

ROUTES4U FEASIBILITY STUDY

*The Cultural Routes of the Council of Europe
and the Adriatic-Ionian Region (EUSAIR)*

June 2018

1 ANALYSIS OF CULTURAL ROUTES CERTIFIED OF THE COUNCIL OF EUROPE IN THE ADRIATIC AND IONIAN REGION

1.1 Present situation

22 of 33 Cultural Routes¹ are located in the Adriatic and Ionian Region which is composed by the regions situated in eight countries (Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Montenegro, Serbia and Slovenia). The figure below provides an overview of the Cultural Routes represented in the Adriatic and Ionian region:

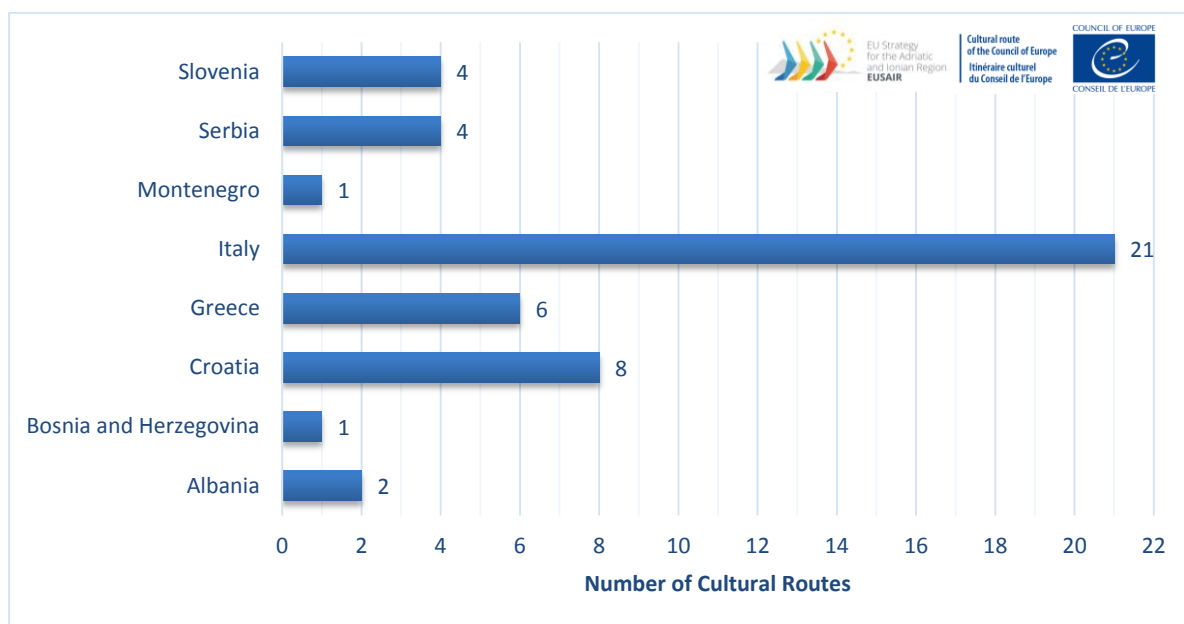


Figure 1 Cultural Routes represented in the Adriatic-Ionian region (N=22)

Regarding the quantitative distribution of the Cultural Routes, it reveals that most of them cross Italy (21) whereas less than half of them are present in Croatia (8). Only a few routes can be found in Greece (6), in Serbia (4) and in Slovenia (4). The lowest number of Cultural Routes is present in the non-EU members Albania (2), Bosnia and Herzegovina (1) as well as Montenegro (1).

Recommendation 1

Cultural Routes members are not distributed in a geographical balanced manner in the Adriatic and Ionian Region. Albania, Bosnia and Herzegovina and Montenegro deserve

¹ In the following, the term "Cultural Routes" is used to describe the Cultural Routes certified by the Council of Europe, in accordance with Resolutions CM/Res(2013)66 and CM/Res(2013)66, see Annex. For further information on the Cultural Routes, go to <http://culture-routes.net/>.

Routes4U Project

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particular attention and support, as they represent underexploited potential for Cultural Routes projects² and the extensions of already certified Cultural Routes.

According to a study published by the European Commission Directorate-General Regional and Urban Policy (DG REGIO) in 2017³, there is a massive difference in the tourism infrastructure between EU-Member States and candidate countries as well as potential candidate countries (Montenegro, Serbia, Bosnia and Herzegovina, Albania). While Italy registered the most arrivals at tourist accommodation establishments and while Croatia and Greece had the highest growth rates in 2015, the values for arrivals in the candidate countries as well as potential candidate countries are very low. With exception of Montenegro, there is a shortage of accommodation infrastructure and inadequate promotion of the tourist destinations.

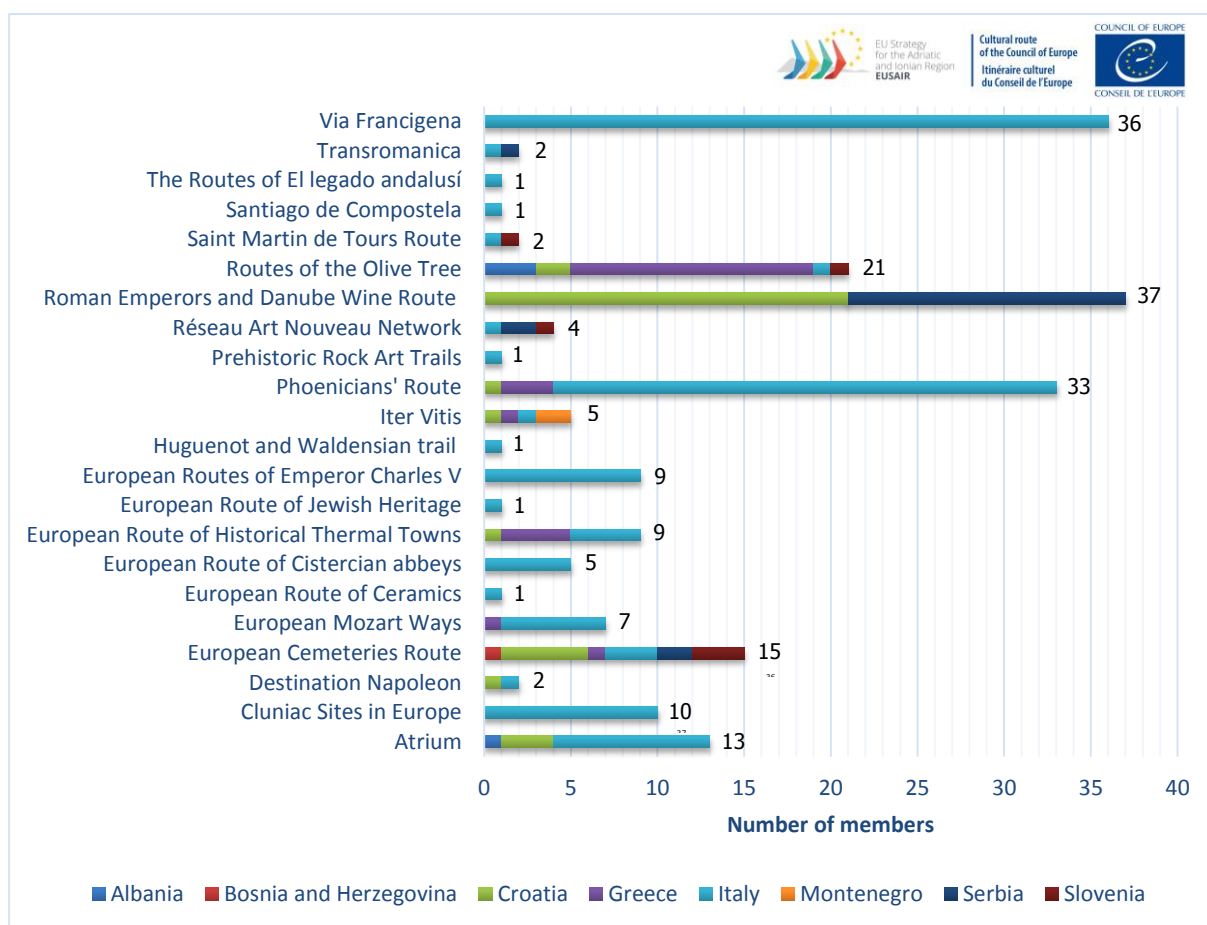


Figure 2 Cultural Routes' members per country (N=216)

No Cultural Route crosses all country of the Adriatic and Ionian Macro-region (see figure 2). The European Cemeteries Route is present in six of the eight countries. With regards to the

² In the following, “Cultural Routes projects” describe either existing routes in view of their certification process by the Council of Europe or initiatives aimed to create new Cultural Routes certified by the Council of Europe.

³ See for this paragraph: DG-Regio (2017): Study on macroregional strategies and their links with cohesion policy. Data and analytical report for the EUSAIR. The data described in this paragraph refer to 2015.

members in the Adriatic and Ionian region, nine Cultural Routes have exclusively network members in Italy (Via Francigena, Santiago de Compostela Pilgrim Routes, Prehistoric Rock Art Trails, Huguenot and Waldensian Trail, European Routes of Emperor Charles V, European Route of Jewish Heritage, European Route of Cistercian Abbeys, European Route of Ceramics, Cluniac Sites) and in no other AIR-country. The analysis of the Cultural Routes crossing the AIR-countries proves that the routes are differently developed in the countries. An emphasis should be put on further strengthening the Routes in the AIR region.

Cultural Routes do not only cross the AIR-countries, but they go beyond the Adriatic and Ionian region. This trans-macro-regional aspect provides opportunities for joint activities, partnerships and synergies in line with the two strategic priorities of the Vilnius Roadmap from 2016 which aims at, on one hand, expanding geographic coverage and partnerships of the Cultural Routes and, on the other hand, developing new themes and topics⁴.

Cultural Routes provide opportunities of enhanced cooperation and exchange of knowledge and capacities between the members of the network. As Cultural Routes networks contain members from AIR- countries as well as non-AIR-countries, they provide specific opportunities to join forces and cooperate on the extension and strengthening of existing Cultural Routes but also on the preparation of Cultural Routes projects.

Recommendation 2

Relevant ministries in the Adriatic and Ionian region are invited to play an active role in the development of strategies and policies how to strengthen the regional development through the Cultural Routes, for example national coordinators could be appointed to be in charge of this task.

Finally, the type of the routes' members was analysed (see figure 5): It can be seen that most of them are municipalities, followed by cities, tourism stakeholders, cultural organizations, scientific organizations, associations, sites, regions, networks and chambers of commerce. Figure 6 provides information about the concrete members of every route so that their network can be expanded strategically.

⁴ See Vilnius Roadmap, 2016, http://culture-routes.net/sites/default/files/attachments/FORUM%20ROADMAP_EN.pdf

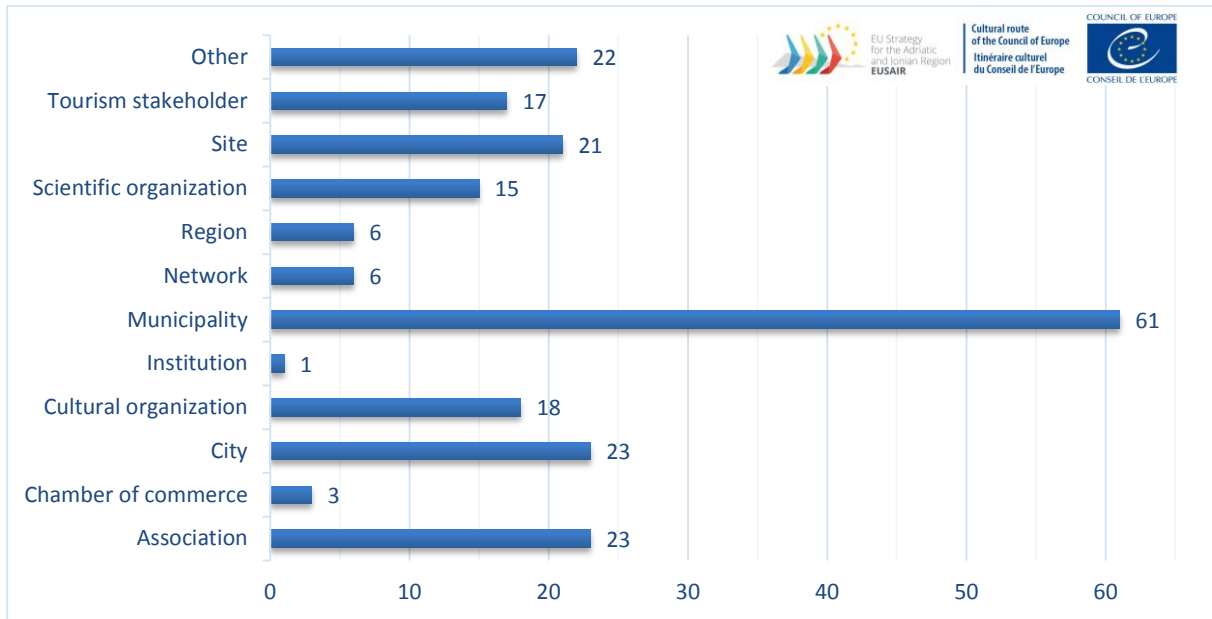


Figure 3 Types of Cultural Routes' members (N=216)

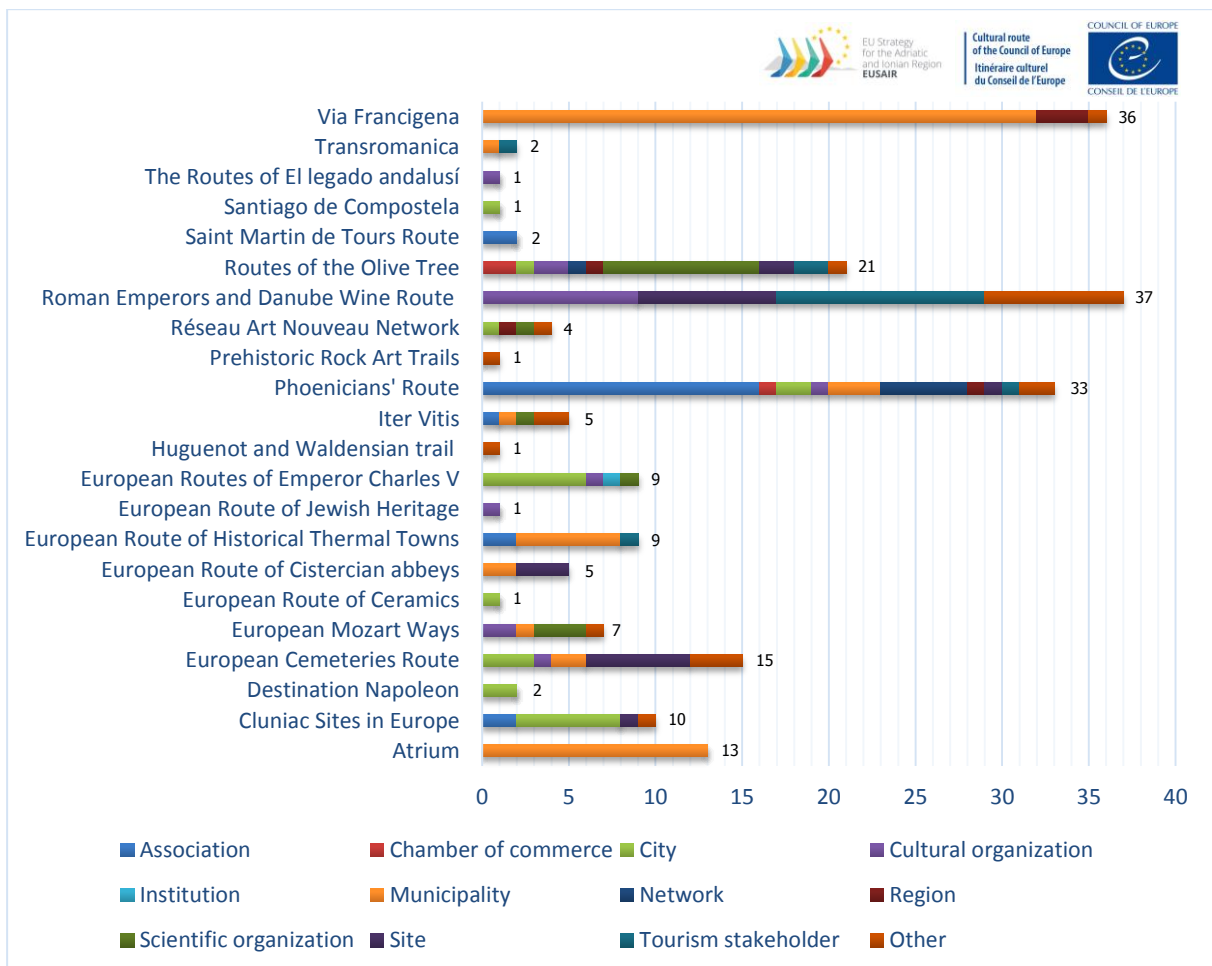


Figure 4 Member types of the Cultural Routes (N=216)

1.2 Cultural Routes themes

The Cultural Routes in the Adriatic and Ionian macro-region cover a wide field of themes related to their tangible and intangible heritage. It has to be underlined that most Cultural Routes are trans-sectorial networks and as such, touch upon different themes.

In the following, the routes will be clustered thematically.⁵

Religious themes are very present – whether by focusing on an important historic personality or by being dedicated to cultural and religious identity in general: The Santiago de Compostela Pilgrim Routes, Via Francigena, European Route of Jewish Heritage, Saint Martin of Tours Route, Cluniac sites in Europe, European Route of Cistercian Abbeys, European Cemeteries Route).

Arts and architecture is a theme which is often represented in form of monuments, groups of buildings or sites. The concerned routes are: TRANSROMANICA, Prehistoric Rock Art Trails, European Route of Historic Thermal Towns, ATRIUM, Art Nouveau Network and the European Route of Ceramics.

Three of the routes are linked to the life and the influence of famous (secular) **European personalities** such as the Austrian composer Wolfgang Amadeus Mozart (European Mozart Ways), Charles V (European Route of Emperor Charles V) and Napoleon (Destination Napoleon).

Agricultural landscape and food production is a topic addressed by three networks: The Routes of the Olive Tree deal with the civilisation around the olive tree, the Iter Vitis Route and the Roman Emperors and Danube Wine Route are devoted to viticulture.

Finally, two routes are dedicated to the **movement of people** in Europe. So is, on one hand, the Phoenicians' Route focusing on the exchange of artefacts, knowledge and experience through commerce. On the other hand, the Huguenot and Waldensian Trail deals with migration and integration because of religious persecution.

This analysis shows that certain categories or themes of cultural properties are underrepresented among the Cultural Routes in the EUSAIR macro-region. All the routes described focus on tangible and intangible *cultural* heritage while natural and coastal heritage⁶ is not taken into consideration. **Modern heritage (from late 19th century onwards) and industrial heritage** are less represented.

Recommendation 3

The creation of new projects of cultural routes to be certified by the Council of Europe in the Adriatic and Ionian region should take into account those themes that are currently

⁵ We used a cluster similar to ICOMOS (2004): The World Heritage List: Filling the Gaps - an Action Plan for the Future. An Analysis by ICOMOS, p. 17.

⁶ Natural sites such as natural and historic parks.

underrepresented such as natural and coastal heritage, modern heritage and industrial heritage.

1.3 Analysing the impact of Cultural Routes on sustainable tourism and regional development

A study of the impact of Cultural Routes, jointly launched in 2010 by the Council of Europe and the European Commission indicates that all Cultural Routes provide opportunities for small and medium-sized enterprises to develop products and services as well as to create jobs within the framework of economic and tourism activities that the routes generate.

The study was based on a set of case studies covering the following routes: the Hansa, the Legacy of Al-Andalus, the Via Francigena, the Olive Tree and the Transromanica. Hence, the study is not representative for the EUSAIR macro-region in general and should be updated as well. Nether the less, the authors give several recommendations related to sustainable tourism and regional development which are also relevant to the Adriatic and Ionian region:

The study concluded that while Cultural Route themes were very clearly defined, they were not sufficient to establish continuous relationships between the partners or to function efficiently as transnational networks.

Recommendation 4

More joint actions and initiatives within Cultural Routes and their transnational partners – such as small and medium-sized enterprises, creative industries, tourism offices, guides etc. - should be initiated in order to establish a solid ground for better understanding of common network structures, to improve the economic impact and to provide visibility to the Routes.

Macro-regional stakeholders should contribute to these objectives, inter alia through their national and macro-regional networks.

Whilst a few of the more established Routes are recording visitor numbers and direct sales of tourism products, or look at the potential economic impact of SME's collaborations across the Route's towns, most are not gathering the data needed to measure the economic impact of their activities.

Recommendation 5

Monitoring and evaluation systems should be introduced to retrieve data on the economic impact of Cultural Routes. Statistical data about the Cultural Routes and their activities should be gathered to allow a comparative analysis on strengths and weaknesses and to further make use of the economic potential of Cultural Routes.

The regular evaluation cycle of the Cultural Routes should include a chapter on macro-region specific data.

Different approaches have been developed to acquire comparative statistical data about the Cultural Routes.

1. The Step –by-step guide to the Council of Europe Cultural Routes “Cultural Routes Management: from the theory to practice” includes a chapter with recommendations how to choose a theme for a new cultural routes (see the table below).⁷

Demand variables	<ul style="list-style-type: none"> ▶ Dimension: number of arrivals, length of stay, number of overnights ▶ Origin of tourism flows: how many domestic and how many international tourists? ▶ Motivations: do they travel for work, visiting friends and relatives, for vacation, etc.? ▶ Seasonality: is there a peak season? How are the arrivals distributed through the year? ▶ Accommodation: how many hotels, how is the quality standard distributed (number of stars), B&Bs, campsites, other kinds of accommodation (country houses, residences, etc.)? ▶ Tourism expenditure ▶ Transport: do tourists use their own cars? ▶ Number of individuals or package tourists
Supply variables	<ul style="list-style-type: none"> ▶ Image: how is the destination currently promoted, using what kind of images and narratives? How is the destination perceived at the national and international level? ▶ Accessibility: is it easy to reach the destination (physical accessibility)? Is the destination cheap compared to other places (economic accessibility)? Is there a particular attitude visitors should have while visiting the destination (cultural accessibility)? ▶ Consumption: are tourists coming from other places? Where are they going after? ▶ Type of resources
Integration of the tourism product	<ul style="list-style-type: none"> ▶ Co-ordination: how should culture and tourism stakeholders co-operate? ▶ Participation: what kind of tourism does the local community want? ▶ Diversification of supply = network analysis

2. The European Tourism Indicators System (ETIS) was introduced to assist in the monitoring, management and strengthening of the performances.⁸ Developed by the European Union in 2013, the tool was applied to seven Cultural Routes⁹ in the framework of a feasibility study requested by the IEIC. Its value added is linked to the opportunity to improve the current qualitative evaluation process of the Cultural Routes (certification system), with quantitative measurement ETIS criteria, in order to ensure sustainable development. Moreover, it allows destinations to make their self-evaluation and comparison (benchmarking) among them.

ETIS (for the Cultural Routes) is based on 5 fields of actions/indicators:

1. Governance (indicator whose aim is to observe the way in which the partners manage the network)

⁷ Alessia Mariotti (2015): Tourism and Cultural Routes. Clusters, cultural districts and tourism systems, in: Cultural Routes Management. From theory to practice. Step-by-step guide to the Council of Europe Cultural Routes, Council of Europe Publishing, p. 67.

⁸ http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators/index_en.htm

⁹ These routes were: Via Francigena, Transromanica, Santiago de Compostela, Jewish Cultural Heritage, Iter Vitis, Olive Tree, Saint Olav. With exception of the Saint Olav Ways, all the itineraries have members in the EUSAIR macro-region.

2. Communication (which is concerned with the means allowing the actors to exchange between themselves and with the public)
3. Sustainable management
4. Indicator of cultural action (Measuring the impact of cultural itinerary activities - is one of the criteria required by the rules)
5. Economic impact (indicators analyse the environmental, cultural and economic impact of the itineraries activity)

A simple methodology was put in place in order to encourage the cultural route to be engaged for data collection, such as:

1. Self-evaluative indicators: they can be carried out by project-oriented structures themselves;
2. Indicators that require wider involvement of all participants in a route: the coordinators of the itineraries have to mobilize their actors and to gather the answers from the surveys;
3. "heavy" indicators: they require an on-site survey and can only be set up by partner organizations of the itineraries (like the Universities of the Knowledge Network).

The issues raised by the Cultural Routes involved were the following:

- Need to have a flexible and simple tool that does not overload the itineraries;
- Preparing ways of deepening the scientific network that should support the development of itineraries;
- Prepare the questionnaire in form of an on-line survey tool;
- Preliminary sceptical approach of the routes towards this new system of data collection, because of the workload;
- Currently, no such data are available, especially the measurement of economic impact is missing;
- Need to develop a new monitoring system, based on the data collection and analysis, which can be integrated with the current certification system

Recommendation 6

In the framework of Routes4U, an online tool could be developed to retrieve data on destination and tourism management. This data would serve to further align the activities of the Cultural Routes with the specific needs in the Adriatic and Ionian Region.

2 PROJECTS ON CULTURAL ROUTES IN THE ADRIATIC AND IONIAN REGION

Members of EUSAIR consulted on the Cultural Routes to be extended, strengthened or newly created. They voted in favor of two projects: The Olive Tree Route and the Roman Emperors Route.

2.1 Olive Tree Route

The "Routes of the Olive Tree" was certified by the Council of Europe and joined the "The Council of Europe Cultural Routes Programme" in 2005.

The Cultural Foundation "Routes of the Olive Tree" established in Kalamata (Greece) acts since 2003 as the lead partner of the network. The route's aim is to promote the cultural heritage related to the olive tree, with particular reference to its history, folkloric traditions, art and gastronomy linked to the Mediterranean diet.

According to its evaluation in 2014-15, the route's strategy is mainly oriented to promote olive products and their nutritional properties/qualities as a commercial product, also due to the role played by the chambers of commerce within the development of the route's theme and strategy. The evaluation contains the recommendation to make use of the olive products to promote sustainable tourism development of its typical producing regions.

According to the evaluation and with regards to the partnership composition, the route should attract more private members dealing with touristic and agribusiness matters (i.e. tour/incoming operators, online travel agencies, tourist magazines, olive oil farmers and producers). Their effective participation in the network could boost its visibility and capacity to achieve its objectives. Also the scientific committee and its related members should be more included in the development strategy of the cultural theme.

Despite a very wide nominal participation of members coming from all over Europe and beyond, the actual operational involvement is limited only to a few members, mainly concentrated in Greece, Italy, France and Morocco. Taking this into account, the Route should pay a stronger effort in order to ensure a wider operational involvement of all its adhering countries and members. To this end, it is also recommended to implement an effective monitoring system of the operational activities directly managed by the route and/or by its members.

Recommendation 7

The Cultural Route should pay a stronger focus on the promotion and strengthening of the relations between towns and rural areas (olive oil producing regions) as a strategic factor for cultural and economic development. The network should also include private members to increase the visibility of the Cultural Route.

More members of the Olive Tree Route should be involved and the network should be revitalized.

2.2 Roman Emperors' Route and the Danube Wine Route

The Roman Emperors Route/Danube Wine Route (RER-DWR) applied for the status as a Cultural Route of the Council of Europe for the first time in 2014.

One of the main challenges is the double theme: "The Roman Emperors Route" and "The Danube Wine Route". The last evaluation of the route in 2014-15 concluded that the route should emphasize one theme (The Roman Emperors Route) as the main theme and present this separately, whereas the wine theme could be seen as one first subtheme. On this base, other thematic subthemes could be explored and developed in the future.

The Roman Emperors Route (RER) and the Danube Wine Route (DWR) was created in 2012. The process has been led by the Danube Competence Centre (DCC). The route members are automatically also members of the DCC, whereas the route itself is an autonomous part of the DCC. The evaluation stated that, even if there are advantages to a model like this, there

will most likely be situations where the interest of DCC and the Route stakeholders might not go hand in hand (for example, concerning joint projects). The author concluded that a change of the organizational model – or additions to the actual one - might be necessary to develop the route further.

The route mainly promotes cultural cross-border tourism in the Danube regions of Bulgaria, Croatia, Romania and Serbia and the development of tourist products. Thus, its network is mainly composed by local tourism stakeholders (local and regional tourism organisations such as the Croatian Chamber of Commerce, Serbian National Tourism Organization, Tourism Ministry of Romania and Tourism Ministry of Bulgaria), archaeological sites (about 20) and vine localities (about 12 wine regions) from these countries and in this region. However, academic and scientific network members seem to be under-represented even if the general theme offers the potential to focus on research and educational activities.

Recommendation 8

The Roman Emperors Route/Danube Wine Route should analyse the possibility of selecting the main theme “Roman Emperors Route” under which it might group subthemes, also allowing non-Danube countries to participate.

The organizational model might be revised in order to avoid conflicts of interests.

The scientific committee could consider including a broader range of members and focusing on how existing knowledge should be utilised, identify what knowledge is missing and explore possibilities to initiate new research connected to the Roman Emperors.

This feasibility study is based on the document produced for the first Routes4U meeting for the Adriatic and Ionian Region (6 June 2018, Venice, Italy). For more information, visit: <https://pjp-eu.coe.int/en/web/cultural-routes-and-regional-development/2018-routes4u-eusair-meeting>
