



IVANA STEVIĆ

**AS REDES NAS ATIVIDADES E DINÂMICAS DO
TURISMO CULTURAL SUSTENTÁVEL**

**NETWORKING FOR SUSTAINABLE CULTURAL
TOURISM ACTIVITIES AND DYNAMICS**



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Dissertação apresentada à Universidade de Aveiro para cumprimento dos requisitos necessários à obtenção do grau de Mestre em Gestão e Planeamento em Turismo, realizada sob a orientação científica da Doutora Zélia Breda, Professora Auxiliar Convidada do Departamento de Economia, Gestão e Engenharia Industrial da Universidade de Aveiro

I dedicate this dissertation to my beloved family – my parents and my sister – “the ones and only” loves of my life, my everlasting support, inspiration and courage.

o júri

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palavras-chave

Redes, governança, políticas públicas, turismo cultural, Porto, património mundial.

resumo

O presente trabalho visa analisar o papel e a importância das redes nas atividades e dinâmicas de turismo cultural, especialmente orientando a investigação para o caso do Património Mundial da UNESCO, da cidade do Porto, Portugal. Para este efeito, a compreensão de uma extensa literatura sobre o tema foi necessária, a fim de criar um conjunto de hipóteses para basear a investigação. A revisão de literatura incluiu não apenas o conceito de redes, mas também de governança e de políticas públicas. Posteriormente, o foco recaiu sobre o caso particular do Património Mundial, que incluiu a análise de conteúdo de documentação legal, manuais oficiais, relatórios e planos estratégicos e de gestão do Sítio. A última etapa da pesquisa foi a investigação prática, que incluiu entrevistas com os representantes das entidades responsáveis pelas decisões estratégicas e de gestão do Sítio. A fim de fazer uma síntese entre a parte teórica e a parte prática da pesquisa, testar as hipóteses e chegar às conclusões necessárias, foram utilizados métodos qualitativos, devido a serem considerados mais apropriados para este caso. O objetivo final deste trabalho foi identificar as oportunidades para uma gestão superior e a preservação dos sítios culturais, e verificar como as redes podem contribuir para o seu desenvolvimento sustentável.

keywords

Networks, governance, public policy, cultural tourism, Oporto, world heritage.

abstract

The present work examines the role and importance of networks in cultural tourism activities and dynamics, especially orientating the research to the case of UNESCO World Heritage Site of Oporto city, Portugal. For this purpose, comprehension of an extensive literature on the topic was necessary in order to create a set of hypothesis to base the research on. This literature included not only the concept of networks, but also of governance and public policy. Subsequently, the focus was put on the particular case of the mentioned World Heritage Site, which included content analysis of legal documentation, official manuals, reports, and strategic and management plans for the Site. The last step of the research was empirical research, which included interviews with representatives of the entities responsible for strategic decisions and the management of the Site. In order to make a synthesis between the theoretical and the practical part of the research, test the hypotheses and reach the necessary conclusions, qualitative methods were used, due to being considered most fitting for this case. The ultimate aim of this dissertation was to identify opportunities for a better management and preservation of cultural sites, and verify how networks can contribute to their sustainable development.

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Chapter 1| Introduction

1.1 Introduction

The following chapter serves as an introduction to this dissertation, providing an insight on its importance for tourism research. Firstly, it discusses the interest and the scope of the dissertation, explaining what the purpose of the study is and justifying the choice of the chosen topic. Subsequently, it states the objectives and methodology of the problem in focus, showing the relevance of the study to that particular problem, followed by the structure of the dissertation.

1.2 Interest and scope of the dissertation

“We live in a networked world” (Scott, Baggio & Cooper, 2008, p. 1), with constantly getting in touch with the term “network” in our everyday lives, yet not thinking about what it actually represents and using it without a second thought. An immense part of the human population is daily connected to, or connected within, a single, and most prominent, global network – the Internet. We have our networks of friends, of family members and of colleagues with whom we interact, interrelate and cooperate. We all are parts of a complex global system that functions on the basis of connections and interrelations, both people and industries, with tourism being no exception.

Tourism is an extremely composite, controversial and bewildering phenomenon (Davidson, 1998; Theobald, 1998, 2005; Wall & Mathieson, 2006), consisted of a large number of interrelated entities joint in a system, having a vast range of stakeholders playing different roles and generating certain impacts. In the present we are living in – with most societies being capitalism-orientated, forcing a fierce competition in all industrial sectors, which often causes exploitation of the available resources; with vertiginously rapid information and knowledge flow and the world turning into one big global village –, tourism market is sentenced to constant changing and evolving, accordingly forcing the destinations to continuously adjust, develop and improve the existing activities and strategies towards a win-win outcome for all parties involved, paying special attention to the question of sustainability. Simultaneously with the destinations’ growth and development, grows the need for strategic decisions on management and governance, policy-making, partnerships and networking, marketing, long-term planning, product enhancement, sustainability, etc., all this with a final objective of maintaining competitiveness.

The complexity of tourism lays in the fact that it entirely depends on destination's resources and their sustainable development, them being not only the natural goods, but also the geographical position and morphological features, the cultural, artistic and archaeological heritage, the agricultural products and social resources, such as tradition, habits, hospitality, etc. (Di Martino & Petrillo, 2006). Hence the need for a complex management that would embrace and deal simultaneously with all the resources of a tourism destination, and it cannot be successfully conducted by each stakeholder separately, without collaboration and knowledge sharing between them. This is where networks come into effect.

1.3 Objectives and methodology

The present study is based on a specific set of objectives and research questions that guide the researcher towards reaching certain conclusions on the topic in focus and finalizing the research. After stating the problem wished to be studied, firstly a single principal and general objective was defined, followed up by a set of specific ones. The principal objective is to understand the role of networks and partnerships in cultural tourism activities and dynamics, and to examine if they exist in the particular case of UNESCO World Heritage Site of Oporto city, while the specific objectives are:

- To understand and discuss the importance of interactive governance and networking (as a form of co-governance) on the cultural tourism level;
- To identify the governance structure of UNESCO World Heritage Site of Oporto city;
- To identify the power-holding entities responsible for the Site in the following aspects:
 - Formulation of tourism policies;
 - Planning and management of tourism in general and, more specifically, of cultural tourism at the Site;
 - Preservation and protection of the Site;
 - Strategic decisions and management of the Site;
- To investigate the levels of collaboration between the identified entities;
- To verify if there is an official network of stakeholders involved in activities (aspects) determined within the third specific objective, or merely a collaboration between them (both official and unofficial);
- To identify the principal difficulties when it comes to:
 - Implementation of tourism public policies;

- Preservation and protection of the Cultural Heritage at the Site in focus;
- Management of the Site;
- Sustainable tourism development at Oporto World Heritage Site.

In order to reach these objectives, the following research questions were formed for examination and analysis:

- How does networking improve the process of governance and management of World Heritage Sites?
- How can collaboration, cooperation and knowledge-sharing among network actors influence sustainability of cultural tourism and tourism sector in general?
- How important is the joint action of all stakeholders, in any way involved in activities and dynamics of the World Heritage Sites (from both tourism and other sectors), when it comes to protection and preservation of heritage?

So as to fulfil the above-stated objectives, examine the research questions, explore the cause-effect relations between key concepts (variables) and test the created hypotheses, a qualitative methodology approach was chosen to be engaged in this study. Within this approach, three methods of data collection were identified as most suitable and practical to conduct, those being the critical examination and analysis of a particular case study – UNESCO World Heritage Site of Oporto city –, content analysis of the existing material concerning the mentioned case study, and semi-structured interviews conducted at the Site, which are then analyzed with, again, the content analysis approach. These methods are explained in further detail within a comprehensive chapter on methodology (Chapter 5).

The case study of Oporto World Heritage served as a practical application of the studied and reviewed literature on networks, governance and public policies in tourism and, more specifically, cultural tourism. The content analysis of strategic and management reports, manuals and plans led to a clearer understanding of the organizational structure of the World Heritage Site in Oporto, the stakeholders involved in tourism activities and dynamics, the preoccupation about making tourism development sustainable and the protection of the Site, that is, the reconciliation between tourism and the preservation of the Site. And, lastly, the semi-structured interviews with the representatives of governing entities served as a final step towards the comprehension of governing and decision-making structure of the Site, of the

relationships between the actors within that structure and the possibility of the existence of a network. After the data was collected, it was subsequently processed and analyzed in the context of the stated problem, which permitted hypotheses testing and answering the research questions.

1.4 Structure of the dissertation

The present dissertation incorporates two distinguished parts, evaluated as most appropriate for its course. The first one incorporates the theoretical foundation of the study, entailing the literature review and comprising three chapters discussing the existing scientific bibliography and providing a theoretical framework on three wide areas of research, which are the basis and the focal point of the study, as well as the prime interest of the researcher – tourism and cultural tourism in particular, governance and public policy, and networks. The second part of the dissertation is consisted of the empirical analysis of secondary data on the topic and primary data relating to the particular case of the UNESCO World Heritage Site of Oporto city. The sequence of the chapters can be observed in Figure 1.1.

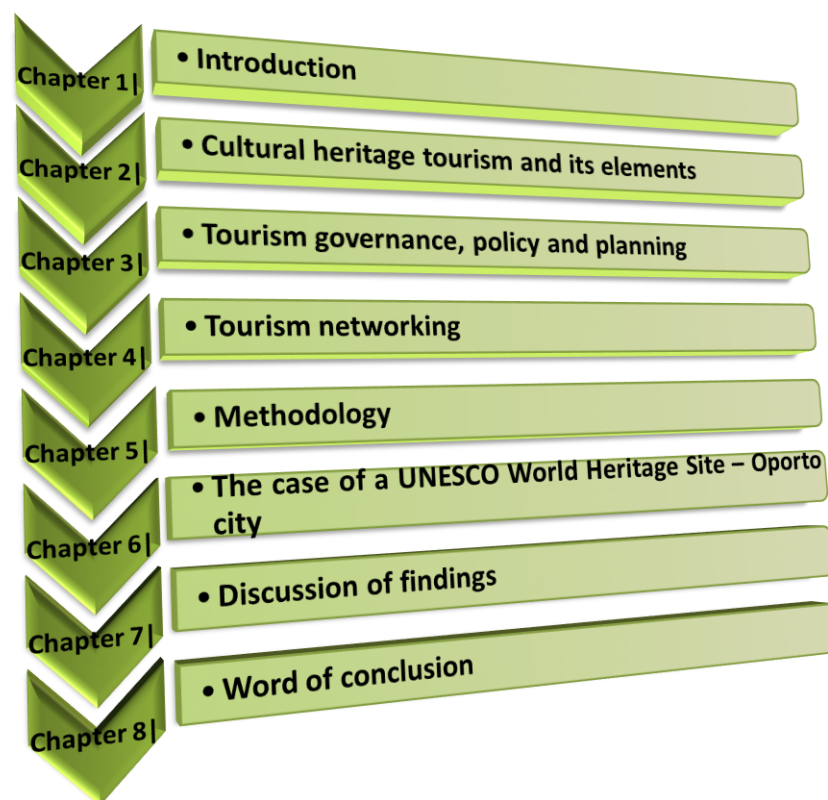


Figure 1.1 – Structure of the dissertation

Source: Own elaboration

The first chapter serves as an introduction to the present dissertation, discussing its interest and scope, based on the statement of the problem to be studied, and shortly presenting the objectives and methodology of the study, which are thoroughly described in Chapter 5 on Methodology. Chapter 1 also explains the structure of the dissertation, giving an overview of each chapter of the present study, and serving as an insight into the course and the logic of the study, and a sort of a document map.

Chapter 2 deals with the core concepts that this dissertation is based on and around which this particular topic evolved, being the concepts of tourism, heritage and culture as the core elements of cultural tourism. Each of the concepts is explained taking into account different viewpoints, i.e., different definitions and meanings they embody, as well reflecting on the impacts they generate and the question of sustainability. Afterwards, the interrelation between the three cultural tourism elements is argued, as well as the changes they impose on one another. Lastly, the very concept of cultural tourism is defined and discussed as a dynamic process, reflecting on its place within the general tourism industry as one of the types of tourism, including a short insight into the development of scientific research within the cultural tourism field.

Chapter 3 focuses on three different, but highly interrelated and interdependent concepts – tourism governance, public policy and planning. Firstly, the concept of governance is defined and different standpoints concerning its understanding are revealed. Afterwards, the focus is put on different levels, elements and modes, types or forms of governance, subsequently depicting each of them separately. After getting a clear insight into this complex phenomenon, concepts of public policy and planning are discussed, followed by the implications of the former concepts for tourism.

Chapter 4 is a logical sequence of the previous chapter, where one specific form of governance was chosen to be studied and focused on, that is networking. The chapter begins with the examination of the conceptual framework of networks, discussing different characteristics and implications of the network approach, as well as the elements that make it successful, followed by the discussion of main types of networks, each of them being given separately. The chapter concludes with the rationalization of networks and partnerships in tourism.

Chapter 5 is the chapter dedicated to methodology of the present study. It broadly describes the process of the elaboration of the study. Firstly, it examines the ontological, epistemological and methodological issues in social sciences in general, as well as in tourism in particular, inspecting the concepts of paradigm, social sciences, the three mentioned “ologies” and the relationships between them. Afterwards, it explains the rationale of the present study, referring to the main interest of the researcher, what emerged along the research process, the reasons why the researcher focused on previously discussed concepts in the theoretical part of the study, and the rationale behind the chosen case study. Subsequently, the research process is described, including the literature review, theoretical framework and hypothesis development, research design, and research approach and methods. Within the section describing the theoretical framework and hypothesis development, the problem in focus is stated, and the objectives, research questions, and hypothesis are defined. The section on research approach and methods includes the justification of data collection with the sampling frame, and the course of data processing and analysis.

Chapter 6 focuses on the specific case of the UNESCO World Heritage Site of Oporto city. The chapter begins with a short portrayal of Oporto city, followed by the description of the Historic Centre, that is, the UNESCO World Heritage Site. Then, the selection criteria for the Site to be classified as World Heritage are explained. This is followed by the characterization of tourism activity in the Historic Centre and the organizational and management structure of the Site, based on the content analysis of the documentation relating to this structure, with the aim of identifying its key actors.

Chapter 7 discusses the findings of the dissertation, as well as the analysis of the findings. And lastly, Chapter 8, presents the main conclusions of the dissertation, making the analogy between research objectives and the final work, discusses the contributions of the study, i.e., managerial implications of the findings, limitations of the study and recommendations for future research.

Chapter 2| Cultural tourism and its elements

2.1 Introduction

The present chapter is dedicated to the elucidation of the concept of cultural tourism and the elements that comprise it, that is, the concepts of tourism, culture and heritage (both tangible and intangible). It aims to, firstly, define and discuss each concept solely and afterwards to make a parallel between them, in order to verify how they influence each other. First, each concept is presented individually and, posteriorly, the interconnections between them are argued, as well as the impacts they make on one another.

2.2 Conceptualizing cultural tourism elements

2.2.1 Tourism

Tourism is a phenomenon, an industry, an activity, an international business, an income generator, a development mechanism, a poverty alleviator. It can be studied and defined from the demand side (e.g. Frechtling, 2001; UNWTO), from the supply side (e.g. Smith, 1988, 1991, 1993, 1995; UNWTO), as a system composed of supply and demand (e.g. Leiper, 1990; Mill & Morrison, 1985; Wall and Mathieson, 2006), from a community perspective (e.g. Murphy, 1985, Murphy & Murphy, 2004), or from a market perspective (e.g. Hall, 2003). It incorporates a whole spectre of different terms that define it, such as leisure, recreation, travel, visit, holiday, etc. It is a complex endeavour difficult to define (Cooper, Fletcher, Fyall, Gilbert & Wanhill, 2005, 2008; Davidson, 1998; Theobald, 1998, 2005; Wall & Mathieson, 2006). Wall and Mathieson (2006) suggest that the distinction between tourism, leisure and recreation are increasingly fading in the post-modern world and put tourism and outdoor recreation side by side, defining their three basic aspects: the supply of facilities, the demand for participation, and the distances that must be overcome to bring together the former and the latter, i.e. to bring the consumer to the place of production. The interrelation between leisure, recreation and tourism is shown in Figure 2.1.

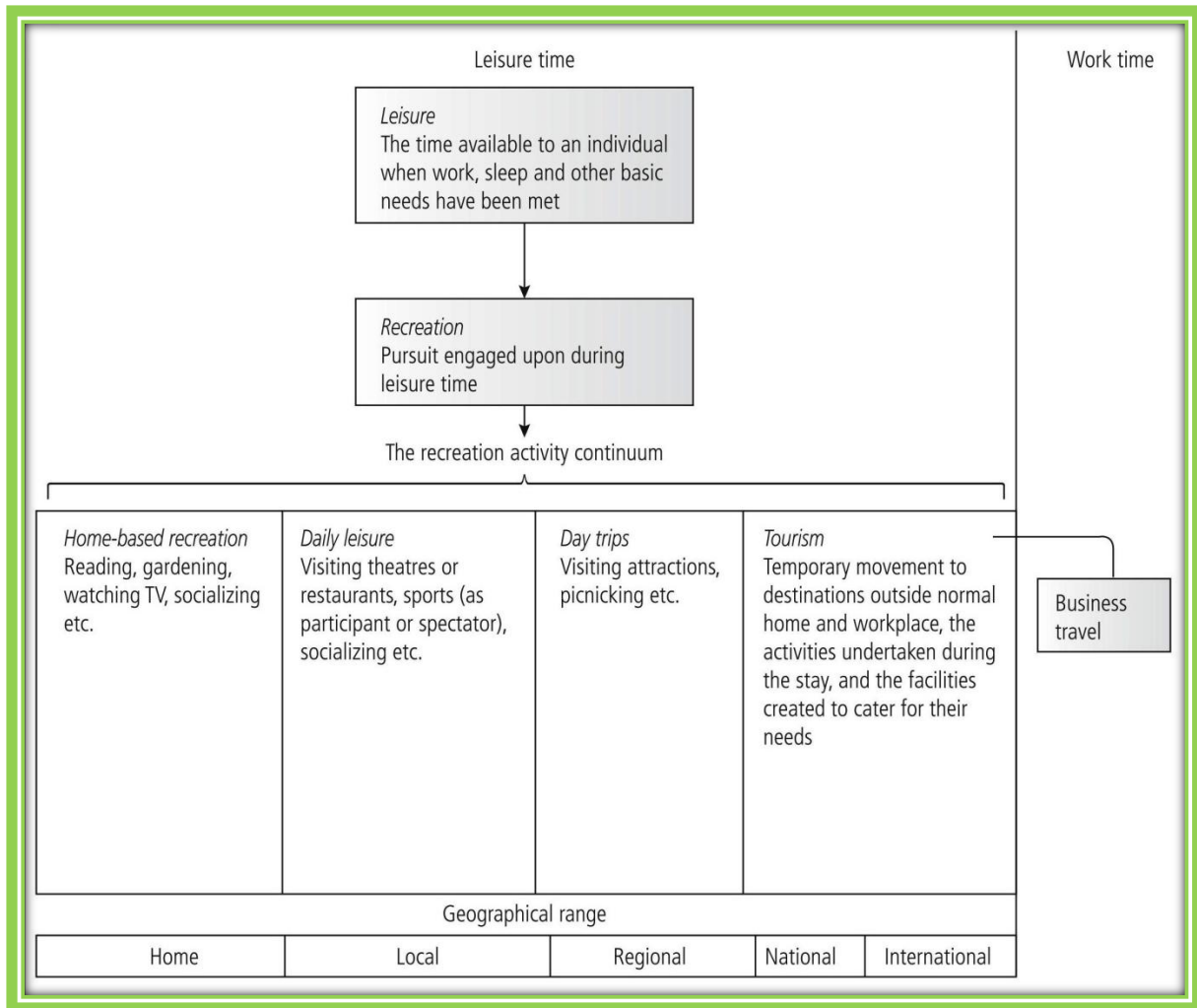


Figure 2.1 – Leisure, recreation and tourism

Source: Boniface & Cooper (2005, p. 14)

When it comes to the designation of tourism as an industry, it has a lot to do with its technical application and it is strongly supported by the actors from the supply side, though there are multiple contradictions that suggest that tourism cannot be considered an industry in a general sense, even though it is necessary to make it measurable, track trends and make it comparable to other industries and sectors (Wall & Mathieson, 2006). According to Davidson (1998, p. 23; 2005, p. 26), there are three main advantages of designating tourism as an industry. Firstly, it provides political legitimacy for tourism, improves its image, and acknowledges its contribution to economic health and its role in economic development, suggesting that it should be equalized with other industries when it comes to budgeting, funding and planning processes. Secondly, it allows creating a solid framework that would tabulate, analyze and publish accurate, meaningful and believable economic data on tourism, enabling the comparison with other industries of the world economy, which altogether results

in giving a greater importance to tourism performance and its contribution to the economy. And, lastly, it enhances the attainment of self-identity of tourism actors, and the self-esteem that goes with identity.

However, designating tourism as an industry has, as well, many limitations and contradictions. Leiper (2007) argues that ‘the tourism industry’ is misleading as a generic expression and should be used rather within a plural variation as ‘tourism industries’. Mill (1990, p. 17) firmly states that tourism is not, nor can be considered an industry, but rather an activity engaged in by people who travel, even though it “gives rise to a variety of industries”. According to Davidson (1998, 2005), various facts discredit those who suggest that tourism is an industry. First of all, tourism does not fit well the traditional definition of an industry; secondly, many of the traditional methods used for measurements and analysis of other industries do not have applicability in tourism; thirdly, it is sometimes impossible to determine the proportion of tourists’ expenditure in total receipts, due to the fact that many sectors, and industries and businesses within them, receive income from both tourists and non-tourists; and, lastly, there is the inferiority and the narrow focus of tourism, which makes it impossible to compete with other industries when it comes to public funding, especially with the ones belonging to primary and secondary sectors, or the ones given a higher priority within the tertiary sector, such as education or health care.

When it comes to defining tourism, definitions can be either conceptual (holistic), trying to describe what tourism is, or technical, enabling the value of tourism to be measured once in a while and in the same way, as well as to facilitate the comparison with other sectors (Smith, 1988). It can also be defined from the demand side and from the supply side, incorporating the conceptual or the technical perspective, or including both these perspectives. The following tourism definition is the demand-side definition given by the World Tourism Organization, which defines tourism from a conceptual point of view, as:

The activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited (Commission of the European Communities, Organisation for Economic Co-operation and Development, United Nations & World Tourism Organization, 2001, pp. 1, 13, 36).

The definition of tourism from a technical perspective of the demand-side focus on the need to isolate tourism travel from other forms of travel for statistical purposes, requiring an activity to fulfil certain requisites in order to be able to count as tourism, such as the minimum and maximum length of stay, strict purpose of visit and a distance consideration (Cooper et al., 2005, 2008).

From a conceptual point of view of the supply-side, tourism can be seen as “[...] an industry that consists of all those firms, organizations and facilities, which are intended to serve the specific needs and wants of tourists” (Leiper, 1979, p. 400, cited by Cooper et al., 2008, p. 13). As for the technical supply-side tourism definition, the major challenge is to distinguish, from the wide spectrum of tourism businesses, which organizations and companies are the ones orientated fully and solely to the tourists, and which ones serve local residents and other markets apart from the tourists (Cooper et al., 2005, 2008). This problem was solved with the creation of the Tourism Satellite Account (TSA).

What exactly is the Tourism Satellite Account? “Since the end of the 1970s, France has been using the term “satellite accounts” as a way of designating those accounting practices in specific horizontal areas that are not correctly identified in the System of National Accounts, but nonetheless could be considered as “satellite sub-systems” of that System, having developed as well the operative plans for quantification of tourism economic impacts (Commission of the European Communities, Organisation for Economic Co-operation and Development, United Nations World Tourism Organization, 2001, p. ix), that is, for estimating the size and contribution of the tourism sector to the economy (Murphy & Murphy, 2004). According to Cooper et al. (2005, 2008), the TSA provides information on the economic impact of tourism when it comes to Gross Domestic Product (GDP), tax revenues, investments, tourism consumption and the nation’s balance of payments; provide information on tourism employment and its characteristics; and allow comparison with other economic sectors.

Interactions between supply and demand occur at a variety of scales, producing a pattern of tourism and the outdoor recreation, which generates certain impacts, as well as the strategic, management and planning questions. As an unreservedly global phenomenon, tourism generates impacts of unprecedented proportions, including both lucrative sources of revenue for a destination, but also having major negative impacts on it (UNESCO Office in Venice,

n.d.). It transforms both the demand and the supply side, i.e. it influences the ones practicing tourism, as well as the ones offering tourism products and working in the tourism industry, not to mention its impact on the resources which are the basis of the entire industry. Growth of one party can, but does not necessarily, generate the growth of another, but on the contrary – the more one grows, the more other(s) can be endangered. Likewise, the growth of tourism reflects on sustainability and protection of both cultural and natural heritage. The changes that tourism imposes on the host country can be environmental, social, cultural, economic, as well as joint socio-cultural and socio-economic, political and moral (Archer & Cooper, 1998; Archer, Cooper & Ruhanen, 2005; Cooper et al., 2005, 2008; Mill, 1990) and these changes raise issues and consequences for both visitors and hosts.

Each of these impacts can be reduced, if not fully eradicated, by undertaking different management and organizational measures, which can be effective only if the impacts have previously been identified, measured and evaluated (UNESCO Office in Venice, n.d.). All the measures should indispensably fall under the auspices of sustainability, and be based upon (Swarbrooke, 1999):

- Scrupulous, conscientious and long-term public sector planning;
- Ethics and practicalities of conservation;
- Educating the tourists and the members of local communities, as well as training and education of human resources;
- Creating partnerships at different levels;
- Community involvement and a superior local control;
- De-marketing of places, times and people;
- Visitors management;
- Putting the emphasis on the physical environment;
- Technocratic thinking.

According to Nordic World Heritage Office, without sustainable management, tourism loses its potential for growth (NWHO, 1999). What exactly does the term “sustainable tourism” stand for, and what must tourism be like, in order to be attributed with the trait of sustainability? The most comprehensive definition of sustainable tourism is the one given by the World Tourism Organization:

Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support system (WTO, 1998, p. 19, cited by UNESCO Office in Venice, n.d.).

Making tourism sustainable brings a whole set of benefits (Swarbrooke, 1999, p. 10), some of them being:

- Enhancement of understanding and awareness of the impacts of tourism on natural, cultural and human environments;
- Ensuring a fair distribution of benefits and costs;
- Stimulation of domestic industries, such as hotels and other lodging facilities, alimentation facilities, transportation and guide services, and handicrafts;
- Diversification of the local economy, particularly in traditional rural areas;
- Enhancing the decision-making among all segments of the society, including local communities, and incorporating planning and zoning that ensure tourism development, appropriate to the existing carrying capacities;
- Demonstrating the importance of natural and cultural resources for a community's economic and social well-being and helping to preserve them;
- Monitoring, assessing and managing the impacts of tourism, developing reliable methods of environmental accountability, and defying the negative effects.

All the mentioned impacts of tourism, the management and organizational measures for their reduction, as well as the benefits that tourism can have in case of implementing the sustainability principles, may as well apply to cultural heritage tourism.

2.2.2 Culture

“In the future, it will be a relief to find a place without culture.”

(Talking Heads, *Stop Making Sense* sleeve notes, in Richards, 2001, p. 3)

A social critic, Raymond Williams (1983, cited by Richards, 2005, p. 21, and Robinson & Smith, 2005, p. 5) pointed out that culture is perhaps “one of the two or three most complicated words in the English language”. The International Council on Monuments and Sites (ICOMOS) defines culture as:

The whole complex of distinctive spiritual, material, intellectual and emotional features that characterise a community, society or social group, including not only arts and literature, but also modes of life, the fundamental rights of the human being, value systems, traditions and beliefs. It encompasses the living or contemporary characteristics and values of a community as well as those that have survived from the past (ICOMOS International Scientific Committee on Cultural Tourism, 2002, p. 21).

Similarly, UNESCO (2001) argues how “culture is at the heart of contemporary debates about identity, social cohesion and the development of a knowledge-based economy”, and how it “[...] should be regarded as the set of distinctive spiritual, material, intellectual and emotional features of society or a social group, that encompasses, in addition to art and literature, lifestyles, ways of living together, value systems, traditions and beliefs”. The latter definition of the concept given by UNESCO clearly fits within the frames of the former one given by the ICOMOS International Scientific Committee on Cultural Tourism.

Culture, in its widest sense, provides a set of material and symbolic resources plentiful in supply (arguably infinite) and highly mobile; however, when looking at the resource aspects of culture, the aspects of agency should not be neglected, due to the value and priority of cultures relating not merely to its intrinsic worth, but also to the ways that it is used (Keating, 2001; Robinson & Smith, 2005; Rojek & Urry, 1997). When it comes to the idea of culture in the tourism context, Robinson & Smith (2005, p. 5) argue that, generally, the idea of “high” culture from the 18th and 19th centuries is reproduced, “[...] despite elaborations and attempts by anthropologists over the years to widen our understanding of the term culture away from elitist notions [...]”. Culture can be an important component of economic development generally, not just in tourism, with both culture and cultural heritage being prominent resources in any society and providing benefits internationally (NWHO, 1999). It has a huge influence and multiple roles in the world’s economies, with them predominantly having: (i) a political role, as the representative and enhancer of national ideologies and particular hierarchies of power; and (ii) social roles, as entertainment and a form of communal intellectual bond (Robinson & Smith, 2005). Culture has been one of the main tools of economic restructuring in European cities in the past 20 years (Bianchini and Parkinson, 1993, cited in Richards, 2005, p. 68).

Some authors, such as Williams (1983) and Tomlinson (1991) (cited by Richards, 2005), chose to concentrate on the way in which the term “culture” is used, rather than to seek an

all-embracing definition of the concept. Out of this reason, Williams (1976, cited by Butcher, 2005, pp. 25-26, and 1983, cited by Richards, 1983, p. 22) identifies three broad categories of modern usage of the term: (i) as a general process of intellectual, spiritual and aesthetic development; (ii) as indicative of a particular “way of life”; and (iii) as the works and practices of intellectual and artistic activity. According to Butcher (2005), it is the third category that is normally associated with cultural tourism. Later on, two other uses of the term, somewhat more concrete, have been identified in the scientific literature: (i) culture as a process; and (ii) culture as a product (Richards, 2005). Culture as a process is an approach derived from anthropology and sociology, which regards culture mainly as codes of conduct, embedded in a specific social group, while culture as a product derives particularly from literary criticism that regards culture as the product of individual or group activities to which certain meanings are attached, such as the “high” cultural products of prestige artists or “low” culture of television soap operas (Richards, 2005).

According to Robinson & Smith (2005, p. 4), in a European context, conventional conceptions of what some understand under the term “culture” have largely been dictated by the “post-enlightenment sensibilities” regarding the romantic, the beautiful, the educational, and even the moral, hence the idea of the “Grand Tour” of the mentioned 18th and 19th centuries “high culture”, indulged in by the social elite. All things considered, culture is a complex phenomenon, involving a whole spectre of different elements, such as differences and diversity of people through generations, their creations, histories and heritage, which can be interpreted in different ways. Heritage, as one of its most representative material representations is discussed in the following section.

2.2.3 Heritage

“If in doubt, call it heritage” (Glen, 1991, p. 73, cited by Ivanovic, 2011) is a phrase that strongly illustrates how heritage can represent a vast range of material and immaterial goods. Heritage is a broad concept that encompasses a community’s natural, indigenous and historic or cultural inheritance, landscapes, historic places, sites and built environments, biodiversity, collections, past and continuing cultural practices, knowledge and living experiences, and that includes all of the moveable articles that may be associated with a place, an activity, a process or a specific historical event (ICOMOS International Scientific Committee on Cultural Tourism, 2002). It also includes collections of related or unrelated items that have

been gathered into museums, art galleries, scientific repositories, archives and libraries, whether they are public or private (ICOMOS International Scientific Committee on Cultural Tourism, 2002). Heritage represents a dynamic social reference point and an instrument of growth and progress, recording and expressing the long processes of historic development, forming the essence of diverse national, regional, indigenous and local identities and making an integral part of modern life (ICOMOS International Scientific Committee on Cultural Tourism, 2002).

Heritage can be divided into natural and cultural, with cultural being either tangible (material or constructed) or intangible (immaterial).

Natural Heritage consists of ecosystems, biodiversity and geodiversity that are considered significant for their existence value for present and future generations in terms of their scientific, social, aesthetic, and life-support values (ICOMOS International Scientific Committee on Cultural Tourism, 2002, p. 23).

Cultural Heritage is an expression of the ways of living developed by a community and passed on from generation to generation, including customs, practices, places, objects, artistic expression and values. It is often expressed as either Intangible or Tangible Cultural Heritage (ICOMOS International Scientific Committee on Cultural Tourism, 2002, p. 21).

Tangible Cultural Heritage encompasses the vast created works of humankind, including places of human habitation, villages, towns and cities, buildings, structures, art works, documents, handicrafts, musical instruments, furniture, clothing and items of personal decoration, religious, ritual and funerary objects, tools, machinery and equipment, and industrial systems (ICOMOS International Scientific Committee on Cultural Tourism, 2002, p. 24).

Intangible Cultural Heritage embraces all forms of traditional and popular or folk culture, the collective works originating in a given community and based on tradition. These creations are transmitted orally or by gesture, and are modified over a period of time, through a process of collective re-creation. They include oral traditions, customs, languages, music, dance, rituals, festivals, traditional medicine and pharmacopeia, popular sports, food and the culinary arts and all kinds of special skills connected with the material aspects of culture, such as tools and the habitat (ICOMOS International Scientific Committee on Cultural Tourism, 2002, p. 23).

Prentice (1994, p. 311) defines heritage as “an inheritance or a legacy; things of value which have been passed from one generation to the next”, comprising landscapes, natural history,

buildings, artefacts, cultural traditions etc. According to Oporto City Council (Câmara Municipal do Porto, n.d. a), for over two millennia the word “heritage” stood for inheritance or possessions of a person, home or institution. From the 19th century this term gained another meaning, starting to represent a set of elements representing the history of one country and its people. Cultural Heritage, the enlarged dimension of the collective identity, is the one uniting goods, whether they are real estate (immovable property) or movable assets, tangible or intangible, and defining what we were and what we are (Câmara Municipal do Porto, n.d. a). It is a dynamic reference point for daily life, social growth and change, a major source of social capital and an expression of diversity and community identity (ICOMOS International Scientific Committee on Cultural Tourism, 2002).

According to ICOMOS International Scientific Committee on Cultural Tourism (2002), both natural and cultural heritage belong to all people that have not just the right, but also the responsibility to understand, appreciate and preserve its universal values. The constructed heritage – whether architectural or urban, or in a form of a landscape, as an important component of the cultural heritage of a country, a region or a community – is a powerful factor of social distinction and identification of individuals and populations, as well as an engine for qualification and development of places and territories (Instituto da Habitação e da Reabilitação Urbana, 2013).

In the times of growing globalization, the protection, conservation and communicating the significance of the heritage and cultural diversity is becoming imperative worldwide, especially due to the fact that they represent major tourism attractions (ICOMOS International Scientific Committee on Cultural Tourism, 2002). The interrelation between tourism, heritage and culture is further discussed in Section 2.3.

2.3 Interrelation between tourism, heritage and culture

There is a mutual dependence between tourism and cultural heritage, based on cultural heritage creating a basis for tourism growth, and tourism having the power to generate funds that make conservation of cultural heritage possible (NWHO, 1999). Tourism is an experience of culture that assists in generating nuanced, as well as new cultural forms, while tourism products can be seen as expressions of culture, in a way that culture is consumed by the tourist (Robinson & Smith, 2005). It is simply cultural per se, with its structures, practices

and events being very much an extension of, and emergence from, the normative cultural framing (Urry, 2005). Both natural and cultural heritage are the very basis of tourism, and the main motivation for a tourist's visit (UNESCO Office in Venice, n.d.). Tourism and cultural sectors have joined forces in the revitalisation of redundant buildings and open spaces for contemporary purposes worldwide, which contribute to the identity of communities and their social traditions, providing opportunities for sustaining traditional and contemporary cultural values (UNWTO World Tourism Organization, n.d.). Many complementary facilities, such as hotels, restaurants, shopping precincts etc., complement and boost the museums, art galleries, cultural attractions and Heritage Sites.

However, although tourism generates many positive impacts in terms of enhancing the revitalization, conservation and protection of cultural attractions and Heritage Sites, Smith (2003, cited by Richards & Wilson, 2004) argues that tourism has also been linked to a decline in cultural values, a loss of local individuality, local customs and traditions. Richards and Wilson (2004) consider that market, in general, degrades culture and a globalised market degrades it utterly, and that tourism, in particular, has been picked out as a major socio-economic and cultural force that carries the seeds of global destruction to localities worldwide. This, indeed, very strong statement by the author can undoubtedly be substantiated by evidence; however, there are always ways in form of different management actions and measures that can be undertaken to control impacts generated by tourism activities, as the ones mentioned in Section 2.2.1 on Tourism.

Swarbrooke (1999) emphasises some particular problems when it comes to interaction between tourism and culture, or tourism and cultural attraction in particular, including Heritage Sites, caused by unprofessional, laic, unscrupulous and/or incompetent management and organization of tourism at these Sites, such as:

- Congestion at the Cultural Site and uncontrolled tourism growth difficult to manage, in case of entrepreneurs' unethical interests in merely short-term benefits and rapid exploitation of the market, leading to nothing but a lose-lose situation for both the Site and its managers, as well as for the tourists visiting the Site. In other words, the over-use of Cultural Heritage Sites and Places results in both damage to buildings and landscapes, and a poor experience to visitors;

- Vulnerability of Cultural Tourism Sites, due to their high importance for the country's economy, and the fact that striking at the tourism industry means striking at the country's government and economic system;
- Over-commercialization and over-exploitation of culture through tourism;
- Lack of local control, that is, little or no control by both local community and the local government when it comes to decision-making, organizational and management processes at the Cultural Heritage Sites, due to most power being in hands of the investors outside the local area.

From these problems it can be concluded that a successful management of endangered Cultural Heritage Attractions goes much beyond attractions themselves. It depends on the effective coordination between a range of actors involved, such as Site managers, local authorities and service providers, such as tourism intermediaries, transportation companies, information managers, etc. (UNWTO World Tourism Organization, n.d.). According to Swarbrooke (1999), the interaction and interrelation between cultural tourism elements can be improved and brought to such level where none of the elements will generate negative impacts on the other element(s), through:

- Enhancing a greater understanding for the customs, beliefs, and behaviour of the host communities, and the respect for both their natural and cultural heritage;
- Including local communities and local governments in the decision-making and management processes at the Heritage Sites;
- Refraining from accentuating any type of differences between the host and the visiting communities, or supremacy and preponderance of the latter over the former;
- Creating and implementing courses of action that integrate ecological, economic, social and cultural parameters that do not jeopardise the long-term stability of both ecological systems and the cultural landscape, and that balance the needs of both residents and visitors;
- Creating partnerships between the external authorities and the local communities;
- Ethical planning and implementation of zoning regulations, in order to prevent conflicts between conservation and the pursuit of economic viability.

As tourism generates multiple impacts on culture, culture also influences the tourism phenomenon and its actors and stakeholders. When it comes to domestic tourism, cultural

heritage stimulates national pride in one's history, while in international tourism it stimulates respect and understanding of other cultures and, as a consequence, promotes peace and understanding (UNWTO World Tourism Organization, n.d.), causing tourism actors, from both the supply and the demand side, to develop a greater respect, appreciation and concern for culture, a superior culture-orientation within tourism, and a stronger spirit for protection and conservation of tangible and intangible cultural heritage.

When it comes to linking heritage conservation and tourism, ICOMOS International Scientific Committee on Cultural Tourism (2002) created a set of principles for managing tourism at places of cultural and heritage significance that best emphasize the relation between culture, heritage and tourism. These principles are:

- Since domestic and international tourism is among the foremost vehicles for cultural exchange, conservation should provide responsible and well managed opportunities for members of the host community and visitors to 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.

These principles demonstrate that heritage conservation has recognized tourism as a long-term activity, and is seeking ways to coexist in harmony (Whyte, Hood & White, 2012) and to protect interests of all parties involved, including the members of host communities, the visitor, as well as the future generations. As nicely expressed by the president of the World Bank, James Wolfensohn, "culture can be justified for tourism, for industry, and for employment, but it must also be seen as an essential element in preserving and enhancing national pride and spirit" (NWHO, 1999, p. ii).

2.4 Cultural tourism

Cultural tourism is a highly elusive concept difficult to define (Ivanovic, 2011, Richards, 2005), being this attributable to the fact that it is consisted of two independent but, yet, correlated components difficult to portray even individually (Richards, 2005), them being tourism and culture, the latter one including heritage, due to the existing variation of its name in the form of heritage tourism, or cultural heritage tourism. After defining the mentioned concepts in previous sections, the very concept of cultural tourism is quite more lucid and comprehensive. Cultural tourism can be defined as:

Essentially that form of tourism that focuses on the culture and cultural environments, including landscapes of the destination, values and lifestyles, heritage, visual and performing arts, industries, traditions and leisure pursuits of the local population or host community. It can include attendance at cultural events, visits to museums and heritage places and mixing with local people. It should not be regarded as a definable niche within the broad range of tourism activities, but encompasses all experiences absorbed by the visitor to a place that is beyond their own living environment (ICOMOS International Scientific Committee on Cultural Tourism, 2002, p. 22).

Cultural tourism is tourism, representing far more than the simple “production and consumption of high art and heritage”, but rather reaching into deep conceptual territories relating to how one constructs and understands himself, the world and the multi-layered relationships between them (Robinson & Smith, 2005).

This type of tourism is one of the oldest forms of travelling, which still continues to be a core of the tourism industry, in its whole, in most parts of the world (Richards & Munsters, 2010) and is “particularly significant as a leisure activity, not just because of this displacement, but also because it provides a laboratory in which to study key aspects of leisure consumption and production” (Richards, 2013, p. 483). According to OECD (2009), it accounted for around 40% of all international tourism, which makes 360 million arrivals in 2007. According to Swarbrooke (1999), cultural tourism is one of the few types of tourism that are highly compatible with the concept of sustainability, which can be attributable to the fact that it involves visitors learning about the history and culture of a certain area. It enhances local community esteem and provides the opportunity for greater understanding and communication among peoples of different backgrounds (Swarbrooke, 1999). However, like all forms of tourism, cultural or cultural heritage tourism as well generates large-scale negative impacts, and Heritage Sites, unfortunately, are no exception when it comes to

impacts of tourism activity, daily facing numerous challenges due to an ever increasing tourism activity and related development issues (UNWTO World Tourism Organization, n.d.). Therefore, efforts have to be made constantly for a sustainable cultural tourism, through a joint of steps based on a set of principles and guidelines, as shown in Figure 2.2.

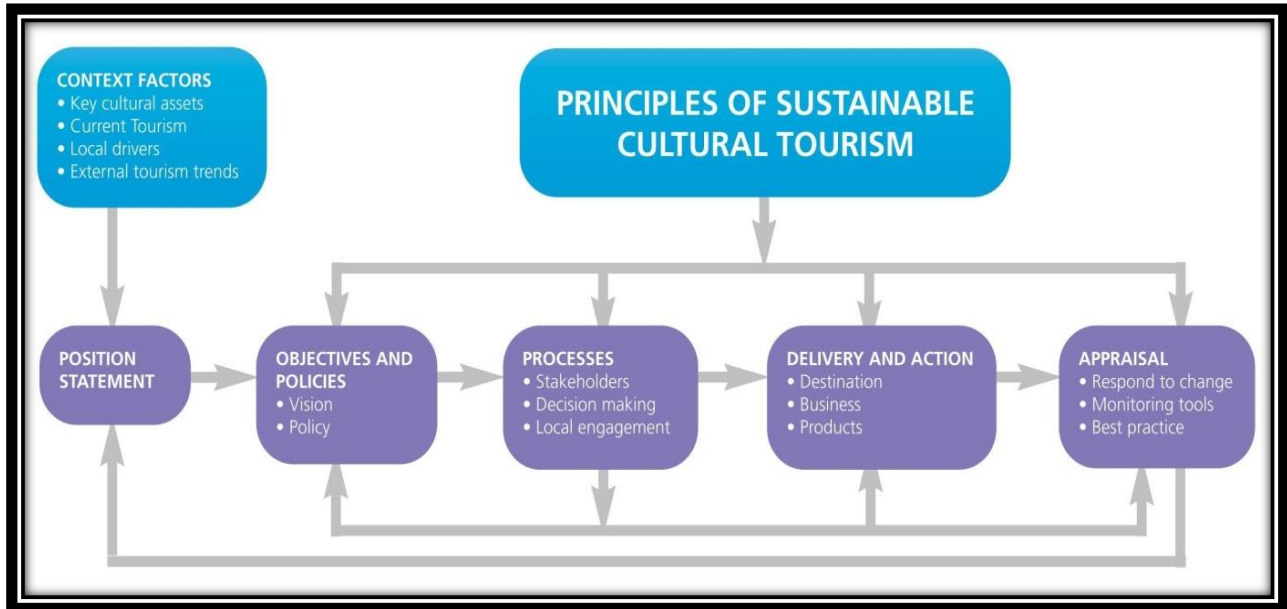


Figure 2.2 – Sustainable cultural tourism: a dynamic process

Source: European Association of Historic Towns and Regions (2006, p. 8)

Figure 2.2 shows how principles and guidelines for a sustainable cultural tourism represent a dynamic and complex process, whose elements all coexist and relate in such a way that they inevitably affect each other. A set of factors (cultural assets, current tourism, local drivers and external trends, among others) determines a certain position statement that leads to determining certain objectives, policies and visions. These generate decision-making processes that include involvement of diverse stakeholders and local engagement, that further call for specific actions relating to the destination, destination products and businesses, that further lead to an appraisal, i.e., the evaluation in a form of responds to change, monitoring and determining the best practices.

Among the most emblematic cultural tourism attractions, representing a vast and diverse collection of human creation across the entire globe and the entire span of human history are the Heritage Sites (UNWTO World Tourism Organization, n.d.). What exactly falls under the

scope of a Heritage Site that represents, as well, a cultural attraction or cultural destination? The following figure (Figure 2.3) gives the answer to this question.

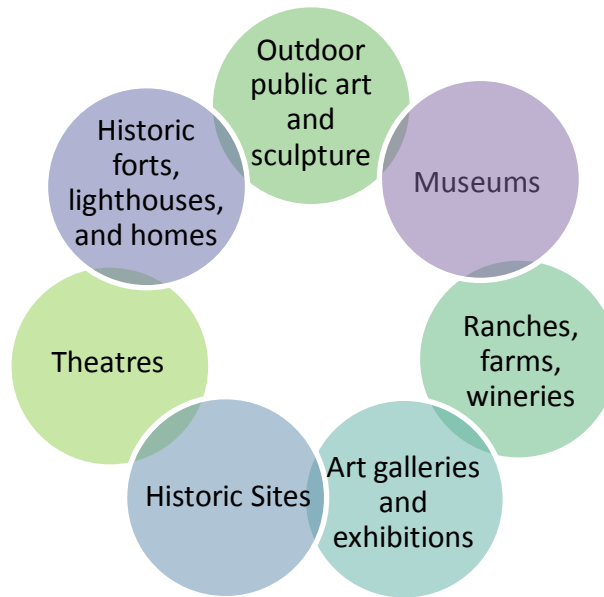


Figure 2.3 – Culture and Heritage Sites
Source: Whyte, Hood & White (2012, p. 10)

Another comprehensive list of the types of Sites and attractions which are considered to attract cultural tourists is provided by the European Centre for Traditional and Regional Cultures (ECTARC, 1989, cited by Richards, 2005, p. 23):

- Archaeological sites and museums;
- Architecture (ruins, famous buildings, entire towns or historical parts of towns);
- Art, sculpture, crafts, galleries, festivals, events;
- Music and dance (classical, folk, contemporary);
- Drama (theatre, films, dramatists);
- Language and literature study, tours, events;
- Religious festivals, pilgrimages;
- Complete (folk or primitive) cultures and sub-cultures.

An additional question to be asked when studying cultural tourism is who the tourists that visit this particular type of destination are. Poria, Butler and Airey (2003) have conducted a study to investigate the links between tourists and the heritage, in order to better understand the concept of cultural tourism. The study took place in one of the most representative

Cultural Heritage Sites in the world – the Wailing Wall in Jerusalem, Israel –, hence the decision to choose the findings of this specific study as illustrative when it comes to the segmentation of this particular type of tourists. The respective authors came to conclude that there are four different groups of tourists visiting Heritage Sites, as illustrated in Figure 2.4.

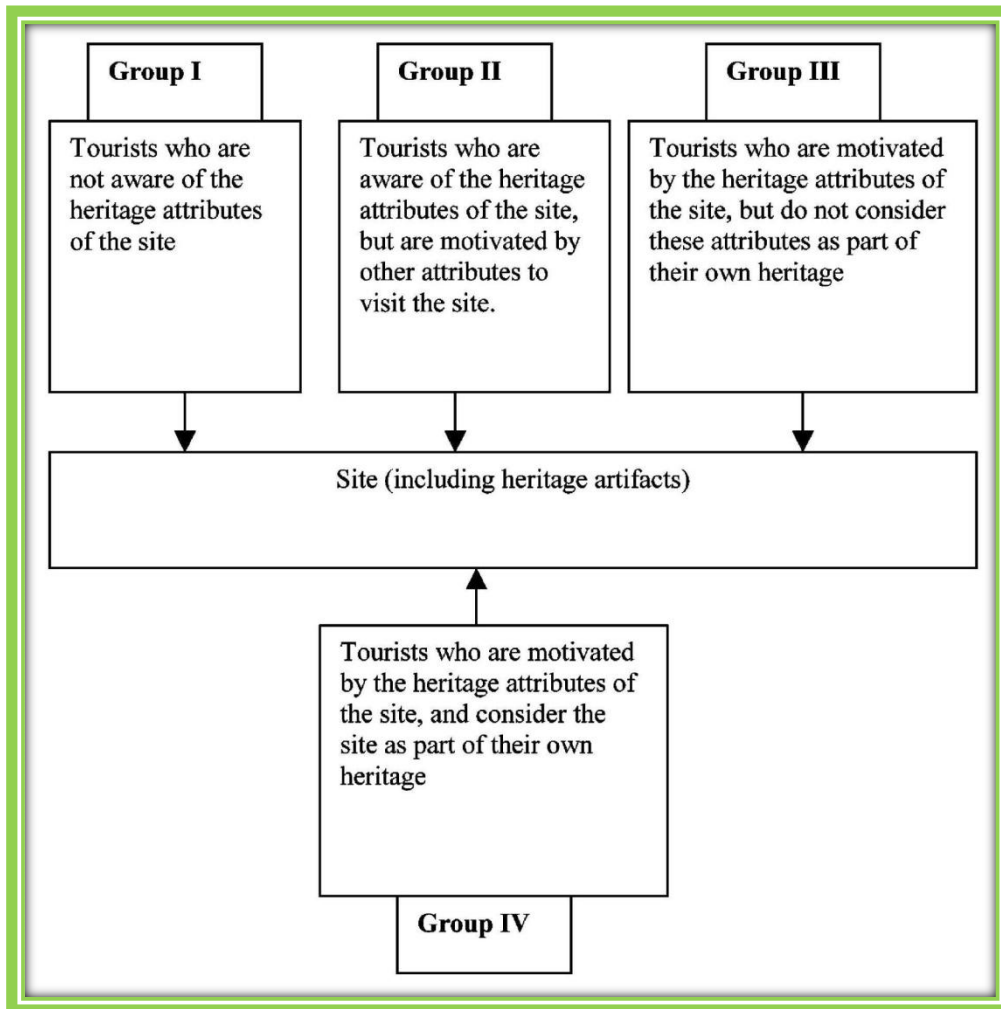


Figure 2.4 – Segmentation of tourists visiting a Heritage Site

Source: Poria, Butler & Airey (2003, p. 248)

Whyte, Hood and White (2012, p. 23), characterize the Cultural/Heritage Tourism traveller as:

- Well-Educated: more likely to have a college or a university degree than the general traveller, often arriving with detailed prior knowledge of the attraction;
- Well-Heeled: enjoying significantly higher incomes than general travellers, thanks to an older demographic profile and higher education levels;
- Well-Travelled: Taking more trips per year compared to general travellers.

Attracting cultural tourists and developing cultural tourism has become of crucial interest and a part of a common national strategy of countries and regions worldwide, seeking to conserve traditional cultures, to develop new cultural resources and to create a strong cultural image (OECD, 2009). According to Richards and Munsters (2010), with the growth of countries' and regions' efforts to develop cultural tourism, and the respective growth of impacts on the respective countries and regions, as a result of these efforts, grew the interest in scientific research within the cultural tourism field by the scholars from various disciplines, particularly sociology and anthropology. This growing body of research on cultural tourism indicates an increasingly complex and rich relationship between the consumption of culture through tourism and the wider field of leisure studies (Richards, 2013). As the interest in cultural tourism field of research has grown, simultaneously grew the variety of techniques and methods used to explore the phenomenon (Richards & Munsters, 2010), with some of them being:

- Quantitative:
 - Survey-based method, in the form of participant surveys submitted to statistical analysis;
 - Economic multiplier method.
- Qualitative:
 - Textual method, in the form of a diary;
 - Oral methods, i.e., in-depth interviews;
 - Visual and audio-visual methods, such as observation and collage technique.

These methods are merely mentioned with the intention of getting an insight into different possible methodologies that can be used in cultural tourism studies, but are not going to be discussed in further detail, due to their potential detailed revisions going beyond the scope of the present study. What will, however, be argued furthermore, is the qualitative methodology and the way it was conducted for the purposes of this study.

2.5 Summary and conclusions

Tourism is a global phenomenon, seen by some as an industry, by the others as a sector, by the third as an activity, etc. However, what can be said in general is that it is a complex endeavour that can be observed in many different ways, from many different perspectives, none of them being wrong. It is an industry/sector/activity with gigantic economic, social,

political, cultural and environmental impacts, which reflect on both host communities and visitors, and both the demand and the supply side. There are advocates and supporters of the postulation that tourism represents an ultimate generator and tool for societies' development and well-being, but there are, as well, the ones arguing that tourism brings negative impacts and degrades societies worldwide in socio-economic and cultural terms. Again, none of them is wrong. There is absolutely no possibility for such a huge and powerful phenomenon not to generate impacts. The only matter to be considered is how to increase the positive ones and neutralize the negative ones. This is where the questions of sustainability and ethics come into effect. Tourism has to be organized and managed in a responsible, scrupulous, conscientious and sustainable way, or else all that makes tourism what it is will soon be lost.

There is a mutual dependence between tourism, culture and heritage, because tourism is simply cultural per se, and because both natural and cultural heritage represent the very basis of tourism. When it comes to interactions between tourism and culture, it is inevitable for some particular problems to emerge, such as congestion at the Cultural Sites, uncontrolled tourism growth that is difficult to manage, resulting in vulnerability of the Sites, or even the over-exploitation of culture through tourism. These problems can be combated with the wide range of strategic and managerial measures, such as the involvement of local communities in the decision-making process, creation of partnerships for a more successful management, ethical planning, zoning regulations, among others. Nonetheless, culture also influences tourism and its actors. However, these impacts are more positive than in the reverse case and they include stimulation of national pride, respect and understanding among different cultures, promotion of peace and understanding, among others.

Tourism is one of the most obvious forms of globalization of culture. It plays an important role in preservation of cultural heritage and national identity, nation-building and enhancement of local development, but can also cause the "impoverishment" of cultural authenticity. Both cultural and natural heritage, which represent the legacy of the global society and crucial cultural tourist attractions, are equally endangered and susceptible to impacts of tourism activity. They represent something that belongs to all people that have not just the right, but also the responsibility to understand, appreciate and preserve its universal values. All things considered, sustainability is an essential set of principles and guidelines, without which tourism loses its potential for growth, especially nowadays, in times of increasing globalization.

Chapter 3|
Tourism governance, public policy and
planning

3.1 Introduction

This chapter deals with the concepts of governance and public policy and, more specifically, tourism policy. It is firstly looked upon the various perspectives of the idea of governance, which has nowadays become quite ambiguous and complex and can be understood in different contexts, depending on the realms in focus. Subsequently, different levels and modes of governance have been discussed in the following sections, in order to reflect, at least, a fraction of the breadth of the concept and to get a more comprehensible insight into the way it functions when it comes to different approaches. The discussion is continued with the conceptualization of public policy as a tool of governance, and the process of planning as the starting point for policy-making. The chapter concludes with implications of the previously argued concepts for tourism.

3.2 Conceptualizing governance

Governance has become “a virtual synonym for public management and public administration” (Frederickson & Smith, 2003, p. 225, cited by Frederickson, 2005, p. 285 and Heinrich, Hill & Lynn, 2004, p. 3), though it was traditionally associated with government, i.e., practicing of power by political leaders (Kjær, 2004). It is a term with dozens of different meanings (Frederickson, 2005; Kjær, 2004), that can, accordingly, be interpreted in many different ways, depending on the area in focus. Nowadays, the idea of governance appears in diverse academic areas, such as sociology, geography, economy, public administration, planning, political science, etc. (Bevir, 2011), causing the academic literature that deals with conceptualization of governance to be quite complex, broad and ambiguous (Lynn, Heinrich & Hill, 2001; Pierre, 2000; Rhodes, 2000). It can be defined as “the exercise of political, economic and administrative authority necessary to manage a nation’s affairs” (OECD, 2006, cited by OECD, 2012, p. 14).

According to Pierre (2000), the concept has a dual meaning. On the one hand it refers to empirical manifestations of state adaptation to its external environment and, on the other hand, it denotes a theoretical representation of coordination of social systems and, primarily, the role of the state in that process (Pierre, 2000, p. 3). The latter meaning can further be divided into two categories (Peters, 2000), first of them dealing with questions related to steering of society and the economy by the state, what can be referred to as the old way of governance; and the second one being more generic and dealing with questions of co-

ordination and different sorts of formal and informal types of public-private interactions and, most predominantly, the role of policy networks. Thus, the first approach is more state-centred, due to its main research problem being to what extent the state has the political and institutional capacity to steer the society and how the role of the state relates to the interests of related actors; and in the second approach, which is more society-centred, the focus is on co-ordination and self-governance, manifested through different types of networks and partnerships (Rhodes, 1997, cited by Pierre, 2000, p. 3).

Williamson (1996, cited by Lynn et al., 2001, p. 5) explains governance as a term that includes both [...] “global and local arrangements, formal structures and informal norms and practices, spontaneous and intentional systems of control”. Rhodes (1997, p. 43, cited by Hall & Jenkins, 2004, p. 528 and Hall, 2010, p. 10) defines it as a [...] “new process of governing; or a changed condition of ordered rule; or the new method by which society is governed”. In its broader sense, governance suggests that not only the state but also the non-governmental actors within the market and civil society have prominent roles in the governing of modern societies at different levels, from local to international ones (Kooiman, Bavinck, Chuenpagdee, Mahon & Pullin, 2008).

According to Treib, Bähr and Falkner (2007), there are three different understandings of the concept of governance that have, so far, been presented in the literature, depending on whether governance is seen as belonging primarily to the realms of politics, polity or policy. In general terms, governance is associated with a change in the nature of the state and it refers to a process of governing where collectively binding decisions are taken by elected representatives within parliaments and implemented by bureaucrats within public administrations (Treib et al., 2007). Governance can also be defined as a process of co-ordination within networks of interdependent actors based on institutionalized rule systems (Benz, 2004, cited by Treib et al., 2007; Jordan & Schout, 2006). It can denote societal steering, with steering being a powerful metaphor for civic governing in the traditional sense, a process of interaction between different societal and political actors and the growing interdependencies between the two as modern societies become ever more complex, dynamic and diverse (Kooiman, 2003; Treib et al., 2007).

There has been a growth of interest in governance during the 1990s, which resulted in highlighting the forms of cooperation between the state and civil society (Peters & Pierre,

2007). As the state is no longer being able to steer the society and the economy alone, it has to develop cooperative practices with other society actors, such as enterprises, the third sector, public organizations and citizens (Nyholm & Haveri, 2009). The interdependent nature of the state and the public administration, on one side, and the mentioned society actors, on the other side, is underlined by the concept of governance, which is used to denote “all forms of organisational relationships” (Edwards, 2002, cited by Beaumont & Dredge, 2010, p. 8).

The literature on new governance highlights the role of markets, networks and non-state actors at the expense of the role of the state, arguing whether or not has the power of the state declined, or has the state simply altered the way it rules (Bevir, 2009). The opinions regarding this matter are different, but it might just be the most logical to say that the concept of governance does not necessarily have to be observed as a substitute of the state and the power of the state, but rather as its supplement. Pierre (2000), for example, considers that the emergence of governance should not be seen as a proof of the decline of the power of the state, but rather as a proof of the state’s ability to adapt to external changes. The role of the state has simply been transformed from one of hierarchical control, analogous to traditional notions of government, to one in which governing is dispersed among a number of separate, non-government entities (Hall, 2010). Governance regime should be designed in a way to be able to ensure attention to some particular ideas and objectives, and to enable their incorporation into the regime.

Summing up the previous statements, the matter of governance concerns the performance of one of the three following types of entities (Hill & Lynn, 2005; Provan & Kenis, 2007):

- i. Governments, or the public sector, i.e., public administration and management;
- ii. Markets, business companies, or the private sector;
- iii. Non-profit organizations, individuals, groups, or society.

In public administration and management, i.e., the public sector, governance refers to “regimes of laws, rules, judicial decisions, and administrative practices that constrain, prescribe, and enable the provision of publicly supported goods and services through formal and informal relationships with agents in the public and private sectors” (Hill & Lynn, 2005, pp. 175-176; Lynn et al., 2001, p. 7), which Provan and Kenis (2007, p. 230) interpreted as “funding and oversight roles of government agencies, especially regarding the activities of

private organizations that have been contracted to provide public services. In its broadest sense, it refers to relationships between the authoritative decisions and the government performance.

When it comes to private sector, governance has focused on the role of directors' boards in representing and protecting the interests of the associated stakeholders (Fama & Jensen, 1983, cited by Provan & Kenis, 2007, p. 230), and can refer either to organization of an individual company, i.e., the direction of multi-product and multinational operations, or to the maintenance of the stability of markets by the institutions (Lynn et al., 2001).

In the non-profit context, the focus has generally been put on the importance of boards of trustees in representing and protecting the interests of society members or other politically important constituencies, which are subject to public scrutiny and depend on these constituencies for resource acquisition (Provan, 1980; Provan & Kenis, 2007). All in all, the concept of governance is nowadays commonly used in both public and private sectors, though it is quite a lot more complex in public sector applications than in the private ones (Heinrich et al., 2004; Lynn et al., 2001).

3.3 Levels of governance

Governance implies a defined allotment of authority and control at different levels, existing in political and organizational life (Lynn et al., 2001). The actors that hold a share of that control on different levels are operating within a certain environment whose aspects depend on different global, national and cultural factors. Under the realm of these factors, different levels of governance are concerned with different objectives, relations, and processes. Following this logic, Lynn et al. (2001) distinguished three levels of governance, them being institutional, managerial and technical levels (Figure 3.1), which ultimately lead to stakeholders' evaluation of government performance, i.e., political assessment of work done within these levels.

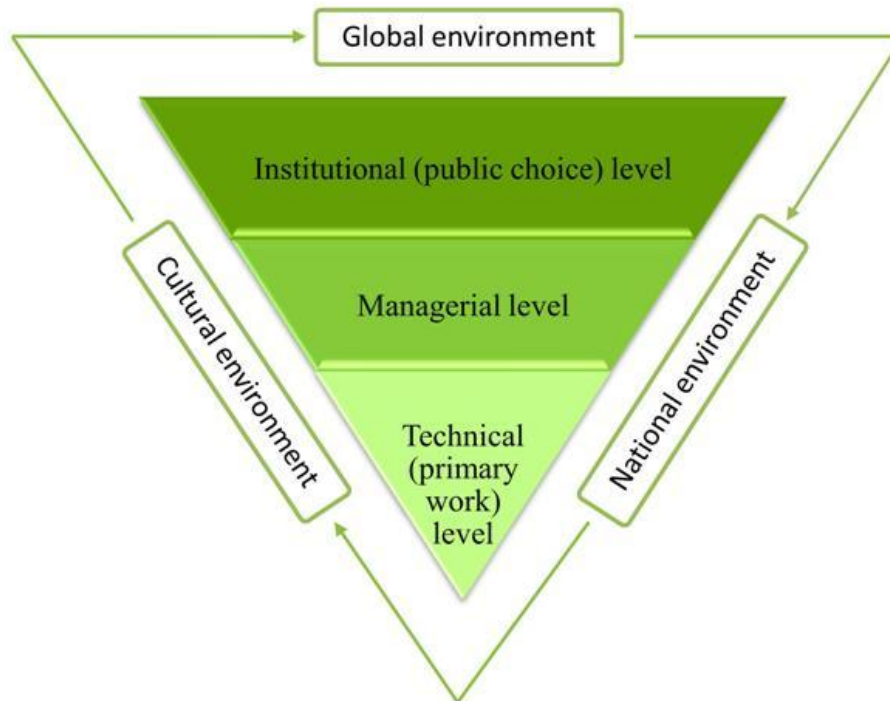


Figure 3.1 – Levels of Governance

Source: Adapted from Lynn, Heinrich & Hill (2001, p. 37)

The institutional level of governance deals with the establishment of governing relations and strategic arrangements between the public, i.e. the stakeholders and legislators, between legislative choices and the formal authorities governing public agencies and, lastly, between the structure of formal authorities and the organization and management of those public agencies. The managerial level of governance is concerned with further development of governing relations and the elaboration of governing strategies by the organizational actors, i.e. public agencies. It involves relationships between the organization, management and administration, and the core technologies and primary work of public agencies. The technical level of governance is concerned with further shaping of governance at primary work level, where governing strategies are being implemented and operationalized. It implies relationships between the primary work of public agencies and its results or outcomes for service recipients, i.e. the stakeholders.

3.4 Elements of governance

The complex and dynamic process of governance includes relationships and interlacement between numerous actors with different interests and preferences that operate within different contexts and frameworks. It involves citizens' interests, legislative choices, formal

authorities' structure, organizational and managerial structures, technologies and primary work of public agencies, results or outcomes for service recipients (stakeholders) and their assessment of formal authorities' performance – all of them being elements of the governing process. The interconnection between these elements is shown in Figure 3.2.

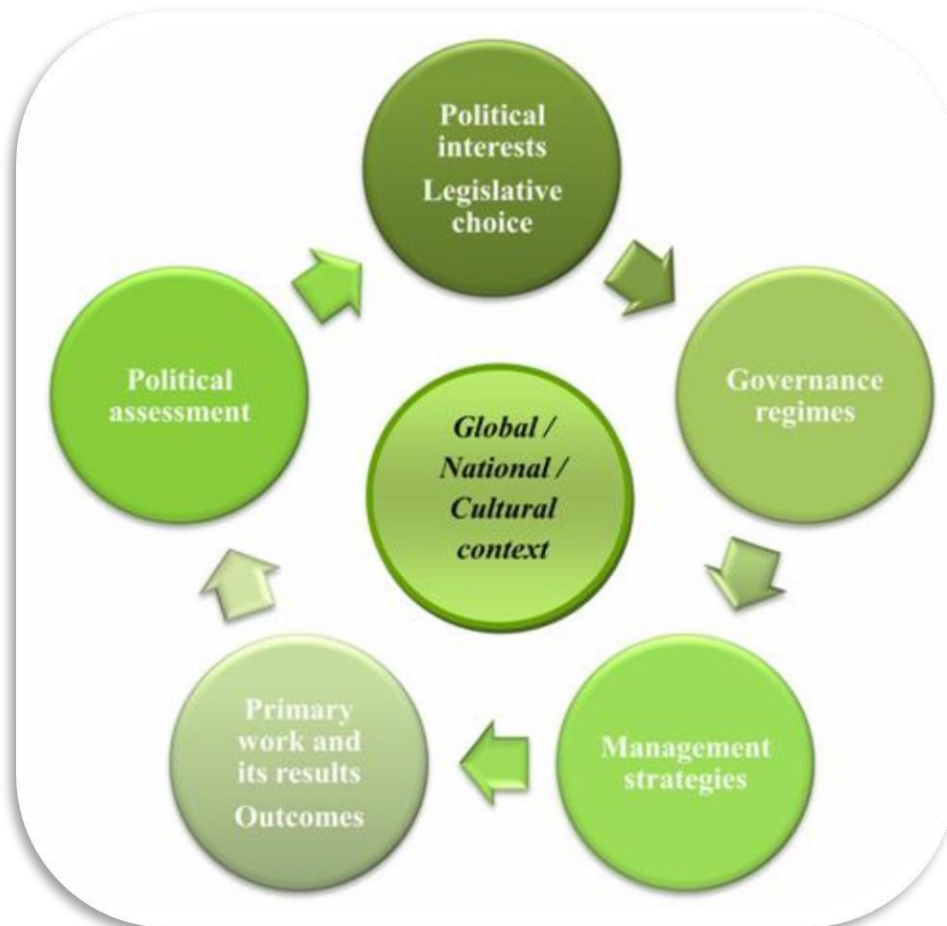


Figure 3.2 – Interconnection of elements of governance

Source: Adapted from Lynn, Heinrich & Hill (2001, p. 34)

Firstly, governance does not occur in a single context. There is always a wide spectre of global, national (socioeconomic) and cultural factors influencing the sectors and the actors or stakeholders within them. Subsequently, there is a parallel between public, i.e. citizen preferences expressed through their political interests from one side, and the legislative choices from the other side. Then, there is a linkage between the enacted legislation, and the formal authorities governing public agencies (governance regimes); between the structure and processes of formal authorities, and the organization and management of public agencies and programs, as well as the administration (management strategies); between the organization,

management and administration, and the core technologies and primary work of public agencies; between the primary work of public agencies, and its results or outcomes for service recipients (stakeholders); between the results of primary work, and stakeholders' assessment of formal authorities' performance (political assessment); and, lastly, there is a parallel between the stakeholders' assessment of authorities' performance, and the public (political) interests and preferences (Lynn et al., 2001).

3.5 Modes of governance

Typologies play an important role as instruments in developing more general insights into the ways in which key concepts and ideas can be framed, so as to facilitate comparative studies and map empirical and theoretical change (Collier, Laporte, & Seawright, 2008, cited by Hall, 2011, p. 438) and have been recognised as an important tool for governance categorization at different levels.

Across the social and political sciences, different authors argue different classifications of governance approaches, i.e. modes or forms of governance. Several classifications given by various authors are looked upon and described in this work. The first classification to be discussed is the one given by Kooiman (2003), who argues three principal modes of interaction at the governance level (Kooiman et al., 2008): (i) hierarchical governance; (ii) self-governance; and (iii) co-governance. The outline of each of these approaches is presented in the following sections, in order to get a more complete picture of different lines of thinking and the evolution of the concept of governance.

3.5.1 Hierarchical governance

The form of governance considered being the most rigid, centralized, rationalized and bureaucratic, but yet the most classical one, is the hierarchical one (Kooiman, 2003). It is a governance form modelled by Max Weber, which, though it has been surpassed by the more modern approaches, still remains a major governing method. It may possibly be considered that hierarchy and network represent two opposite ends of a continuum (Heinrich et al., 2004). But, although the idea of hierarchy may suggest a uni-directional type of governance, it does not have to be the case. It can also refer to a specific form of societal interactions, i.e. interventions, which are the most vertical of all societal interactions, meaning that the position of each party within the system is clearly defined, that is, it is evident who the

governing are and who is being governed (Kooiman, 2003). As Hill and Lynn (2005) nicely explain, variables at virtually every level of the governance hierarchy both influence and are influenced by variables at other levels. Therefore, hierarchy does not necessarily have to be purely vertical.

The two major expressions of hierarchical governance, as well as the ways of conceptualizing the intervention processes, are steering and control (Kooiman, 2003; Kooiman et al., 2008). Steering is a global and non-mechanistic form of directed governing, more political in nature and with more dynamic features than the control, hence direction is the key element of steering, the one that requires governors, together with the governed, to have a general idea of a more favourable future state, when compared to the existing one. As for control, it is a more administrative expression of hierarchical governance that can also be phrased as power and control, mainly within the framework of the market sector. Campbell et al. (1991, cited by Kooiman, 2003, p. 118) argue that exercising power and control represents “a critical impetus for change in markets”, particularly when it comes to struggle for new governance structures and institutionalizing new power relations.

3.5.2 Self-governance

There are various theoretical positions regarding the term of self-governance. Despite some of the theoretical approaches being divergent and having emerged rather as a reaction to an existing approach, they all stand upon the same basis of the autonomy and power to exercise control over itself, meaning that the actors are outside of purview and control of the government (Kooiman et al., 2008). For the sake of discussion, two theoretical approaches to self-governance, given by Kooiman (2003), are reviewed in this study: self-governance as *autopoiesis* and self-governance as actor constellations.

The concept of *autopoiesis* literally means self-production and, by definition, is an autonomous system firstly developed to better understand the living systems by a couple of biologists, later on being applied to social systems and becoming used in many areas of the social sciences, including governance. This line of thinking connects the concept of self-referentiality to *autopoiesis*, arguing that the communications, not actors, are the essence of the self-referentiality of social systems, because communication can exist and reproduce itself

independently of the actors, meaning that the systems autonomously and self-referentially “decide” what is relevant and what conveys meaning (Kooiman, 2003).

The second line of thinking is actor-oriented, where self-governance is understood as actor constellations. It concerns only the self-governing tendencies exhibited by societal sectors which are intervention resistant. Such tendencies can be observed through a number of independent and varying factors on the side of the sectors themselves, as well as on the side of authorities wishing to intervene. On the side of the sectors, the issue in focus is the difficulty or ease with which services and products can be substituted, i.e. the more difficult their alternative, the higher the tendencies for self-governance, and vice versa. Also, the congruence between governing intentions and those of the subject they are aimed at is at question. The larger the divergence between them, the more difficult it is to achieve the external governance, that is, the bigger the tendencies towards self-governance. As for the side of external interference, there are several factors that lead to promotion of autonomic tendencies, i.e., the refusal of the intervention. That occurs in case of governing not being articulated and/or forcibly initiated by an interest group, when the state lacks legitimacy to intervene in a sector, or if a sector is highly independent of public finances and the knowledge required for the intervention (Kooiman, 2003).

3.5.3 Co-governance

Co-governance implies “utilising organized forms of interactions for governing purposes” (Kooiman, 2003, p. 97), which in social-political governing represent the key forms of horizontal governing, meaning that the actors communicate, collaborate or cooperate without a centralized or dominant actor, as it can be the case in a more general category of societal interplays with a hierarchical order. The fundamental point of the concept is that the interacting parties have some common objective or an interest to pursue together, that in some way the autonomy and the identity are at stake (Kooiman et al., 2008). As the idea of co-governance can be explained through concepts such as collaboration or cooperation, mutual interdependencies, i.e. common objectives or interests, can be seen as the main reason for collaborative or cooperative interactions. Governance theory contains several manifestations of co-governance, including communicative governance, public-private partnerships, networks, regimes and co-management (Kooiman, 2003).

3.5.4 Interactive governance

The concept of interactive governance emphasizes solving societal problems and creating societal opportunities through interactions among civil, public and private actors (Kooiman et al., 2008). The interactive governance occurs at different societal scales, from the local to the global and with overlapping, cross-cutting, the authorities and responsibilities. The perspective proceeds from the assumption that societies are governed by a combination of governing efforts.

The context of interactive governance has been used in other related fields of study, such as, for example, innovation and planning. Accordingly, a school of collaborative planning has originated from the opinion that planning is a result of interactive governance based on power sharing, relation building, mobilization of local knowledge and mutual learning supported by sustainable institutional designs (Torfing, Peters, Pierre & Sørensen, 2012). Similarly, the creation of capacities for learning and innovation on multiple levels depends on complex interrelations between economic and political actors (Torfing et al., 2012).

3.6 Public policy and planning

Public policy refers to actions undertaken by governments, these actions being plans, laws and behaviours (Bevir, 2009). “Perceptions and ideas generated in response to global and local pressures are embedded in policy-making institutions (e.g. organizational frameworks, processes and strategies) and are implemented by different units of governments” (Milne, 1998, cited by Dredge and Jenkins, 2003, p. 385). Resuming, public policies embed all the matters concerning the performance, procedures and actions within a certain area, are created by the power-holding institutions and implemented by government units operating at different scales. Public policy can be defined as “a course of government action or inaction in response to public problems” (Kraft & Furlong, 2007, p. 5).

According to Hall (2010, p. 7), public policy is an extremely broad concept that covers matters, such as:

- The purpose of government action(s);
- The objectives that are to be achieved;
- The means to achieve objectives, usually referred to as plans, proposals or strategies;

- The programmes that are established to achieve objectives, them being the means authorized by the government; and
- The decisions and actions that are taken with respect to policy, including implementation.

Public policy is tightly connected with the concepts of legislation, regulation and licensing, all of them falling under the realm of national laws. “Legislation provides the authority to enforce requirements, which are defined and elaborated by regulations. Licensing is a process of checking and signalling compliance with regulations or otherwise identified obligatory standards, conveying permission to operate” (UNEP & WTO, 2005, p. 78). When it comes to policy design and application at different levels of governance, coherence and consistency are essential for ensuring that the policy is effective (OECD, 2012). Another essential aspect of an effective policy is the integration at all levels – central, horizontal and vertical. Policy integration implies coordination of the objectives of all parties involved, and some level of agreement on priorities, outcomes and methods, along with the capacity to develop effective and integrated policy solutions (OECD, 2012). Central government level implies coordination across ministries and cooperation of the former with the private sector, which is often undertaken through interaction with a peak industry body. Horizontal integration refers to coordination across organisations at the same administrative level, while vertical integration refers to coordination between central, sub-national and local government levels.

When talking about policy-making, it is likely to place planning alongside it. As mentioned previously, the decisions concerning public policies are, *inter alia*, an outcome of plans, strategies and processes, which are inevitably a result of planning. Planning should be designed in such way to maximize socio-economic benefits that an industry, in this case tourism, brings to the local population, while at the same time moderating and even eliminating the unfavourable effects (Archer & Cooper, 1998). Planners must act in a proactive way and control the development in terms of stricter construction and transport regulations, controlled access to vulnerable and protected sites and attractions of high significance, as well as introduce certain restrictions and barriers if required (Archer & Cooper, 1998). This is where the question of sustainability and sustainable development comes to focus.

3.7 Implications for tourism

Governance is becoming an increasingly discussed concept in tourism public policy literature (e.g. Beaumont & Dredge, 2010; Dredge, 2003; Hall, 2008, 2011; Hall & Jenkins, 2004; Ruhanen, Scott, Ritchie & Tkaczynski, 2010). OECD (2012) indicates that governing bodies are becoming increasingly aware of the importance of tourism as an economic development driver, as well as a tool for achieving their stated policies and goals. There is also the need to incorporate tourism thoroughly across all levels of government when it comes to policy development and implementation, and to cooperate effectively with the private sector (OECD, 2012). Developing strong public sector management capabilities and a multi-actor system of governance, including public-private partnerships and a greater horizontal and vertical coordination of relevant government bodies, is marked as a priority in many of the world's economies (OECD, 2012). There is also the ever-needed consideration for elements of "good governance", them being accountability, responsibility, efficiency and effectiveness, responsiveness, forward-looking vision, and the rule of law, which often play a crucial role in the delivery of tourism at national, regional and local levels (OECD, 2012).

In recent years, there has been an increase in government treats and regulations relating to tourism, which came as a result of both intra-governmental (between the government(s) on a country level, i.e., national, regional, or local) and inter-governmental cooperation (on an international level, between countries' governments) (Swarbrooke, 1999), which, nowadays, is even more evident. The following implications for tourism, when it comes to successful governance practices, are withdrawn from the OECD Tourism Trends and Policies Report (2012, p. 9, p. 13):

- Effective governance practices must reflect the changing business and policy environment, and the evolving roles and competencies of government tourism organisations;
- Good governance practices can help facilitate an integrated, "whole-of-government" approach to tourism development;
- Governance can be improved through both institutional and human capacity building, ensuring that institutions have well defined objectives and clear mandates, as well as effective leadership and political support.

The responsibilities of governments and governmental agencies towards tourism are set out by the national tourism laws that:

[...] provide a constitutional basis for tourism policy in the long term, and are more shielded from short term political influence than non-statutory tourism strategies. Laws – in the way that they describe tourism and the purposes of government intervention in the sector – can provide a vehicle for underpinning sustainability. [...] and also provide the basis for enabling the control and licensing of activities specific to the tourism sector (such as hotels) and for the undertaking of certain actions to support tourism development (e.g. provision of financial assistance). (UNEP & WTO, 2005, p. 79)

When talking about regulations defined by national tourism laws, they can cover many different issues (UNEP & WTO, 2005, p. 81), but typically relate to:

- Access to certain areas;
- Frequency and length of tourism use;
- Operators' qualifications;
- Safety standards of equipment and facilities;
- Certain damaging activities that need to be controlled.

Apart from governance, the implications of public policy for tourism are, as well, in focus of this section. Tourism policy emerges from a complex network of dynamic interactions between a diversity of public and private sector actors and agencies, which can be clearly comprehended through framing the analysis of both tourism planning and policy-making processes around concept of policy communities and networks (Dredge, 2003). Tourism public policy can be defined as:

A set of regulations, rules, guidelines, directives and development/promotion objectives and strategies that provide a framework within which the collective and individual decisions directly affecting tourism development and the daily activities within a destination are taken (Ritchie & Crouch, 2003, p. 148).

Hall (1994, cited by McLeod & Airey, 2007, p. 219) argues that “tourism policy process is based on the type of government, its political will to develop tourism, the structure of tourism organizations and the stage of the development of the tourism industry”. It is “a course of government action or inaction in specific relation to tourism” (Hall, 2010, p. 8). Tourism policy debates reflect issues concerning economic development, tourism marketing and promotion, often also the creation of public-private partnerships (PPPs) and, more recently,

the issues of sustainability, community well-being, social cohesion and poverty alleviation (Beaumont & Dredge, 2010). Effective tourism policy, as well as policy in general, as previously mentioned, requires integration and collaboration at various levels, with those levels being central, horizontal and vertical, as well as integration of environmental, social and economic perspectives (OECD, 2012). However, Kerr (2003) argues that the role of government is still crucial in managing the public policy process and the survival of the industry, since it has the necessary legitimate power to provide the political stability, social infrastructure, security, and the legal and financial framework for ensuring tourism growth and development.

Dredge and Jenkins (2003) explain how public policy context involves multiple organizations operating at different levels (national, regional and local), with the aim of presenting and promoting destination identity at different scales, in order to attract tourists and increase market share. The authors also emphasize the increasing impacts of globalization within the tourism sector, as a powerful, emerging concept within the academic, political and broader public rhetoric, which increasingly “challenges the governance capacities of the state and weakens sovereignty over decision-making” (Dredge & Jenkins, 2003, p. 385). It impacts, not only the governance decision-making, but also the policy-making process, including the ones relating to tourism. But the question here is: Does globalization influence tourism, or is it the other way around? These two phenomena might, as well, be considered to be in a cause-and-effect relationship, meaning that not only the globalization impacts and shapes tourism, but that tourism is one of the phenomena that causes and augments the globalization process. This is a very interesting and complex problem to investigate but, unfortunately, has no place for further debate, due to it surpassing the scope of the present study.

When it comes to studying tourism policy, and politics, in general, one of the great difficulties is associated to studying and understanding change, and this reflects in the way that “theories of politics and policy-making are inextricably linked to what is identified as important to understanding change” (Hall, 2010, p. 9). Given that policies imply theories, the relationship between policy and theory in both analysis and practice is fundamental to a conceptual understanding of the policy process and, therefore, understanding of change within that process (Hall, 2010). Hall and Jenkins (1995, p. 95) provide a comprehensive conceptual framework for tourism public policy studies and identify four fundamental

methodological elements for the development of a reflective tourism policy analysis. This framework is shown in Figure 3.3.

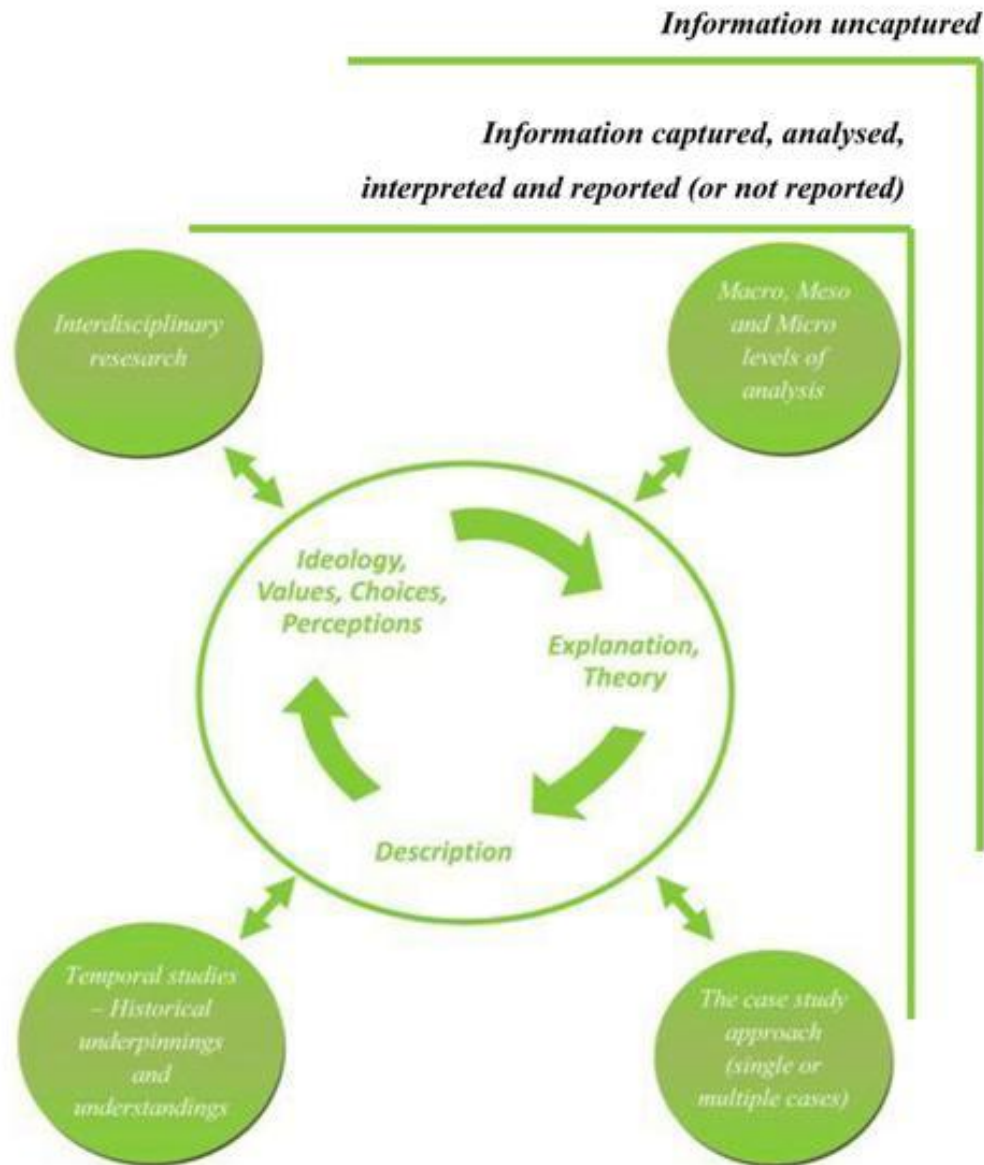


Figure 3.3 – A conceptual framework for studying tourism public policy

Source: Adapted from Hall & Jenkins (1995, p. 95)

Figure 3.3 shows that tourism public policy should be studied within an interdisciplinary research process and at various levels over time and space, with those levels being macro, meso and micro. In difference to mere short term analysis that might provide misleading findings, the historical underpinnings and understandings, i.e., the imprint of earlier decisions, actions, procedures and programmes provide important contextual information and

must be taken into account. In addition, the case study approach can provide various opportunities when it comes to analysing public policy and addressing particular policy problems and applications. Lastly, the integration of description, theory and analysis, and the explicit recognition of ideology, perceptions, values and choices straighten the explanatory powers of the theory, i.e., the topic in focus (Hall & Jenkins, 1995).

When it comes to cultural tourism, the new economic role of cultural development has been a major trigger for inducing, as well, development of cultural tourism by the local authorities (Richards, 2005) and, as a consequence, for cultural policy-making. As in the case of local level of tourism policy-making, the national cultural tourism policy also tends to emphasize the economic benefits that come with the cultural tourism development. Cultural tourism falls under the realm of the state (national) cultural policy-making, which provides the bridge between cultural politics on one hand and cultural attractions on the other (Butcher, 2005). Tourism and culture have both become more central to the urban policy agenda, as their importance for the economic revitalization of cities increased and as they started to be seen as tools for social integration and emancipation of multiethnic communities and the regeneration of the public functions of run-down inner city areas (Corijn & Mommaas, 1995). Policies on tourism and culture have, therefore, become more integrated into economic development strategies, and the interest in both phenomena has widened, in order to facilitate the new economic role assigned to them (Richards, 2005).

Cultural Sites and attractions, including historic buildings, cultural events, galleries, museums, events, Heritage Sites and other objects of interest to the cultural tourist, together with the public spaces, contribute to cultural capital and are all part of the remit of the public sector, hence the importance of policy when it comes to them (Butcher, 2005). Another aspect of their great importance lies in the fact that they are the vehicles for economic development and regeneration. All these Sites are regulated through state cultural policy that is very much the product of a wider contested cultural politics (Butcher, 2005). Cultural policy has been defined as “the institutional supports that channel both aesthetic creativity and collective ways of life” (Miller & Yudice, 2002, p. 1).

The mentioned institutional supports may be regarded as the ways in which governments support, or fail to support, the artistic output and the output that is considered part of the cultural capital of a certain place, with the place being perceived as exhibiting positive

cultural connotations and, therefore, being attractive to potential cultural tourists (Butcher, 2005). Therefore, much of the cultural destination attractiveness and success in terms of cultural tourism depends precisely on institutional and government support.

When it comes to tourism and cultural tourism planning, it has to be done with concern for, and in collaboration with, the local community and all the involved stakeholders of the respective destination, Site or object. Conflicts of interests between stakeholders and, particularly, with the local community can be nothing but a degrading factor for tourism development, hence the consultation with the community members is essential precisely during the process of planning (Pedersen, 2002), that is, before the actual implementation of plans is taken into action. Successful planning, whether in tourism or other sectors and industries, leads to a successful implementation of the respective plans and a successful definition of public policies.

3.8 Summary and conclusions

With the aim of better understanding the idea of governance and discussing it in the context of tourism, this chapter makes a parallel between the concepts of governance, public policy and planning. The most important finding after the conclusion of the chapter is a growing importance of the shift from authoritative decisions of state and government performance to more society-oriented, relational actions. This portrays the interdependent nature of the state and the public administration on one side, and the civil society actors, such as enterprises, the third sector, public organizations and citizens on the other side. After different concepts, modes and perspectives of governance being argued at various levels and in different contexts, a greater insight into the complexity of the governing process in tourism is gained.

There are debates on new forms of governance and the question whether the role of the state has declined, or has it simply altered the way of rule. Either way, governance regime should be designed in such a way to be able to ensure attention to some particular ideas and objectives, and to enable their incorporation into the regime. There are also debates of the concept of governance in different contexts and on different levels, referring to different practices, activities, relationships, focuses, concerns, and dealing with different sets of arrangements, concluding that it implies different allocation of authority and control at each of these contexts and levels. In the tourism context, responsibilities of governments and

governmental agencies are set out by the national tourism laws, covering issues, such as the access to certain areas, frequency and length of tourism use, qualifications of human resources, safety standards and activities that need to be controlled.

When it comes to the policy-making process, it refers to a set of plans, laws and behaviours undertaken by governments, depending, to a great extent, on the process of planning, due to the fact that only a successful planning leads to a successful implementation of the public policy. Public policy context involves multiple organizations that act at different levels (national, regional and local). Tourism public policy emerges from complex interactions between diverse public and private sector actors and agencies, which can be clearly comprehended through the concepts of policy communities and networks. Debates on this matter reflect issues concerning economic development, tourism marketing and promotion, creation of public-private partnerships, questions of sustainability, community well-being, social cohesion and poverty alleviation. In the specific case of cultural tourism, the new economic role of cultural development has been a major trigger for inducing its development and, as a consequence, the cultural policy-making.

Chapter 4| Tourism networking

4.1 Introduction

The following chapter aims to discuss the importance of collaboration, cooperation and network relationships in tourism, for a more successful tourism management, especially when it comes to cultural tourism, protection of heritage and sustainable tourism development. It starts with the conceptualization of the network framework and network theory, discussing different characteristics and implications of the network approach, as well as the elements that make it successful. Special focus is put on networking as a form of governance, due to this chapter being a logical sequence of the previous one that discussed governance. Different types of networks, their structures and ways of functioning are discussed afterwards, followed by the comprehensive examination of tourism networks and partnerships, which concludes the chapter.

4.2 Networks: a conceptual framework

The academic literature that uses networks as a theoretical framework for research with a focus on social sciences, political science, information studies, public administration, management, etc., has exploded in recent years (Berry et al., 2004). Networks that include public and private sectors have become of extreme importance for a successful functioning of individual businesses but also the entire industries, with tourism industry being no exception. Long-standing researches on science and society interactions emphasize the role of networks, partnerships and deliberative experiments in bringing governments, industries, educational institutions and civil society actors together (Torfing et al., 2012).

The concept of networks is generally based on relationships between different entities, which can be organizations or people, and the properties of networks relate to the structure of these relationships (Scott et al., 2008). Among the most important elements that characterize the shape and the behaviour of the physical and the social world, as we understand it, are precisely relationships and connections, with most parts of the natural and the social sciences being, in essence, founded on the study of relationships (Baggio, Scott & Cooper, 2008). Networks were originally a metaphor for the complex interactions between people of a certain community, later on becoming formalized and related to mathematical theory and afterwards transferred into sociology (Scott et al., 2008). They can be defined as:

[...] a more (or less) stable patterns of social relations between interdependent actors, which take shape around policy problems and/or policy programme (Klijn & Koppenjan, 2000, p. 155, cited by Jordan & Schout, 2006).

The network theory emerged from the policy subsystems theory, i.e., the theory about different areas of public policy, with policy subsystems being powerful organising perspectives, created in efforts to understand communicative conceptions of policy-making (Dredge, 2003). This theory challenges the “stagist” approach to policy-making (Dredge, 2003), based on the assumption that there is a clear sequence of stages through which public policies proceed, and which, therefore, constitute the policy process (Dorey, 2005). This approach, however, does not make a distinction between separate areas of public policy, or convey the extent to which different policies involve different actors and modes of interaction or influence, providing an inaccurate account of how policies are made, because it depicts policy making as a linear process with a clear beginning, middle and end (Dorey, 2005). The fact is that policy can, and is, still being made while it is being implemented and, as such, may be transformed in ways that were not originally imagined or planned (Dorey, 2005), and that both planning and policy-making are dynamic and recursive processes involving a multitude of business, government and community actors and agencies, being this the notion that the network theory is based upon (Dredge, 2003). The potential of network theory lies in explanations of new governance structures and processes that were discussed in Chapter 3.

Network theory recognises that policy-making occurs in open, flexible and fluid systems that span public and private sectors, different branches of the same government and different levels of government in federal systems, where “networks of actors, committed to a particular set of ideas, constantly identify, discuss and negotiate policy issues and ideas with a view to influencing formal policy-making structures and procedures” (Dredge, 2003, p. 359). In this context, networks can be observed as “sets of relatively stable on-going and non-hierarchical relations built up around certain policy issues or problems, where policy actors mobilise diverse resources for some shared common good” (Dredge, 2003, p. 359).

As the main focus of the study lies on the concepts of governance and networks, networks are going to be observed principally in the context of governance. In this perspective, networks can be defined as important form of co-governance (Kooiman, 2003), or multi-organizational governance (Provan & Kenis, 2007), or simply one of the new forms of governance, that

unlocks the potential for economic growth and increased competitiveness of markets (Beaumont & Dredge, 2010). The advantages of network coordination in both public and private sectors are manifold and extensive, including enhanced learning, more efficient use of resources, increased planning capacities and greater aptitude for addressing complex problems, better provision of services and, generally, greater competitiveness (Provan & Kenis, 2007).

According to Dredge (2003, p. 360), networks can be characterised by:

- A variety of network participants that transcend organisational boundaries and structures;
- A commitment to common objectives;
- A non-hierarchical interaction, with no established or formal hierarchy of power or responsibility;
- The pooling and mobilisation of diverse resources to achieve the common objectives;
- Stability, where “quasi-institutional” structures may develop over time;
- The capacity to influence decision-making through the transfer of knowledge and ideas and through the utilization of power and influence, emphasising that networks are not, however, decision-making bodies.

Solely from these characteristics it is possible to perfectly define and understand the concept of networks; they are stable, non-hierarchical, powerful and influential, but non-decision-making structures, consisting of a variety of diverse participants or stakeholders, committed to and united in achieving common goals, with a capacity to influence decision-making through the transfer of knowledge and ideas and through the utilization of their power and influence.

In the core of a successful networking practice lie concepts of collaboration and cooperation. Managing a good set of collaborative relationships is critical for the achievement of economic development objectives (Baggio, 2011b). Nordin (2003, cited by Baggio, 2011b, p. 50) stresses the need for development of collaboration and cooperation strategies, so as to gain a long-term competitive advantage. The strength of collaborative relationships is derived from the capacity of individuals and agencies to work not only jointly, but also individually towards achieving the common objectives, whilst still maintaining their individual objectives

and autonomy (Dredge, 2006). That is, only strong individuals can make a strong group. If the stakeholders are not successful in their individual conducts, they are not likely to be successful outside their autonomy, although acting with a group can enhance and improve their performance. Even at the individual level, the ability to establish and develop successful relationships with other companies is an important factor of success (Baggio, 2011b).

When it comes to tourism, Dredge, Ford and Whitford (2010) suggest that collaboration provides important opportunities for maximizing the strength and synergy of the existing tourism planning, marketing and management activities, whereby the success and well-being of the whole overshadow the individual interests. Additionally, collaboration represents an essential forerunner to the issue-based network approach to local tourism planning and management that, if conducted effectively between the local governments, can lead the decision-making process towards reflecting the interests of local communities and strengthening the local organisational capacity (Dredge, Ford & Whitford, 2010), all of the former fully applying to the concept of cooperation, as well. The issue-based network is a type of a network where individuals, them being different actors and stakeholders, organize themselves into a network after identifying certain issue at stake, as a result of discussions on a certain topic. All things considered, there is no “one size fits all” model for local (government) collaboration, nor is there a prescribed solution for the development of issue-based networks; different models of collaboration reflect different particular issues, opportunities, resources, and objectives that councils bring to the process (Dredge, Ford & Whitford, 2010, p. 124).

As previously mentioned, networks can be observed as a form of co-governance, or multi-organizational governance that, according to Provan and Kenis (2007, p. 229), has been widely recognized by both scholars and practitioners. Although there is an assumption, by some, that it is inappropriate to discuss governance in terms of networks, due to governance implying hierarchy and control (Provan & Kenis, 2007), as it was discussed in the previous chapter, not only does the governance not necessarily (nor always) refer to hierarchical structures, since there are other forms of governance (self-governance, co-governance), but, even in the case of governance being hierarchical, it does not necessarily refer to rigid, nonflexible and purely vertical structures. Moreover, discussing network’s governance does not necessarily have to refer to network as a way or a form of governance, but the governance and management of networks themselves. Hence, studying network governance can also

indicate studying the way networks function, are organized and managed, as well as discussing their mechanisms of control, which makes one step further towards a comprehensive understanding of the concept of networks, their structures and features.

4.3 Network governance

Networks can be organized in many different ways and include diverse types of stakeholders, including entities at different governance levels, public and/or private organizations, as well as individuals. There are literature approaches that observe networks purely as a form of governance, and others that do not explicitly address governance, such as the one on organizational networks (Provan & Kenis, 2007). In the latter case, networks are comprised of autonomous organizations and, thus, are essentially cooperative endeavours and not legal entities; therefore, the legal imperative for governance is simply not present as it is for organizations (Provan & Kenis, 2007). Networks may be self-initiated by network members themselves, or may be mandated or contracted, as is often the case in the public sector (Provan & Kenis, 2007). They may be in a form of multilateral collectivities, in which case they become extremely complex entities, requiring explanations that go well beyond the dyadic approaches that have been traditionally discussed in the organization theory and strategic management literatures (Provan & Kenis, 2007). According to Kilduff and Tsai (2003), networks can be goal-directed, as opposed to serendipitous networks. Serendipitous networks are those that “develop opportunistically”, while goal-directed networks “are set up with a specific purpose, either by those who participate in the network or through mandate, and evolve largely through conscious efforts to build coordination” (Provan & Kenis, 2007, p. 231).

When it comes to the research on organizational networks, two basic approaches are: (i) network analytical approach; and (ii) network as a form of governance. The first approach focuses mainly on micro-level and networks’ structural characteristics, where the units of observation are sets of objects called nodes, positions, or actors, and the sets of the existing or absent relations among these objects are referred to as edges, ties, or links (Knoke, 1990, cited by Provan & Kenis, 2007, p. 232). The problem that surges with this approach is that the network itself is not really in the focus of the analysis, but the actors (nodes, positions) that comprise the network and the relations between the actors (the edges, ties, or links). The second approach, however, does put the network in the focus of the analysis, claiming that

networks are more than the sum of the actors and their connections, and deserve to be studied in their own right (Provan & Kenis, 2007). Further, network is viewed as a mechanism of coordination, what is referred to as network governance. Unlike organizational governance, network governance may not be a legal issue, and unlike organizations, networks must be governed without benefit of hierarchy or ownership. Apart from that, network “participants typically have limited formal accountability to network-level goals and conformity to rules and procedures is purely voluntary” (Provan & Kenis, 2007, p. 232).

4.4 Modes of network governance

According to Provan & Kenis (2007), network governance modes can be categorized along two different dimensions, first of them making a distinction between brokered and not brokered network governance. At one extreme, the network may be governed entirely by the organizations that comprise it, making this type of governance highly decentralized. The organizations interact and cooperate between each other, sharing the responsibilities, which makes this a shared mode of governance. At the other extreme, the network may be highly brokered, with a few direct organization-to-organization interactions, except when it comes to operational issues, such as the transfer of business, clients, information on services, and the like. In this case, network governance occurs by and through a single organization, acting as a highly centralized network broker, or lead organization, treating the issues that are critical for the overall network maintenance and survival. At the mid-range, a single organization might engage in some key governance activities, while leaving others to the remainder network members, or, on the other hand, the network members may divide governance responsibilities among various divisions, or groups of network members, with no single organization taking on the central governance tasks (Provan & Kenis, 2007).

The second dimension of categorization of network governance modes concerns the brokered networks, which can be either participant-governed (either collectively by the members themselves, or by a single network participant assuming the role of a lead organization), or externally governed by a unique network administrative organization. These forms of network governance are explained individually in the following sections.

4.4.1 Participant-governed network

Participant-governed network is a type of self-governed network, with the simplest and most common form of governance, where the network members themselves hold all the decision-making power, without the involvement of any external or third party governance entities (Provan & Kenis, 2007). This is the network with, generally, less formal relations between the members (Beaumont & Dredge, 2010), exclusively dependent on the involvement and commitment of all the subsets that comprise the network, i.e., on their social and human capital (Beaumont & Dredge, 2010; Provan & Kenis, 2007). Members are personally responsible for organizing internal operations and managing internal relations, as well as the relations with external entities, such as the government(s) and other public entities, public or private organizations, companies, and other individuals.

According to Provan and Kenis (2007), at one extreme, these networks can be highly decentralized, governed collectively by the members themselves, with most or all network members interacting on a relatively equal basis, in a form of shared governance. At the other extreme, they may be highly centralized, governed by a single network participant assuming the role of the lead organization, which is, too, a network member. As for the question of power, it is more or less symmetrically distributed between all members, at least when it comes to decision-making at the network level, even though there may be discrepancy in organizational size, resource capabilities, and performance of different members (Provan & Kenis, 2007). In theory, the network acts collectively, as a whole, without any individual, formal administrative entity representing it, although some executive and managerial activities may be performed by one of the network's subsets.

4.4.2 Lead organization-governed network

In case of shared governance, there might be situations that may not be conducive to a decentralized, collective self-governance, as in case of participant-governed networks, but where a more centralized approach is needed (Provan & Kenis, 2007). This is where the lead organization-governed network comes to focus, as a form of a participant-governed network, with the exception of generally centralized and not equally-shared power structures, where one particular leading organization assumes a central coordinating role, facilitating and enabling collaboration, often contributing in-kind support and leadership (Beaumont & Dredge, 2010; Provan & Kenis, 2007). The role of lead organization may emerge from the

members themselves, or it may be mandated by an external funding source. A network established and led by the Council, for example, falls under the scope of a lead organization governance arrangement (Beaumont & Dredge, 2010). This type of network governance most often occurs within vertical relational structures, with a single powerful actor and several subordinate ones, a highly centralized and brokered network governance, and asymmetrical power structure. In this case, the lead organization directs and manages the network, and provides assistance for the remainder member organizations in their efforts to achieve network goals, which may be closely aligned with the goals of the lead organization itself (Provan & Kenis, 2007). However, it can also occur in horizontal multilateral networks, most often when one organization has enough resources and legitimacy to play the role of a lead organization (Provan & Kenis, 2007).

4.4.3 Network administrative organization

Network administrative organization (NAO) is an externally governed, centralized type of network, where a separate, external, administrative entity is purposely established to undertake governance activities, operating as a central node for communication, coordination and decision-making (Beaumont & Dredge, 2010; Provan & Kenis, 2007). The difference from the lead organization-governed network is that the NAO is the network broker and facilitator, but not the network member, as is the case with lead organization. According to Provan and Kenis (2007), this entity may be either voluntarily established by the network members, or mandated as part of the network formation process; it may be a government entity, a unique for-profit corporation, or a non-profit organization, even in the case when the network members are for-profit firms.

Government-run NAOs are generally set up in the initial phase of network's existence, in order to stimulate network's growth and to ensure fulfilment of its goals, especially in case of widespread goals, such as the ones related to regional economic development (Provan & Kenis, 2007). When it comes to non-profit NAOs, local tourism organization is an example of one (Beaumont & Dredge, 2010). This mode of network may be modest in scale, consisting of a single individual on one hand, or, on the other hand, a formal organization with board structures that include all or a subset of network members, including an executive director, staff and an operating board, in which case it may be used as a mechanism for

enhancement of network legitimacy, dealing with complex issues and reducing the complexity of shared governance (Provan & Kenis, 2007).

4.5 Tourism networks and partnerships

Tourism has always been a networked industry, characterised by the fragmentation and geographical dispersion, with a pervasive set of business and personal relationships between actors, such as tourism intermediaries, accommodation facilities, transportation companies, food and beverage establishments, attractions, etc. (Scott et al., 2008). There is a growing body of tourism literature on the conception of networks (Beaumont & Dredge, 2010; Dredge, 2006; Scott et al., 2008) and the importance of collaboration between the participants of the tourism system on different levels (Baggio, 2011a, 2011b; Baggio, Scott & Cooper, 2008; Bramwell & Lane, 2000; Cooper, Scott & Baggio, 2009; Dredge, Ford and Whitford, 2010; Hall, 1999; Lazzeretti & Petrillo, 2006; Morrison, Lynch & Johns, 2004; Presenza & Cipollina, 2010), putting the main focus on tourism destination as an essential element to analyse in order to understand the tourism system as a whole (Baggio et al., 2008).

Today's global challenges are too immense for one organization to struggle individually (UNESCO, n.d.), especially when it comes to small and medium-sized tourism enterprises (SMTE) that cannot survive the harsh competition without strategically planning in advance and creating partnerships with different stakeholders (Buhalis & Cooper, 1998). The interdependence between different actors of the tourism system enables these enterprises to diminish their size disadvantage (Bieger, 2004, cited by Presenza & Cipollina, 2010; Breda, Costa & Costa, 2006). Subsequently, there is a pressing need for partnerships bringing together the international organizations from both public and private sectors and joining them into networks, with the special attention being paid to enhancing effectiveness of international cultural cooperation on both global and country (local/regional) level (UNESCO, n.d.). Coordination, collaboration and cooperation within an industry are improved by shared understanding and knowledge (OECD, 2012). Physical proximity, investment in Research & Development and cooperation between enterprises enhance the information flow and exchange, consequently leading to knowledge "spillovers" and generating innovation, which are considered essential factors in promoting economic growth (Breda et al., 2006).

Developing networks and partnerships within the tourism sector is a significant tool of meeting the challenges resulting from the constant changes on the global tourism market (Breda et al., 2006). Cooperation and formation of alliances among different actors, with the objective of improving the competitiveness beyond the incidental effects that promote gathering is considered to be the most important aspect of cluster functioning (Andersson et al., 2004, and Mishan, 1971, cited by Baggio et al., 2008). A tourism destination may be considered an example of one such cluster (Baggio et al., 2008). Gilligan and Wilson (2003, p. 38) see clusters as one of the four key dimensions within a neo-marketing approach, that help to create a customer-centric and competitive organization, forming, breaking and reforming “in order to move in time with the rhythm of the market”.

When it comes to World Heritage Sites, strategic collaboration and partnership between key actors is of crucial importance in addressing key tourism policy and management issues, such as coordination between heritage management and tourism organizations, extending benefits to local communities, reducing tourism congestion and environmental impacts, increasing site financing and enhancing the interpretation and communication of heritage values through tourism, etc. (UNWTO, n.d.).

In tourism literature, the concepts of networks can be divided into two main streams of application that necessarily overlap (Presenza & Cipollina, 2010). Firstly, networks are seen as “a useful framework for analyzing the evolution of business, product development, packaging and opportunities for further development” (Tinsley & Lynch, 2001, cited by Presenza & Cipollina, 2010, p. 17). Secondly, networks are understood as “an important conduit for managing public-private relationships and understanding structures of tourism governance” (Palmer, 1996, Tyler & Dinan, 2001, and Pforr, 2002, cited by Presenza & Cipollina, 2010, p. 17). The first concept has the accent on the analysis, while the second one stresses the importance of management and understanding. Adding the presumption of information and knowledge possession by each stakeholder, as well as the dimensions of planning and innovation, networking can embody a powerful tool for a long-term success, driven by sustainable development of a tourism destination.

In the context of previously discussed tourism policy, Dredge (2003, p. 361) depicts four main advantages of the network approach that come to focus:

- The network approach recognizes the overlapping and simultaneous manner in which different policy issues within a certain policy community can be addressed by different networks (e.g., networks addressing regional co-ordination, the development and management of a local tourism association, and marketing and product development may exist within the tourism policy subsystem). Moreover, among these networks there may be an overlap in terms of interests, values and resources. Some policy goals transcend network boundaries, but others do not;
- The network approach recognizes that significant policy actors may have membership in other policy communities and subsystems that are dominated by other policy interests, which may or may not be consistent with those of the tourism subsystem. This approach, therefore, fits well with the realities of tourism as a multi-dimensional area of public and private sector activity;
- The network approach recognizes that different levels of political support may exist for different policy issues within a certain policy subsystem (e.g., there may be political support for the development of a local tourism association, but the same level of support may not exist for broader regional co-operation);
- The network approach recognizes that, within the policy communities, policy actors may have membership in different policy networks, and their powers, roles, functions and level of support and interaction may vary within these structures.

These aspects show not only the benefits that networking brings to the tourism policy process, but also the importance of and benefits that come with the joint action, as well as some possible scenarios when it comes to interrelations between the undertakers of these actions.

4.6 Summary and conclusions

This chapter is the logical sequence of the previous one, making a parallel between the concept of networks and the previously discussed concepts of governance, public policy and planning, showing their close connection and interdependence. Networks are generally based upon relationships between different entities, with the network theory emerging from the policy subsystems theory discussing different areas of public policy. The main characteristics of networks include stability, non-hierarchical and non-decision-making structure, a variety of diverse participants, commitment to common goals, capacity to influence decision-making

through the transfer of knowledge and ideas and through the utilization of their power and influence, with collaboration and cooperation being in the core of a successful networking.

There are diverse literature approaches to the network issue, some arguing that networks are purely a form of governance, and others defending that networking does not explicitly address governance, in case of organizational networks. However, discussing network governance does not necessarily have to refer to network as a way or a form of governance, but the governance and management of networks themselves, the way they function, are organized and managed, as well as discussing their mechanisms of control. Networks may be organized in many different ways and include diverse types of stakeholders, counting the entities at different governance levels, public and/or private organizations, as well as individuals. They may be self-initiated by network members, or mandated or contracted, or in a form of multilateral collectivities, or goal-directed (i.e. set up with a specific purpose), or serendipitous (i.e., developed opportunistically). Either way, they are viewed as a mechanism of coordination, what can be referred to as network governance. Unlike organizational governance, network governance may not be a legal issue, and unlike organizations, networks must be governed without benefit of hierarchy or ownership.

When it comes to creation of networks and partnerships within the tourism sector, it is concluded to be a significant tool of meeting the challenges resulting from the constant changes on the global tourism market, and that in complex systems, such as the tourism one, actors cannot overcome these challenges alone. Where there is a higher level of collaboration and cooperation between the stakeholders, both cultural tourism and tourism, in general, are arguably easier to establish, organize and manage.

Chapter 5| Methodology

5.1 Introduction

The present chapter discusses the methodological process of the dissertation, that is, the flow of the research process and the way it was carried out. In order to provide an introductory discussion on qualitative research in social sciences and tourism in particular, what is being presented first are some reflections on ontological, epistemological and methodological issues in social sciences in general (Section 5.2), putting, of course, the special focus on tourism. Subsequently, the rationale behind the dissertation is presented (Section 5.3), followed by the section describing the research process (Section 5.4). This section points up the literature review (Section 5.4.1), the theoretical framework and hypotheses development (Section 5.4.2), the research design (Section 5.4.3), and the research approach and methods used (Section 5.4.4). Within the part on the theoretical framework and hypotheses development, various stages – from the problem statement to objectives, research questions, and hypothesis – are explained. Section 5.4.4 discusses processes of data collection and data processing and analysis.

5.2 Ontological, epistemological and methodological issues in social sciences

In recent years there has been an increase in the number of publications dealing with different methodological approaches to tourism research (Phillimore & Goodson, 2004). Every research process is closely related to knowledge construction or knowledge production, and every production of knowledge implies some epistemological, ontological and methodological issues, the so called “ologies” that have quite a fundamental influence on how people design and conduct research (Brotherton, 2008). Tribe (2004) explains that tourism knowledge, in particular, is a social and political construction, and that the elements of this construction, which work on the production of tourism knowledge, function in such a way as to legitimise the understandings of tourism, while marginalising the others.

Before the explanation of issues that arise when it comes to research in social sciences, social sciences *per se* should be defined first. Social science is an “attempt to explain social phenomena within the limits of available evidence” (Lewins, 1992, p. 41, cited by Phillimore & Goodson, 2004, p. 6). Therefore, it could be said that tourism, as a social science, is an attempt to explain tourism phenomena within the limits of available evidence, being that

evidence collected through a series of different methods and used for the construction of knowledge.

Methodology and the research methods, as well as the ontological and epistemological questions, both in tourism studies and, generally, in the social sciences, cannot be discussed without previously defining the term paradigm (Jennings, 2009), which is a starting point for any research process and the way one is practiced. Paradigm is a basic set of beliefs, values and techniques shared among members of a certain group of researchers that define their worldview (Phillimore & Goodson, 2004; Kuhn, 1970, cited by Ayikoru, 2009, p. 65), a set of assumptions one is willing to make, which serve as principles in guiding their activities (Guba & Lincoln, 1989). Within the theoretical research context, paradigms are constituted of ontological (world view), epistemological (knowledge construction), methodological (information collection and analysis) and axiological (values and ethics) perspectives (Lincoln & Guba, 2000). After defining the problem, the paradigm is the set of principles that guides the problem in focus (Guba & Lincoln, 2005).

When it comes to paradigms that inform the research within the scope of tourism studies, i.e., methodologies and methods used in tourism studies, there are two different clusters of paradigms: the ones related to qualitative research, which use qualitative methodologies; and the ones related to quantitative research, which predominantly use quantitative methodologies. However, there are always approaches that use mixed methodologies, employing both quantitative and qualitative research methods (Jennings, 2012).

Ontology is a branch of philosophy that refers to a perspective on the nature of reality (Ayikoru, 2009; Jennings, 2012). In other words, it deals with the question of what is real. Hollinshead (2004, cited by Ayikoru, 2009, p. 63) argues that there are various ontological issues that should be considered prior to conducting social and, likewise, tourism research, and that “matters of ontology should always precede the choice of particular research method”. Therefore, ontology is, or at least should be, a pre-phase of the research process.

Epistemology, or research philosophy, or theory of knowledge, is concerned with the examination of the nature, sources, validity and limitations of knowledge, and the links between the theory and data in the process of construction of knowledge (Mannheim, 1952, cited by Aitchison, 2005, p. 22). In other words, it is the branch of philosophy that studies the

nature of knowledge and the process by which knowledge is acquired and validated (Gall, Borg & Gall, 1996), as well as the nature of the relationship between the researcher and the researched (Jennings, 2012), i.e. the knower and the known (Ayikoru, 2009). When it comes to leisure and tourism, it means asking ourselves what we know, how we obtain the knowledge about what we know, how our beliefs and values shape what we know and, ultimately, what evidence there is to support or disprove our claims to knowledge (Stanley, 1997 & Oakley, 2000, cited by Aitchison, 2005, p. 22). Epistemological standpoints affect the research process in a way that they permit researchers to develop questions, design the study and adopt appropriate research strategies for answering the respective questions (Yeganeh, Su & Chrysostome, 2004, cited by Breda, 2010, p. 139).

Methodology can be explained as a group of guidelines or a sequence of analytical steps of the research process, the way in which the inquirer gains knowledge (Ayikoru, 2009; Jennings, 2012, Krippendorff, 2004). Its purpose is to enable the researchers to plan and critically examine “the logic, composition, and protocols of research methods; to evaluate the performance of individual techniques; and to estimate the likelihood of particular research designs to contribute to knowledge” (Krippendorff, 2004, p. xxi). Methodology “is a model, which entails theoretical principles, as well as a framework that provides guidelines about how research is done in the context of a particular paradigm”, while methods can be defined as “the tools or instruments employed by researchers to gather empirical evidence or to analyse data” (Sarantakos, 1998, p. 32, cited by Jennings, 2009, p. 672). A scientific method is a body of techniques used to investigate a certain phenomenon and search for cause-effect relationships inside the phenomenon. “It is based on observable, empirical, measurable evidence, and is subject to laws of reasoning, attempting to minimise the influence of bias in the researcher when testing a hypothesis or a theory, thus being necessary in developing scientific knowledge” (Breda, 2010, p. 139).

The relationship between ontology, epistemology and methodology was nicely portrayed by Guba (1990, p. 18) in a form of three separate questions:

1. Ontological: What is the nature of the “knowable”, i.e. of “reality”?
2. Epistemological: What is the nature of the relationship between the knower (the inquirer) and the known (the “knowable”)?
3. Methodological: How should the inquirer go about finding out knowledge?

The answers to these questions are the starting point that defines every researcher's investigation and determines its flow, and they may be phrased as a paradigm to be adopted by the researcher. "Behind these terms stands the personal biography of the researcher, who [...] approaches the world with a set of ideas, a framework (theory, ontology) that specifies a set of questions (epistemology), which are then examined (methodology, analysis) in specific ways" (Denzin & Lincoln, 2011, p. 1).

5.3 Rationale of the study

The present study was initiated as part of a process of research on a specific topic within the elaboration of a dissertation for obtaining the degree of Master of Science. The main interest of the researcher included the topics of cultural tourism and networks. However, as research, in general, is an evolving process, where numerous alterations, adaptations and emergence of new interests take place (Wilkinson & Young, 2004), this research was no exception. As Strauss and Corbin (1990, p. 23, cited in Breda, 2010, p. 141) nicely point out, "one begins with an area of study and what is relevant to that area is allowed to emerge".

What emerged along this research process, the readings and the literature review on the topic of the study was a greater interest and focus on additional concepts, first of them being the concept of governance. As networks can be defined as forms of co-governance (Kooiman, 2003), or multi-organizational governance (Provan & Kenis, 2007), the general concept of governance passed to be in equal focus of this research, and was studied, with the same care as the concept of networking, out of two reasons. First of them is the general importance of successful governance when it comes to the complex joint of activities and dynamics at Sites of such inestimable value, as is the case of Oporto World Heritage Site. Second of them is the fact that, through the concept of governance, it was possible to get a whole new perspective and a much more complete insight into the concept of networks, due to them being a form of governing process. Apart from the new focus on the concept of governance, concept of tourism in general was studied with greater care than firstly planned, once again with the intention of getting a wider picture of the phenomena, and not merely focusing on cultural tourism.

As for the practical part of the research, it was conducted more or less as initially planned. The Site of interest was all along Oporto city World Heritage Site protected by UNESCO,

and the research was to be conducted in such way to determine whether or not an existence of a network of stakeholders “in charge” of the Site could be affirmed. Through content analysis (discussed in section 5.4.4) of the existing documentation – various reports, manuals, strategic and management plans – concerning the organization structure of the Site, it was already supposed that there is no officially established network on the tourism level. These assumptions, however, needed to be further examined, the existing structure to be elucidated, as well as the type of relations between the participants of that structure. In order to achieve this, a direct contact with determined actors was needed. The initial aim, however, was to examine a superior number of actors than it was eventually done, due to realizing that a small number, but of very concrete actors, was sufficient to reach the determined objectives.

5.4 The research process

The research process is a complex endeavour that integrates theory with practice, with a purpose of trying to understand what a certain phenomenon means and represents (Ritchie, Burns & Palmer, 2005). Research can be used to highlight specific problems, to generate knowledge and, in that way, to place different businesses’ managers and organizations in a competitive position (Cooper et al., 2005, 2008). A few more interesting summaries of the concept of research are given bellow.

Research is a diligent and systematic inquiry or investigation into a subject in order to discover facts or principles, and increase the sum of knowledge, enhance design or enrich artistic ability (University of Houston, 2008, p. 11).

Research is a careful or diligent search; a studious inquiry or examination, especially: investigation or experimentation aimed at the discovery and interpretation of facts, revision of accepted theories or laws in the light of new facts, or practical application of such new or revised theories or laws; the collecting of information about a particular subject (Merriam-Webster, n.d.).

In addition, research may be categorized as: (i) basic (fundamental or pure) research, which is an experimental or theoretical work undertaken primarily to acquire new knowledge of the core foundation of a certain phenomenon and observable facts, without any particular application or use in view; and (ii) applied research, which is an original investigation also undertaken in order to acquire new knowledge, but directed primarily towards a specific practical objective (OECD, 1981, 1994). In other words, basic research is driven by the researcher’s curiosity in a certain topic, with the main purpose of increasing the knowledge

and with no pre-determined commercial value, while the applied research aims to solve concrete practical problems.

Each research process is based on a particular joint of steps that lead the researcher towards the finalization of investigation and the attainment of results, findings and conclusions or, simply said, the answers to the problem in focus. Figure 5.1 illustrates the steps in planning a research process or investigation.

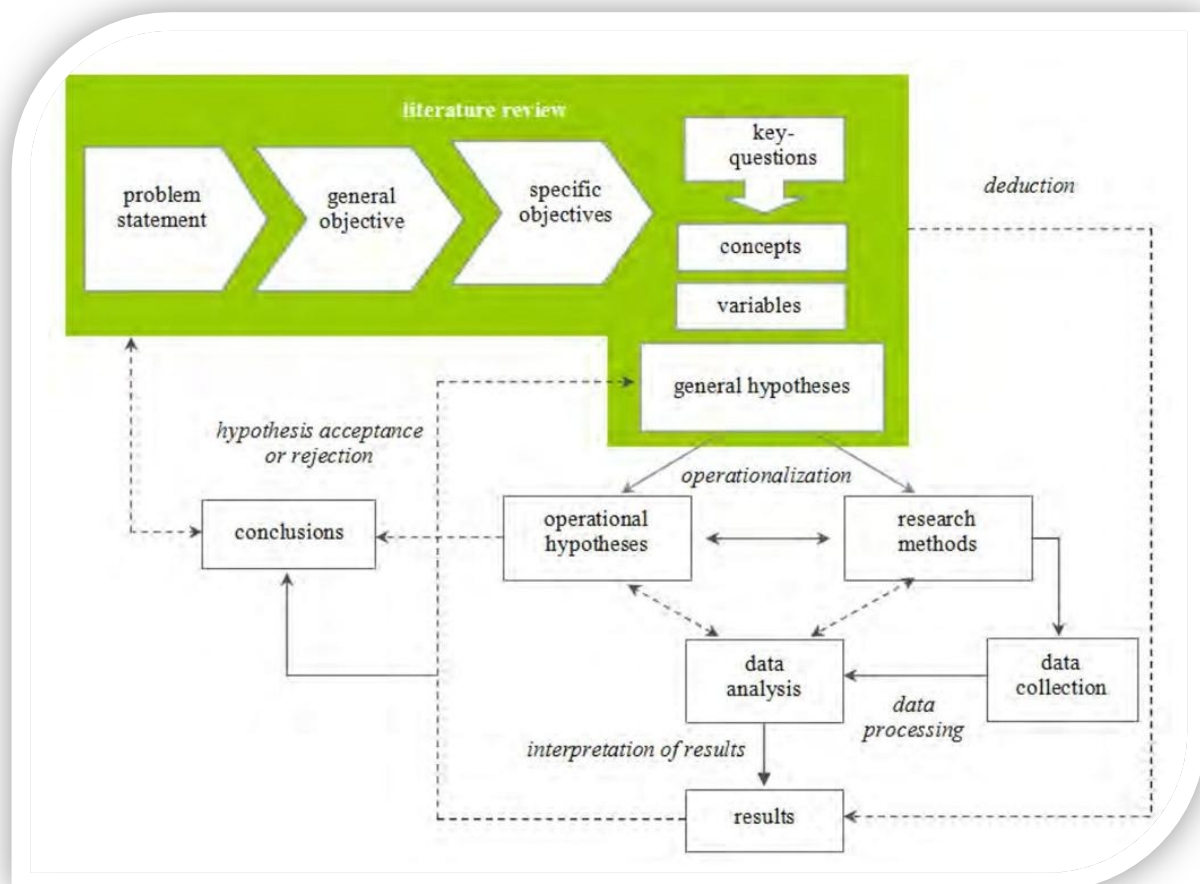


Figure 5.1 – Steps in planning a research investigation

Source: Breda (2010, p. 144)

The process of research or investigation generally starts with the identification of the research area and the research topic within it (Breda, 2010), i.e., the statement of the problem that is to be processed, as well as the general and specific objectives that guide the researcher through the research process. The exhaustive literature review on the topic in focus that preceded the research process enables the researcher to define the key concepts and variables and form a

set of hypotheses. The choice of research methods determines the way data is collected and analysed. After the data is analysed, certain results of the research are obtained, which permits the researcher to interpret these results and reach conclusions, based on which the hypotheses are tested. If the results of data analysis are in accordance with the pre-determined hypothesis, the hypotheses are accepted and, if not, they are rejected.

5.4.1 Literature review

“A literature review is a description of the literature relevant to a particular field or topic” (Emerald Group Publishing Limited, n.d.). It gives an overview of what has been said about the topic in focus, of who the key writers are, of the prevailing theories and hypotheses, of the questions being asked, and of appropriate methodologies and methods (Emerald Group Publishing Limited, n.d.). It:

[...] uses as its database reports of primary or original scholarship, and does not report new primary scholarship itself. The primary reports used in the literature may be verbal, but in the vast majority of cases reports are written documents. The types of scholarship may be empirical, theoretical, critical/analytic, or methodological in nature. Second, a literature review seeks to describe, summarise, evaluate, clarify and/or integrate the content of primary reports (Cooper, 1988, p. 107).

It is a comprehensive review of secondary data sources, such as conceptual literature, empirical studies, trade literature and published statistics in specific areas of interest to the researcher, providing the basis for development of theoretical framework from which hypotheses can be developed (Breda, 2010). Literature review may be purely descriptive, as in an annotated bibliography, or it may provide a critical assessment of the literature in a particular field, stating where the weaknesses and gaps are, contrasting the views of particular authors, or raising questions. Cooper (1988, p. 109) outlines a taxonomy, according to which literature reviews may be defined in terms of their: (i) focus; (ii) goals; (iii) perspectives; (iv) coverage; (v) organisation; and (vi) audience.

Within this study, the main concepts examined in the literature review are shown in the following figure (Figure 5.2).

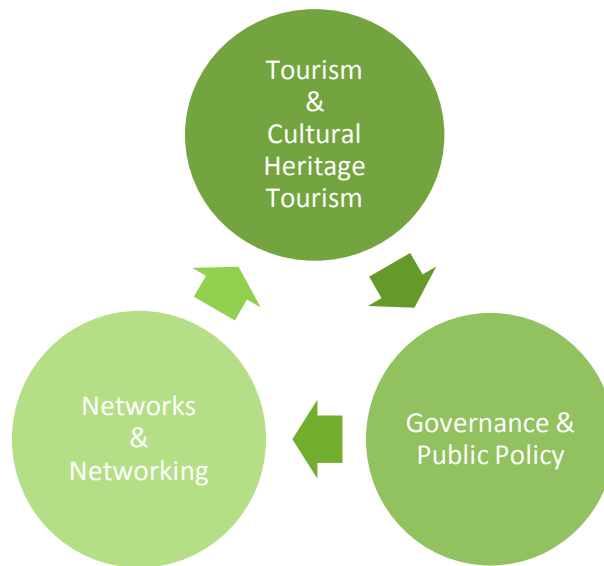


Figure 5.2 – Components of the literature review

Source: Own elaboration

Out of the three elected areas in focus of this study, it cannot be alleged that any overweighs the other(s). Cultural, that is, cultural heritage tourism, even being the generator of this study and the core around which the idea of the topic was created, passed to be equally important as the remainder components. It was equalized even with the general tourism concept, due to the simple fact that the tourism phenomenon, with all its characteristics and concepts, represents the core of each of its variations, one of them being cultural, or cultural heritage tourism, and that a much more complete and comprehensive insight would be attained if it would be viewed as a whole, not looking solely upon one of its forms. Therefore, tourism, in general, and cultural tourism, in particular, were evenly discussed in Chapter 2. Chapter 3 was dedicated to the matter of governance and public policy, due to these two forms being tightly connected and interrelated. However, more space was given to the concept of governance, due to it being the basis for the Chapter 4 on Networking (viewed as a form of co-governance), which is the principal problem questioned empirically within a specific case of UNESCO World Heritage Site of Oporto city. The comprehensive joint of previously discussed and defined concepts within these three grand areas represents variables whose interrelations are examined in this study.

5.4.2 Theoretical framework and hypotheses development

5.4.2.1 Problem statement

There is a large body of literature on sustainable tourism development, but most of it has focused on natural protected areas, despite the fact that the majority of travel takes place in the cities and urban areas, due to most of the world's populations living in these areas (World Tourism Organization, cited by Timur & Getz, 2008, p. 445). Tourism is an increasingly important factor in the planning and management at UNESCO World Heritage Sites (Pedersen, 2002). The development of tourism that is sustainable in economic, environmental, social and cultural terms has been repeatedly recommended, but researchers have recognized that the management and implementation of sustainable tourism requires the involvement and collaboration between many actors, and that this collaboration is both complex and difficult to achieve (Paskaleva-Shapira, 2001, cited by Timur & Getz, 2008, p. 446). Managing rapid tourism growth is a time-consuming process demanding clearly defined public policy, collaboration and cooperation between stakeholders, especially in the pre-action stage, i.e., the planning process, followed by the constant monitoring (Pedersen, 2002).

Having identified this joint of problems, the researcher decided to put it in focus of the study. However, wanting to apply it to a specific and particular case and, besides theoretically, to critically investigate the problem in practice, the World Heritage Site of Oporto city was chosen to be that case. There are various reasons why this particular case was chosen, first of them being the complexity and uniqueness of the Site. Oporto is a lovely old city that exudes beauty, uniqueness and exuberant culture, with a vast area being classified as World Heritage. Other than that, this case was chosen for being convenient for data collection, due to its geographical proximity to the researcher's place of residence. The last and most important reason was the belief that this case is one of the best to be analyzed within this particular problem, the realization of the prearranged objectives, and answering the research questions.

5.4.2.2 Objectives

Based on the choice of the research area and the researcher's focal interest(s) within it, i.e., the stated problem, a set of objectives was determined to lead the course of this dissertation. Firstly, a single principal and general objective was defined, followed up by a set of specific ones, as shown in Table 5.1.

Table 5.1 – General and specific objectives of the study

General objective	<ul style="list-style-type: none"> ❖ To understand the role of networks and partnerships in cultural tourism activities and dynamics, and to examine, if they do exist, which type of networks and partnerships are present in the particular case of the UNESCO World Heritage Site of Oporto city.
Specific objectives	<ul style="list-style-type: none"> • To understand and discuss the importance of co-governance and networking (as a form of co-governance) at the cultural tourism level; • To identify the governance structure of the UNESCO World Heritage Site of Oporto city; • To identify the power-holding entities responsible for the Site in the following aspects: <ul style="list-style-type: none"> · Formulation of tourism policies; · Planning and management of tourism, in general, and, more specifically, of cultural heritage tourism at the Site; · Preservation and protection of the Site; · Strategic decisions and management of the Site; • To investigate the levels of collaboration between the identified entities; • To verify if there is an official network of stakeholders involved in activities (aspects) determined within the third specific objective, or merely a collaboration between them (both official and unofficial); • To identify the principal difficulties at the Site when it comes to: <ul style="list-style-type: none"> · Implementation of tourism public policies; · Preservation and protection of the Cultural Heritage; · Management; · Sustainable tourism development.

Source: Own elaboration

5.4.2.3 Research questions

The researcher's set of ideas and the defined research framework (ontology), together with the determination of the main and the particular objectives, lead to creation of a set of questions (epistemology), which were then examined and analysed (methodology) in specific ways. In order to reach these objectives, the following research questions were formed for examination and analysis:

- RQ1:** How does networking improve the process of governance and management of World Heritage Sites?
- RQ2:** How can collaboration, cooperation and knowledge-sharing among network actors influence sustainability of cultural tourism and the tourism sector in general?
- RQ3:** How important is the joint action of all stakeholders, in any way involved in activities and dynamics of the World Heritage Sites (from both tourism and other sectors) when it comes to protection and preservation of heritage?

5.4.2.4 Hypotheses

Hypotheses represent powerful tools and fundamental parts of scientific research, which, depending on the relationships between concepts, i.e., variables, can be univariate (discussing a single variable), bivariate (discussing the relation between two variables, one of them being dependent and the other one being independent), and multivariate (discussing the relations between three or more variables) (Breda, 2010).

In this study, all three types of hypotheses were used. Comprehensive literature review of the previously discussed topics that are in focus of the study, including the definition of the concepts within these topics, enabled the creation of a number of hypotheses that appeared as logical formations to be tested by data gathered empirically. These hypotheses are:

- H1:** Network relationships generally improve the functioning of cultural tourism and tourism sector in general.
- H2:** Network relationships between different actors enhance information and knowledge sharing.
- H3:** Networks are the most optimal forms of governance when it comes to governing composite and multifaceted areas, such as the ones classified as World Heritage Sites.

H4: Formal collaboration between different actors, whether this collaboration is officially defined as a network or not, causes a superior level of productivity of each actor separately.

5.4.3 Research design

A research design is a detailed description or plan that guides the implementation of the research (Cooper et al., 2005, 2008). It provides a plan or a scheme for a successful research investigation by guiding a researcher in achieving the research objectives and answering the research questions (Ivanovic, 2011). It is a logical sequence of the review of literature on the topic, and the theoretical framework and hypothesis development, within the overall research process. When talking about the research design, the most important questions to be considered are the approach to the research (Cooper et al., 2005, 2008), i.e., in which way the data is going to be collected and whether the primary or the secondary sources will be engaged in the study, and which method of the data collection will be used. The approach to this study and the methods considered most appropriate for its elaboration are presented in the following section.

5.4.4 Research approach and methods

Choosing the approach to the research and the methods of its conduction depends on the nature of the topic and the problem chosen to study and treat. It is the result of the predetermined objectives and research questions, formed hypothesis, the pertinence and pragmatism between the former and the problem stated, as well as the appropriateness for the researcher. In the case of a detailed study of opinions, attitudes and perceptions of individuals regarding a certain topic, the most appropriate approach is the qualitative one, due to the possibility for the researcher to achieve greater insight into and understanding of the problem (Cooper et al., 2005, 2008). Qualitative methods are more adaptable to dealing with multiple (and less aggregate) realities, because such methods expose more directly the nature of the transaction between the researcher and the respondent and, therefore, make easier the assessment of the extent to which the phenomenon is described in terms of the investigator's personal perspective and, also, because they are more adaptable to the many mutually shaping influences and value patterns that may be encountered during the research (Lincoln & Guba, 1985). Denzin and Lincoln (1994, p. 2) define qualitative research as:

[...] a multi-method in focus, involving an interpretative, naturalistic approach to its subject matter. This means that qualitative researchers study things in their natural setting, attempting to make sense of, or interpret phenomena in terms of the meanings people bring to them. Qualitative research involves the studied use and collection of a variety of empirical materials, case study, personal experience, introspective, life history, interview, observational, historical, interactional, and visual texts that describe routine and problematic moments and meanings in individual's life.

Due to the researcher's aim of understanding the functioning of the UNESCO World Heritage Site of Oporto city when it comes to tourism activities and dynamics, the structure of entities in charge of and, in any way, involved in these activities and dynamics, the parallel between tourism development from one side, and sustainability, protection and preservation of the Site from the other side, the qualitative methodology approach was acknowledged as the most suitable to be engaged in this study. The research methods, i.e., methods of data collection identified as most suitable and practical to conduct within this approach are: (i) case study; (ii) content analysis; and (iii) semi-structured interview.

Case study is a method extensively used in tourism research. According to Beeton (2005, p. 37), "it is such a pervasive methodology in tourism research and study that it appears that its justification is no longer deemed necessary, if it ever was". It establishes whether or not there is a relationship between variables, but not whether they are causally related (Dixon & Bouma, 1984, cited by Beeton, 2005, p. 38). It can be defined as "the study of a few cases, sometimes one, constructed out of naturally occurring social situations and investigated in considerable depth" (Botterill & Platenkamp, 2012).

This method can best be illustrated by its features (Beeton, 2005, p. 38, adapted from Hoaglin et al., 1982):

- Can explain why an innovation worked or failed to work;
- Has the advantage of hindsight, yet can be relevant in the present and to the future;
- Can illustrate the complexities of a situation by recognizing more than one contributing factor;
- Shows the influence of personalities and politics on an issue;
- Can show the influence of the passage of time through longitudinal studies;
- The reader may be able to apply it to his/her situation;
- Can evaluate alternatives not chosen;

- Can utilize information from a wide variety of sources;
- Can present information in a wide variety of ways;
- Can illuminate a general problem through examination of a specific instance.

The case study engaged in this research is the UNESCO World Heritage Site of Oporto city, which is going to be comprehensively examined and discussed in the following chapter (Chapter 6).

Content analysis is potentially one of the most important research methods used in social sciences, which entails a systematic reading of a body of texts, images and symbolic matter, created to be seen, read and for their meanings to be interpreted, which not necessarily have to be from an author's or user's perspective (Krippendorff, 2004). Neuendorf (2002, p. 15) describes it as a method that [...] "summarises rather than reports all details concerning the message set". This method can be qualitative (Jennings, 2004, cited by Jennings, 2005); purely descriptive (Hall & Valentin, 2005); quantitative (Neuendorf, 2002), including numerous steps, such as coding schemes, calculations and tabulation; and often even used in multi-method studies (Hall & Valentin, 2005). For the purpose of this study, the content that was analyzed, firstly, consisted of a set of manuals, reports, and strategic and management plans relating to the chosen case study, and, afterwards, the same method was used to analyze the interview data.

Semi-structured interviews, along with in-depth/unstructured interviews, are the key components of a qualitative research project (Jennings, 2005). These two types of interviews have very few and small differences, but both differ from structured interviews by their openness, reciprocity, reflexivity, among other characteristics. This research method is explained in more detail in the following section, due to it being a crucial instrument of data collection.

5.4.4.1 Data collection

According to Pizam (2005, pp. 98-101, cited by Breda, 2010, p. 152), data collection can be attained by three different means:

- (1) By the researcher observing the phenomena (participant and non-participant observation);

- (2) By the researcher communicating directly with the subjects (questionnaire, interview and projective methods);
- (3) From secondary sources.

Primary data are those collected personally by the researcher, while secondary data are those that have already been collected for different purposes by an individual or an organization, e.g., the government and other national, regional and local bodies and institutions, such as tourist offices (Cooper et al., 2005, 2008). Secondary data is consisted of, and contains, the existing information about the research topic in focus. It allows the researcher to get an insight into the state of the art, that is, the level of development of the area of the problem in focus, and to see whether or not the primary data collection is needed in the first place, and in which way it can complement the existing data and contribute to the area in focus.

When it comes to the approach or method of primary data collection in tourism, the most commonly used one is the sample survey, which has four different forms or types: Web-based survey, postal survey, personal interview and telephone interview (Cooper et al., 2005, 2008). The choice of which one to use depends on the nature of research and the objectives the researcher wants to attain.

Data needed to fulfil the objectives of this study, to test the hypothesis and to reach certain conclusions on the topic was gathered by using the combination of these three collection methods. The necessary information was firstly collected, sorted and analyzed by means of content analysis of the secondary data, i.e., of legal documentation, official manuals, reports, and strategic and management plans for Oporto World Heritage Site, after a thorough literature review on the topic in focus. The conceptual literature and empirical studies were collected mainly from on-line bibliographic databases containing abstracts and citations for academic journal articles, full scientific journals, e-books, reference works, book series etc., such as ScienceDirect, Emerald, Scopus, B-On, CABI, Springer, among others. Apart from these sources, the information was as well gathered using Google Books search engine, and from the library of the University of Aveiro.

The next step of the research consisted in the collection of primary data via the conduction of an empirical research at the World Heritage Site of the city of Porto, the particular case in focus of this study. This step implied direct communication with representatives of the

entities in charge of strategic decisions and management of the Site, which consisted of semi-structured, semi-formal interviews.

In the latter half of the 20th century and in the early phases of the 21st century, interviews grew to be the research method of choice within the social sciences, with tourism being no exception (Jennings, 2005). Interviews present several advantages over the use of questionnaires, such as the fact that the response rate is usually higher, the technique of interviewing is more effective among interviewees when it comes to problems in answering questionnaires, different interpretations of the same questions can be avoided (Breda, 2010), possible doubts of the interviewer or the interviewee, regarding certain answers/questions, can be clarified *in situ*, etc.

According to Jennings (2005), there are three interviewing methods: structured (standardized or formal), semi-structured and unstructured (non-standardized or informal), that can occur in formal or informal context, as shown in Table 5.2.

Table 5.2 – Comparison of structured, semi-structured and unstructured interviews

Descriptor	Structured interviews	Semi-structured (focused) interviews	In-depth, unstructured interviews
Style	Specific protocol of question and answer	Conversation-like	Conversation
Design	Structured	Semi-emergent	Emergent
Researcher stance	Objective	Subjective	Subjective
Researcher perspective	Outsider (etic)	Insider (emic)	Insider (emic)
Consequence of researcher stance and perspective	Limited reflexivity	Reflexivity	Reflexivity
Exchange issues during the research process	Limited reciprocity	Reciprocity	Reciprocity
Language used	Subject/respondent Data Representation	Informant, participant co-researcher Empirical materials Slice of life	Informant, participant co-researcher Empirical materials Slice of life
Material / Data collection	Checklist Some open-ended questions	Field notes Transcription and recording	Field notes Transcription and recording
Basis of analysis	Mathematical and statistical analysis	Textual analysis	Textual analysis
'Findings' expressed as	Numeric representation	Depthful and thick descriptions	Depthful and thick descriptions
Writing style for reporting research	Scientific report	Narrative	Narrative

Source: Jennings (2005, p. 101)

Save for the structure and the context, interviews can be classified in other ways, such as by the methodology of the overall research process, the number of people who are involved in the interviewing, the purpose of the interview, and the composition of the people involved in the interview (Jennings, 2005).

The interviews chosen to be engaged in this study, as previously mentioned, were semi-structured by structure and semi-formal by context. The semi-formal context of the interviews should not, however, be confused with the formal relation, i.e., formal behaviour between the interviewer and the interviewee. They were not conducted as a regular conversation, but more of a conversation-like dialog, due to the formal and respectful relation towards the interviewee and, therefore, the characterization of it as semi-structured and not unstructured, even though they were in-depth, extensive and thorough. Most of the questions were pre-prepared and structured, but with the flow of the dialog new questions and sub-questions emerged. There was plenty of room for reflexivity and reciprocity between the interviewer and the interviewee, which made the interview more interactive and, in the researcher's opinion, the information gathering more successful, than if some other method for this particular type of data had been used. The interviews were recorded, so that the researcher had more freedom to deepen the dialog and could focus on the quality of the interview, on truly listening to the interviewee, and on gathering all the necessary information, rather than to try catching notes and focus more on writing than on listening.

5.4.4.1.1 Sampling frame

The sample for data collection was selected based on the content analysis that permitted the identification of key entities involved in tourism organization and management of the World Heritage Site of Oporto city, with these entities being:

- ❖ Porto VIVO SRU – Sociedade de Reabilitação Urbana (Society for Urban Rehabilitation)
- ❖ Oporto City Council
 - Cultural Department
 - Tourism Department

The chosen entities were identified as crucial for obtaining the necessary data for hypothesis testing, after analysing the power-holding structure at the city level, as well as the

organizational and management structure, and its involvement in tourism activities and dynamics at the Site. Initially, it was intended to get a wider picture, not only of governance and possible network structure of the Site, but also an in-depth analysis of responsibilities and roles that each actor plays in cultural tourism organization and functioning, sustainable tourism development, and protection of the Site. With this aim, apart from the mentioned entities, a wider number of organizations were contacted, such as local and regional tourism offices and the Tourism Association of Oporto, i.e., Oporto Convention & Visitors Bureau within the Regional Agency for Tourism Promotion – Oporto and North of Portugal.

However, it was concluded that these organizations have very narrow and specific fields of action, additionally having most of them refused to share information and having them suggested the researcher to contact the already identified entities of Oporto City Council and Porto Vivo SRU. Therefore, the researcher decided to conduct the research with the representatives of these entities first, and to eventually determine, through contact with former, if there are some other critical stakeholders that could complement the study. However, after the conduction of interviews with the mentioned representatives, it was clear that they were the most essential for fulfilment of objectives of the present study, and that the contact with other organizations would only mislead and complicate the study, and estrange it from the initial purpose. Each representative suggested the contact with the remainder two representatives, and pointed out that there are no other entities and/or organizations that can provide the researcher with more relevant, accurate and specific information. These suggestions led to the ultimate decision of not expanding the defined sampling frame, but leaving it for some future study.

5.4.4.2 Data processing and analysis

After being collected, the data needs to be processed and analysed. This process is nicely explained by Sekaran (2003, cited by Breda, 2010, p. 178), illustrated in Figure 5.3.

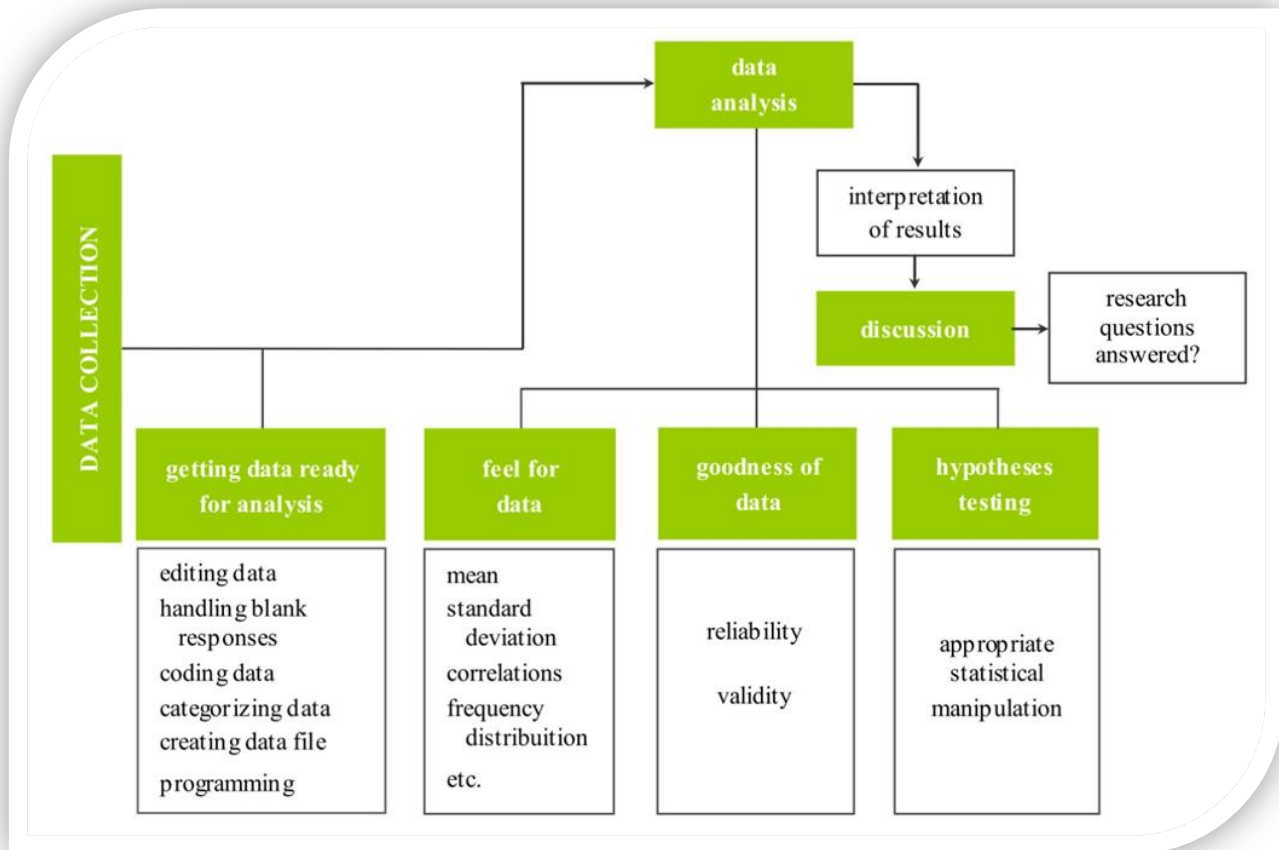


Figure 5.3 – Data analysis process

Source: Breda (2010, p. 178)

Figure 5.3 depicts a more of a composite process of analysis of, again, a more of a composite data, including programming and statistical analysis and manipulations. Even though this study does not include such a complex data, which does not call for a complex statistical analysis, this specific process of data analysis was chosen to be illustrated since it shows very nicely and clearly the overall process of data analysis, which can include and refer to any type of data. It includes the preparation of data for analysis, the “feel for data”, evaluation of “goodness of data” and the hypothesis testing. After fulfilling these steps, the results of the analysis are being interpreted and the findings of this interpretation are being discussed. The final step of the process implies generation of conclusions, that is, the evaluation of whether or not the pre-determined objectives of the study are reached, and whether or not the research questions are answered.

As pointed out by Ritchie and Spencer (1994, p. 176), “qualitative analysis is essentially about detection, and the tasks of defining, categorizing, theorizing, explaining, exploring and

mapping are fundamental to the analyst's role". Therefore, when it comes to this particular study, the data collected by means of the previously described and explained qualitative methods was critically analyzed, again, in the spirit of qualitative methodology approach. The analysis of the first group of data consisted in the systematic reading of a body of texts, images, manuals, reports, and strategic and management plans relating to the chosen case study, in order for their meanings to be interpreted in a qualitative, descriptive way. Afterwards, the elected case of Oporto World Heritage Site was studied with the reflection on the former analysis, which served as guidelines for the further research.

Through the analysis of this specific case, it was intended to search for and examine the cause-effect relations between the concepts, i.e., variables in focus, which are discussed in previous chapters of the present study. Lastly, the recorded interviews, conducted at the Site, were submitted to transcript of records in a way of joining everything the interviewees had been saying in a shrewd, sensible and coherent way, without pointing out the intermissions, breathers and buzzwords. The analysis of the collected data was expressed textually and, again, it was the analysis of the content, this time the content of the interviews. Findings of the analysis and conclusions of the overall research were expressed as depthful and thick descriptions, with the writing style of the reporting being narrative.

5.5 Summary and conclusions

This chapter is dedicated to the methodological concerns of the present study. It firstly discusses the major ontological, epistemological and methodological issues in social sciences, as well as the relationship between these issues, which was done in order to get a clearer insight into the overall process of the scientific research, as well as to be able to better define the course of this very dissertation. Rationale of the study explains the emergence of the idea and the subject of this specific research, as well as what had emerged along the way. The next matter in focus of the chapter regards the research and the process of the research, observing it as a complex endeavour that integrates theory with practice, and categorizing it into basic and applied. Within the section on the research process, four more topics are developed, them being literature review, theoretical framework and hypotheses development, research design, and research approach and methods.

Literature review explains the theoretical part of the dissertation, which had served for a better understanding of the problem in focus, and had helped the researcher to gain an insight into what could be done to somehow contribute to the Tourism state of art, as well which specific case to engage in the study.

When it comes to theoretical framework and hypotheses development, it includes problem statement, objectives, research questions and hypotheses of the dissertation. The statement of the problem is the justification that lies behind the study, explaining the problem chosen to be considered. It includes the matter of sustainable tourism development and the fact that, it was noted that natural protected areas are overshadowing the cultural ones; that managing rapid tourism growth represents a time-consuming process that demands clear public policy, as much as collaboration and cooperation between stakeholders on multiple levels. It also depicts the reasons why the particular case of the World Heritage Site of Oporto city was chosen to be engaged in the study. Objectives and research questions were discussed subsequently, followed by the set of hypothesis that are sought to be tested by the empirically gathered data. Research design was discussed as a component of the overall research process, followed by the research approach and methods.

The section on research approach and methods was the last one discussed within the research process. It explains the qualitative research approach and each of the three qualitative research methods used within the approach, them being case study, content analysis, and semi-structured interview methods. The section includes segment of data collection, followed by the sampling frame, and the segment of data processing and analysis. The former one firstly explains the general process of data collection, the fact that it can be attained by different means, and differentiates the primary from the secondary data. Subsequently, the data collection of this very study comes to focus, including the process of gathering of both types of data. The part on sampling frame points out the elements that constitute the sample of data collection, which consists of the entities involved in tourism organization and management of the Oporto World Heritage Site. It justifies why this very sample has been chosen for the information gathering. The last segment explains how collected data was processed and analyzed.

Chapter 6|
The case of a UNESCO World Heritage Site
– Oporto city

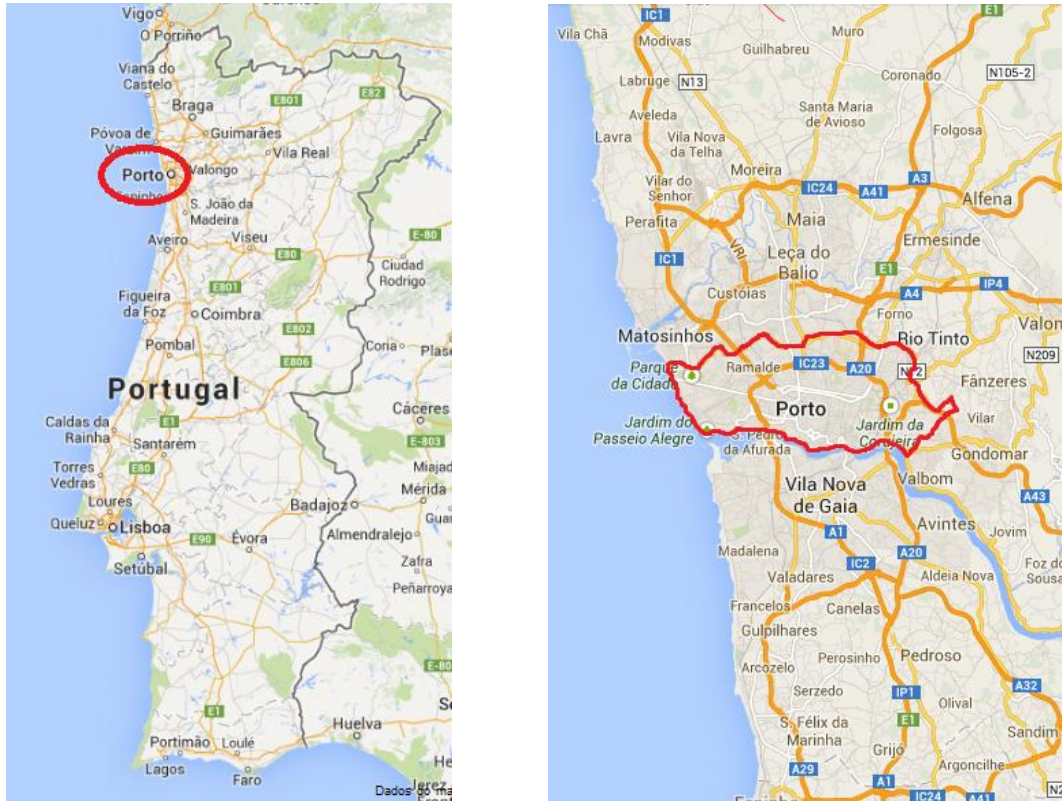
6.1 Introduction

This chapter treats the particular case study of a UNESCO World Heritage Site of Oporto city, with the aim of applying the designated theory to a concrete practical example. Firstly, a brief description of Oporto city area is given, followed up by the characterization of the tourism activity, putting a special focus on cultural tourism. Afterwards, the World Heritage Site is described, characterized, and the classification criteria explained. The chapter then discusses the management and organization structure of the Site and aims at discovering which role tourism plays within this structure, and which actors are involved in tourism activities and dynamics.

6.2 Oporto city

6.2.1 Geography and location

With an area of 45 sq. km and a population of about 240.000 inhabitants (Portal de Turismo do Município do Porto, 2013a), Oporto is the second biggest city of Portugal, known as the capital of the North. This is a city with not such a privileged geographic location, due to, not only the inferior position of Portugal when compared to the rest of Europe, but as well due to the city itself being placed on the very west end of the European continent, on the Atlantic coast. However, it is complemented by a modern and all-embracing communication network (Portal de Turismo do Município do Porto, 2013a), including roads and highways, railways, waterways, including both maritime and fluvial transport, as well as air traffic, considering the fact that one of the country's airports is located at the outskirts of the city. It is located on, approximately, 320 km distance from the capital of the country, Lisbon, around 560 km from the Portugal's south end, about 240 km from the country's east end and the border with Spain, and about 100 km distance from the country's north end and Galicia, Spain. The location of the city at the country (national) and municipal level are shown in the following figures (Figures 6.1, 6.2 and 6.3).



Figures 6.1, 6.2 & 6.3 – Oporto’s location, municipality borders and parishes

Source: Google maps

The city area is characterized by a temperate maritime climate, with mild springs and summers, when temperatures vary between 15° C and 25° C, occasionally reaching up to 35° C from July until September. Autumns and winters are typically windy, rainy and cool, with temperatures between 5° C and 14° C (Portal de Turismo do Município do Porto, 2013a).

6.2.2 Brief historical overview

Oporto is the second largest Portuguese metropolis and one of the most charismatic European cities, as well as one of Europe's last undiscovered destinations. This city, named by the Romans, was built along the hillsides overlooking the mouth of the Douro River, creating an outstanding urban landscape with a 2.000-year history that has eternally been linked to the sea, since its birth. The "layers" of its continuous growth can be seen through its numerous and diverse monuments, from the Sé Cathedral with its Romanesque core, to the neoclassical stock exchange, and the church of Santa Clara built in the typical Portuguese Manueline style (UNESCO World Heritage Centre, 2013b, par. 1).

The archaeological remains, discovered at the mouth of the Douro River, have proven that the area of modern Oporto has been occupied since the VIII century BC by the Phoenician merchants, followed by the Romans, establishing a town on the very same place in the 1st century BC, under the name of Portus (UNESCO World Heritage Centre, 2013b, par. 8). With the arrival of barbarians in the early 5th century, the town became a very important administrative and trading centre. In the succeeding centuries it was the object of attacks and plunder by successive groups – Visigoths, Swabians, Normans, and Moors. By the early 11th century, however, it was firmly established as part of the Castilian realm that expelled Moors out of Portugal and made it part of the new kingdom. The first period of its expansion came in 1374, with a construction of the new town walls protecting the two urban nucleuses, the original medieval town and the thus far extramural harbour area (UNESCO World Heritage Centre, 2013b, par. 9).

Oporto lent support to the expeditions organized by Henry the Navigator, who was originally from Oporto, in the early 15th century. English entrepreneurs started to growingly invest in vineyards of the Douro valley, creating a monopoly in order to supply the growing English market, and Oporto, as the port for the export of wines from the region, benefited greatly, as the wealth of Baroque buildings in the town attests. With the intention of putting an end to the English monopoly, in the second half of 18th century, Marquis of Pombal created a new monopolistic, but Portuguese, wine company (Alto Douro), which induced a great disapproval, not only by the English, but also by the Portuguese bourgeoisie that benefitted from the business (UNESCO World Heritage Centre, 2013b, par. 10). However, this act had put an end to the growing economical crisis within the region.

Oporto was the birthplace of the Liberal Revolution in 1820, which led to the adoption of the Seminal Constitution, in 1822, by the monarchy. The city played an important role in the expulsion of the monarchy in 1910, and in the 1974 revolution that led to the reestablishment of democracy in Portugal (UNESCO World Heritage Centre, 2013b, par. 11). In the course of the 19th century, the development of Oporto was closely connected with the left margin of the Douro River, with the construction of the emblematic and highly significant Luís I Bridge, designed by the architect Théophile Seyrig, a disciple of Gustav Eiffel, as well as many new significant buildings being constructed in this period, such as the prominent Augustinian Convent of Serra do Pilar (Portal de Turismo do Município do Porto, 2013b). In the 20th century the city has progressively changed from being primarily industrial to the one whose economic basis lies in the service industries (UNESCO World Heritage Centre, 2013b, par. 12).

6.2.3 Historic centre: UNESCO World Heritage Site

6.2.3.1 Position and borders

The boundaries of the area classified as Oporto World Heritage Site by the UNESCO are determined by the Douro River in the south (from *Escadas (stairs) do Caminho Novo* to Luiz I Bridge); in the east by the Luiz I Bridge, *Escadas dos Guindais*, street of Augusto Rosa and *Praça da Batalha* (Battle Square); in the north by the street 31 de Janeiro, Almeida Garrett Square, *Praça da Liberdade* (Liberty Square), the streets *Rua dos Clérigos* and *Rua de São Filipe de Nery*; and in the west by *Campo dos Mártires da Pátria* (Field of Martyrs of the Nation), the street of Dr. António de Sousa Macedo, *Passeio das Virtudes*, the street of Francisco Rocha Soares, and *Escadas do Caminho Novo* (Câmara Municipal do Porto, n.d. b). The area of the Historic Centre, together with the borders of the city walls and the heritage that is currently being in process of classification, is shown in Figure 6.4.

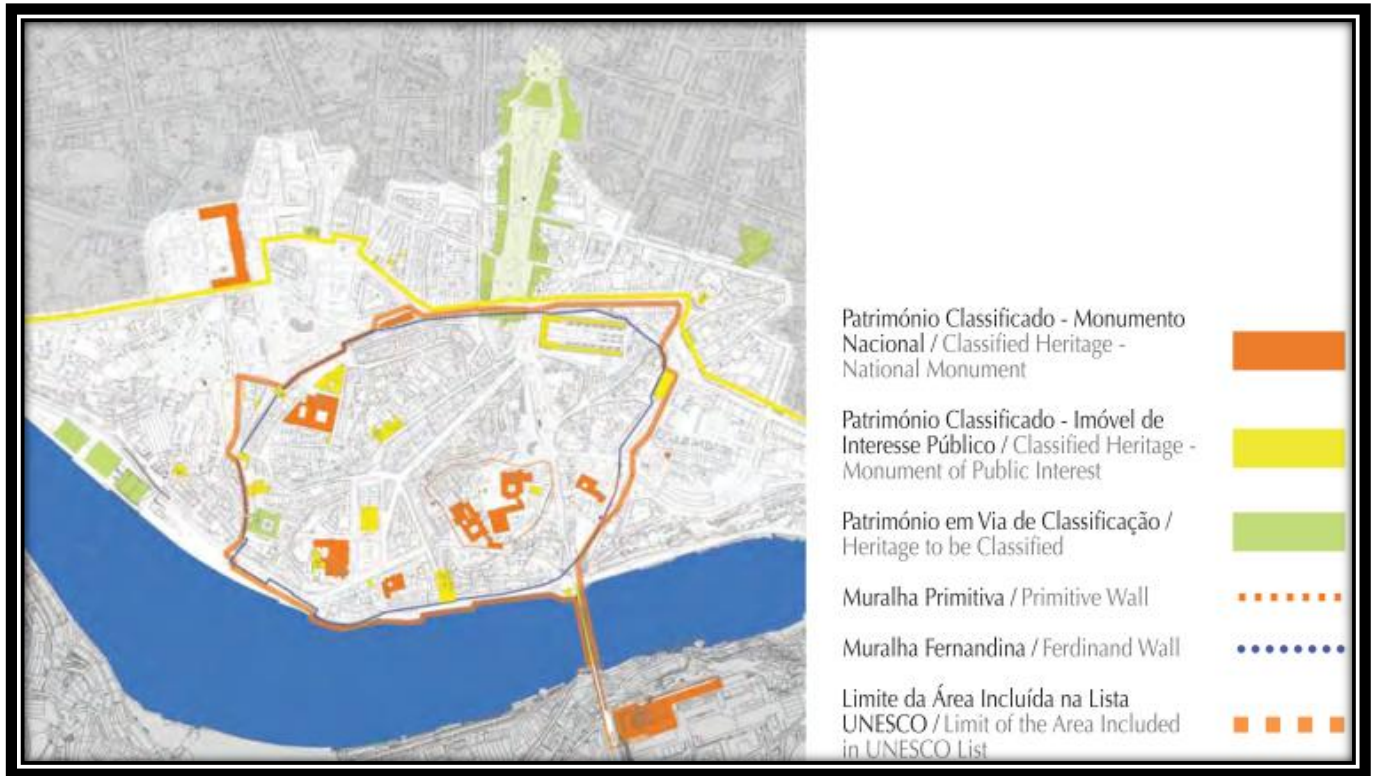


Figure 6.4 – Borders of the Historic Centre of Oporto World Heritage Site, heritage in process of classification, and borders of city walls

Source: Câmara Municipal do Porto & Porto VIVO SRU (2010, p. 75)

The area comprises the medieval borough located inside the XIV century Fernandine massive stone walls, with the inclusion of some neighbouring buildings, such as the Tower and the Church of the Clergy (*Torre e Igreja dos Clérigos*), São João National Theatre, the old building of the Civil Government, and of two more city blocks (Câmara Municipal do Porto, n.d. b). The first of the blocks includes the streets *Rua de 31 de Janeiro* and *Rua da Madeira*, and the Battle Square (*Praça da Batalha*), while the other one includes the streets of Dr. Barbosa de Castro, Dr. António Sousa Macedo and *Passeio das Virtudes* (Câmara Municipal do Porto, n.d. b). The part within the walls includes the oldest buildings in the city, as well as emblematic streets and attractive public areas, all together conserving, to a large extent, the medieval town plan, structure, and characteristics, with some later monumental insertions (Portal de Turismo do Município do Porto, 2013b; UNESCO World Heritage Centre, 2013b, par. 7). Unfortunately, only two sections of the Fernandine walls, initiated by Dom Afonso IV in 1336, but named after his successor, Dom Fernando, in whose reign they were completed after some decades, are still standing (UNESCO World Heritage Centre, 2013b, par. 7).

6.2.3.2 Description and historical overview

The historic centre of Oporto comprises an urban mesh of great historical, cultural, aesthetic, artistic and architectural value, witnessing an urban development that dates back to the Roman, medieval, the Almada¹ and the Industrial Revolution era (Losa & Alves, 2002, pars. 6 & 15). There are numerous planned and unplanned interventions over the mentioned eras allowing to be studied. The rich and varied civil buildings of the area express the cultural values of Romanesque, Gothic, Renaissance, Baroque, neoclassical and modern architecture (UNESCO World Heritage Centre, 2013b, par. 4), reflecting the cultural values of successive eras and adapting perfectly to the social and geographic structure of the burgh. One of the most important aspects of Oporto and, particularly, its historic centre, is its scenic character, resulting from the complexity of the terrain, the harmonious articulation of its streets and roads, the dialogue with the Douro River and Vila Nova de Gaia, and a successful interaction between the social and geographical environments (Losa & Alves, 2002, par. 6; UNESCO World Heritage Centre, 2013b, par. 4).

Buildings and structures are predominantly made of granite masonry, rammed earth, wooden floors, ceramic tile roofs, skylights, wrought iron balconies, plenty of tiles on the facade coatings, window frames of the openings in painted wood, coloured plasters and granite public space paving (Losa & Alves, 2002, par. 16). When it comes to the question of ownership of the properties within the area classified as World Heritage, it is partially public, i.e., state or municipal, and partially private, belonging to the Catholic Church, individuals or collectives. The properties are currently used in residential, commercial, religious, administrative and tourism purposes, while the initial usage, apart from the mentioned, included military and excluded tourism purposes (Losa & Alves, 2002, pars. 8-10).

This area is characterized by many important and very much diverse ecclesiastical buildings, such as the Cathedral with its Romanesque core, São Francisco Gothic church, São Lourenço dos Grilos in the Mannerist Baroque-Jesuit style, Santa Clara in the Gothic Manueline style

¹ The Almada period refers to the 18th century period of Oporto city. It was named after João de Almada e Melo, a military commander and the chairman of the Committee of Public Works at the time, credited for the urban plan of Oporto city (the Almada plan), which was one of the first plans of a kind to appear in Europe. The Almada plan intended to renew the old town and control the growth within the medieval city walls that was carried out in a spontaneous and chaotic way, especially since the mid-seventeenth century (Costa, 2001).

with later classical Renaissance elements, and the early Baroque churches *Igreja da Misericórdia* and *Igreja dos Clérigos* (UNESCO World Heritage Centre, 2013b, par. 7). Oporto also has a number of outstanding public buildings, such as São João National Theatre, palaces *Palácio da Batalha* and *Palácio das Sereias*, and the former prison – *Cadeia da Relação*. Among the important later structures are the neo-Palladian *Hospital Santo António*, the imposing *Alfândega Nova* (customs building) and the palace *Palácio da Bolsa* in neoclassical style, Ferreira Borges market, São Bento railway station, and the *Paços do Concelho* city hall building (UNESCO World Heritage Centre, 2013b, par. 7).

The presence of the river was fundamental for the establishment of Roman settlement, as a means of communication and trade, which was certified in recent excavations, carried out both in the *Bairro da Sé* and in the area of Ribeira, allowing the uncovering of the old Roman road from Conímbriga to Braga, passing through today's Merchant Street, Bainharia and Pelames streets (Losa & Alves, 2002, par. 2). The need for military protection and defence against the possible enemy later leads to development of two new urban centres in the zone of *Morro da Sé (da Pena Ventosa)*, which characterizes the burgh. First of them is the riverside zone that includes the docks for loading and unloading the goods and the waypoint to the other shore where the traders supported by the King dominate; and the second of them is the very *Morro da Sé*, which lies in the domain of the Clergy and their Bishop. Within this hill (*morro*), around the Cathedral, in the 12th century, the first perimeter of walls is built, but, with the increase of the population and the expansion of the city, a new Fernandine wall is constructed already in the last quarter of the 14th century (Losa & Alves, 2002, par. 2).

The medieval ages is the period of great change and population growth that results in the emergence of idea of hospitals, lodging facilities and squares. On the whole, it is during the following centuries, the Renaissance period, and later in the XVIII century with the appearance of Baroque, that the city starts gaining new forms. The XVIII century is the century par excellence of public venture, large civil buildings construction, and the extramural expansion of residents' properties (Losa & Alves, 2002, par. 2). After the earthquake in Lisbon, in 1755, new projects and urban arrangements are being undertaken, making use of the new legislation and taking into account the public interest. Important intramural works are carried out, including the reordering of the Ribeira Square (*Praça da Ribeira*), opening of São João Street, creation of the São Roque Square, construction of the Hospital de Santo António, among others (Losa & Alves, 2002, par. 2). Creation of the

Committee of Public Works, around 1762, is the first step towards creation of the department that would be responsible for urban development of Oporto, having the primordial role in this action the Almada family, i.e., the mentioned military commander and chairman of the respective Committee of Public Works – João de Almada e Melo, and his son Francisco de Almada e Mendonça (Losa & Alves, 2002, par. 2).

Entering the 19th century, it is noted that the population growth inevitably leads to the increase of buildings' height, different expansions and mansards. A great part of the wall cloth is torn down, since the concept of a city confined within the protective walls goes against the ideas of Illuminist trait (Losa & Alves, 2002, par. 2). With the outbreak of Liberalism, new urbanism theories are put into practice, with mercantile bourgeoisie playing an important role in the new urban reforms, provoked by fomentation of the industry. In the second half of the 19th century, the beginnings of land speculation are witnessed. Already in the beginning of the 20th century, the rampant occupation of the historic centre leads to a densification of the urban fabric, resulting in visible deficiencies in terms of infrastructure and leading, in 1914, to the Plan of Improvements and Expansion of Oporto city, where the intervention of a British man, Barry Parker, plays a predominant role. From 1914 to 1962, there are ten of such Urbanization Plans, culminating with the Municipal Master Plan of the city of Oporto in 1962, authored by Robert Auzelle (Losa & Alves, 2002, par. 2).

6.2.3.3 Selection criteria

The Historic Centre of Oporto was selected, by the Committee, for inscription to the World Heritage List in December 1996, on the basis of cultural selection criteria, demanding for the heritage “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” (UNESCO World Heritage Centre, 2013a). The Committee considered the Site to be of outstanding universal value, as the urban fabric with its many historic buildings bears a remarkable testimony of the development, over the past millennium, of a European city, which have looked outward to the west for its cultural and commercial links (UNESCO World Heritage Centre, 2013b, par. 2).

6.2.3.4 State of preservation

Oporto Historic Centre, classified as the World Heritage Site consists of 1,976 buildings, whose condition, i.e., state of preservation varies to a great extent. The results of the analysis of the overall inventory in 2008 (Câmara Municipal do Porto & Porto VIVO, 2010) showed that:

- 443 objects were found in good condition, not requiring any interventions;
- 649 objects were found to be in fair condition;
- 575 objects were decaying;
- 78 objects were in advanced state of decay; and
- 51 objects were undergoing restoration works (Figure 6.5).

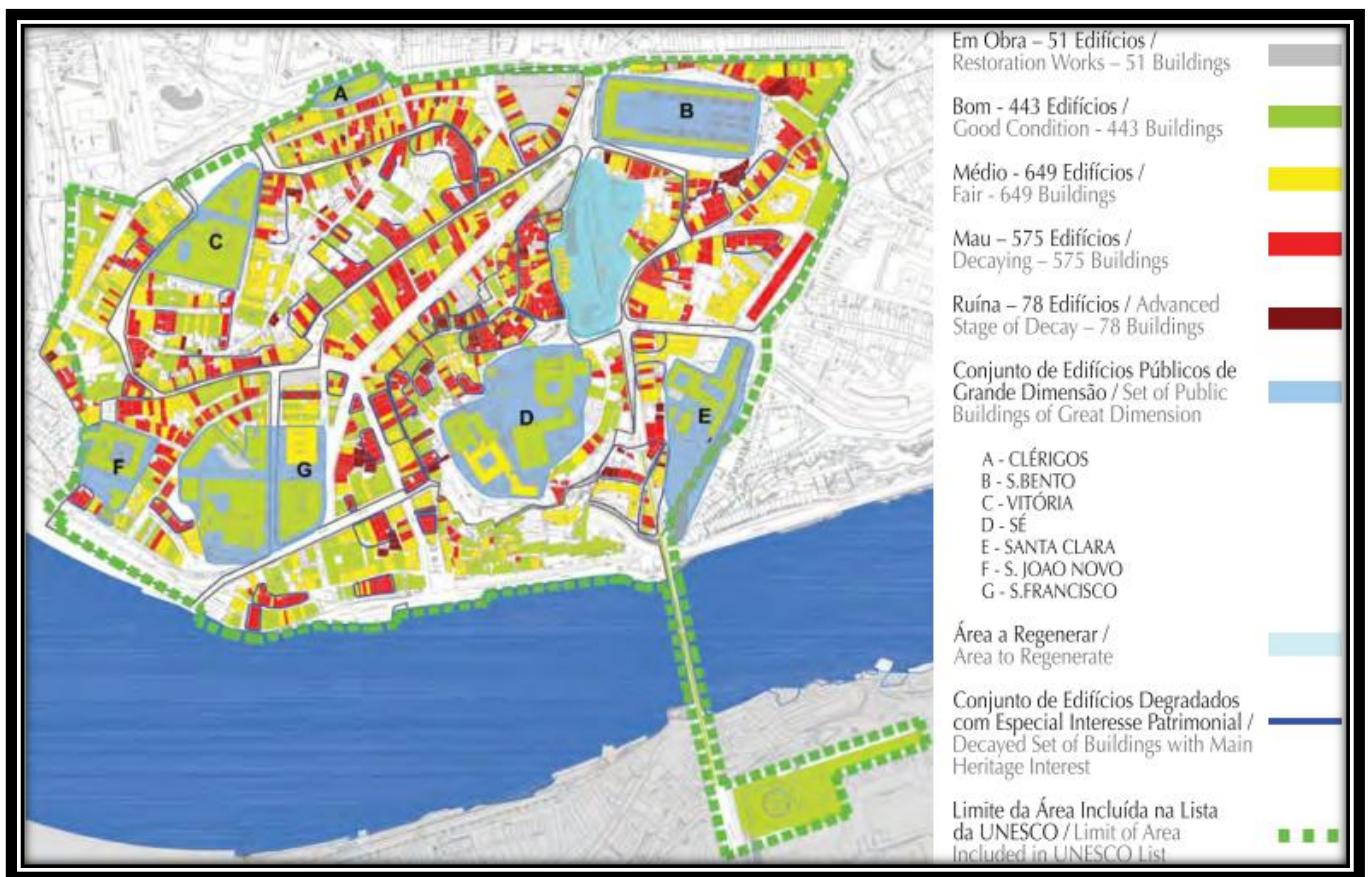


Figure 6.5 – State of preservation of Historic Centre of Oporto inventory

Source: Câmara Municipal do Porto & Porto VIVO SRU (2010, p. 58)

6.2.3.5 Management structure

Integrated in the List of Cultural Values of Humanity by UNESCO since 1996, the historic centre of Oporto came into the focus of attention of national and international bodies (Câmara

Municipal do Porto, n.d. c), with its conservation, protection and ethical management, which is, more than ever, becoming an imperative (Câmara Municipal do Porto & Porto VIVO SRU, 2010). UNESCO has recognized the crucial role of active management of Sites on its list, and, therefore, has engaged in the revision of the program and in the operational guidance for implementation of the World Heritage Convention in 2002, which requires such management plan that guides all stakeholders and agents engaged in the activities within these Sites. This plan should focus on the preservation of the classified good, indicating how it should be preserved, ensuring its protection and the possibility for all present and future generations to equally enjoy it (Câmara Municipal do Porto, n.d. c).

One such plan was elaborated for the Historic Centre of Oporto World Heritage Site, by the Oporto City Council and the Porto VIVO SRU (Society for Urban Rehabilitation), in 2010, as a basic strategic document. This plan includes:

- Detailed information concerning the history and significance of the Site;
- Insight in the mechanisms of protection;
- Description of the condition of buildings;
- Description of the heritage of unique value and museological spaces;
- Analysis of the socio-economic development of the Site;
- Questions of environment and mobility;
- Questions of risks, prevention and combat;
- Focus on tourism and creative industries;
- Overview of opportunities and challenges;
- Strategic framework, including vision, mission and strategic objectives;
- Action plan, including the overview of the areas in focus, monitoring, management and implementation of the plan.

There were, as well, some previous versions of the Plan, but this one is the last, the most complete and the most comprehensive one. Inter alia, it includes the management structure of the Historic Centre of Oporto – World Heritage, which is given in Figure 6.6.

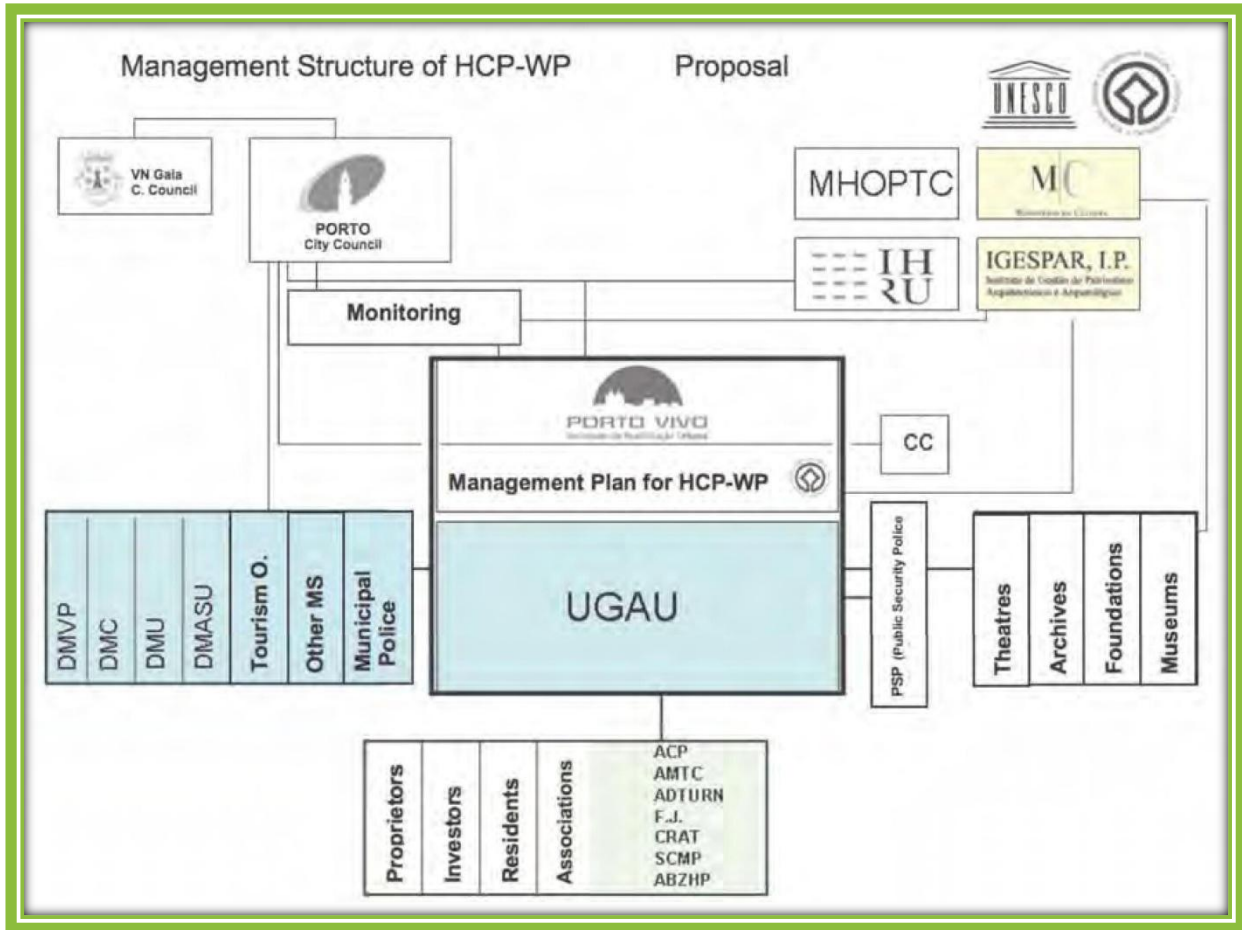


Figure 6.6 – Management Structure of Historic Centre of Oporto – World Heritage

Source: Câmara Municipal do Porto & Porto VIVO SRU (2010, p. 243)

Due to the complexity of the matters included in the Plan, there is a considerable number of stakeholders on the local, regional and national level, which are included in the management, activities and dynamics of the Site. The principal entity and the power-holder, when it comes to decision-making concerning the Site, is the Oporto City Council. This entity is the one that controls and directs all the activities and the actors that undertake these activities, when it comes to the area protected by the UNESCO, on the public level. This City Council has to collaborate with the City Council of Vila Nova de Gaia, which is responsible for a small part of the protected area at the other side of the Douro River, and periodically collect some information from them. Both City Councils, then, depend on and report to IGESPAR² and IHRU³.

² Institute of Architectural and Archaeological Heritage Management (*Instituto de Gestão do Património Arquitectónico e Arqueológico*)

³ Institute of Urban Habitation and Rehabilitation (*Instituto da Habitação e da Reabilitação Urbana*)

Above these entities there are the Ministry of Culture and the Ministry of Environment, Spatial Planning and Regional Development. Under the Oporto City Council, the next responsible entity is the Porto VIVO SRU, who depends directly on the Council. It has been given the responsibility for elaborating the Management Plan by the Oporto City Council, and one of its working units (the Cabinet for monitoring that the plan) also responds to the City Council. Porto VIVO then collaborates with the Parish Boards, proprietors, investors, residents and different associations, with the police for public safety, cultural institutions, such as theatres, archives, foundations and museums, and with different departments of the City Council, such as the Municipal Directions of Culture, of Tourism, of Public Roads, of Environment and Urban Services, etc.

All of these stakeholders collaborate and cooperate in a joint mission to protect, preserve, valorise and promote a national good of priceless value, which serves as an inspiration for current and, hopefully, future generations (Câmara Municipal do Porto & Porto VIVO SRU, 2010). Due to the two-tiered nature of the Site, it being a living city and a classified property, it makes it more difficult to fulfil the mission. That is why the actors have to constantly deal with the Site's nature, emphasize its potentialities and combat the challenges that prevent the potentialities to reach their peak. The objectives that they are being led by and that have been defined by the Plan, with the intention for it to be both innovative in supporting the strategic decision-making and effective in the resolution of specific problems, are defined within the strategic framework (Figure 6.7).

Obj. 1	PRESERVING, CONSERVING AND RESTORING THE BUILDING HERITAGE AND REDEVELOPING THE PUBLIC SPACE OF THE HISTORIC CENTRE OF OPORTO WORLD HERITAGE.
Obj. 2	MOBILISING CURRENT AND FUTURE USERS (RESIDENTS, WORKERS, VISITORS, STUDENTS AND INVESTORS) OF THE HISTORIC CENTRE OF OPORTO, IN THE DEFENCE AND PROMOTION OF ITS HERITAGE VALUE, PROVIDING INCENTIVE FOR THEM TO PARTICIPATE IN ITS PROTECTION, PRESERVATION AND PROMOTION.
Obj. 3	CONTRIBUTING TO THE EXCELLENCE OF TOURISM EXPERIENCE IN THE HISTORIC CENTRE OF OPORTO.
Obj. 4	STIMULATING THE CREATION OF A CREATIVE CLUSTER INSPIRED BY THE EXCELLENCE OF THE SURROUNDING CULTURAL HERITAGE.
Obj. 5	CONSOLIDATING THE ROLE OF THE RIVER DOURO AS AN ESSENTIAL ELEMENT OF INTERPRETATION, LIVING AND COMMUNICATION BETWEEN THE TWO BANKS OF OPORTO WORLD HERITAGE.

Figure 6.7 – Strategic objectives for the Site management

Source: Câmara Municipal do Porto & Porto VIVO SRU (2010, p. 150)

The strategic framework that includes these specific objectives led to the creation of a complete action plan that includes five critical, wide strategic areas, with tourism being one of them. These areas, together with the specific objectives that lead the activities relating to them, as well as the programmes and projects undertaken within them are all encompassed in figure 6.8.

STRATEGIC AREAS	SPECIFIC OBJECTIVES	PROGRAMMES	PROJECTS
I – HERITAGE	1. Preserving, Conserving, Restoring	A) Heritage Protection and Safeguard	1. Coherence and Effectiveness of Protection Mechanisms 2. Urban Area Management Unit 3. Joint Evaluation Committee 4. Ribeira/Barredo (19 Q.) 5. Sé (11 Q.) 6. Santa Clara (5 Q.) 7. São Bento (8 Q.) 8. Av. Ponte (2 Q.) 9. Mouzinho/Flores (11 Q.) 10. Clérigos (9 Q.) 11. Vitória (9 Q.) 12. Taipas (3 Q.) 13. São Francisco (6 Q.) 14. Improving Unique Heritage 15. Stimuli to private investment 16. Fiscal Incentives
		B) Heritage Rehabilitation	17. Physical Interventions 18. Environmental Interventions 19. Management of Sanitation Infrastructure Network
		A) Urban Environment	20. Improving Streets and Squares 21. Management of the Public Thoroughfare
		B) Improvement and Management of the Public Thoroughfare	22. Improving Gardens and Public Spaces
		C) Improving Gardens and Green Spaces	
		A) Traffic Flow and Control	23. Mobility Plan
	2. Maintaining, Enhancing and Improving the Public Space	B) Parking	24. Creation of New Parking 25. Safety Plan
		C) Safety and Comfort	26. Fire Prevention and Protection 27. Escalators
			28. Idea and Activity Contests
	3. Improving Mobility, Comfort and Safety	A) Training	29. Communication and Involvement Plan 30. Creation of Participation Forums
		B) Awareness Raising, Information and Communication	31. Development and Social Cohesion
A) Development and Social Cohesion		32. Creation and Publicising of WHP logo	
II – COMMUNITY	4. Raising Awareness and Educating for the importance of the HCP	A) WHP Logo	33. Recreation of Historic Moments 34. Creating New Theme Itineraries 35. Revitalisation of Traditional Festivals
	5. Social Development		36. Improving Viewpoints (Miradouros) 37. Route Fernandine Wall to Sta Clara
III – TOURISM	6. Promoting the Involvement of public and private agents	A) Improving Heritage	38. ICT 39. Welcome Centre 40. "I can help" Agents 41. Improving Restaurant Services 42. Improving Tourism Circuits 43. Orientation and Interpretation Signage
		B) Improving Landscape	
	7. Improving Landscape and Heritage Resources	A) Promotion and Reception	44. Revitalisation of the Existing Museological Spaces and Creation of New Ones
		A) Revitalisation of the existing Museological Spaces and creation of new ones	45. Revitalisation of Ferreira Borges Market 46. Consolidation of hotel services
	8. Improving Promotion and Reception	B) Creation of Tourist Infrastructures and Services	
		A) Infrastructure Network and Support Services	47. Creative Regeneration of PCH
IV – CREATIVE INDUSTRIES	10. Entrepreneurial Dynamism	A) Creative Education	48. Creative Education at Compulsory and Upper-Secondary Levels 49. Palace of Arts – Factory of Talents
	10. Knowledge, Technology and Competences		50. Mobility Model Between the Two Banks 51. Boat Landing at Ribeira 52. D. Luís I Bridge Lower Level 53. Shuttle River/ Sea Cruise Terminal 54. Douro Boats 55. Creation of Itineraries at Water Level
V – RIVER DOURO	11. Infrastructures of Improvements and Mobility	A) Improvements and Mobility	Total: 55 Projects

Figure 6.8 – Strategic areas and specific objectives, programmes and projects defined within the action plan

Source: Câmara Municipal do Porto & Porto VIVO SRU (2010, p. 233)

6.3 Summary and conclusions

Porto is a lovely city with priceless cultural milieu where the old meets the new, with a rich history that dates back to over two millennia, and the eras that can be tracked in time through different architectural layers that today's modern city is built upon. Its historic centre is a unique phenomenon, the landmark of the city and the heart of tourism activity that, having all this considered, needs to be preserved, protected and scrupulously managed and organized. Having in mind the fact that not many complex areas such as the Historic Centre of Oporto exist in the world, and that it needs to be protected, preserved, cherished and promoted worldwide, it was classified as a World Heritage Site by the UNESCO Committee.

All the above facts made imperative the creation of a unique management plan that contains not only all the information regarding the structure and elements of the Site, but, as well, all the efforts made towards its protection, the mission and strategic objectives leading these efforts, and a plan of action that would be a practical implementation of the pre-defined objectives. It also includes the management structure of the Site, which points out the way that the Site is organized and governed, revealing that there is no official, protocol led, defined network of stakeholders and leading to the conclusion that, though closely collaborating between each other, the actors are led by their own principles and objectives, and not by the joint goals concerning merely the prosperity of the Historic Centre.

Chapter 7| Discussion of findings

7.1 Introduction

This chapter divulges findings of the present study, generated after revision of scientific literature on the topics in focus, the content analysis of documentation concerning the particular case of UNESCO World Heritage Site of Oporto city, and the discussion of answers obtained through semi-structured interviews with representatives of the power-holding entities in charge of strategic decisions, organization and management of the Site in focus.

7.2 Findings: discussion and analysis

The findings of the research include:

- The actors, parties and stakeholders in charge of the Site management and accompanying activities, and their interrelations;
- The sustainability of cultural tourism;
- The Site conservation and protection;
- Principal difficulties and challenges when it comes to Site organization, management, conservation and protection.

Who deals with cultural heritage at the national (country) level is IGESPAR, the principal entity in charge of the management of the country's heritage, with the headquarters in Lisbon and different divisions across the country. Apart from IGESPAR, another entity on the national level is the IHRU, which, together with IGESPAR, reports to the Ministry of Culture and the Ministry of Environment, Spatial Planning and Regional Development. At the regional level, who is in charge of Oporto's heritage is the Regional Directorate of Culture of the North (*Direcção Regional de Cultura do Norte*), with the headquarters in Vila Real (Representative of Porto VIVO SRU, personal communication, October 4th, 2013). However, this entity, despite being mentioned by one of the interviewees as responsible for heritage of the region including Oporto's World Heritage, has actually proven to have little, if any, authorization when it comes to the specific case of the World Heritage Site of Oporto, even though it is responsible for the remainder nationally protected heritage, such as castles, ruins, monasteries and churches, including a few in Oporto city.

When it comes to the local level institutions, the one that has the most specific and concrete duties, when it comes to organization and management of the Historic Centre, is the Oporto

City Council. This entity is responsible for the preservation of the major part of the Historic Centre and, therefore, has the major interest in its preservation and improvement (Representative of Oporto City Council, Cultural Department, personal communication, October 16th, 2013). It reports to the aforementioned entities on superior levels that, consecutively, report to UNESCO at the international level. In other words, the Oporto City Council is directly dependent on IGESPAR and IHRU, while IGESPAR and IHRU are dependent on UNESCO, which is the international body that manages all classified heritage worldwide (Representative of Porto VIVO SRU, personal communication, October 4th, 2013).

As regards the public policies concerning the cultural heritage, the entity that has the power of decision-making processes is the Portuguese Government, including multiple guidelines from UNESCO when it comes to World Heritage Sites, including Oporto's (Representative of Oporto City Council, Tourism Department, personal communication, October 11th, 2013). There is a national law for the heritage, but also a number of UNESCO conventions that must be respected. On the other hand, there is a Master Plan that includes all the information concerning the issue of heritage protection. There is legislation both at the national level and the local level. The Oporto City Council also published a document called "*Sim Porto*", in order to make an analysis and evaluation of the assets, and who afterwards makes decisions about what is needed to be done in the protected area is Porto Vivo SRU, but still dependent on the decisions of the Regional Division for Culture of the North (Representative of Porto VIVO SRU, personal communication, October 4th, 2013). Thus, everything that is done at the level of the protected area has to have their approval and support, even though all legislation comes essentially from the state.

The most important finding of the practical part of the study concerns the inexistence of an officially signed protocol when it comes to the question of collaboration between the numerous stakeholders involved in activities and dynamics of the World Heritage Site of Oporto. The only assigned protocol exists between the Porto VIVO SRU and the Oporto City Council, with the latter responding to and being inferior to the former. There is definitely a network of actors that collaborate and cooperate at local and regional level, including both public entities and private organizations and companies, but it is not officially protocol led, defined, or stated as a network. Each of the actors is led by their own principles and objectives, and not by a group of joint objectives concerning merely the prosperity of the

Historic Site. However, strong collaboration and cooperation between the stakeholders, as well as their contributions to the successful functioning of the Site makes them important parts of the management structure. If this structure were to be an official network, a lead organization-governed network is how the structure could be defined as, due to the fact that it is not the participants who have an equal share in decision-making process, and that the principal entity in charge of the Site is not established by the network members themselves, or mandated as part of the network formation process in the initial phase of network's existence. It does not have an executive director, staff and an operating board that externally control the activities of the stakeholders, but is established and governed by the City Council, who then collaborates with the inferior members of the management structure.

When it comes to the question of sustainable development of tourism and cultural tourism, in particular, it is included in the key strategic areas within the action plan for the Historic Centre. It includes the efforts of preserving, conserving and restoring the heritage of the Site; maintaining, enhancing and improving the public spaces; raising awareness and educating the local community of the importance of the Historic Centre; involving both public and private actors in the activities related to the Site; improving tourism activities and incentivising the creation of new places of interest; incentivising creative industries, entrepreneurship, knowledge sharing and technological development; and improvement of the activities related to the Douro River.

As regards the assurance of a long-term sustainable development of the area, the biggest challenge is how to control the tourism without that affecting the community in economic terms; to attract the population which is rapidly decreasing and hence increase the occupancy of the buildings, improving the access for vehicles and increase energy efficiency that, in most cases, is inconsistent with the policies of heritage protection, that include many constraints in this aspect.

When it comes to the analogy between the pre-defined research objectives and the final work, it can be stated that each of the objectives has been met. The insight into the fulfilment of the objectives is given in table 7.1.

Table 7.1 – Fulfilment of the objectives of the study

<p>General objective</p>	<p>❖ The role of networks and partnerships in activities and dynamics concerning not only cultural tourism, but, as well, tourism in general, was analyzed, discussed and understood. Firstly, each of the concepts – cultural tourism and its elements, networks and its related terms, such as partnerships, collaboration and cooperation – was discussed separately, and, posteriorly, a parallel between these concepts was made.</p> <p>In order to better comprehend the idea of networks, special attention was given to the concept of governance, due to the latter being the starting point and foundation of the former. The conceptualization of governance was complemented by the concepts of public policy and planning. Implications of these for tourism were also comprehended.</p> <p>As for the investigation on whether or not, and, if yes, which type of networks and partnerships exist in the particular case of the UNESCO World Heritage Site of Oporto city, it was concluded that there is a network-alike organization and management structure, but not officially designated as a network, without a clear governance structure and without an officially assigned protocol.</p>
<p>Specific objectives</p>	<ul style="list-style-type: none"> • The importance of co-governance and networking, as a form of co-governance, was discussed and understood on both tourism and cultural tourism level; • Governance structure of the UNESCO World Heritage Site of Oporto was identified; • The power-holding entities responsible for the Site were identified; • The levels of collaboration between identified entities was examined and understood; • It was verified that there is no official network of stakeholders involved in cultural tourism activities and dynamics, but a strong collaboration between them, both official and unofficial; • Principal difficulties when it comes to implementation of tourism public policy, preservation, protection and management of Oporto’s Cultural Heritage, as well as sustainable tourism development at the Site, were identified.

Source: Own elaboration

As regards the questions asked within the research, the conclusion of the study allowed them to be successfully answered. To the question: “How does networking improve the process of governance and management of World Heritage Sites?” – The answer is that networking enhances collaboration, cooperation and joint action between various stakeholders, and joint action leads to knowledge sharing, as well as the greater efforts and greater engagement in the fulfilment of objectives, due to them being collective and not particular. Other than that, the fact that success of the entire collective, in this case the World Heritage Site, partially depends on each of the individual actors, generates a great deal of responsibility and commitment, and leads to an ethical and conscientious governance, organization and management of the Site.

To the question: “How can collaboration, cooperation and knowledge-sharing among network actors influence sustainability of cultural tourism and the tourism sector in general?” – The answer is that collaboration and cooperation between the network actors increases the information flow and knowledge-sharing between the actors, enhancing the awareness of importance of the question of sustainability between the actors, who, further, communicate the importance to the local community and other individuals outside the network, which, subsequently, leads to joint efforts when it comes to sustainability of cultural tourism and, generally, the tourism sector.

To the question: “How important is the joint action of all stakeholders, in any way involved in activities and dynamics of the World Heritage Sites (from both tourism and other sectors) when it comes to protection and preservation of heritage?” – The answer is included in the previous two answers, that is, joint action increases productivity, due to a greater deal of responsibility and commitment held by each stakeholder, leading to a more ethical and conscientious governance, organization and management of the World Heritage Sites. Also, the greater the unity of the actors, the greater the information flow and knowledge sharing on the network level, which, then leads to the increase of awareness of the need for protection and preservation of heritage and, subsequently, the very success of these endeavours.

Literature review on the set of repeatedly mentioned topics and the analysis of the empirically gathered data enabled the hypothesis testing. First hypothesis that the network relationships generally improve the functioning of cultural tourism and tourism sector in general was proven to be true, through the comprehensive literature review on the topics of cultural

tourism, governance and governance structures, public policy and planning, network governance, networks and partnerships, as well as through the conducted interviews.

H1 is, therefore, accepted.

The second hypothesis that the network relationships between different actors enhance information and knowledge sharing was also proven to be true after the analysis of the governance structure of the Site, conducted, particularly, through the content analysis of the Management Plan for Historic Centre of Oporto World Heritage, elaborated by Oporto City Council and Porto VIVO SRU, as well as through the interviews with the members of both entities.

H2 is, therefore, accepted.

The third hypothesis that the networks are the most optimal forms of governance when it comes to governing composite and multifaceted areas, such as the ones classified as World Heritage Sites could not be backed up neither through the literature review, nor through the empirical research. It can only be subjectively stated by the researcher that, in her opinion, this hypothesis seems as a logical sequence of the need to govern complex areas with the equally complex structures, such as the network ones.

H3 does not have sufficient foundation to be accepted.

And the last hypothesis that the formal collaboration between different actors, whether this collaboration is officially defined as a network or not, causes a superior level of productivity of each actor separately, was also proven to be true through the interview with the representatives of the two entities, which accentuated notable improvements in many of the actors activities, after engaging in joint activities with other actors.

H4 is, therefore, accepted.

7.3 Summary and conclusions

Findings of the study reveal the governance and management structure of Historic Centre of Oporto World Heritage, which enable the conclusion of the inexistence of an officially defined and established network, when it comes to activities concerning the Historic Centre. Governance structure, however, is made clear, as well as the interrelations between the actors within this structure. The focus on activities directed to the sustainable tourism development, the one which is in accordance with the protection and conservation of the Site is found within the main strategic areas defined by the action plan. This Plan shows the maturity, responsibility and high ethics, when it comes to organization and management of the Historic Centre. It as well shows that collaboration and cooperation widely contribute to a successful management and organization of such complex areas, as is the case with this particular one, and that the interrelations between the actors involved in organizational and management structures of the classified Oporto area are as successful, ethical and sustainable as the ones within the officially defined and established networks.

This particular management and network-alike structure is as suitable for this type of area as the officially constituted networks, contributing in the same amount to the sustainability of the Site, having similar objectives and being guided by similar principles. Regarding the impacts that affect the enduring success and development of the Site, they are inevitable in today's globalized world, and would be encountered independently on the governance structure, due to the complexity of the Site, as well as socio-economical and political factors that generally dominate in this type of areas. Meeting the challenges brought by the modern times is almost inevitably inconsistent with the policies of heritage protection. Therefore, the biggest challenge of all is to try to reconcile the old with the new, by accepting the fact that changes are inevitable and by embracing these changes through a professional, principled and conscientious management and organization.

Chapter 8| Word of conclusion

8.1 Introduction

This chapter presents the main conclusions withdrawn from the present dissertation. It provides the analogy between the research objectives and the final work, discusses the contributions of the study, that is, managerial implications of the findings, limitations of the study and the difficulties encountered, and, lastly, suggestions/aspirations for a future research.

8.2 Main conclusions

This dissertation is a result of combining: (i) a thorough examination of the existing literature on cultural tourism, governance, public policy and networks; (ii) examination of these concepts in the particular case of the World Heritage Site of Oporto city; (iii) qualitative research conducted at the Site; and (iv) analysis of the findings and conclusions drawn from the research. The literature on the three specific topics guided the research of the present study. The existing theory helped to identify the problem to be studied, the variables whose interrelations were to be examined, and the results that could be expected from the practical research. It also helped to reveal some new insights into the topics, show new analogies and ways of interpreting the topics, especially due to the fact that theories from quite dissimilar disciplines were studied.

Through this study it was verified that the existence of collaboration and cooperation between the parties of interest, even if they were not possible to define as official network structures but merely as network-alike, improves organization, management and functioning, not only of the tourism sector, but the general prosperity of an area. It also causes a superior level of productivity of each actor individually, due to constant information and knowledge sharing. From the examined literature on network structures, it can be concluded that they are, indeed, the most optimal form of governance when it comes to governing composite and multifaceted areas, such as the ones classified as World Heritage Sites, as is the case with Historic Centre of Oporto. However, the existing governance and management structure of the Site is just as successful in meeting the challenges, as if it were defined as an official network structure.

As emphasized by Pedersen (2002), the process of developing a management plan can encourage the participation of stakeholders, but only with the purpose and the approach of identifying what is needed from the public, and what a Site can offer them in return, and not

merely releasing a draft management plan for public comment. These were exactly the principles that led the Porto VIVO SRU to develop the Management Plan for the Historic Centre of Oporto World Heritage, declaring that the management plan aims to satisfy various groups of actors, including: (i) residents; (ii) visitors; (iii) employees; (iv) investors; (v) Oporto City Council, responsible for the major part of the Historic Centre; (vi) the Portuguese State that is the signatory of the convention; and (vii) the UNESCO – the final recipient of the Management Plan (Câmara Municipal do Porto & Porto VIVO SRU, 2010, p. 22).

The tourism industry is one of the principal drivers of economic development of Oporto city, making its successful management the imperative for ensuring the balance between the impacts generated by the tourism industry, undisturbed life of the local community and the spatial harmony. Complexity of issues and interests, however, which form the basis of tourism policy-making, complicates matters. Therefore, the process of planning needs to be in accordance with interests of all parties involved, not forgetting about the environmental aspects, and keeping in mind that the successful planning leads to the successful application of public policy.

8.3 Contributions of the study

When it comes to theoretical contributions of this study, it contributes to a better understanding of the concepts of governance, public policy and networking in the particular case of cultural, that is, heritage tourism, due to the fact that there are not many studies dealing with the questions of networking and governance in tourism, especially joining the two and discussing them within a single study. What is more, there are not many studies dealing with these issues in the particular case of cultural tourism and World Heritage Sites. Therefore, this study specifically contributes to the literature in this aspect.

As for the practical implications of both literature review and the overall research findings, they can be used for the improvement of future organizational matters in the particular case of Oporto Historic Centre, and as a suggestion for changing the future governance structures and moving them towards the network governance approach.

8.4 Limitations of the study and suggestions for a future research

The greatest limitation of the present study is the fact that it focuses merely on one particular case, which is the World Heritage Site of Oporto city and, therefore, cannot serve as a pattern when it comes to other cases. There can be, clearly, withdrawn some basic conclusions that can refer to similar cases, but the researcher cannot claim the exclusivity and generality of findings. It was beyond the remit of this study to review and critically assess more thoroughly many of the questions that have emerged through its elaboration, such as the history of Cultural Heritage structures of the World Heritage Site of Oporto city, the duties and responsibilities of each actor, i.e., stakeholder within the governing structure of the Site, etc. Therefore, a narrow scope can be emphasised as another limitation, which, on the other hand, can be justified by the fact that this dissertation puts an end to master studies and not doctoral ones, in which case there would be far more room for a more thorough and in-depth research, involving more matters.

For the above-stated reasons, the aspiration for the future research would be simultaneously including more cases in the research, in order to investigate whether or not, and to which extent, the issues concerning networks, governance and public policy are common in similar cases. Another ambition concerns the involvement of a superior number of more complex questions when it comes to the matter of governance in the particular case of World Heritage Sites. And, lastly, there is a will for conducting a more complex analysis, including both qualitative and quantitative approaches and research methods.

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Appendices|

Appendix 1: Interview structure (Portuguese version)

1. Quais são os principais atores envolvidos na formulação de políticas públicas do sector cultural da cidade do Porto (por exemplo – o Governo nos diferentes níveis territoriais, outros organismos do sector público, agências de desenvolvimento económico, organizações privadas, ONG...)?
2. Quais são os papéis que os atores desempenham no desenvolvimento do turismo cultural sustentável e na proteção do Património Mundial da cidade do Porto protegido pela UNESCO?
3. Quais são os principais motores das políticas públicas culturais da cidade do Porto em termos de:
 - Património Cultural (material e imaterial) e a sua proteção
 - Turismo Cultural
 - Desenvolvimento socioeconómico
 - Diplomacia / intercâmbio cultural
 - Questão da sustentabilidade, ou seja, o desenvolvimento sustentável
4. Existe alguma rede de atores envolvidos no desenvolvimento do turismo cultural sustentável e na proteção do Património Mundial protegido pela UNESCO, ou apenas uma colaboração informal?
5. De que forma é que o desenvolvimento sustentável do sector cultural e do Património Mundial, em particular, está a ser garantido a longo prazo e em que áreas em particular?
6. O que está a ser feito atualmente em termos de desenvolvimento sustentável no sector cultural e no que diz respeito ao Sítio classificado, e o que é que está planeado num futuro próximo nos seguintes aspetos:
 - Infraestrutura cultural (incluindo ambos os edifícios e as instituições)
 - Restauração / reconstrução do património tangível
 - Programas de Festivais / Eventos, ou seja, o património intangível
 - Outros (por favor especifique)
7. Quais são os principais desafios para assegurar, a longo prazo, o desenvolvimento sustentável dos bens culturais e do Sítio classificado da cidade do Porto (por exemplo – os económicos, sociais, organizacionais / governamentais, políticos...)?

Appendix 2: Interview structure (English translation)

1. Which are the key actors involved in Oporto city's cultural policymaking (e.g. government at different territorial levels, other public sector bodies, economic development agencies, private organisations and NGOs)?
2. Which roles do these actors play in sustainable cultural tourism development and the protection of World Heritage of Oporto city, protected by UNESCO?
3. Which are the main drivers of Oporto's cultural policy in terms of:
 - Cultural Heritage (both tangible and intangible) and its protection
 - Cultural Tourism
 - Socio-economic development
 - Diplomacy/cultural exchange
 - Question of sustainability, i.e., sustainable development
4. Is there any network of actors involved in cultural tourism sustainable development and the protection of World Heritage protected by UNESCO, or is there merely an informal collaboration?
5. In what way is the long-term sustainable development of the cultural sector and the World Heritage Site, in particular, being assured and in which areas in particular?
6. What is being done at the moment in terms of sustainable development/improvement within the cultural sector and the World Heritage Site, and what is planned for the near future regarding the following aspects:
 - Cultural infrastructure (including both buildings and institutions)
 - Tangible heritage restoration/reconstruction
 - Festival/event programmes, i.e. intangible heritage
 - Other (please specify)
7. What are the key challenges to assuring the long-term, sustainable development of Oporto's cultural assets and the World Heritage Site (e.g. economic, social, organisational/governmental, political...)?

Appendices 3, 4 & 5: Transcripts of the interviews

Appendix 3: Interview 1

1. A nível de autoridade nacional existe o IGESPAR, a entidade principal, são eles que fazem a gestão de todo património de Portugal, que é uma entidade que está sempre a mudar do nome. Depois eles têm direções espalhadas pelo país. Aqui no Porto há Direção Regional de Cultura do Norte (em Vila Real). Depois as Câmaras nos Sítios classificados como o Porto reportam a esta entidade (IGESPAR) e esta entidade por sua vez reporta a UNESCO. Os Sítios classificados, com valor excecional, que é o caso do Porto, quem gere e quem é a dona do bem é a câmara do Porto. A Câmara do Porto está dependente do IGESPAR, e o IGESPAR da UNESCO que é a entidade internacional que gere os bens culturais classificados. A direção que está em Lisboa também tem no Porto uma direção, mas no fundo é a mesma entidade. Portanto a sede do IGESPAR está em Lisboa e tem uma direção no Porto, ou seja, em Vila Real. É que o Porto numa maneira geral não vai tratar dos assuntos em Lisboa, mas trata-os no Porto. E a Câmara reporta a esta entidade, e esta entidade é que tem acima, em termos internacionais, a UNESCO. Nós fizemos um documento que se chama “Plano de Gestão do Centro Histórico do Porto Património Mundial” que está disponível no nosso site e que também explica um bocadinho a esta *linkagem*.

2. No Porto temos um Sítio classificado que é uma área de 50 ha. Dentro desta área há vários responsáveis. Há edifícios em si que são da responsabilidade do próprio Estado através dessa entidade do IGESPAR. São eles que fazem a gestão do próprio equipamento. Na questão do turismo, nós neste momento temos também operadores privados. Para além da câmara que tem o conjunto de oferta turística em termos de passeios culturais, de *workshops*, das sessões que fazem no âmbito do património cultural, o próprio Porto Vivo faz algumas ações. Toda essa gestão pertence compilada no âmbito do Plano de Gestão do Centro Histórico do Porto Património Mundial. E aqui há algum trabalho conjunto, quer da Câmara com Porto Vivo, quer da Câmara depois com os diferentes operadores. Quem tem a ligação com os operadores é a Câmara através do Departamento do Turismo. O Porto Vivo só tem os resultados finais de todo esse trabalho que é envolvido. E depois o conjunto de edifícios que estão integrados nos programas culturais e programas do turismo – cada um faz a sua própria gestão. Não há aqui uma única gestão de toda esta zona porque estamos a falar de uma área alargada que tem muitas vertentes, temos a Sé Catedral, por exemplo, que tem uma oferta imensa de programas

para o turismo, turismo interno e externo, portanto são elas (as vertentes) que fazem um pouco dessa gestão, mas a ligação é quer com IGESPAR, quer com a própria Câmara.

Existem várias entidades privadas ligadas ao turismo e não só. Nós, nomeadamente, temos aqui uma empresa que tem vindo a crescer, e que está muito ligada ao turismo ligado ao Rio que faz parte integrante da área classificada e o eixo Rio Douro é uma componente muito importante para a nossa classificação e que inclusivamente traz muito turismo, mas não só para a nossa cidade e o Sítio classificado como para o Rio Douro. Mas isto, em termos culturais, em termos turísticos, tem uma forte ligação e uma forte importância porque realmente nós temos muito turismo que vem também por causa das questões ligadas ao Rio Douro, as caves de vinho do Porto, portanto é outra componente turística e aí quem está a trabalhar mais são efetivamente os privados, e temos aqui alguns promotores a trabalharem, como por exemplo a empresa Douro Azul, que quer instalar um museu ligado à questão do Rio Douro, à questão cultural e de património, e que vai ser sitiado não na zona classificada mas na zona de proteção. Portanto temos vários operadores turísticos que estão muito no terreno e que cada vez estão a crescer mais. Todos os circuitos que se fazem em autocarro, ou em outras modalidades como as bicicletas, as vespas etc, tudo isso é expós e colocado no mercado por uns operadores privados. Embora toda esta oferta é disponibilizada através do site da Câmara que tem muita informação e através deste site é feita toda a divulgação turística em termos do património cultural.

Quem é que mesmo faz as decisões em nível de políticas públicas sobre o património cultural - é o governo de Portugal, mas nós temos umas orientações da UNESCO. Existe uma lei de património, e existe uma série de convenções da UNESCO que é preciso respeitar. Inclusivamente essa lei de património é revertida ao fim ao cabo na legislação que o Estado Português produz para os Sítios classificados. Por outro lado, o Porto tem o seu Plano Diretor onde são revertidas as informações sobre a questão da proteção do património. Existe a legislação quer a nível do governo, quer a nível local através do Plano Diretor e, inclusivamente, a própria Câmara do Porto publicou um documento que se chama o SimPorto que vem no sentido de se fazer análise do património e da valorização do património e, essencialmente, quem depois toma decisões sobre, inclusivamente, o que é que se pode fazer a nível de verificado nesta área que é protegida é a própria Porto Vivo, mas que ainda está dependente da decisão da tal Direção Regional de Cultura do Norte. Portanto tudo que é feito aqui tem que ter o aval deles. Mas no fundo toda a legislação vem do Estado.

3. Isso passa tudo muito pela Câmara essencialmente. Na Porto Vivo neste momento toda esta informação existe porque a Porto Vivo tá responsável e a sua missão é a reabilitação do centro histórico e da Baixa do Porto, mas foi lhe atribuído um outro trabalho pela Câmara, que foi exatamente a elaboração deste Plano de Gestão que tem um conjunto de projetos para a zona classificada e depois de ir fazendo a monitorização de todos esses projetos, mas a informação essencialmente da parte cultural e da parte do turismo é nos fornecida pela Câmara, com os resultados finais. Essa informação que está disponibilizada no fundo foram os indicadores trabalhados depois de nos terem sido fornecidos pelas estas entidades, essencialmente a Câmara e o Departamento de Turismo em conjunto depois com as outras entidades que trabalham na área. A Câmara tem uma série de equipamentos que estão localizados na área classificada, que são para o turismo e para uma série de oferta de programas culturais etc., mas é a Câmara que os gere. E depois também há alguns privados, mas as vezes os privados não são totalmente privados. Há sociedades com elementos públicos ou as empresas com elementos públicos a gerir os espaços. A Porto Vivo o que tem vindo a fazer é uma recolha desses indicadores, para fazer uma análise da forma da evolução do estado do Sítio, mas não está ligada à gestão e à forma como é que a sustentabilidade é feita nas diferentes áreas e nos diferentes equipamentos.

4. Não. É só uma colaboração.

5. O caso de procurar a garantir a sustentabilidade é através exatamente desta monitorização que se foi vindo a fazer, em que nós todos os anos fazemos uma avaliação, quer do estado da conservação do edificado, quer da densidade populacional no sentido de saber as questões da desertificação e da ocupação, da própria funcionalidade dos edifícios, e de todo estado da conservação, quer das vias, quer das questões da mobilidade. Há uma monitorização que é feita e que se insira em 5 eixos (em Plano de Gestão). Essa análise tem sido feita anualmente para se identificarem as oportunidades e os pontos mais negativos, e para serem tomadas as medidas de melhoria. Portanto, essa monitorização é feita aqui no gabinete, mas isto é feito numa colaboração alargada com vários representantes de diversas áreas. No fundo, isto não é uma rede montada, mas podia se quase considerar, e é nessa direção que se tem vindo a trabalhar para fazer exatamente a avaliação de toda esta área, e mesmo nas questões da sustentabilidade. Nós vamos brevemente publicar um novo relatório de monitorização que inclusivamente *linka* todas as entidades fora da Porto Vivo que estão a trabalhar no terreno nesta questão da gestão e da análise da valorização. Nós temos identificado um conjunto de

parceiros com quem atuamos e com quem trabalhamos. A própria Câmara do Porto solicitou aqui à Porto Vivo a elaboração deste Plano e dos relatórios da monitorização após da elaboração do Plano, e também fez sair uma ordem de serviço em que da parte da Câmara identifica um responsável de cada um dos setores – de urbanismo, do próprio turismo, etc, que trabalham em conjunto, numa rede (poderemos considerar), com autonomia para tomar algumas decisões, no sentido de serem tomadas medidas na conservação e na manutenção da zona. Portanto esse equipa está efetivamente no terreno e há um pouco para a gestão desta área. Há uma outra imagem que se fala aqui, um organigrama que no fundo reporta para a gestão do Sítio (no Plano de Gestão).

Por sua vez e por autorização da própria Câmara há aqui uma ligação transversal a todos estes departamentos que são da Câmara, portanto - com quem se trabalha em parceria quase, digamos, para ter todas essas informações e serem feitos alguns trabalhos em conjunto para resolver questões que existem no Sítio. Há aqui outras entidades que são também públicas, mas que não tem a ver com a Câmara, por exemplo a PSP, os Arquivos, Fundações, Museus, Teatros... E depois ainda tem o conjunto de proprietários, investidores, moradores, associações...e estes são que reportam e com quem a Porto Vivo se relaciona nesta gestão. Vai sair agora o relatório de monitorização diferente, ao ano de 2012. Desde que foi feito o Plano de Gestão, foi, digamos, definida esta estrutura da atuação. A Porto Vivo tem vindo a fazer, ela própria, a gestão do Sítio, mas através destas entidades. Da parte da Câmara, quem está neste momento nomeada para estar em ligação direta com o Porto Vivo é a Dra. Sofia Alves, que foi nomeada pelo presidente da Câmara para ser a coordenadora de todo um conjunto de pessoas da Câmara, ou seja, os representantes de todas as direções que trabalham para a gestão e a sustentabilidade do Centro Histórico, e que reporta depois à Porto Vivo. Temos um trabalho em conjunto.

O Plano de Gestão é um documento estratégico para a atuação aqui na zona classificada, que tem dois grandes capítulos. Tem toda uma fase inicial da análise e de conclusões, e depois tem uma segunda parte que tem a ver com o Plano de Ação, e é este Plano de Ação que contem um conjunto de projetos por eixos (que são 5) para serem implementados nesta zona e é esse conjunto de projetos que está a ser avaliado e monitorizado todos os anos. Nós estamos ainda agora a comparar os dados relativamente a 2008. A UNESCO de 6 em 6 anos pede uma avaliação, ou seja, um relatório. Foi feito 1 em 2005 e para o ano vai ter que ser entregue o outro. Os dados mais recentes que temos são de 2012, mas ainda não estão

publicamente disponibilizados, mas vão estar. Estamos só a aguardar que as entidades – A Câmara e a própria Porto Vivo aprovam o documento. Já está feito e é um bocadinho mais extenso e produzido, porque foram 5 anos após da elaboração do Plano de Gestão.

6. Em termos de infraestruturas e de equipamentos onde estamos a falar, de uma maneira geral, de património que está reabilitado e em bom estado, temos pontualmente alguns edifícios a necessitar de obras e essas obras têm havido a acontecer através essencialmente da Direção Regional de Cultura do Norte. São eles que têm que tratar da questão dos equipamentos. Com o aumento do turismo tem havido um cuidado efetivo dos equipamentos e a melhoria das infraestruturas. Um bom exemplo é a Casa do Infante, que teve grandes melhoramentos e que está sempre a melhorar a oferta, a Igreja dos Clérigos que neste momento está a ser reabilitada e está a ser aberta ao público com museu. A própria Santa Casa da Misericórdia abriu um museu. Efetivamente, esta zona, em termos culturais, tem evoluído bastante. O turismo tem aumentado, a procura de turismo cultural é que tem mais significado. Portanto, todos os responsáveis, no fundo, por esses equipamentos têm vindo a investir e a procurar melhorar as instalações e a qualidade da oferta cultural. A própria Câmara tem se vindo a organizar e a reestruturar a sua oferta cultural porque a procura tem crescido bastante.

Assim com mais escala, eu diria em que a Câmara teve mais participação nos últimos 2 ou 3 anos, embora isto também tem a ver com as questões políticas e as vezes com as prioridades dos políticos. Nós tivemos aqui uma Câmara que deu a prioridade às questões dos bairros sociais e deixou a parte cultural para uma segunda fase, embora tem apostado muito na reabilitação do edificado. Esta questão do turismo e da cultura, eu diria que a Câmara apostou mais e investiu mais nestes últimos 4 anos, neste último mandato. E aí também surgiu uma crescente preocupação das questões culturais e da sustentabilidade cultural. Inclusivamente eles até investiram na própria restauração no aspeto da requalificação. Houve nestes últimos anos uma série de sessões feitas pelo turismo que se chamavam “Receber a moda do Porto”, dirigidas aos responsáveis pelas unidades hoteleiras e da restauração, no sentido de conseguir a melhoria da qualidade da oferta e da preservação do património.

E relativamente ao património intangível – os eventos, a preservação da identidade nacional e das próprias tradições, etc. – tem havido essa preocupação e também numa forma crescente.

Temos uma outra empresa da própria Câmara que é Porto Lazer, que nestes últimos anos trabalhou muito na questão dos eventos na zona histórica e na Baixa do Porto.

7. O maior desafio é saber como travar o turismo, sem que isso nos afete em termos económicos, como também conseguir atrair a população que está a diminuir e, conseqüentemente, a aumentar a ocupação do edificado, melhorar o acesso para automóveis e aumentar a eficiência energética que, na maioria dos casos, é incompatível com as políticas de proteção do património, nas quais existem muitas condicionantes.

Appendix 4: Interview 2

1. Cultura é apenas uma das componentes do turismo. Uma coisa são as políticas culturais que a Câmara tem e outra coisa é a estratégia e as competências que nós temos na área do turismo que não tem nada a ver com a cultura. Mas obviamente, tudo o que a cultura faz para o público estrangeiro vai enriquecer a nossa atividade e o nosso cliente que é o turista.

Na área do património cultural nós temos o Turismo de Portugal, e depois temos entidades regionais do turismo e temos associações. Uma das entidades regionais, que é Turismo do Porto e Norte, trabalha o turismo interno, ou seja, é responsável por tudo que tem a ver com turismo interno. Depois temos, no caso do Porto, a ATP – Associação do Turismo do Porto que trabalha a parte da promoção. Nós, o Departamento do Turismo da Câmara, trabalhamos na organização da oferta turística e o acolhimento, ou seja, a partir do momento que o turista entra na cidade do Porto a responsabilidade é nossa. Nessa perspetiva, nós tentamos ter tudo direcionado e organizado para quando ele cá está. Isso significa que somos responsáveis pelos Postos de Turismo, para acolhermos e orientarmos os turistas através de um atendimento presencial. Nós temos o mapa e as brochuras que oferecemos. Outra plataforma importante que já entra no planeamento é o nosso portal. Onde é que nisto tudo entra o turismo cultural? – O turismo de Portugal identificou produtos prioritários para cada região e para o turismo cultural. Aqui para a cidade do Porto temos o Negócio (Turismo de negócio) e o *City Break*, estando o turismo cultural muito implícito no *City Break*, i.e. associado ao *City Break*. Portanto, nós trabalhamos essencialmente esses dois produtos, e quando falo de “nós”, refiro-me aos organismos como a ATP e o Departamento do Turismo da Câmara Municipal do Porto.

2. O que é que nós fazemos para o turismo cultural? Nós tentamos criar produtos e visitas que vão ao encontro para organizar a oferta para esse tipo de turista. Ainda agora fizemos uma brochura em que associámos muito o Porto Património Mundial, tentámos no nosso portal ter toda a organização relativa à oferta cultural da cidade, tudo com que seja acessível ao turista e, essencialmente, é isto que nós fazemos. Por exemplo, tentamos fazer brochuras sobre as igrejas, criar percursos, etc., embora a nossa grande preocupação é o acolhimento, por exemplo, aos cruzeiros. Nós temos as nossas técnicas identificadas e estamos ali a prestar apoio, saímos da nossa zona de conforto e nós vamos ao encontro do turista. E outra questão é como organizar toda oferta para estar acessível ao turista. A nossa preocupação para o Património Mundial é divulgar o selo Património Mundial em todos os nossos materiais. Nós

não tínhamos uma brochura que identificasse e que falasse do Sítio classificado, e nós preparámos essa brochura como uma coisa muito soft e tinha que ser barata para oferecer para o turista. Nós aqui, obviamente, também interferimos muito na qualificação da oferta turística, dos recursos humanos e da qualificação dos nossos técnicos de turismo em que um dos itens, por exemplo, vai ser o Património Mundial, ou seja, isto tem a ver com a formação contínua que os técnicos têm que ter, que eles digam o que é que o Porto tem para lhe ter sido atribuído o selo, ou seja, para quando eles estão a dar a informação ao turista, eles digam: “Nós somos o Porto Património porque o nosso Centro Histórico tem isto, isto e isto, que não tem mais no lado nenhum”. Portanto, é esse o nosso grande contributo.

3. Essa não é bem a nossa área. A política cultural da cidade do Porto é do Departamento da Cultura e, se calhar, era melhor falar com a Dra. Sofia Alves sobre isso. Nós aqui exponenciamos toda a parte do Património Cultural que já existe e usamos só isso. Temos o nosso plano de atividades, essencialmente na qualificação da oferta, no acolhimento, na divulgação de toda oferta nos portais, nas redes sociais...

4. Isso também tem que falar com a Dra. Sofia. A Cultura é importante para lhe responder a isto. Eu não posso falar da política municipal quando isso é uma estratégia que tem que ser a Cultura (o Departamento da Cultura), que tem a sua política. Mas, por exemplo, nós este mês temos o mês da arquitetura e temos uns percursos da arquitetura que as entidades organizam e nós divulgamos a essa informação para o turista. Tudo que existe na cidade e que é associado à arquitetura, nós informamos o turista sobre isso, por exemplo, se quer fazer percursos culturais da arquitetura. Nós organizamos o produto em termos da oferta turística e tentamos organizar os circuitos. Reeditámos agora uma brochura para o turista para ter a perceção do tipo da oferta que nós temos e, obviamente, isto também está a parte cultural. As brochuras para divulgar contêm as vertentes importantes da cidade como o Vinho do Porto e o Sítio de Património Mundial, que quisemos juntar e explicar por que é que o Porto é Património Mundial. Quisemos fazer a ligação ao património do Norte, ao Douro e Guimarães. Aqui também é uma política cultural, mas é na perspetiva da organização da oferta, ou seja para o turista, quando vem à cidade do Porto, é importante ele ver que temos esta vertente cultural importante, mas que também temos Guimarães e o Douro, e este triângulo é importante eles conhecerem. Os eventos também é uma área muito importante que nós estamos a tentar potenciar.

Eu estou agora num projeto, mas é um projeto dentro da Fundação Cupertino de Miranda. O que é que eles estão a tentar fazer? Eles querem que os museus sejam mais visitados. Nós e a Associação do Turismo estamos a tentar ajudá-los para venderem esse produto e como é que eles têm que se organizar. Têm que criar rotas. O que é que nós estamos a dizer aos museus é que eles têm que mudar, têm que estar dirigidos para o turista de hoje em dia e têm que tornar o produto dinâmico. Ninguém vem ao Porto só para ver museus. Têm que criar serviços complementares. Portanto, nós sugerimos que façam uma brochura, ou a fazemos nós, em que fazemos uma rota dos museus, até pode ser um elemento comum que eles têm e, entretanto, dar umas dicas – para experimentar algum restaurante, ir a alguma loja, ir a um miradouro, visitar um monumento interessante – para que as pessoas vão até lá. E isso eu acho que, atualmente, é um grande desafio mesmo para o turismo cultural. Há um nicho do mercado que vem especificamente para ver os museus, mas o turista que nos visite é muito curioso, quer as coisas rápidas, quer ver muita coisa, quer explorar, experienciar, e o museu é uma coisa morta. Os museus neste caso têm que se reinventar e tem que ser nós próprios do Turismo a estar sempre a acompanhar o mercado.

A nossa competência é dar dicas, ou seja, fornecer a informação e dar sugestões para cada segmento se organizar. Se querem vender museus, nós fornecemos a informação sobre as características do turista e eles têm que adequar o seu produto ao turista, ou seja, de se adaptarem ao mercado. Nós não conseguimos vender museus aos turistas se não estão traduzidos, se não tem ninguém que fala línguas. Como é que nós vamos mandar lá os estrangeiros? Se nós queremos desenvolver o turismo cultural, temos que pensar nisso. Os monumentos têm que estar preparados para este público, porque se não, nós não os podemos vender. E é essa a nossa obrigação, enquanto a entidade responsável pela organização do turismo na cidade. Quem vende aqui o destino somos nós através do nosso portal, e ao conhecer o mercado nós damos as dicas e colaboramos com eles. Nessa perspetiva, a nossa obrigação é tentarmos organizar a oferta, mas tem que ser com todos os interlocutores, porque sozinhos não conseguimos. Outra das nossas competências é para dar dicas ao mercado e fazer inquéritos, ou seja, dar dicas aos interlocutores da cidade para eles se orientarem na sua estratégia, para adotarem a estratégia de acordo com a motivação e com perfil do turista.

Não sei se já leu o projeto para o Plano de Gestão da Zona Histórica da SRU. Há uma série de diretrizes que eles têm que cumprir, e o Turismo também tem uma parte. A Cultura

promoveu uma série de circuitos culturais para revitalizar mesmo o próprio Centro Histórico. Mas eu aconselho vivamente para falar com a Dra. Sofia porque, quanto às políticas culturais, é ela com quem deve falar.

5. O que é que o Departamento da Cultura está a fazer e nós também fazemos parte da equipa é trabalhar nos novos públicos, ir às escolas; aqui há um trabalho de fundo que é despertar o interesse dos residentes para terem orgulho na sua cidade, para proteger e ter a noção sobre isso. Então, a Câmara, ou seja, este grupo de trabalho, está a trabalhar muito nessa sensibilização e nas escolas. Eles vão às escolas primárias, para falar sobre “O meu Património” (o nome do projeto) e para eles apreciarem e sentirem que estão num Sítio muito especial que é importante proteger. Depois tem, por exemplo, um grupo multidisciplinar no qual nós fazemos parte. Mês a mês há uma saída, por zonas, em que o grupo sai, por exemplo da Via pública e Turismo, e vai só observar e ver o que está mal e depois faz-se um relatório e apresenta-se aos serviços da Câmara, para a respetiva correção. Portanto, tentam-se aqui envolver outros serviços da Câmara em preservação do Sítio. A Dra. Sofia vai-lhe falar que foi criado um Plano de Gestão do Centro Histórico onde há uma ordem de serviço em que diz, para cada serviço, quem é o representante. Periodicamente esse grupo tem que se reunir para a implementação do Plano de Gestão.

Nós temos um projeto que é o “Vamos receber à moda do Porto”, que nós do Turismo desenvolvemos. Uma das áreas muito importantes é qualificar, é qualificação. Então, o que é que nós temos feito nesse sentido há 3-4 anos? Nós vamos, por exemplo, aos empresários dos barcos e vamos falar sobre turismo e a importância do turismo, depois convidamos a Escola de Hotelaria e Turismo também para dar a formação, vamos à restauração falar com os gestores, aos taxistas também já demos aulas de formação, para todos eles perceberem que temos que tratar bem o turista. Disso tudo é qualificação. Nós do Departamento de Turismo atuamos nestes grandes eixos, que são: Qualificar, Organizar e o Acolhimento.

Nós também estamos num projeto – o Porto Tours – que é sobre os circuitos turísticos, em que os empresários de todos os circuitos que estão lá são associados e nós também colaboramos com eles. A nossa posição tem que ser isenta, porque nós somos o garante que as coisas têm que funcionar, o mercado tem que funcionar. Nós estamos sempre a mediar, sempre atentos e a tentar apoiar. Por exemplo, as empresas que se querem instalar na cidade, querem começar a trabalhar na área, e há muitas, vêm ter connosco e nós ajudamos, damos as estatísticas e os estudos, ajudamos a orientar, etc. A nossa função é essa.

Em nível das redes, há aqui duas coisas diferentes. A primeira é a rede dos públicos internos, onde a Câmara é a entidade responsável pela manutenção e a preservação do Centro Histórico, mas é necessário ter públicos internos, ou seja, vários serviços como a Via pública, o Ambiente, a Limpeza urbana, o Turismo, a Cultura, etc, e todos estes serviços têm que trabalhar em conjunto na preservação. Todos eles interferem na gestão desta zona. Outra coisa é os públicos externos, ou seja, as entidades fora universo da Câmara, que nós obviamente também temos que trabalhar com eles. Precisamente um grande objetivo do projeto “Vamos receber à moda do Porto” é criação, dentro do Turismo, dessa rede, ou seja, todos nós nos conhecermos, senão as coisas não funcionam. Por exemplo, é importante eles saberem, se tiver algum problema com os turistas, que nós existimos. Existe uma Esquadra de Turismo, com especialistas que falam várias línguas, e se o turista é assaltado ou tem algum problema é a eles quem deve ligar logo e eles tratam de tudo. E depois nós vamos receber essa partilha de conhecimento. Se eles precisarem de dar uma informação ao turista tem o nosso portal, tem os nossos postos de turismo, podem nos telefonar. Portanto, tem muito essa rede da partilha.

6. Na perspectiva do Turismo, o nosso trabalho é organizar o produto e nós vamos organizar criando uma brochura para os museus no âmbito desse projeto que é da Fundação Cupertino de Miranda. Isto é, se eles não conseguirem, nós vamos pegar no produto museus e vamos trabalhá-los para o nosso público com aquilo em que nós vamos apostar no turismo cultural através da criação dessa brochura de produto museus porque esse é um problema muito grave na nossa cidade, como é o caso das igrejas também. Existem muitas igrejas que estão fechadas. Digamos que tivemos que pôr o comboio a andar e já está a andar. Agora vamos à cada carruagem e vamos trabalhar, e o Turismo Cultural é uma dessas carruagens. Já nos organizámos internamente, já temos a estratégia definida, e agora vamos trabalhar.

Os nossos técnicos vão, por exemplo, definir o que é que é importante para a cidade, os eixos, o que é que eles devem passar aos turistas – o Património Mundial, o vinho do Porto, a modernidade, a arquitetura. Especialmente, esta parte toda da arquitetura é um eixo que nós trabalhamos muito. Nós trabalhamos muito em rede com a Associação dos arquitetos, fizemos com eles alguns percursos, porque é uma área à que damos muita importância. Relativamente aos eventos, nós não organizamos, mas promovemos e estamos em estreita articulação com a Porto Lazer, especialmente quando se trata dos eventos internacionais. Estamos sempre presentes com o nosso acolhimento e para dar o apoio aos turistas

estrangeiros. Portanto, criámos a tal rede e trabalhamos com os nossos parceiros, que é a Porto Lazer.

7. Turismo Cultural, para ser sustentável, as questões mais importantes são a preservação, trabalhar na qualificação, na formação e na sensibilização dos seus públicos mais novos, para eles organizarem-se e criar produtos. Mais um desafio que se coloca mesmo ao Turismo Cultural é estar atento às tendências do mercado porque, se o turista hoje em dia gosta de experimentar e de participar, então dentro de museus tem que se colocar qualquer coisa que, quando o turista sai de lá, sai com uma experiência boa. O grande desafio da sustentabilidade das políticas obviamente passa por qualificar e por elas responderem às exigências do mercado, que eu acho que é um grande problema que nós estamos a assistir. Quem trabalha em Turismo, seja Cultural ou seja o que for, tem que prestar muita atenção às tendências e justar sempre o produto aos clientes.

A zona classificada é uma zona muito complicada ao nível de residentes, há muita falta de civismo. A Câmara pode limpar e passado uma hora já está sujo. Mudar isso vai levar anos e por isso é que temos que começar nas escolas e é nas escolas na zona que a Cultura está a trabalhar este projeto que se chama o “Património”, que é para levantar estas questões. As gerações mais antigas já não vale a pena, tem que ser pelos miúdos. Nós, então, vamos às escolas do primeiro ciclo, da 1^a, 2^a, 3^a classe, a começar logo aí a falar da importância para eles sentirem orgulho e, se verem alguém a deitar o papel para o chão, eles irem apanhar. Se verem um cão a fazer cocô, para dizerem ao dono dele que apanhe a porcaria do seu cão. E tem que ser assim porque a Câmara tem muita dificuldade em gerir. Acho que é um trabalho muito importante que a Cultura está a fazer nos mais novos. A nossa expectativa é que os residentes estão a ver as vantagens económicas dos turistas. Todos aqueles cafés e restaurantes, o comércio, se não forem os turistas eles não existiam. Com a crise em que estamos e que as pessoas cada vez menos jantam e almoçam fora, quem nos está a sustentar atualmente são os turistas, e o turista gosta de ver as coisas limpas. Nós, com o “Vamos receber à moda do Porto”, insistimos muito nessa vertente de que o turista é exigente porque o turista hoje em dia é mesmo isso. Nós temos uma grande vantagem que é o acolhimento, é a nossa grande arma secreta, é a simpatia das pessoas, mas isto morre se tiver tudo a cheirar mal e tudo sujo. Mas isso vai levar muito tempo, por isso nós estamos a tentar nestas gerações mais novas, depois eles ensinam os pais que não sujam e não deitam no chão, porque é a nossa casa.

Depois também são as políticas do Governo em que para recuperar o edificado precisam do dinheiro. Os senhorios não dão dinheiro, muitas vezes as rendas são muito baixas, e é preciso muito dinheiro para recuperar o edificado. E pronto, passa também pelo interesse do Governo Central em perceber que, para preservar e também para o Turismo, tem que ter investimento na recuperação do edificado e, em vez de construir, tem que se recuperar. Mas o Governo simplesmente cortou as verbas à SRU. É o Governo de Portugal que tem que transferir essas verbas para a SRU, para ter dinheiro para recuperar o edificado, porque a Câmara não tem capacidade financeira para avançar com a recuperação dos edifícios.

Appendix 5: Interview 3

1. Os principais atores variam bastante, ou seja, são muitos. Estamos a falar de Agências Institucionais, e quando estamos a falar de Agências Institucionais estamos a falar das Universidades, dos investigadores, da Igreja, da Santa Casa da Misericórdia, das empresas privadas. Enfim, estamos a falar de uma infinidade de gente com interesses diferentes, dos próprios investidores que investem na cidade, dos agentes turísticos, ou seja, dessa gente toda que opera neste domínio. Estamos a falar também da comunidade local, das pessoas que habitam o território, da população escolar, dos professores, dos alunos noutra domínio, das instituições oficiais, do próprio Estado, seja ao nível central, regional ou local, portanto, de todo um conjunto de parceiros muito diversos que são chamados a ter opinião e a dar a sua opinião. Nalguns casos, por força da lei, são chamados também a pronunciar-se legalmente, dependendo do que estamos a falar. Portanto, de facto acho que posso dizer que são os representantes de toda a sociedade. Mas, quanto a quem mesmo toma as decisões e define as políticas públicas, temos diferentes níveis.

2. Há uma lei geral de competências, daquilo que compete à Câmara Municipal fazer, a lei das competências das autarquias locais. Portanto, está muito claro nessa lei o que é que compete às Câmaras fazer e o que é que não compete. O que não está lá não compete. Estas políticas públicas eu acho que ainda podem ter um enquadramento maior. Por um lado podem ter o enquadramento no Ministério da Cultura, mas hoje em dia obrigatoriamente têm que ter um enquadramento Europeu, porque nós que naturalmente fazemos parte da comissão Europeia temos todo um conjunto de quadros legais à que também reportamos. Portanto, há sempre um enquadramento Europeu, depois há legislação e competências em termos de estratégia global do país, que naturalmente é do Estado, da administração central. Depois haverá competências regionais, mas estas ainda estão na esfera do poder central, ou seja, do Estado. E depois há competências que competem especificamente as autarquias, a Câmara Municipal em concreto, as Juntas de Freguesia. Há uma lei que regula isso claramente, como também há competências específicas na área da cultura, há questões que são da tutela direta da Direção Regional da Cultura do Norte e há outras além da Câmara que têm competências próprias.

3. Por muito que lhe possa dar alguma opinião, essas são as perguntas para quem tem o poder de decisão. Ou seja, quando um presidente da Câmara é eleito, ele tem um programa

específico político, ou seja, um programa eleitoral, de candidatura, que ele submete antes das eleições, em que declaram o que pretendem fazer caso fossem eleitos. Agora, aquilo que vão ser as políticas públicas no âmbito das competências da Câmara, vai estar muito condicionado pelo aquilo que os políticos da Câmara querem que seja. Pode haver um político que queira muito apostar e fazer um grande investimento, por exemplo, no Mercado de Bolhão ou Palácio de Cristal, que são dois casos que, no momento, se encontram em cima da mesa. Portanto, isso depende muito do que é que os políticos entendem que é prioritário, o que tem a ver com a conceção e a ideia que eles próprios têm. A nós, depois, compete-nos, através de um conjunto de instrumentos de ação, levar a cabo aquilo que foi superiormente decidido. Portanto, para lhe estar a falar sobre os principais motores das políticas públicas culturais, há de serem mencionados uns aspetos que são factos, como, por exemplo, é um facto que esta zona da cidade está classificada desde 1996 como Património Mundial da Humanidade pela UNESCO.

Partindo do pressuposto que toda a gente quer que isto se mantenha, há que trabalhar para isto. Portanto, isto pode ser encarado como um motor. Pode haver algumas classificações que são motores no sentido que nos obrigam a manter um determinado caminho. Hoje em dia, se temos mais turistas a virem à cidade, esse também é um motor de desenvolvimento económico. Portanto, eu acho que, no global, tendo em conta aquilo que é a orientação política do executivo, são todos aqueles motores que tradicionalmente falámos, que têm a ver com uma vertente mais económica, com uma mais cultural, com o que é que nós queremos oferecer à cidade do ponto de vista cultural, do ponto de vista social. Por exemplo, pode haver uma abordagem mais próxima da área da coesão social, do conhecimento e da cultura, ou uma área mais distinta, e isto depende tudo de como é que o presidente da Câmara e a sua equipa vêm estas questões.

Quanto os investimentos, a Sociedade da Reabilitação Urbana Porto Vivo, atualmente, é uma sociedade que se dedica a reabilitação desta zona da cidade e que tem parte do capital da Câmara e outra parte do Estado, portanto, já aqui há um investimento do Estado para esta zona. Agora, como tem dito o nosso presidente, um euro que é investido pelo Estado, e aqui o Estado entende-se na sua globalidade – Central e a Câmara, tudo junto –, atrai dez euros de investimento privado. Portanto, nós temos vindo a assistir mais recentemente a um aumento muito grande de recuperação e reabilitação dos edifícios nesta zona, de aumento da atividade económica, de abertura de uma série de estabelecimentos mais ligados ao comércio. Temos

também aqui assistido um forte crescimento na área das indústrias criativas, também muito potenciado com a criação do Palácio das Artes. Claramente que sempre muito assente naquilo que é a estratégia do executivo para esta área mas, claro, depois com todos os enquadramentos legais nacionais e Europeus.

4. Nesta zona classificada nós temos uma entidade que é responsável e que é gestora do Sítio – a Câmara Municipal do Porto. Esta entidade é responsável perante UNESCO para gerir este Sítio, mas não há uma rede formal no sentido de que está um protocolo assinado por uma série de intervenientes para este assunto. Agora, toda a cidade, por um lado, todos os agentes e todos os atores quando são chamados envolvem-se. E mesmo quando não são chamados têm também uma vontade própria e um sentido crítico próprio e muitas vezes manifestam a sua preocupação sobre uma série de aspetos que vão acontecendo. Há momentos de auscultação periódicos, há relatórios anuais onde se pede informação a todos os agentes da cidade, ou muitos, pelo menos. Agora, isso não é necessariamente uma rede formal no sentido de estar tudo assinado num papel, mas é uma rede que funciona; não sei se melhor ou pior do que uma rede formal, mas que funciona, e isto é o que importa porque ninguém se recusa a prestar informação ou dar dados porque todos sentem que isto é um património que, de facto, é de todos, e o que importa é preservá-lo. A Universidade do Porto, por exemplo, se for chamada a pronunciar-se sobre alguma coisa, claro que vai ser a primeira a querer associar-se. As instituições como centros paroquiais, as IPSSs⁴ que estão aqui nesta zona, os centros de dia, todas estas entidades quando são chamadas a trabalhar com a Câmara nalguma questão específica, fazem-no sempre dum modo muito participativo porque, de facto, este é um território que é partilhado por todos.

5. Desde os primeiros momentos em que o Sítio foi classificado pela UNESCO é que houve preocupação, passados aqueles anos iniciais em que ainda não havia um grande amadurecimento, mas, não passado muito tempo, a UNESCO sugeriu que fosse feito um Plano de Gestão, precisamente para tentarmos organizar aquilo que a cidade queria para o seu centro histórico classificado. O Porto foi o primeiro Sítio a ter um Plano de Gestão aprovado pela UNESCO, que está publicado e está em vigor e, acima de tudo, está ativo, e é isto o que importa. Nesse Plano de Gestão foram definidas logo as áreas estratégicas de atuação e para

⁴ Instituições particulares de solidariedade social (Private Welfare Facilities)

essas áreas estratégicas, que são 5, foi definido todo um conjunto de atividades que iriam contribuir para a concretização. Naturalmente, passados estes anos, já há coisas que estão ultrapassadas e que já se fizeram, outras que ainda não se fizeram, e outras que já estão desajustadas, porque as coisas não evoluem sempre de um modo totalmente controlado.

Quais têm sido as preocupações? Claramente, a questão da reabilitação tem sido uma preocupação prioritária porque esta zona, se agora já começa a ser mais procurada pelo investimento privado, era uma zona muito deprimida, apesar de ser fantástica de ponto de vista patrimonial, mas não nos interessa uma cidade fantástica de ponto de vista patrimonial, se depois está vazia e se apenas temos aqui lojas de souvenirs e pouco mais. Portanto, houve aqui uma forte aposta na área da reabilitação urbana que é visível, há todo um conjunto de quarteirões que foram intervencionados ao longo dos anos através da Porto Vivo SRU. Enfim, toda esta zona está a ser, de facto, intervencionada já há bastantes anos, no sentido de tentar atrair pessoas e captar investimento. Depois, temos também outra área estratégica que é o turismo e tentar, deste ponto de vista, garantir que o turismo que se vai promovendo é um turismo sustentável. Nestas reabilitações que foram feitas agora, nomeadamente ao nível das ruas e das vias públicas, há precisamente a preocupação deste espaço não ser todo tomado pelos autocarros turísticos. Portanto, estes arranjos que foram feitos agora e estas condicionantes de trânsito evitam, precisamente, que haja esse tipo de situação aqui nesta zona. Isto já é uma preocupação e salvaguarda para o futuro, para evitar situações de pressão turística que nós conhecemos noutras cidades. Talvez, enfim, o expoente máximo dessa pressão hoje em dia seja a cidade de Veneza, por exemplo, e que eu conheço com particular detalhe, porque as cidades de Património Mundial mantêm-se em contacto, não só no país, naturalmente, mas também fora do país, a nível internacional. Portanto, podemos sempre trocar as experiências e todo um conjunto de situações que são semelhantes a todos nós, apesar de muitos distintos.

O que têm tido também de grande importância é a questão das indústrias criativas, ou seja, se é certo que tem havido ao longo dos anos um abandono desta zona da cidade. É certo que nós não queremos que venha para cá viver gente que não tem nada haver com este território e não queremos assistir a um projeto de gentrificação que, enfim, também acontece noutros sítios. Temos tentado procurar o equilíbrio, por um lado manter as pessoas que cá estão, mas, por outro, tentar atrair para esta zona da cidade pessoas jovens e criativas, que possam facilmente ter esta zona como a sua zona de excelência para viver. Então, a criação do Palácio das Artes,

que é o centro das indústrias criativas e um local que permitiu que muitas coisas se desenvolvessem em torno do próprio Palácio das Artes, que funciona como uma incubadora artística para uma série de ateliers de áreas diferentes, ajudou a potenciar a esta área também. Hoje em dia, o que vai acontecendo aqui em termos de novas abordagens, quer de artesanato urbano, quer de ideias conceituais diferentes mais artísticas, se visitarmos aqui um pouco a volta já vemos coisas muito diferentes a acontecerem, o que tem muito a ver com fruto dessa intervenção.

Uma outra, que tem sido bastante trabalhada em vários domínios, tem a ver com a comunidade e o envolvimento da comunidade. Por um lado, a Câmara trabalha diretamente as abordagens junto da população escolar e da população senior, e temos projetos muito específicos que trabalhamos. Por exemplo, há um projeto que se chama “O meu Porto é Património Mundial”, dedicado precisamente a esta zona da cidade, que visa trazer os alunos e os mais velhos a conhecerem a zona, e que é um projeto continuado, consistido em quatro sessões ao longo de dois meses. Por outro lado, temos iniciativas totalmente distintas, como, por exemplo, “Manobras” no Centro Histórico do Porto, que tem a ver com os eventos que não são isolados, mas que potenciam o envolvimento da comunidade. Há projetos que são desencadeados com a comunidade durante muitos meses e depois no final há uma semana ou dois/três dias de Manobras que são dados a conhecer o público que já esteve a trabalhar muito tempo com a comunidade. Outro exemplo é a Casa das brincadeiras na Rua de São Miguel, que funcionava como uma casa onde toda a comunidade ia para “aprender a brincar”, mas que a própria casa foi construída com brincadeiras da comunidade. Lá encontrava-se uma sala, uma divisão da casa que era toda feita em cartão e cada pessoa que chegava acrescentava qualquer coisa, e ia fabricar, ia pessoalmente fazer essa coisa. Também me recordo de um evento que tinha a ver com músicas e com cantares do São João, na zona da Miragaia, que tinha sido trabalhado com a comunidade antes, e depois no dia das Manobras é que se mostrava à toda a gente, mas foi tudo trabalhado com muito tempo antes.

Portanto, todo um conjunto, quer com a população escolar, quer com a comunidade como um todo, há aqui diversas intervenções que pretendem precisamente envolver a comunidade, porque o Centro Histórico do Porto só o é, e só tem estas características porque a comunidade é como é, e as pessoas que vivem aqui são como são, e que lhe dão também estas características; uma coisa não se pode separar da outra. Portanto, estes podem ser dois bons exemplos de trabalho com a comunidade em áreas diferentes.

Por último, é um eixo que penso que, dos cinco eixos, ou cinco estratégias, é o que está menos explorado, que tem a ver com o Rio Douro, e menos explorado de ponto de vista da Câmara, naturalmente. Isto, talvez, porque os próprios privados comecem ou já tenham feito grandes dinamizações neste domínio, de explorar o Rio também como um fator de diferenciação da cidade, que possibilita o encontro das duas margens. O que o Rio também representa é uma ligação ao outro Património Mundial, que é Douro Vinhateiro, porque nós temos aqui um rio que nos une, e dois Patrimónios Mundiais unidos por um rio.

6. Nós temos aqui várias questões. O próprio Plano de Gestão aponta alguns caminhos. Por exemplo, há uma das áreas no Plano de Gestão que diz que é necessário reforçar atratividade dos museus já existentes nesta zona, que são dois ou três. Os meus colegas e eu temos, neste momento na calha, a abertura de um núcleo interpretativo dedicado ao Infante Dom Henrique da Casa do Infante, porque quem cá vier não tem muita informação sobre o Infante, como a Casa atualmente é mais um centro de interpretação da própria Casa e da estrutura do edifício. Essa é uma das áreas que nós temos para breve, para começar a trabalhar, e estamos neste momento a preparar uma candidatura para isso mesmo. É um projeto que, para além de dinamizar o que a Casa do Infante é em si – um monumento nacional importante –, vai trazer mais público a esta zona no sentido pedagógico; ou seja, no sentido de conhecimento e de interpretação do que isto é o nosso património cultural, do que é a nossa história, do que são as nossas evidências, do que é que foi isto ao Infante Dom Henrique, do que é que foi isto para os descobrimentos e do poder alargar ao mundo inteiro, enfim – a cultura Portuguesa e todas as trocas que isso implicou em termos de relacionamento. Portanto, esse é, claramente, um projeto estruturante que está em margem.

Outro projeto é podermos alargar este projeto que falámos – “Porto Património Mundial” –, a uma escala muito maior, envolvendo não só as crianças, mas passando envolver também adultos. Depois, temos uma coisa que já fizemos recentemente, mas que, enfim, não estava bem organizada. Também tivemos alguns percursos culturais que a Câmara fazia, só que não era uma oferta organizada, mas agora editamos um folhete trimestral em que dizemos três em três meses qual é a nossa oferta de percursos culturais que englobam esta zona da cidade e o resto da cidade, naturalmente. Porque a Câmara, apesar de ser gestora deste Sítio e a clara responsável para o Sítio, é responsável para a cidade toda e, portanto, temos que trabalhar sempre em consideração com toda a cidade. Isto são apenas exemplos de alguns projetos em concreto que vão acontecer. Eu sei que a questão da reabilitação é, de facto, crítica e vai

continuar a acontecer na medida em que a Câmara puder fazê-lo. O que é que para nós é importante, é que está a chegar a altura de fazermos a revisão deste Plano de Gestão, porque nós estamos neste momento focados naquilo que são as diretrizes do Plano de gestão, que nos dão orientações muito claras do que é que devemos fazer para seguir a estratégia definida. E talvez agora, passados alguns anos, seja importante “parar um bocadinho, rever o Plano de Gestão e reformulá-lo para então nos dar as linhas para o próximo futuro, e já não um futuro tão curto porque nós temos a noção do que estamos a fazer, mas um futuro mais alargado, a médio e longo prazo para nos reposicionarmos em relação a que já foi feito e o que precisa de ser feito.

Relativamente ao património imaterial, havia um projeto, ou seja, uma atividade no âmbito de Manobras, que estava corporizado numa coisa que não era da Câmara, mas que funcionou. Trata-se do Museu de Resgate, que pretendia precisamente resgatar os sons típicos desta zona da cidade. Eu acho que este é um projeto muito inovador e muito interessante que também incluía uma plataforma *on-line* para poder disponibilizar alguma coisa. Podiam ouvir sons da água do Rio Douro, dos passarinhos a passar, das pessoas a falarem, enfim, de todo tipo e feitio, recolhidos nesta zona da cidade. Outro tipo de projeto, que tem a ver com memórias e que é mais um projeto muito interessante, fizemos com Anilupa⁵ e com os centros sociais que acolham os séniores. Neste projeto fizemos filmes de animação em que os séniores contavam as histórias e as crianças ajudavam criar bonecos de animação. Estes filmes são realmente maravilhosos e retratam muito do património imaterial desta zona.

7. Aqui, a primeira questão tem a ver com a questão política. Neste momento estão em cima da mesa algumas indefinições, que são os senhores políticos que têm que resolver, portanto, o presidente da Câmara, o governo etc., que têm que se entender para perceber que modelos é que encontram para que todas estas coisas funcionem. Portanto, primeira de todas tem a ver com decisões políticas ao nível de modelos de organização. Este é um desafio que, claramente, temos pela frente. Depois, desafios grandes, nomeadamente ao nível económico e turístico e ligando aqui as duas coisas, têm a ver, por um lado, garantir o desenvolvimento económico da área, que pode ser numa parte com o recurso ao turismo e noutra parte com o recurso ao desenvolvimento económico, mas sem pôr em causa a sustentabilidade do Sítio

⁵ Centro Lúdico da Imagem Animada

por causa da pressão do turismo. Hoje em dia ainda não estamos nessa fase, mas temos que aprender também com o que os outros já estão a passar. Outro grande desafio passa pela fixação das pessoas neste território, porque, enfim, a cidade só existe se for habitada. A Câmara está a fazer os seus esforços, mas é uma tarefa que não se concretiza em dois ou três anos. É preciso aqui, de facto, um grande investimento, sendo com que o terceiro desafio pode parecer aquele que é o mais difícil por causa das questões de dinheiro e do investimento no edificado. Enfim, havendo a reabilitação, as coisas vão acontecendo e vão surgindo as oportunidades. Portanto, os três principais desafios diria que seriam esses.