaigns for individual travellers and tourist operators, e.g.:

- *Tips for Responsible Tourism*, World Heritage Alliance,
- *Responsible Tourist and Traveler Guide*, UNWTO,
- *Traveler's Code*, Pacific Asia Travel Association,
- *How to Avoid Guilt Trips* by British non-profit organisation Tourism Concerns,
- *Global Code of Ethics for Tourism, For Responsible Tourism*, UMWTO (2001),
- Campaign '*One Billion Tourists: One Billion Opportunities*', UNWTO (2012) with the aim to show tourists that respecting local culture, preserving heritage or buying local goods when travelling can make a big difference.
- Campaign '*Your Actions Count – Be a Responsible Traveler*' by UNESCO, UNWTO and UNODC (The International Bureau for the Fight against Drugs and Crime) (2014) against different forms of illicit trafficking, including against the trafficking of cultural property.

## 2.3 Partnership platforms

### 2.3.1 Horizontal and vertical cooperation in destination management

**Cultural routes** – aimed at the development and promotion of an itinerary or network based on a historic route, a cultural concept, figure or phenomenon of a particular importance. For the last two decades cultural routes achieved a noteworthy impact and progress: they encourage widespread community participation in cultural activities raising awareness of a common cultural heritage. Cultural routes in Europe include: *Council of Europe (CoE) Cultural Routes, routes created with European Union funds, routes based on UNESCO labelled CH sites, and other international initiatives.*<sup>121</sup>

**Creative quarters** – focused on cultural quarters rather than on singular cultural assets looking beyond the tourism development and targeting sustainability goals. Concrete examples encompass: *Temple Bar in Dublin (Ireland), Westergasfabriek in Amsterdam (Netherlands), ECoCs – RUHR 2010 (Germany), Pécs 2010 (Hungary), Košice 2013 (Slovakia), Riga 2014 (Latvia), etc.*

**CHERPLAN project**<sup>122</sup> – started in 2011 as a joint international project in the South East Europe. The project is in line with the recommendations of EU horizontal policies being built with the very objective to introduce and apply sustainable environmental approaches to cultural heritage, by linking economic development to preservation of cultural values and using a participatory approach. One of its focuses lies in sustainable tourism as driving force for cultural heritage sites development.

**Linking Natura 2000**<sup>123</sup> **and cultural heritage** – launched in 2013 as the 'Connecting Practice' project<sup>124</sup> with the aim to explore, learn and create new methods of recognition and support for the interconnected character of the natural, cultural and social value of highly significant land and seascapes and affiliated biocultural practices. The project is a joint initiative between IUCN and ICOMOS providing the opportunity for exploring how to form a more genuinely integrated consideration of natural and cultural heritage under the World Heritage Convention – 'bridging the divide' that is often observed between nature and culture – overcoming the many unintended adverse outcomes that can result.<sup>125</sup>

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<sup>121</sup> Council of Europe, n.d. Cultural Routs

<sup>122</sup> Ruoss, E. and Alfarè, L. eds. 2013. CHERPLAN

<sup>123</sup> Natura 2000 is the largest coordinated network of protected areas in the world including over 27, 000 natural sites across 28 EU Member States (EC, 2017).

<sup>124</sup> ICOMOS/IUCN, 2015. Connecting Practice Project.

<sup>125</sup> EC, 2017. Linking Natura 2000 and cultural heritage

### 2.3.2 Networking

**European Cultural Tourism Network (ECTN)**<sup>126</sup> – established in 2009 (following the merger of the networks set up by ECTN INTERREG IIC operation) as the only pan-European network for cultural tourism development and promotion. It connects destinations, authorities, NGOs and research institutes for sustainable cultural tourism development and promotion across Europe. The ECTN manages:

- **‘Destination of Sustainable Cultural Tourism’ Award** (since 2014) – the only award in cultural tourism in Europe for to tourism destinations Europe-wide achieving common benefits of destinations, communities, businesses, citizens and visitors.
- **CHRISTA project** (Culture and Heritage for Responsible, Innovative and Sustainable Tourism Actions) launched in 2016.

**The Network of European Regions for Competitive and Sustainable Tourism (NECSTouR)**<sup>127</sup> – established in 2007 as the largest European Network of Regions committed to competitive and sustainable tourism. It brings together around 35 regions of Europe with a strong competency in tourism, as well as, tourism-related academic organisations such as universities and research institutes, and representatives of sustainable and responsible tourism business associations and networks from around 20 Countries of the European Economic Area. NECSTouR develops a coherent framework for the coordination of regional development programmes and research following the European Commission Communication ‘Europe, the world’s No 1 tourist destination – a new political framework for tourism in Europe’<sup>128</sup>. It aims to build Touristic Europe based on the Competitive and Sustainable Tourism Model.

**The European Heritage Heads Forum (EHHF)**<sup>129</sup> – founded in 2006 is an informal professional and expert network for national heritage heads (built heritage, landscapes and archaeology) of the European Union and European Economic Area that provides a forum for information and experience exchange about the management of the historic environment in the 21st century. Since 2006, the members of the EHHF meet annually to highlight their shared interest in the cultural heritage of Europe. EHHF manages:

- **The EUHeritage Tour project** – launched in 2014 with the aim to create a transnational route to UNESCO cultural heritage sites in Europe as a thematic logic, contributing to the differentiation of the European tourism as well as to the promotion of shared cultural heritage, thus stimulating a greater sense of European identity.

**European Expert Networks on Culture and Audiovisual (EENCA)** – between end of 2010 and Spring 2015, Interarts and Culture Action Europe coordinated the *European Expert Network on Culture (EENC)*<sup>130</sup>, on behalf of the Directorate General for Education and Culture of the European Union (DG EAC). Set up by a consortium of 18 experts, the network provided advice and support to the European Commission in its cultural policy development though the analysis of cultural policies at European, national and regional levels and the preparation of reports, studies and other policy-oriented tools. Its successor *The European Expert Network on Culture and Audiovisual (EENCA)*<sup>131</sup> was established in December 2015 by a Consortium of Panteia and iMinds-SMIT (VUB) on behalf of DG EAC of the European

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<sup>126</sup> ECTN, n.d. <http://www.culturaltourism-network.eu>

<sup>127</sup> NECSTouR. n.d. <http://www.necstour.eu/>

<sup>128</sup> EC, 2010. *Europe, the world’s No 1 tourist destination – a new political framework...*

<sup>129</sup> EHHF, n.d. <http://www.ehhf.eu>

<sup>130</sup> EENC. n.d. <http://www.interarts.net/>

<sup>131</sup> EENCA, 2017. <http://www.eenca.com>

Commission. The main objective of this multi-disciplinary network is providing high-quality analysis and advice to the European Commission in the fields of culture and audiovisual. The EENCA international team is formed by 14 core experts and 16 associated experts. The EENCA's main research themes include:

- *Cultural heritage,*
- *Mobility of artists and cultural professionals,*
- *Skills and training,*
- *Cultural and creative industries,*
- *Cultural external relations,*
- *Intercultural dialogue and social cohesion.*

### **The Concil of Europe (CoE) Cultural Routes Network<sup>132</sup>**

*The Cultural Routes programme* launched by the Council of Europe in 1987 counts today over 30 certified Routes. Its objective is to demonstrate, by means of a journey through space and time, how the heritage of the different countries and cultures of Europe contributes to a shared cultural heritage. The certification '*Cultural Route of the Council of Europe*' is a guarantee of excellence. In December 2010, the Committee of Ministers of the Council of Europe adopted *Resolution CM/Res(2010)53* establishing an Enlarged Partial Agreement (EPA) to enable closer co-operation between states particularly interested in the development of Cultural Routes. The Council of Europe (CoE) Cultural Routes are best placed to facilitate the accomplishment of these tasks in Europe: they represent a quintessence of cultural tourism activities in Europe with the longest historical record they incorporate the uniqueness and diversify of European tourism products. Concrete examples encompass routes with very different themes, e.g:

- *The Santiago de Compostela Pilgrim Routes (1987)*
- *The Viking Routes (1993)*
- *European Mozart Ways (2004)*
- *The European Route of Jewish Heritage (2004)*
- *Via Regia (2005)*
- *European Route of Historical Thermal Towns (2010)*
- *Via Habsburg (2014)*
- *The Roman Emperors and Danube Wine Route (2015)*

## **Conclusions**

Sustainable cultural tourism involves a need to consider the ability of a heritage site to withstand increased visits and/or a change in visitor profile without causing undue damage to tangible and intangible values.<sup>133</sup> In order to achieve a real sustainability, both the tourism development and the heritage conservation must be properly treated within management activities, so that the market appeal of a destination correlates with its ability to cope with an increased level of visitation, or to be modified in a way that does not compromise the cultural values.<sup>134</sup> Due to the vulnerability of many CH sites and potential hazards connected with their mass visitation the risk assessment shall be a stable component of both cultural heritage management and sustainable tourism development.

In addition, there has been a wide consensus that the agenda of sustainable CH management including the sustainable cultural tourism development has to be included into a larger sustainable development framework. In the cultural tourism sector, the idea

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<sup>132</sup> Council of Europe, 2017. CoE Cultural Routes.

<sup>133</sup> Du Cros, 2001

<sup>134</sup> Bucurescu, 2012, p. 101

of sustainability has been manifested through reducing the negative effects of tourism activities on CH and other environments, and by stimulating positive effects on local economy and community development. Within the CH the sustainability addresses in particular safeguarding and preserving cultural heritage for future generations while managing its diverse forms of use, including tourism.

An institutional discourse on cultural heritage on a transnational level has been developing since the Second World War by series of world heritage initiatives supported by UNESCO. It reached a significant landmark in 1972 by the adoption of the UNESCO *Convention for the Protection of the World Cultural and Natural Heritage*, and more recently by the *Convention for the Safeguarding of the Intangible Cultural Heritage* in 2003. However, most of these initiatives did not explicitly treat tourism. Tourism concerns were added only subsequently after the emergence of the sustainable tourism discourse, and usually were included into operational directives or interpretation guidelines of the original documents.

Institutional debates on sustainable tourism began emerging at local and international forums held by the UN beginning in the 1990s. A landmark in sustainable tourism development is considered the *Rio+20 Conference on Sustainable Development* in 2012 where the UN's sustainable tourism policy was formulated. By 2012, culture was included in 70% of the United Nations Development Assistance Frameworks.<sup>135</sup> In the same year UNESCO launched *World Heritage and Sustainable Tourism Programme* (2012) with the aim to facilitate the management and development of sustainable tourism at WH sites. The continuing emphasis on cultural aspects within sustainable tourism development has peaked by two current initiatives – the *Second UNWTO/UNESCO World Conference on Tourism and Culture 2017* and *The European Cultural Heritage Year 2018* (EC). Nowadays, 'embracing the sustainability agenda' is one of the three key priorities of further tourism development as defined by UNWTO.<sup>136</sup>

Diverse solutions towards sustainable management of cultural tourism have been developed. They encompass both *top-down initiatives* on transnational and national levels aimed at stimulating sustainable cultural tourism development by institutional means, as well as, *bottom-up solutions* based on best practices and academic research reflecting challenges of cultural heritage practitioners with respect to tourism development. Top-down institutional tools on a transnational level (the focus of this report) can be divided into three major groups:

- *Assistance to local actors* (guidelines, charters, toolkits, checklists, policy frameworks, codes, etc.);
- *Awareness-raising* (sustainability education, encouraging responsible tourism);
- *Partnership platforms* (horizontal and vertical cooperation in destination management, networking).

### **Limitations of current institutional tools**

The institutional tools on a transnational level analysed within this report seem to provide guidelines and toolkits for a larger target group including tourist destinations, tourism operators, cultural organisations and heritage sites. There are very few initiatives which are intended specifically only for cultural sites managers (e.g. UNESCO toolkit, 2015). However, this can be due to the fact that for achieving the sustainable management of cultural tourism a cooperation of diverse actors involved in the field has been suggested. On the other hand, managers of CH sites face very specific problems connected with the carrying capacity of heritage monuments/areas, the threat of commodification and risk of cultural appropriation. These problems differ from the

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<sup>135</sup> UN, 2012a. *UN System Task Team on the Post-2015 UN Development Agenda*

<sup>136</sup> UNWTO, 2017, p. 15

challenges faced by tourism operators and tourist destinations managers. Therefore, we assume that more specific institutional tools for SCT development intended for cultural sites and heritage monuments are needed.

### **Limitations of this report**

The limitations of this report lie in its predominant focus on top-down initiatives intended to provide tools for cultural sites and authorities with regard to sustainable cultural tourism development. However, to get a more complex picture of available management tools for achieving sustainable cultural tourism also bottom-up solutions are suggested to be considered. The bottom-up tools are based on best practices and academic research reflecting challenges of cultural heritage practitioners with respect to tourism development. They encompass diverse management models, new governance models, market strategies and ICT solutions developed to cope with current problems encountered by heritage sites managers and cultural tourism practitioners. In addition, the bottom-up tools can serve as an inspiration for authorities when preparing institutional guidelines and toolkits for cultural sites managers. The list of bottom-up tools (non-comprehensive) is included in the Annex 4.

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## Annexes

### Annex 1: List of top-down institutional tools for sustainable management of cultural tourism

#### 1 Assistance to local actors

- *Sustainable tourism development: A guide for local planners*, UNWTO (1993)
- *International Cultural Tourism Charter – Managing Tourism at Places of Heritage Significance*, ICOMOS (1999)
- *The Burra Charter*, ICOMOS Australia (1999)
- *World Tourism Organisation Global Code of Ethics for Tourism* (2001)
- *Indicators of Sustainable Development for Tourism Destinations. A Guidebook*, UNWTO (2004)
- *Making Tourism More Sustainable: A Guide for Policy Makers* (2005)
- *The Malta Declaration on Cultural Tourism: Its Encouragement and Control*, Eupopa Nostra (2006)
- *The Dubrovnik Declaration*, Council of Europe (2006)
- *Guidelines for Sustainable Cultural Tourism in Historic Towns and Cities* (2009)
- *UNESCO World Heritage Sustainable Tourism Toolkit* (2015)
- *EUROPEANA Brand Guidelines* (2015)
- *Thessalia Charter for Sustainable Cultural Tourism* (2016)

#### 2 Awareness-raising

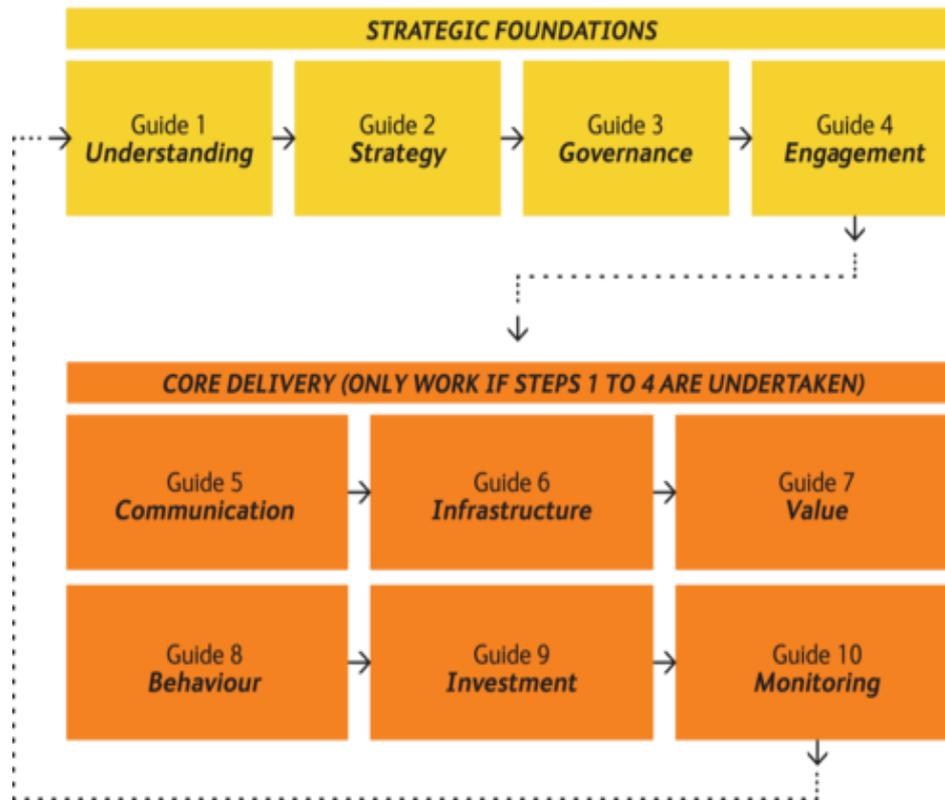
- *Decade of Education for Sustainable Development for the period 2005 – 2014*
- *Learning for our Future* (Scotland)
- *Learning for Change* (Scotland)
- *Caring for Our Future* (Australia)
- *Tips for Responsible Tourism*, World Heritage Alliance
- *Responsible Tourist and Traveler Guide*, UNWTO
- *Traveler's Code*, Pacific Asia Travel Association
- *How to Avoid Guilt Trips* by British non-profit organisation Tourism Concerns
- *Global Code of Ethics for Tourism, For Responsible Tourism*, UNWTO (2001)
- Campaign 'One Billion Tourists: One Billion Opportunities', UNWTO (2012) with the aim to show tourists that respecting local culture, preserving heritage or buying local goods when travelling can make a big difference.
- Campaign 'Your Actions Count – Be a Responsible Traveler' by UNESCO, UNWTO and UNODC (The International Bureau for the Fight against Drugs and Crime) (2014) against different forms of illicit trafficking, including against the trafficking of cultural property.

#### 3 Partnership platforms

- Cultural Routs (*CoE Cultural Routes, Routes created with European Union funds, UNESCO labelled European sites, European Cultural Heritage labelled sites, other international routs*)
- Creative quarters (*Temple Bar in Dublin, Ireland; Westergasfabriek in Amsterdam, Netherlands; ECoCs – RUHR 2010 in Germany; Pécs 2010 in Hungary; Košice 2013 in Slovakia; Riga 2014 in Latvia, etc.*)
- *CHERPLAN project*
- Linking Natura 2000 and cultural heritage – 'Connecting Practice' project
- *European Cultural Tourism Network (ECTN) – 'Destination of Sustainable Cultural Tourism' Award, CHRISTA project*
- *The Network of European Regions for Competitive and Sustainable Tourism (NECSTouR)*

- *The European Heritage Heads Forum (EHHF) – The EUHeritage Tour project*
- *European Expert Networks on Culture and Audiovisual (EENCA)*
- *The Council of Europe (CoE) Cultural Routes Network*

## **Annex 2: Steps in UNESCO World Heritage Sustainable Tourism Toolkit**



Source: UNESCO, 2015. *UNESCO World Heritage Sustainable Tourism Toolkit*.

## **Annex 3: Main institutional agenda on heritage on European and World level**

### *European Heritage institutional agenda*

- **1954** European Cultural Convention
- **1975** European Charter of the Architectural Heritage
- **1985** Convention for the Protection of the Architectural Heritage of Europe
- **1992** European Convention on the Protection of the Archaeological Heritage
- **2000** European Landscape Convention
- **2005** The Framework Convention for the Value of Cultural Heritage for Society (The Faro Convention)
- **2013** European Heritage Label
- **2014** Towards an integrated approach to cultural heritage for Europe (EC)

### *World Heritage institutional agenda*

- **1962** Recommendation concerning the Safeguarding of the Beauty and Character of Landscapes and Sites
- **1968** Recommendation concerning the Preservation of Cultural Property Endangered by Public or Private Works
- **1972** Convention concerning the Protection of the World Cultural and Natural Heritage

- **2001** Universal Declaration on Cultural Diversity
- **2003** Convention for the Safeguarding of the Intangible Cultural Heritage
- **2005** Convention on the Protection and Promotion of the Diversity of Cultural Expressions

**Annex 4: List of bottom-up tools for sustainable management of cultural tourism (not comprehensive)**

- *Carrying capacity* – targeted at heritage sites;
- *Tourism crowding management* – targeted at heritage sites, cultural organisations and tourism destinations;
- *Visitor management* – targeted at heritage sites, cultural organisations and tourism destinations;
- *Tourist area life cycle* – targeted at tourism destinations;
- *Market appeal/robusticity matrix* – targeted at heritage sites and tourism destinations;
- *No-growth strategies* – targeted at heritage sites and tourism destinations;
- *The semiotic square model for tourist heritage visitation* – targeted at heritage sites;
- *COBACHREM model* (Community-based cultural heritage resources management) – targeted at governments and local communities with cultural heritage resources;
- *Conceptual model of community involvement for sustainable heritage tourism* – targeted at governments and local communities with cultural heritage resources;
- *Digitisation and off-site visitation* – targeted at heritage sites and tourism destinations;
- *Gamification* – targeted at heritage sites and tourism destinations.