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**LOCAL IDENTITY  
AND TOURISM  
MANAGEMENT  
ON WORLD  
HERITAGE SITES**

COIMBRA 2017

5<sup>TH</sup> UNESCO UNITWIN CONFERENCE

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**CONFERENCE PROCEEDINGS**

LIVRO DE ATAS

Department of Geography and Tourism, University of Coimbra, Portugal

Departamento de Geografia e Turismo, Universidade de Coimbra, Portugal

Center of Studies on Geography and Spatial Planning Portugal

CEGOT - Centro de Estudos de Geografia e Ordenamento do Território Coimbra

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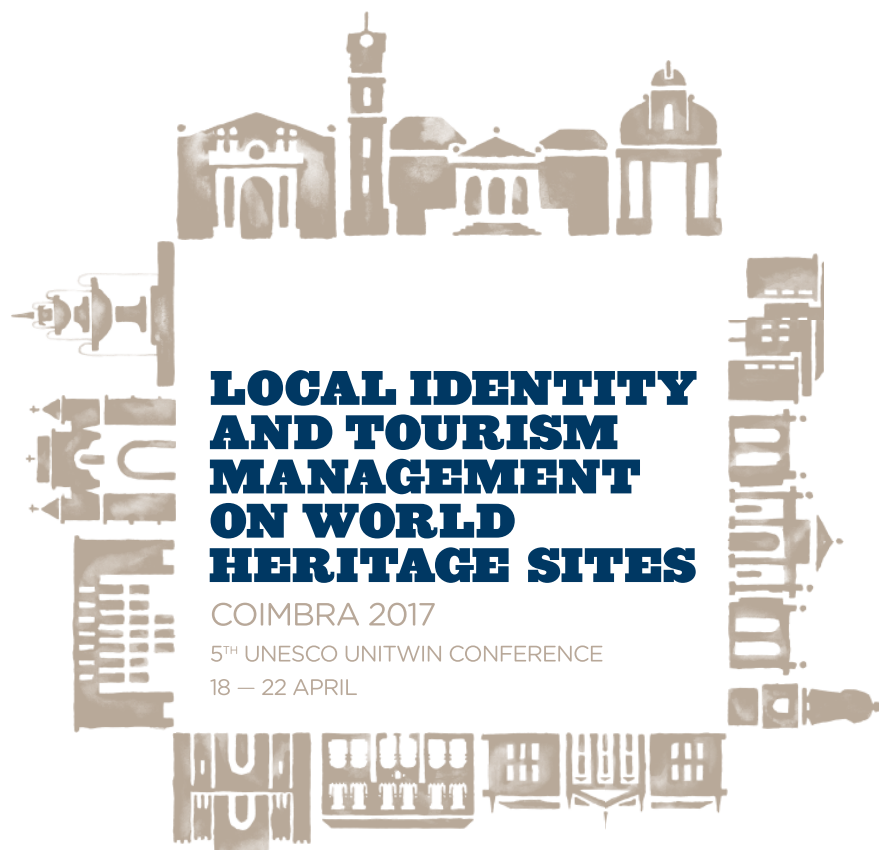
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# **THEME A**

**UNIQUENESS AND NOTORIETY  
IN CLASSIFIED SITES - TRENDS  
AND CHALLENGES**

## **TEMA A**

**SINGULARIDADE E NOTORIEDADE EM  
SÍTIOS CLASSIFICADOS - TENDÊNCIAS E  
DESAFIOS**

## THEME A

One of general criteria for listing a site as World Heritage include the acknowledgement of its supralocal relevance, as well as the singularities that make it unique in the world. Although likely to be integrated into larger networks, this individuality is dependent of its specific geographic location but also related to tangible and intangible values symbolized by the place.

The sites already listed and therefore subject to special protection, as well as those with the potential for a future integration are an excellent laboratory in terms of landscape content analysis, study and collection of data that identify and justify this distinction, a strategic issue in a global dynamic that presents some risks of standardization of processes and spatial patterns.

## TEMA A

Um dos princípios gerais da classificação de um sítio com o estatuto de Património Mundial passa pelo reconhecimento da sua relevância extra local, mas resulta também das especificidades que cada um desses bens apresenta. Ainda que suscetível de ser integrada em redes mais vastas, essa individualidade estará a jusante da sua localização geográfica específica mas também dos valores materiais e imateriais simbolizados pelo lugar.

De uma forma ou de outra, os sítios já classificados e protegidos, assim com aqueles com potencial para integração futura nesta rede da UNESCO constituem um laboratório de excelência em termos de análise de conteúdo da paisagem, de estudo e recolha de elementos que sinalizem e justifiquem essa distinção, questão estratégica numa dinâmica global que apresenta alguns riscos de uniformização de processos e padrões espaciais

# Museums and tourism at World Heritage Sites in Spain

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## Abstract

As suggested by the ICOM, museums have taken on a fundamental social role which is encouraging tourism, as demonstrated by the high number of visitors to certain museums, and have become essential heritage-based tourist attractions. In previous studies, we have analyzed these characteristics of museums in relation to tourism from the perspective of employability and of destinations to shape and define this tourism-related appeal. In this study, we want to analyse the issue of museums as heritage-based tourist attractions in relation to World Heritage Sites, as a declaration of heritage conservation but where tourism is seen as an opportunity, that is to say, from the social and cultural point of view, but also from the perspective of tourism. To this end, the long tradition and history of the museums in Spain, with their very different types, have to be taken into consideration, together with the many different types of WHS. After this period of documentation, the results of an empirical study that has considered the interlinked nature of museums and WHS, their relationship with other cultural attractions, and the public and private agents in this interlinked situation have been presented and analyzed in order to compare them with the results obtained at tourist destinations that have not been declared WHS. The data are quantitatively different and bear witness to other dynamics. We have been able to deduce from this study how WHS destinations have certain dynamics that are different to other tourist destinations, in addition to the various types of museums and their social and cultural characteristics, identity, uniqueness and impression.

## Keywords

Heritage; Museum; Tourism; World Heritage Site.

## 1. Introduction

In an era in which culture has been massified and therefore simplified, we believe it is essential to define the dynamics which have been generated at the microlevel between the domains of culture, heritage, and tourism (Vera Rebollo, 1995; Velasco, 2009) through the precise application of the general framework of human relations in space (García López, 2015). The creation of the field of "cultural tourism" (Galí-Espelt, 2012; Munsters, 2012, PNIT 2012-2015), a phenomenon involving cultural, social, economic, and territorial components of great complexity, has inspired much further research (Richards and Munsters, 2010), much of which is still ongoing. Today one prefers to speak of "territorial cultural heritage" (Troitiño Vinuesa, 2014), underscoring the territorial factor while also emphasizing the evolution of demand, or the exclusively cultural motivations animating tourists, whose numbers have fallen in Spain (Prieto Gutiérrez, 2015).

In this context, this empirical study was conceived with the aim of analyzing cultural tourism, focusing on the interrelationship between cultural and touristic destinations and museums, regarded as tourist attractions, in Spain through an analysis of the management of



these institutions as well as their strategy vis-à-vis tourist territory. The general results as well as such related aspects as hiring practices have already been analyzed and interpreted as materializations of the category “cultural tourism,” and we have proposed that these social/professional relationships are key to understanding the interrelationship between culture and tourism (Morère and Perelló, 2012; Morère and Perelló, 2014). We chose museums as our analytical tool since they are paradigmatic tourist attractions as well as representative of the dynamics generated by a territory, with its actors and visitors. For this reason, they constitute the foundation of our empirical analysis.

On the one hand, museums are the result of a long cultural evolution.<sup>1</sup> They are institutions managed within the field of culture but whose significance transcends that of conservation. They can take on social, cultural, and touristic roles, as reflected in the recent definition given by the ICOM, which emphasizes their social character and their connection with the public.<sup>2</sup> Thus, one can trace out this long evolution: from their role conserving and collecting artifacts to their transformation into institutions open to visitors (Patin 1992; Sildelberg, 1995; Bolaños, 1997; Santacana, 2004; Appleton, 2006; Poulard, 2007; Michaud, 2008), with an internal organization prioritizing education, research, and leisure (van Aalst and Boogaarts, 2002; Brugman, 2012) that helps consolidate such principles as cultural democracy, inter-disciplinarity, and inclusivity (Johanson and Kjell, 2010; Galla, 2013-14). On the other hand, museums are the only heritage-oriented institutions that can be created and built in the face of a historical legacy that has definitively come to an end, even if that legacy can be reconstructed or interpreted. It is for this reason that they are infused with great dynamism (Sildelberg, 1995; Stylianou-Lambert, 2010), both internally and externally, and have provided an opportunity for those who regard culture and heritage as a stepping stone toward development and growth. Museums have evolved and changed their identity and place within different environments, thereby modifying their role as well as the ways they are perceived by the public. Still, we insist, as institutions they unite cultural dissemination, territory, heritage, and history. That said, on their long march forward museums have turned toward society and consequently toward tourism, demand, territory, and actors. Since the 1990s, a significant bibliography has been produced on the subject (Gascon, 1992; Chassé and Thornin, 1992; Renimel, 2005; Arrieta Urtizbera, 2012; Morère and Perelló, 2013; Fagnoni and Gravari-Barbas, 2015), revealing an interesting thematic evolution.

The first line of our research deals with the public and visitors and analyzes demand (Hooper-Greenhill, 1998; Pérez Santos, 2000; Herrero Prieto et al., 2002), the latter of which has been at the center of a debate about whether museums should primarily be sources of revenue or repositories of heritage (Patin, 1992; Herrero et alii, 2003; Greffe, 2009; Vernières, 2012)<sup>3</sup>. Knowing facts about visitors to museums has thus become essential, hence the development of new methodologies for analysis (Pérez Gómez, 2012) and periodic studies (Puiggrós, 2005; Pena and Sánchez, 2006; Caracterización, 2012). We have taken into account differences between residents and tourists (Jelida, 2013), seasonal variation (Pérez Gómez, 2000), visitors' experience and satisfaction (De Rojas & Camarero, 2008; Weaver, 2007; Brida

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<sup>1</sup> This is of even greater interest when analyzing that are World Heritage Sites, where their historical and patrimonial evolution are essential.

<sup>2</sup> <http://icom.museum/la-vision/definition-du-musee/L/2/>: 2007

<sup>3</sup> Tourism is among the indirect and induced consequences of heritage (Vernières, 2012).

et al. a, 2013; Brida et al. b, 2013; Kasim et al., 2014), and even museums' internal perceptions as a factor in strategic planning (Periañez and Quintana, 2009; Yoshimura et al., 2014).

The second line focuses on museums and destinations. Museums can be considered major cultural and touristic brand names (Fernández Sabau, 2006), and indeed as the central attraction of many tourist destinations (Stylianou-Lambert, 2011; Puiggròs, 2005). Together with other actors, such as local populations and institutions, museums have also become instrumental in spurring territorial development, planning, and the renovation of destinations (Murphy and Farmer, 2012), working alongside other actors, including the local population and institutions (Valenzuela et al., 2008; Cárdenas and Conde, 2012). A museum's location also plays a major role (Johanson and Kjell, 2010)<sup>4</sup>. Furthermore, we address the relationship between museums and destinations, i.e. the museum's mission, and whether it fails or succeeds (Leiper and Park, 2011), as well the links between attractions within the same destination and how they can fail. Museums make up part of that territory which, as a unit in the analysis of tourism, has recently been called "heritage territory." Within the territory of tourism, one can discern as essential the connections between tourist attractions, their hierarchization and the networks uniting them, such as, in this study, museums and world-scale attractions. This is the framework of our study (Donaire, 2012; Bryan et al., 2012).<sup>5</sup>

## 2. Spain, Museums, World Heritage and Tourism

In Spain, tourists visit museums more than any other sites except for monuments. In 2014-2015, the last years in which the survey "Habits, Practices, and Cultural Consumption" was carried out, 47% visited museums and 51% visited monuments, (<http://www.mcu.es/estadisticas/MC/EHC/2010/Presentacion.html>), hence the economic and cultural impact of these visits on local populations. The total number of visitors (both resident and non-resident) to museums also underscores the latter's overall importance as both social and cultural (and not solely tourist) institutions. The Prado Museum in Madrid received 2,536,844 visitors (2014), the Reina Sofía Museum in Madrid 2,673,745 visitors (2014)<sup>6</sup>, the Thyssen Bornemisza Museum in Madrid 998,992 visitors (2014), the Picasso Museum in Barcelona 915,224 visitors (2014), and the Guggenheim Museum in Bilbao 1,101,363 visitors (2014). Art museums were the most highly visited, occupying a privileged place as tourist objects (Stylianou-Lambert, 2011; Morère and Perelló, 2014).<sup>7</sup>

Recent decades have ushered in a concerted effort to develop museums, supported both by legislation and the economic boom which lasted from the 1980s until the crisis of 2008-

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<sup>4</sup> There are numerous Spanish and international examples of this (Hamnet and Shoal, 2003; Basso and Funari, 2004; Tresserras and Matamala, 2006; Lusso, 2009; Shoal and Strom, 2009; Unsal, 2010; Brida *et alii*, 2012a; Camprubi Subirana, 2015; Gilabert, 2015), specifically the Guggenheim Museum in Bilbao (Zulaika, 2002; Plaza *et alii*, 2010) or certain destinations with a wide range of museums, including Frankfurt, which has 40 museums (Renimel, 2005), and Málaga, which has 36 museums, including its signature brands the Picasso Museum, the Carmen Thyssen Museum, and the Georges Pompidou Center

<sup>5</sup> In our analysis, we carefully considered the complementarity between declared properties that have been classed as World Heritage, one of the greatest touristic and patrimonial distinctions that can be conferred upon a destination, and museums. World Heritage is acquiring a touristic function with respect to promotion, management, and governance (Bourdeau *et alii*, 2015; Ruiz Lanuza and Pulido, 2015).

<sup>6</sup> <http://www.iet.tourspain.es/es-es/estadisticas/otrasestadisticas/museodelprado/paginas/informespublicaciones.aspx>. Figures reveal that the number of visitors to large museums grew between 2014 and 2015, with some exceptions. There was a growth of 6.3% for the Prado Museum and a 9% growth for Bilbao's Guggenheim Museum.

<sup>7</sup> These are among the most visited monuments, apart from the Sagrada Família (Barcelona) at 3,230,000 visitors in 2013 and the Alhambra and Generalife with its 2,402,473 visitors in 2014.

2009. This legislative development has propelled the conceptual evolution of museums within society, the context of national laws governing heritage, and those laws which are specific to different autonomous regions.<sup>8</sup> In addition, it has paved the way for such later developments as the State Secretariat for Culture, which has fortified the role of museums as strategic assets by creating a “Network of Museums” (RD 1305/2009)<sup>9</sup> and the Permanent Public Laboratory (Garde and Varela, 2009-2010). As for economic development, it has meant a radical change to the Spanish museum sector, from its cultural and social content to its place within the context of tourism. Traditionally, this sector was centered around provincial museums more closely linked to territory and identity, but it has been completely overwhelmed by the emergence of autonomous regions and the influx of money.<sup>10</sup> In accordance with this trend, museums have begun to see themselves as resources supporting cultural heritage as much they are forms of cultural heritage (Properties of Cultural Interest in Spain), or world heritage, in themselves (Bote, 1998; Piñanes Leal, 2004; Herrero Prieto, 2011).

Indeed, the 1990s witnessed the construction of great museums, architectural works of high quality designed by prestigious architects. Still, the goal of these projects was mainly cultural and museum-oriented (Herrero Prieto et al, 1998; Herrero et al., 2002; Layuno, 2004).<sup>11</sup> The renovation took place in two main stages, the second of which was most devoted to decision-making and regional development.<sup>12</sup> Museums responded to museum-oriented projects first and then, little by little, to those that were more explicitly oriented to the tourist market. They embraced a simultaneously urban-based and renovation-centered planning strategy modeled on the paradigmatic example of the Guggenheim Museum in Bilbao, further examples of which have only multiplied since (Tresserras and Matamala, 2006). It was at both the municipal and regional levels that this relationship would be established. In this way, museums would become brand names, following the examples set in Bilbao, Madrid, and Barcelona: namely, the Guggenheim, the Prado, the Dalí, and the Picasso Museums, brands symbolizing both cultural and touristic quality.

These strategies, designed for urban areas, focused on such major metropolises as Madrid and Barcelona, but they also included smaller urban environments (Herrero Prieto et al, 1998; Arrieta Urtizberea, 2006; Feo Parrondo, 2011).<sup>13</sup> This led to greater name recognition for historical and ethnographic museums (Pérez Gómez, 2012) in medium-sized and small cities (Rueda Torres, 2006). In the rural region of Castilla y León, the number of museums in medium-sized cities doubled between 1970 and 1996 (Herrero et al., 2003), mainly in the

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<http://www.mcu.es/legislacionconvenio/loadSearchLegislation.do?cache=init&legislation.area.id=PAHI&layout=legislacionPatrimonio&language=es>

<sup>9</sup> These networks, in fact, figure as a model of museum management: Calzada and Barandiarán, 2013

<sup>10</sup> This group of museums proved to have a very specific touristic and social role, as revealed by our empirical study.

<sup>11</sup> The intervention of great architectural names. The first was the Roman Art Museum in Mérida, designed by the architect Rafael Moneo, then the IVAM in Valencia from 1984-1989 and the Thyssen Museum in Madrid in 1992; these were followed by the Reina Sofia Art Museum in Madrid (Jean Nouvel's reformations came later), the “Galician Center of Contemporary Art” in Santiago de Compostela by Alvaro Siza, the University Museum of Alicante, by Alfredo Payá (1995-1999), and the Barcelona MACBA (1989-95).

<sup>12</sup> The Carmen Thyssen Museum in Málaga, the Museum of “Arts and Sciences” in Valencia, the Museum of “Science and Technology” in La Coruña, in Galicia, the Archaeological Museum in Alicante, the Helga Alvear Museum in Cáceres (Extremadura) and the MUSAC in León (2001).

<sup>13</sup> The exception could be wine producers and their museums, works by important architects that are located in vineyards: Norman Foster and Ribera del Duero wine in Gumiel, Izán; Frank Gehry and Marqués de Riscal; Protos in Peñafiel and the works of Rogers.

1980s with the development of small, locally-operated ecclesiastical museums. And even if the pace of demand appeared to be consistent with the supply, at least during early years (Herrero et al., 2003), this growth would appear to be disproportionate and unsustainable over time. Within regional research and development approaches, small and medium-sized cities as well as rural settings have been favored spaces in which to create new museums that are closely tied to their territory and its identity. At the same time, medium-sized cities preserve the tradition of the provincial museum.

Similarly, the number of archaeological museums in Andalusia has risen by more than 100% over the last decade (Ramos Lizana, 2011). In accordance with the same trend, the field has witnessed the birth of eco-museums (Arrieta Urtizberea, 2012; Navajas Corral, 2011; De Sousa Pedrosa, 2014), small local museums, and centers for the interpretation of heritage of all sorts (Santacana and Mestre, 2004). In each of these cases, museums can be regarded as attractions which complement a destination’s other cultural offerings (Troitiño Vinuesa and Troitiño Torralba, 2008; Mestre Balet, 2010). But this multiplication of museums has occurred under the auspices of poor planning.<sup>14</sup> As for the National Tourism Administration, it regards museums as tourist attractions. Indeed, this is the focus prioritized by the PNIT, the Plan National International du Tourisme (the National International Tourism Plan) (2012-2015). Museums are included in the Plan de Qualité (Quality Plan) (“Manual de Buenas practicas, 2010”, i.e. “Manual of Good Practices, 2010”), or in such Plans de Promotion (Promotion Plans) as the “Plan de Promoción Internacional de Turismo Cultural 2010-2012” (International Plan for Cultural Tourism 2010-2012).

Table 1- WHS by Autonomous Community.

|                                  |
|----------------------------------|
| Andalusia 6 + 1 shared           |
| Aragón 1 + 3 shared              |
| Canary Islands 3                 |
| Cantabria 1                      |
| Castilla-La Mancha 1 + 1 shared  |
| Castilla y León 7 + 1 shared     |
| Catalonia 6 + 1 shared           |
| Community of Madrid 3            |
| Valencian Community 2 + 1 shared |
| Extremadura 3                    |
| Galicia 3 + 1 shared             |
| Balearic Islands 1               |
| Navarre 1 + 1 shared             |
| Basque Country 1                 |
| Principality of Asturias 1       |
| Region of Murcia 1 shared        |
| Rioja 1 + 1 shared               |

Source: UNESCO and Fernández Salinas, 2008

In the context of excessive supply, the social and cultural sustainability of this policy on museums has been questioned (Herrero et al., 1998; Morente del Monte, 2007; Feo Parrondo,

<sup>14</sup> Inland regions such as Castilla y León and Andalusia have created plans like the RECA Plan based on the diversification of the heritage offerings, and which also includes the construction of museums (Herrero et al., 1998; Feo Parrondo, 2011). This may explain this development.

2011; Ramos Lizana, 2011-2012).<sup>15</sup> There has been no planning at the level of individual destinations but only a general economic analysis (Zara, 2013), nor has there been any planning that takes into account the place museums occupy within their territorial framework (Ramos Lizana, 2011-12).

This is the reality that justifies our research on Spain's tourism industry as well as on museums as paradigmatic and their connection with World Heritage Sites. Spain has worked actively with UNESCO with respect to its policy on World Heritage Sites, at least until four years ago, and boasts 45 such sites, the most recent of which—the Dolmens of Antequera, in Málaga—was declared in 2016.<sup>16</sup> The vast majority of these sites are classified as monuments, historic cities, and archeological zones, with those of a cultural nature significantly outnumbering those that are natural and mixed (Fernández Salinas, 2008; Castillo and Querol, 2015). The following table outlines Spain's WH Sites by autonomous community:

### 3. Goals and Methodology of the Empirical Analysis

Within this context, we have defined 2 specific purposes to our analysis of the ways that museums have acted as heritage-based tourist attractions and have functioned internally within the framework of destinations as complex territorial systems:

- SP 1. To analyze the relationship between museums' perceptions of themselves as tourist attractions and the destinations in which they are located. We have thus considered distinct internal and external strategies deduced from discussion groups which were formed previously (Morère and Perelló, 2013).<sup>17</sup>
- SP 2. To analyze the interrelationship of museums with cultural tourist destinations, specifically those with a World Heritage status—a designation of cultural and conservational significance, but also a brand-name, image, and touristic function. In order to do so, we have studied museums segmented by the number of visitors they receive, a distinction that also indicates what kind of museums they are. The bibliography shows the large number of museums built during the last few decades and, quite specifically, the segmentation between museum types, whether they be art museums or old-fashioned museums more closely associated with identity (Rénimel, 2005; Stylianou-Lambert, 2011; Morère and Perelló, 2013). The museums chosen correspond to a very specific typology, being those that receive the lion's share of visitors: art museums, normally located within an urban framework, are those traditionally most in demand by tourists and visitors.

Research was carried out by documentary and bibliographic analysis and a quantitative analysis based on a self-administered, telematic questionnaire sent to a representative sample of directors and communications managers at museums and centers of interpretation: cultural

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<sup>15</sup> The "Plan del Impulso del Turismo Cultural e Idiomatico" (2002-2003) insisted on the excess of cultural and heritage offerings without taking into account the needs and contexts and tourist destinations (Piñanes Leal, 2004).

<sup>16</sup> [http://portal.unesco.org/es/ev.php-URL\\_ID=45692&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/es/ev.php-URL_ID=45692&URL_DO=DO_TOPIC&URL_SECTION=201.html)

<sup>17</sup> For the analysis of the primary dynamics and internal strategies derived from museum management, more variables were defined than deduced from the results of discussion groups formed by experts on the cultural tourism and museum sectors, according to the study *Cultural Tourism, Heritage, Museums, and Employability*, financed by the School of Industrial Organization in 2013 (Morère and Perelló, 2013). The following variables were determined: Creation of the Department of Tourism, Training Plan, Employment of Specialists in Tourism, Institutional Collaboration, as well as Private Collaborations that have been developed with respect to companies: hotel businesses and travel agencies. Experts underscored the networks of collaboration between the private and public sectors, and between institutions at all levels.

spaces in Spain gleaned from the Museum Directory, Museum Collections, of the Ministry of Education, Culture, and Sports (CulturaBase).<sup>18</sup> Out a total of 1530 museums (INE, 2010), the responses constituted a sample of 180, determined by a confidence level of 95% (2 sigmas), an error of  $\pm 7\%$  y  $p=q=50$ , proportionally fixed by Autonomous Region and type of museum.<sup>19</sup> This study was carried out during the second half of 2012.

We also determined which destinations were the most highly cultural in nature: Madrid, with 35.5% of tourists expressing cultural motives for their visit, Catalonia with 33.2% of the same, Andalusia with 16.4%, and even the Valencian Community, with 11.3% in 2011. The data from 2012 confirms Catalonia's strength, and shows that international tourism has declined in Madrid and Andalusia. As for national tourism, the same regions, with the addition of Castilla y León, are preeminent: Andalusia, Catalonia, Castilla y León, the Community of Valencia, and Madrid (IET, Familitur, 2010, 2011; Balantur, 2012). As far as offerings are concerned, these destinations are known for their cultural heritage, their museums, and their World Heritage Sites (Piñanes Leal, 2004), hence the choice of museums which stand alone in providing a foundation of quantifiable data.

#### 4. Empirical Analysis and Results: Museums and Tourism at World Heritage Sites

The first objective was to analyse the interrelationship between museums' perception of themselves as tourist attractions and their satisfaction with respect to the destinations in which they are located. This was the basis for understanding the dynamics between museums and destinations. In order to carry this out, numerous internal and external strategies were taken into account. Museums claim that they consider themselves to be mainly tourist attractions, at 83% (Fig. 1), which is confirmed by the fact that museum managers and administrators consider them to be tourist attractions.

|                        | Yes  | No   | Don't Know |
|------------------------|------|------|------------|
| Museums as Attractions | 83.3 | 13.2 | 3.4        |
| Museum Satisfaction    | 51.1 | 46   | 2.9        |

Figure 1 - Museums as attractions and museum satisfaction

Source: EOI Survey.

This is a great step forward, considering the ways that museums have traditionally been understood, their uses, and the identity of the people who work for them (Morère and Perelló, 2013). Still, the figures vary when we quantify their levels of satisfaction. Indeed, the number

<sup>18</sup> <http://www.mcu.es/culturabase/cgi/um?M=/t11/p11/principales/&O=pcaxis&N=&L=0> Museums constitute the main heritage-based tourist attraction quantifiable in Spain, according to the data.

<sup>19</sup> The percentage distribution of responses does not faithfully reflect that of distribution of museums in Spain, as far as their type is concerned. In fact, archaeological museums represent 12% of the total, ethnographic and anthropological museums 17%, specialized museums 10%, fine arts museums 15%, history museums 7%, and contemporary art museums 9% (<http://www.mcu.es/culturabase/cgi/axi>). The responses obtained after having administered the questionnaire with the chosen sample, distributed proportionally by Autonomous Region and type of museum, over-represent archaeological museums and contemporary art museums. On the other hand, the questionnaire's self-administered, telematic formula had the drawback of reducing the response rate; indeed, although our study was able to gather 180 questionnaires that were filled in and answered correctly, some museums that were formally invited to participate did not do so. The over-representation of certain types of museums resulted from the fact that they were more interested in participating in a study on cultural tourism, whether this was because they considered the participating museum to be an attraction or because they considered that it an opportunity for strategic improvement.

drops to 51% when we take into account such levels (Fig. 1). One can clearly perceive a lack of satisfaction and the existence of a gap between the museum as an institution and its current social role.

The strategies, both internal and external, museums have developed allow one to quantify tourism’s relevance for them. In (Fig. 2), one can deduce that several internal strategies are perceived favorably by over 50% of the museums under consideration: their training in tourism, but above all institutional/business collaboration, accepted by over 95% of the museums, shows their interest in uniting museums with their destinations. Local collaboration, or collaboration with that which is closest to the museum, is accepted by 90% of the museums. The private sector is poorly represented since its collaboration accounts for a smaller portion of the total, but contact between the hotel sector (51%) and travel agencies (55%) creates a new, important kind of connection for cultural tourist destinations.

| Strategies | Depart. | Train. | Spec | Coll. | Nat. | Aut. | Prov. | Munic | Heb. | Travel Agencies |
|------------|---------|--------|------|-------|------|------|-------|-------|------|-----------------|
| Yes        | 47.6    | 75.9   | 48.3 | 95.3  | 51.1 | 84.3 | 72.4  | 90.7  | 51.8 | 55.2            |
| No         | 38.1    | 16.8   | 37.8 | 1.2   | 43   | 12.8 | 22.9  | 8.1   | 45.2 | 40.1            |
| n.r.       | 14.3    | 7.8    | 14   | 3.5   | 5.5  | 2.9  | 4.7   | 1.2   | 3    | 4.7             |

Figure 2 - Museums strategies

Source: EOI Survey.

Thus, museums have begun to turn outward toward territory and destination, areas where one can still find the keys to the lack of satisfaction in the tourism sector, and which correspond to Purpose 2: the interaction of museums with cultural destinations and their relation to other attractions and heritage values, specifically World Heritage.

Using the questionnaire, we were able to deduce that those autonomous communities most implicated in cultural tourism—Castilla y León, Catalonia, Andalusia, and Madrid—are the most unsatisfied, though Andalusia was slightly more satisfied at around 50% (Fig. 3).

|                     |      |
|---------------------|------|
| Andalusia           | 55   |
| Aragón              | 50   |
| Asturias            | 62.5 |
| Balearic Islands    | 66.7 |
| Canary Islands      | 50   |
| Cantabria           | 33.3 |
| Castilla y León     | 50   |
| Castilla La Mancha  | 50   |
| Cataluña            | 50   |
| Valencian Community | 50   |
| Extremadura         | 60   |
| Galicia             | 63.2 |
| Madrid              | 33.3 |
| Murcia              | 58.3 |
| Navarra             | 100  |
| Basque Country      | 33.3 |
| La Rioja            | 33.3 |
| Melilla             | 0    |

Figure 3 - Regional Satisfaction In %

Source: EOI Survey.

In fact, these communities, despite their cultural ranking, are quite demanding as far as their relationships and networking with agents and institutions are concerned. This dissatisfaction is even more notable in Madrid. By contrast, within such small Autonomous Communities as Asturias, the Balearic Islands, Galicia, and Extremadura, where relations and networks easier to put in place between local territorial agents, responses indicated higher levels of satisfaction. In this sense, we note that those Autonomous Communities most devoted to cultural tourism, with the exception of Madrid, are also those which have the greatest number of declared World Heritage Sites and, therefore, according to the data are the most unsatisfied.

With respect to the links between attractions, museums, and World Heritage, a low percentage—only 20% of the museums—have any connection with declared World Heritage Sites (Fig. 4).

|                     | Yes  | No   | Don't know |
|---------------------|------|------|------------|
| Connection with WHS | 21,7 | 76,7 | 1,6        |

Figure 4 - WHS Link Museums.

Source: EOI Survey.

This reveals museum policy, independent of declared World Heritage Sites, and a certain behavior also independent of World Heritage Site, which can be interpreted if we analyze the museums more closely along with the connections between the territory of those museums and World Heritage Sites (Fig. 5).

| Museum Connected with a World Heritage Site | Collaboration with Public Autonomic Institutions% | Collaboration with Public Municipal Institutions% | Collaboration with Lodging Businesses % | Collaboration with Tour Operators% |
|---|---|---|---|------------------------------------|
| Yes   | 87,2  | 94,9  | 41                                      | 50                                 |
| No  | 10,3  | 5,1   | 56,4                                    | 44,7                               |
| Ns-Nc                                       | 2,6   | 0   | 2,6                                     | 5,3                                |

Figure 5 - WHS Link Institutions and Enterprises

Source: EOI Survey.

A bivalent analysis reveals the connections between museums, World Heritage, and levels of collaboration between different public and private institutions, by way of parameters previously considered: collaboration with regional and local governments, with hotel businesses and with travel agencies. Absolute figures, in percentages, are very important in themselves as well as by virtue of their comparison with those given in Fig. 2, which reveal networks of collaboration established in general by museums. Thus, when connected with UNESCO sites, 87.2% of museums develop regional-autonomic projects, 94.9% collaborate with the municipality in which they are located, and 50% do so with travel agencies and tour operators. Again, one finds a whole ensemble of public and private collaborations, the most developed locales and public as well.

When comparing this collaboration with results obtained for museums in general (Fig. 2), it becomes clear that it is slightly less robust, at 84.3% for autonomous institutions and slightly higher for municipal institutions when museums are joined with UNESCO (94% compared with 90.7% of museums in general).



Differences can be thus discerned: when the municipality is closer one finds denser networks of collaboration. In the private sector, the data changes: 41% of museums claim that they collaborate with hotel businesses, compared with 51% when it comes to museums in general, i.e. when such collaboration is less marked (Fig 2). A similar difference can be found in the case of travel agencies. Whereas 50% of museums working with UNESCO collaborate with travel agencies, this collaboration increases to 55% for museums in general (Fig, 2).

Private collaboration is weak in the case of World Heritage Sites and lower than in the case of museums in general, given that territory and destinations follow more rigidly conceived and traditional touristic models, yet still have important municipal links.

These results, however, are not homogenous. Museums are segmented according to the number of visitors they receive. This, in fact, corresponds to certain typologies: new creations for small museums, old-fashioned museums in medium-sized cities, and large museums in metropolises.

And each of these can behave differently with respect to WH. Data obtained about the number of visitors reveal that over two-thirds of the museums studied (69%) receive fewer than 50,000 visitors annually, 29% receive between 50,000 and 500,000 visitors, and very few museums (3%) claim to have more than 500,000 visitors annually.

In this way, three segments have been identified, keeping in mind the number of visitors that they receive annually (Fig. 6).

| Museums                               | Annual Visitors <50,000 | Annual Visitors 50,000-500,000 | Annual Visitors >500,000 |
|---------------------------------------|-------------------------|--------------------------------|--------------------------|
| Archaeological                        | 65.9                    | 34.1                           | .0                       |
| Contemporary Art                      | 60.0                    | 26.7                           | 13.3                     |
| Decorative Arts                       | 60.0                    | 40.0                           | .0                       |
| Fine Arts                             | 41.2                    | 52.9                           | 5.9                      |
| House-museum                          | 83.3                    | 16.7                           | .0                       |
| Science and Technology                | 83.3                    | 16.7                           | .0                       |
| Natural, Science and Natural, History | 50.0                    | 50.0                           | .0                       |
| Specialized                           | 61.1                    | 33.3                           | 5.6                      |
| Ethnographical and Anthropological    | 90.9                    | 9.1                            | .0                       |
| General                               | 70.0                    | 30.0                           | .0                       |
| History                               | 75.0                    | 25.0                           | .0                       |
| Others                                | 75.0                    | 16.7                           | 8.3                      |

Figure 6 – Visitors

Source: EOI Survey

Let us begin with museums that receive fewer than 50,000 visitors. These are united with their territory by tradition, given that they are primarily archaeological, ethnographic-anthropological, and house-museums. Exceptions include science and technology museums, with few visitors.

The second segment involves museums that receive between 50,00 and 500,000 visitors. In this category, there are great differences between types. Medium-sized museums preferentially include those devoted to the fine arts.

Large museums which receive over 500,000 annually are segmented into various typologies.

These groups of museums provided different responses describing their links with World Heritage (Fig. 7). It can be seen that museums which receive few visitors (less than 50,000) barely have any World Heritage connection. The most representative segments are medium-sized museums (about 30%) and those museums which receive the greatest number of visitors, at 60%.

| Museum Visitors/WH | Yes  | No   | n/s-n/c |
|--------------------|------|------|---------|
| <50,000            | 15.6 | 84.4 | 0       |
| 50,000-500,000     | 31.4 | 62.7 | 5.9     |
| >500,000           | 60   | 40   | 0       |

Figure 7 - Museums, visitors and WH

Source: EOI Survey.

To comprehend these differences, one must better understand museums in terms of their touristic function (Fig. 8). Small museums, with hardly any connection to WH, do consider themselves to be touristic. And, one can perceive a large difference between the most highly visited museums and medium-sized museums. Those museums which are most highly visited consider themselves to be touristic in nature, at 100%,<sup>20</sup> while on average most museums do not think of tourism as their only option. We are dealing with a highly individual segment.

| Museum Visitors | Yes  | No   | N/a |
|-----------------|------|------|-----|
| <50.000         | 86,4 | 11   | 2,5 |
| 50.000-500.000  | 73,5 | 20,4 | 6,1 |
| >500.000        | 100  | 0    | 0   |

Figure 8 - Museums, visitors and tourism satisfaction

Source: EOI Survey.

In Fig. 9., the individuality of this middle segment is defined: it receives resident and non-resident visitors in equal proportions, in contrast to those highly visited museums which primarily receive non-residents and small museums which, despite their vocation and attempt to be tourist attractions, are mainly visited by residents.

| Museum Visitors | Yes  | No   | Ns/Nr |
|-----------------|------|------|-------|
| <50,000         | 53,4 | 43,2 | 3,4   |
| 50,000-500,000  | 49   | 49   | 2     |
| >500,000        | 20   | 80   | 0     |

Figure 9 - Museums and Resident Visitors

Source: EOI Survey.

<sup>20</sup> These museums are located in urban settings. It was for this reason that marketing strategies substituted urban for cultural tourism.

## 5. Analysis and Results

By means of this empirical study, in which the museums have been analyzed not only as museums but also as heritage-based tourist attractions in their relation to tourist destinations and other heritage sites such as WH, we have arrived at a series of relevant conclusions about Cultural and World Heritage Sites' impact on tourism.

As a preamble, let us recall that we are analyzing a territory in which those regions most favored by cultural tourism—Catalonia, Castilla y León, Andalusia, and Madrid—coincide with those that have the most World Heritage Sites, with the exception of Madrid. In addition, both traditional museums and World Heritage Sites are attractions of great worth in themselves for managers. This confirms that both are located in places that enjoy a certain touristic tradition. By contrast, newly created museums often have no connection with WH. They are created and built as attractions, in places without other Heritage Sites to reinforce their attractiveness.

On the other hand, we have confirmed that museums are currently considered tourist attractions. The barrier between cultural heritage and tourism has fallen. Still, there exist high levels of dissatisfaction, something which is more notable in regions with a greater cultural identity, especially Madrid. In this way, museums, as tourist attractions, are carrying out a series of internal and external strategies, both public and private in nature, weaving together networks of collaboration throughout their territory.

Still, the percentage of museums connected with WH, the object of this study, is not very high. Networks of attractions and nodes are still at an embryonic stage. In effect, WH, made up of cities, monuments, and isolated properties, has not felt the need to relate, identify with, or possess museums. It is as if WH had enough presence and worth in itself for it ever to consider collaborating with other attractions, although we have learned about WH networks, such as the Network of World Heritage Cities. Indeed, the construction of new museum spaces might even be understood as an intervention that would alter the very meaning of heritage and thereby be unwelcome.

However, in certain cases we have deduced a special link between museums and WH (and territory.) The museum universe is quite varied and, to explain this link more clearly, we needed to segment museums by the number of visitors they receive. Museums that receive between 50,000 and 500,000 visitors have the closest connection to WHS. Moreover, these visitors are residents as much as they are tourists and, because of this, they have a greater connection with local identity and the museum tradition in their area, especially in the case of fine arts museums. This can be explained by their location in urban settings—typically medium-sized cities—and by the history of the museum itself, created largely after the property confiscations of the 19th century or at the beginning of the collectivist movements. This is the museum of yesteryear, in its most authentic form: the provincial museum. For that reason, when the identity of a place is united with that of the city, the population identifies with its museum; indeed, even though it may receive non-resident visitors, that museum remains a reference point for residents. This type of museum can be situated within the relevant groupings of monuments declared WH. Still, the figures show that managers are somewhat averse to tourism. Their territorial strategies are developed at the local level and are conservative toward the private sector.

The reading is different in the case of other groups. Museums that receive fewer than 50,000 visitors are joined to their territory by tradition, since they are mainly archaeological, ethnographic-anthropological, and house-museums. These are not usually linked with UNESCO properties and were newly designed as part of revitalization projects. They are considered touristic even though they mainly receive local visitors. These are the museums which most actively participated in our study. Exceptions might include science and technology museums, which receive few non-resident visitors, are usually found in urban settings, and whose main function is not a priori touristic. Large museums, with over 500,000 annual visitors, are divided into various typologies and claim overwhelmingly that their visitors are non-residents. They call themselves touristic and, as such, recognize the brand value of WH for tourism, even though within their territory they may not be able to establish networks. These most visited museums, which are urban, responded the least. Their data are meaningful inasmuch as they show the highest levels of tourist penetration, in terms of intention and strategy. In this way, they do feel involved with WH but, as we understand it, in a strategic and non-territorial way. They see themselves as tourist attractions.

## 6. Conclusion

By means of empirical investigation, this study has allowed us to analyze the connections between heritage (museums) and WH as well as between networks and hierarchies within a territory. The study reveals the complexity of these relations but, above all, also favors the formulation of two essential ideas, to be kept in mind during future research and when offering results to management and the museum sector. There are a variety of museums considered part of the cultural heritage which exhibit a wide range of behavior as attractions and in relation to WH. While urban settings and museums which receive large numbers of visitors are both touristic in nature as far as their management and internal and external networks are concerned, there are other museums located in medium-sized cities in which heritage is still closely associated with identity. And although these are highly visited heritage sites, local identity still predominates. These territories, however, are still WH Sites; sites with a OUV (Outstanding Universal value) linked to local values too. We need to use rigor, caution, and great delicacy when unilaterally opening these spaces up to tourism as the only way forward.

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# The Impact of Tourism on Bdoul community in Petra

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## Abstract

Petra is a place of unique historical interest located in the South of Jordan. It was first introduced to the western world by Burkhardt in the 19th century. At that time it was inhabited by Bdoul a tribe who were residing in the ancient caves of the archaeological site. In the eighties of the last century the government decided to transfer these people to a nearby village called Umm Syhoon. This study aims at evaluating the social and economic impact of tourism development on the lives of two groups of the Bdoul people in Petra region first those who have been transferred from the rock-cut tombs inside the archaeological site of Petra to the village of Umm Sayhoon since 1985 and those who refused to move and stayed in the area of Jabal Al Naby Harun. These impacts occur as a result of interaction between the Bdoul people in both groups with tourists. The main objectives of the research were to identify the ways in which tourism has affected the social and economic life of host communities and to determine how impacts have affected the Bdoul community positively and negatively. It must be emphasized here that the Bdoul people in Umm Sayhoon were negatively influenced to greater extent by tourism than their relatives in the area in Jabal Al -Naby Harun. In order to achieve scientific and accurate results both theoretical and practical parts of the study were carried out. The theoretical part included collecting and analyzing data published in books of early European travelers and historical books concerning the history of Petra through ages. The practical part included a number of visits to different institutions in Petra region to obtain information and statistics about situation of tourism and number of tourists in the past years and interviews with local people of the Bdoul society from both groups in Umm Sayhoon and the area of Jabal al Naby Harun were carried out. In order to get more comprehensive data, interviews included people from different generations, different genders and different social backgrounds.

## Keywords

Bdoul; Local community; Petra; community awareness and development; displacement of local community.

## Introduction

Over time, all communities experience changes that affect the industries, technologies, and land use patterns that help form the foundation of their local economies. Some changes can be gradual, natural and happen over a long period of time. Other changes can be sudden, tragic and disastrous for local community. In this study, we will try to tell the story of a group of people who used to live in archaeological site and their life changed drastically when tourism became a main part of their life. Who are these people? Where is this city and how it was built through Ages? Answering these questions will constitute the first part of the study. The second part will focus on the positive and negative effects of tourism through a comparison between two different groups belonging to the same tribe. Therefore, this study will be divided into three main components:

1. The Bdoul as a bedouin tribe and a part of the local community around Petra

2. Petra, the unique city in terms of its history, amazing landscape and antiquities
3. Tourism in Petra and its impact on the Bdoul: A comparison between two groups of the same tribe: the Bdoul in Umm Sayhoun and those in Stoooh Al Nabi Harun.

## **1. The Bdoul**

### *1.1. The Bdoul as viewed by early travelers*

The Bdoul are the oldest known inhabitants of Petra. It is a Bedouin tribe consisting of a group of families living in the southern part of Jordan. There are different versions about their origin. Some of the Bdoul say that they are the grandsons –and daughters of the Nabataeans. However, though that the Nabataen might be the ancestors of the Bdoul must at least be a possibility, the information we have till today do not prove this theory. Many of the historians and travelers to Petra discussed their origin and they came up with different theories. The first certain reference to them as tribe was the by the Arab historian Al Hanbaly who said that the Bdoul is a tribe belonging to Al Huweitat and Al Alaween two big tribes residing in the southern region of Jordan. These tribes had the job of helping the pilgrims coming from Egypt and protecting the Hajj caravans. This was nearly in the Mamluke period in the 13<sup>th</sup> century (Al Hanbaly 2002, 328).

The first traveler who introduced Petra to the European world in modern age was the Swiss Johann Burkhardt. In his attempt to find the tomb of Aaron on one the top of one of the high cliffs in Petra, he planned to visit Petra on his journey from Cairo. Telling his guide that he wished to sacrifice a goat to Aaron, he was led through the narrow valley where on 22 August 1812, he became the first modern European to lay eyes on the ancient Nabataean city of Petra (Burkhardt 1822). From that time on He became the best known traveler for rediscovering the ruins of the ancient Nabataean city of Petra in Jordan. After his visit many of the travelers were highly motivated to come to this amazing place and they tried to give their views o the origin of this tribe whose charismatic and awe-inspiring sheikh was called Imqaibel Abu Zaitun. Some of the travelers claimed that they heard from Al Laythneh another tribe in the region that the Bdoul were Jews. The word Bdoul in Arabic means “change’ and because they changed their religion into Judaism, they were Jews (Canaan 1929). However, the Bdoul themselves refused the idea completely and they said that they are called Bdoul because their ancestors the Nabataeans changed their religion from Paganism into Christianity then later into Islam (Taylor 2001).Robinson and Smith 1841 made interviews wiyh the Sheikh of the Bdoul Imqaibel Abu Zaitoun and they came out with the conclusion that the Bdoul were a clan of the big tribe Al Huweitat living in different towns and villages in the southern part of Jordan (Robinson and Smith 1841).

Kinnear 1841 studied the Bdoul and their relation to the other tribes living in the region and he said that they have been inhabiting the archaeological site Petra since the 18<sup>th</sup> century and they were paying taxes from their stock and they belong together with Alawin, Maray’ah to the big tribe Huweitat who were residing the Jabal Al shara mountain area (Kinnear 2010).Canaan argued their origin and he said that they were probably Jews. In his research Canaan he talked about the lifestyle of the Bdoul and he studied the impact of tourism on their lives (1929).

Some travelers attribute their origin to the big tribe of Al-'Anza in Hijaz area (Von Oppenheim 1944). Shoup also agreed that they were a branch of Al'Anza big tribe from Madain Saleh in Saudi Arabia (Shoup 1980).

Russell also studied the Bdoul and described them as a group of people living on herding of goats and cultivation of small plots of barley, tobacco, and wheat . In addition to this, they hunt some animals and gather some wild plants. He said they live in and around Petra together with other Bedouin tribes like Amarin and Layathneh (Russell 1993).

In fact, the Bdoul were the most studied tribe among those living in and around Petra and many other scholars were interested in conducting researches about them like Bienkowski (1991), Shoup (1980, 1985), Meckenzie (1991) and others.

On the whole, many of them agreed that they were a branch of Hwueitat, or Howaytat (Arabic: الحويطات) are a large tribal confederation of Jordan, Palestinian territories and Saudi Arabia. The Howaytat (have several branches, notably the Ibn Jazi, the Abu Tayi, the Anjaddat, and the Sulaymanniyin, in addition to a number of associated tribes. By the late 18th century the Howaytat were already laying claim to areas around Aqaba and northwards; they also laid claim to land in Egypt. They all agreed that they are semi-nomadic group whose subsistence economy is based on herding of some animals and cultivation of some cereals, pulses and few fruits and vegetables. They lived in tents in summer and they used to live in caves in winter and cold seasons.

#### 1.2. *The Origin of the Bdoul according to the local people: (Interviews)*

Five questions were given to some old people from the Bdoul from different places concerning the origin of them, the reason why they lived in the caves of the archaeological city Petra, how long they have been there, their relation to other tribes living in the region around Petra and the etymological meaning of the word Bdoul.

Concerning their place of origin some said they have always been there since the coming of the Nabataeans in the first half millennium B.C. They insist on the fact that they are the grandsons of the Nabataeans who built Petra. Therefore, they think they have been there for more than two thousands of years. They also recalled some of their memories during the Ottoman period and British colonization. Others say that they came there because some of their kids committed a crime unintentionally and because they feared revenge, they fled to the caves of Petra. The Bdoul also reject the idea of attributing them to the Jews. They refuse some of the theories of travelers who emphasized this idea. They said that some travelers like Albright and Canaan depended on the story narrated to them by the tribe of Layathneh and therefore Canaan said that they were Jews and Albright said they were Gypsies.

Concerning the etymological meaning of the word, irrational answers were given. For example, they said that their grandfather was mentally disabled. Others say that they were called so because they changed their habits and culture.

In regard with their relation to other tribes living in the region, they were in better terms with Amarin from Al Beidha than with Layathneh from Wadi Musa. It should be emphasized here that their relations were influenced by the control of tourism revenue. With the boom of tourism in Petra the relation started to worsen more and more.

On the whole, most of these narrations were biased in a way or another and many of the stories could be right or wrong. The only certain fact was that these Bedouin tribes are the oldest inhabitants of the archaeological site Petra. They have been there a long time ago at least since the Mamluke times in the 13<sup>th</sup> century.

## **2. Petra, the location and History**

Petra was one of the greatest cosmopolitan centers of the Classical antiquity<sup>21</sup> in the Near East. At the peak of the Nabataean Kingdom during the first century B.C. and the first century A.D. Petra used to control one of the most vital commercial routes connecting the rich provinces of Mesopotamia and Egypt. Petra, located at about 260 km south of Amman and 133 km north of the Gulf of Aqaba on a latitude 35°37' E and latitude 30°19' in the E desert of Jordan, lies on a central way to the main ancient trade road S and N from Egypt and to the Arabian Peninsula to Damascus, W and E from the Mediterranean to the Arabian Gulf. (Hammond 1989, 442). Petra is situated on the southern slope of Esh-Sharah Mountains half way between Wadi el-Hesa and Aqaba and between the Hejaz railway and Wadi el "Araba. Petra is geographically formed as a shelf between two bordering ridges of Nubian sandstone. The site is generally reached through the Siq, a twisty natural crack formed in the eastern mountain wall with towering crags on each side. Wadi Musa, one of the two main perennial springs of Petra, flows between the towering cliffs through the area of the ancient city and proceeds into the gorge known as Siyagha and eventually drops into Wadi 'Araba.

Therefore, the basin of Petra allowed a natural protected refuge for inhabitants since early periods of human history. Occupation in Petra seemed to have started at an early period. Some Paleolithic tools have been collected in the natural caves inside Petra (Horsfield 1930, 374) and continued in the following period through Epi-Paleolithic (Byrd 1994, 210) represented by one of the most Natufian sites Al-Beidha, a site in Petra basin (Olsszewski 2001, 58). The next represented period is the Iron Age when the Edomite Empire was established. One of the best investigated sites in Edom is Umm al Biayara in Petra. The excavations of Crystal M. Bennetts there between 1962 and 1964 revealed an Edomite settlement that dates back to the 7<sup>th</sup> century B.C. based on an inscription of Qos-Gaber king of Edom. Umm al-Biyara is one of the most prominent landmarks of Petra. It was a domestic, unwalled stone of stone-built houses dating to the 7<sup>th</sup>-5<sup>th</sup> centuries B.C. In fact, many scholars of Iron Age depended on the discovery of this inscription to date the establishment of Edomite Empire in Southern Jordan. This was one of the greatest discoveries for the understanding of Nabataeans history since they were settled in the place of Edomite s. Scholars in the past have thought that this place was called el sela' and was mentioned in Diodorus records during the battle between the Nabataeans and the Seleucids. El Sela' turned to be a rock place near el Tafileh (London 1997, 195). The next chapter of human history is the Persian period which can be fixed at 539-332 B.C. between the conquest of the Persian king Cyrus II and the conquest of Alexander the Great. In general, the administrative system of Jordan during this period is not clear at all for the lack of written evidences. Very few evidences belonging to this period were unearthed (Bienkowski 2001, 347). Therefore, the exact role of Petra or Umm al Biayara in the

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<sup>21</sup> The term Classical antiquity is used to describe the period of Graceo-Roman sway political sway in the Levant from the time of the conquest by Alexander in 332 B.C. to the end of the Byzantine empire in the southeast at about 649 or the coming of Islam. During this period some Arab or local powers flourished among which is the Nabataean kingdom.

Persian period is not known, though the entry of the Nabataean into southern Jordan must have occurred in the Persian period. Here we have historical evidences attesting the existence of Nabataeans in southern Jordan. The Persian king Cambyses would not have been able to continue his journey to Egypt without the help of an Arab king who offered him camels and water. The Arabs who were usually referred to as Nabataeans were frequently stated as friends of Persians and they paid an annual tribute to them as shown by the writings of Herodotus (Lindner 1977, 39). This leads us to move into the Nabataean period and the golden time of **Petra** as a capital of one of the greatest kingdoms of the Near East in Classical periods. The Nabataeans as mentioned before they entered Jordan in the middle of the first Millennium B. C. that is to say in the Persian Period. The Nabataeans then came into contact with the great Empires that dominated the Near East in the Hellenistic period and the following Roman period. The Hellenistic period in Jordan started conventionally with the coming of Alexander the Great to Syria and Palestine around 332 B.C., continued with Jordan under the rule of Ptolemies from Egypt, and finally ends with the rule of Seleucids in Jordan around 198 B.C. In the northern part of Jordan the excavations attested the continuity of occupation from Iron Age II, through Persian to Hellenistic, though early Hellenistic sites are rare (Bienkowsky 2001, 361). Southern Jordan was in the mean while settled by the Nabataeans who left no cultural remains or architectural monuments reflecting a sedentary way of life in that period. However, written historical references attested their existence in early Hellenistic period. The first certain reference to the Nabataean as a ethnic group was in the accounts of Diodorus in 312 B.C. ( 19.49.1: 95.1-97.6). Diodorus was a Greek historian, born in 90 B.C. in Agrigium, Sicily. He was contemporary of Julius Caesar and Augustus and witnessed the birth of the Roman Empire. Diodorus traveled in Asia and Europe and lived for long time in Rome, collecting all the material for his great Bibliotheca Historica (Historical Library). This work is a history of the world in 40 books, from the creation through the Gallic Wars and up to the first years of the Roman Empire. Diodorus mentioned them in the battle between the Nabataeans and the Seleucids whose main purpose was to attack the Ptolemies of Egypt and to assure the safety of the trade route which was controlled by the Nabataean Arabs. The battle ended with the defeat of Greek armies.

These accounts of Diodorus reveal the following interesting points about the lifestyle of them:1) It depicts that Nabataeans lifestyle included all the characteristics of the nomads who lived in tents, never built houses or cultivated plants. They were partly settled and still clung to many ways of the nomads. They raised camels and domesticated animals. He reported:“They have a law neither to sow corn nor to plant any fruit-bearing plant, nor to use wine, nor to build a house. This law they hold because the judge that those who possess these things will be easily compelled by powerful men to do what is ordered them because of their enjoyment of these things. Some of them keep camels, others sheep, pasturing them over the desert.” (XIX.94.3-4). 2)The Nabataeans evidently did not trust anybody and never accepted a man of another country as their overlord and continued to maintain their liberty unimpaired. They aimed at having peaceful relations with others for they offered presents and tributes to others.3) They were skillful traders and controlled the commerce of frankincense and myrrh between South Arabia and the Levant. It was in fact their reputation as skillful traders that attracted the interests of Antigonos the one-eyed to attack them.4) They were literate people who used Aramaic the franca lingua among Syro-Palestinians from the eighth century B.C. to the birth of Christ. Another historical reference to the Nabataean as ethnic group was the

Papyri of Zenon in 250 B.C. He said that the Nabataeans also resided in the neighborhood of the Hauran in Syria and were merchants of aromatics with Ptolemaic agents in Moabite Transjordan. About two hundred years afterwards, they have never been mentioned again. The earliest definite evidences for a settled life came only in the end of the second or the beginning of the first century B.C. That period witnessed a decline of the Seleucid presence in the area which led to a rise of Hasmonaeans and other local powers and to an increase in the long-distance trade of the Ptolemaic World because of the discovery direct trade route between India and South Arabia. This might have been a motivation for the Nabataeans to settle in Petra to fill the vacuum left by Seleucids and to compete with the Ptolemies in long-distance trade (Schmid 2001, 367-370). From that time on, **Petra** started to be one of the greatest centers of the ancient world. During the late Hellenistic period (198-63 B.C.) and Early Roman imperial era (63 B.C.-106 A.D.), the Nabataeans centered at Petra in Edomite Transjordan, and again depending on documentary sources (The Bible, 2 Macc.5 &6) created one of the largest states in the Near East. Their Kingdom covered much of the present-day northwestern Saudi Arabia, the Sinai Peninsula, the Negeb, most of Jordan, and at times extended as far north as Damascus in Syria. As common at that time, borders did fluctuate, and much of the Nabataean interest was motivated by trade, the most important factor in their rise and decline. In order to keep the peace necessary for the flow of the caravans, they earned their peace loving image, which was even incorporated in the titles of their late kings. On the other hand, it also gave them their warring image, referred to by Josephus in his account of the Jewish war. They kept the balance and kept the flow, with this flow not only came material goods and wealth, but cultural contact and exchange. The Near East caravans route were only a part of a much larger trade network covering most of the world known to the classical geographers at the time, and it was through this cultural exchange over such a network that the Nabataeans culture earned its true dynamic change. Along the routes were the caravan cities, the greatest of which was Petra, whose suburbs (but not center) acted as the receiving areas for the caravans. These cities were not merely resting places but also big clearing-houses in which were merchants and 'bankers' involved in investments in the caravans, an activity which committed large sums of money and extended over vast sections of the routes. Also in these cities changes occurred, new camels and men were provided and merchandise exchanged. It was at his point that the local products were introduced into the network, and the processing of goods carried out, such as in the important case of the Dead Sea bitumen industry. The exchanges were not only in men, beasts and goods, but also in culture, art and ideas, thus giving cities a cosmopolitan essence. This exchange was not confined to the Nabataean trade centers but was going in the other great centers in a very large area of the world. Most probably, the Nabataean caravans, as such, rarely went beyond Nabataean controlled areas, but their merchants certainly did. Acting as trade agents representatives, they established in some cases whole communities which would have also acted as protectors of the caravans their head office in Petra invested in, a practice also carried out by representatives from other Near Eastern centers such as Tyre and Palmyra. There is historical and archaeological evidence of Nabataean representation at centers in Mesopotamia, the Aegean, Italy, Egypt and East Africa. In 106 A.D. the Nabataean Kingdom was annexed by Trajan and province of Arabia was created. The Nabataean annexation by the Romans in AD 106 does not signify the end of their culture that continued for several centuries afterwards, probably as late as the sixth century AD. Petra continued to play its role as a

significant center of Classical Antiquity during the later part of the Roman period. Petra was incorporated in the Province of Arabia whose capital was Bostra. Trajan elevated the status of Petra into Metropolis. Petra continued to be honored by successive Roman Emperors when Hadrian paid a visit to it calling it afterwards 'Hadriana Petra'. Eliogabalus (218-222) granted the city the title Colonia Romana and later, in the course of the reconstructions of the administrative system undertaken by Diocletian (284-305 A.D.) Petra became the capital the Province of Palestine III. It was in this period that the Christians of Petra were subjected to persecution (Freemann 2001, 434). Petra continued to be an important city during the Roman period and possessed all the features of a Roman city like the colonnaded street, the theatre, and the Nymphaeum and when the Roman empire started to decline in the Western world and Constantine I established the Byzantine Empire, Petra was a Christian important center. This can testified by the churches of Petra with the great discovery of the Papyrus scrolls in one of its churches (Bikai 220, 274). After the end of the Byzantine period, Petra started to be forgotten and never mentioned again till the coming of the Crusaders. Building castles and settlements were more intensive in the Southern part of Jordan. Baldwin I and immediately after his accession to the throne in November and December 1100 sent a military expedition from Hebron to the Dead Sea as far as Wadi Musa and Jebel Harun. Two castles have been built in Petra. In the northeast part of Petra north of Wadi Musa, Al Wu'ayra Castle was built. It might have been built in 1127/31 following a raid of Baldwin II (Mayor 1990: 97-99). Al-Habis is another big Crusader Castle comprising a tower surrounded by disconnected and irregular lines of walls. It might have been built during the time of Baldwin III (1143-1162) when he besieged Wadi Musa in 1144. He built it to monitor the activities of the cave-dwelling Arabs and the Wadi 'Araba routes (Walmsley 2001, 519). After the interlude of the Crusaders, Petra was rarely mentioned in history. It was once visited by the Mamluke leader Baybers. Petra gained its attention again after the famous visit of The Swiss Traveler Burckhardt in 1812. Since then many of the Western and Arab scholars started a number of archaeological campaigns to investigate the secrets of the 'red-rose' city.

### **3. Tourism in Petra and its Impacts on Local People**

#### *3.1. History of Tourism in Petra*

Petra went through different phases of growth of tourism since its introduction to the World by the Swiss traveler Burkhardt in 1812. With advances in transportation means, infrastructure and advertisement, visitation to Petra has drastically changed (Comer 2012).

##### *3.1.1. Tourism between 1812 and 1918*

Between the time of its first introduction to the Western world by the swiss traveler Johann Ludwig Burkhardt in 1812 and 1918, few travelers like Maurice Adolphe Linant (1836), John Lloyd Stephens (first American visitor), and sometimes disguise was necessary because Bedouin tribes like Layathneh and Bedul were hostile to them. Some Israelis used to cross the border illegally and visited Petra through the back path called Jabal Al Turkuman who were soon discovered by the Bedouin living. Some Israelis were either killed or turned over to Jordanian authorities and as a result no more attempts were done. Along with the growth of the interest of western scholars of the culture and history of the Middle East , some European historians and anthropologists came to visit Petra and in most of the cases they had to come



under military protection. Travel to Petra was dangerous and people had to come by horse or camel from Jerusalem and Aqaba (Shoup 1985).

### 3.1.2. *Tourism between 1921 and 1970*

With the establishment of Transjordan Emirate by Amir Abdullah in 1921 and the establishment of Jordan Express Tourist Transportation (JETT) in 1964, tourism moved into another phase. Paved roads and electricity improved infrastructure and the first telephone in Wadi Musa was installed in 1926 despite the rejection of local communities. The first hotel was built by Thomas Cook Travel Company in 1920 inside Petra near Qasr al Bint when archaeologies started to excavate (Shoup 1985). From that time on tourism started to affect the lives of local people where some of the local people were hired in British army, worked with archaeologists or served tourists. Most of the employers anyway in tourism were foreigners at that time and a lot were Egyptians. In 1940 the hotel at Petra was sold to a Palestinian family and was called then Nazzal camp. In 1950 the Jordanian government opened a Rest House between Wadi Musa and Petra and employed local people mostly from Lyathneh tribe from the village of Wadi Musa. Bedul were in contrast not very responsive to the industry of tourism. On the whole between 1812 and 1970 few visitations were organized to Petra (Comer 2012).

### 3.1.3. *Tourism between 1970 and 1985*

Between 1970 and 1985 most of the local employers in Petra were from Lyathneh tribe from Wadi Musa. The Bedul who were still residing in the caves of Petra at that time were less responsive to tourism industry than their colleagues from Wadi Musa. People from Al Layathneh tribe were engaged in the businesses of tourism. they hired horses, sold books, juices, souvenirs and faked objects. The Rest house was also closed to their village and as a result they were able to walk to go to Petra on foot from their houses. Few from the Bedul hired horses. With the addition of some vehicles to JETT company in 1980, construction of Petra Forum Hotel in 1983 and employing some local people from Wadi Musa as tour guides, tourism flourished a lot. The English manager of the hotel employed some people from Bedul tribe to cook Manasaf the Jordanian Typical dish and to provide tourists with juices. Sometimes Bedouin performed some traditional dancing to entertain tourists (Shoup 1985).

### 3.1.4. *Tourism between 1985 and 2011:*

- Main Events influencing Tourism

The nomination of Petra by UNESCO as World Heritage Site in 1985, the resettlement of the Bedul at Um Sayhun, and the Amarin in Beidha housing, the releasing of Indiana Jones Film the last Crusade in 1989, the establishment of Petra Archaeological park in 1993, the peace treaty between Arabs and Israel 1994, the formation of Petra Development Tourism Regional Authority in Petra in 2007 and the listing of Petra as one of the new World Wonders in 2007 are all events that dramatically increased the number of visitors to Petra from few thousands to millions per year (Comer 2012). Between 1985 and 1995 the number increased to fourfold and from 1995 to 2012 the number increased to tenfold (Farajat 2012). In fact, since the beginning of the so-called Arab spring the numbers of visitors started to decrease (see table1).

– Tourism from 2011 till Today:

In 2011, some Arab countries from the Middle East and North Africa region became involved in episodes of political turmoil after experiencing a revolutionary wave of spontaneous demonstrations followed by widespread violent and non-violent protests. Political turmoil has negative repercussions on economic development. Protests and revolutions plague more than one market in the region, and are now spreading to previously stable markets, creating negative perceptions of the region. As a result of the political turmoil, a number of destinations suffered in 2011, including Petra. This coincided with the rise of entrance ticket to Petra which has negatively affected tourism. Tourism may have many different effects on the social and cultural aspects of life in a particular region or area, depending on the ethical strength of the people in the region. The interaction between tourists and the host community can have positive and negative effects (Mathieson & Wall 1982). Having contact with people from diverse backgrounds with different lifestyles may lead to development in quality of life and people may learn from other experiences and people may develop infrastructure and seek better education (Esmail Zaeai, Mahin & Esmail Zaeai, Mansour 2013).

The importance of tourism development plans is necessary for sustainable tourism and local populations around historically important sites. Concerning Petra, and because of lack of careful management plans, tourism brought a lot of dramatic consequences on the local society, the environment and the archaeological site. In fact, the rock cut monuments of Petra were negatively influenced by the increase of number of tourists because no proper management plans were implemented to avoid the deterioration of this great part of our archaeological heritage. Urban and tourism Infrastructure expansion like the widening of Wadi-Musa Al Taybeh road led to the cut of Juniper trees and the erosion of soil was caused. In addition to this, the use of asphalt and concrete increased the risk of seasonal flash floods. The old inhabitants of Petra the Nabataeans solved this problem by building tunnels (Akasheh 2012)

Table 1 - Petra Visitors Statistics 2000-2016

| Year | Number of visitors |
|------|--------------------|
| 1984 | 43,920             |
| 1985 | 93,933             |
| 1992 | 58,227             |
| 1993 | 80,330             |
| 1994 | 138,577            |
| 1995 | 337,221            |
| 1996 | 372,625            |
| 1997 | 379,226            |
| 1998 | 347,159            |
| 1999 | 429,644            |
| 2000 | 481,198            |
| 2001 | 231,203            |
| 2002 | 158,837            |
| 2003 | 160,658            |
| 2004 | 310,269            |
| 2005 | 393,186            |
| 2006 | 359,366            |

|      |         |
|------|---------|
| 2007 | 577,860 |
| 2008 | 802,866 |
| 2009 | 728,839 |
| 2010 | 918,136 |
| 2011 | 596,032 |
| 2012 | 599,288 |
| 2013 | 574,729 |
| 2014 | 551,491 |
| 2015 | 410,371 |
| 2016 | 464,154 |

Source:<http://visitpetra.jo/DetailsPage/VisitPetra/StatisticsDetailsEn.aspx> retrieved on 30/03/2017

### 3.2. The Bdoul and Tourism

#### 3.2.1. Tourism in Um Sayhoun Children, Women and Men

Two kilometers square in area and hosting more than three thousand people from the Bdoul tribe, Um Sayhoun is considered one of the highest places in population density. The village is newly built in 1985 and in 1987 to host more 100 hundred families from the Bdoul. After the inscription of Petra by the UNESCO as a world Heritage Site, the government of the Hashemite Kingdom of Jordan in cooperation with UNESCO and World Bank decided to relocate the Bdoul to move them into Umm Sayhoun (Comer 2012). In spite of the fact that the relocation gave the Bdoul a certain degree of national recognition and better access to education, better health care and the cash economy of tourism they experienced a lot of difficulties and challenges. First of all, they moved to a new environment that differs physically and culturally from their own. It restricted their herding and they were not able to cling to their traditional life (Simms and Koorring 1996).

In fact, the government tried to move the Bdoul in 1970's, but because of armed rebellion, they were not able to do it. After a long process and hard negotiations the Bdoul agreed to be relocated to Umm Sayhoun half way between Petra and Beidha. A test house was built and the Bdoul were invited to visit and make suggestions. They did not like the house because of its small size, but the government went on building the same model. Process of construction was finished in 1982 and people were forced to move there. The houses were designed for 100 families only 60 of which moved and forty stayed in Petra (Shoup 1985). Today about 200 hundred people live in the archaeological site.

As a result of resettlement process, the Bdoul experienced the greatest trauma in their lives. They were shocked by the small houses, by the restriction of new lifestyle. They used to be semi-nomads who were living in tents in the summer and moved to the warm caves in winter. They had more space for their stock and for their belongings. Therefore, tourism showed them its negative side. They had to move to protect the archaeological site and to flourish tourism in Petra (Shoup 1985).

After interviewing some of the People of Umm Sayhoun from different age groups and from both genders, tourism seems to have both negative and positive impacts. However, negative impacts outweigh positive ones.

Here we would like to present the results of study dividing it into three parts, a part for children, a part for women and a third part for men.

- Tourism and Children in Umm Sayhoun:

There is no better way to learn about a new culture than to experience it firsthand. Tourism offers a wonderful connecting thread between visitor and host community. It promotes dialogue and interaction. Such a contact between people of different backgrounds is the best base for tolerance. Every visitor to Umm Sayhoun can notice that the kids there speak languages fluently and they are sometimes very hospitable to foreigners.

However, this is the only positive impact we see there. The lack of good management plans for strengthening the awareness of local communities, and finding solutions to fight poverty, led to disastrous results of tourism. At first, the relocation of the Bdoul gave the children the chance to have good education and to know more about the cultures of the world, but today tourism cause the dropping out of schools either completely or partially.

- Dropping out of schools:

The total reliance on tourism for fighting poverty made the children drop out their schools. When we asked them why they did so, they told us they wanted to help their parents. The number of male pupils who leave school are more than females. The table below shows the number of students dropping out schools:

Table 2 - The number of students dropping out of school between 2005 and 2015 in Umm Sayhoun

| Academic year | Male | Female | Total number |
|---------------|------|--------|--------------|
| 2005          | 6    | 4      | 10           |
| 2006          | 4    | 3      | 7            |
| 2007          | 10   | 5      | 15           |
| 2008          | 8    | 2      | 10           |
| 2009          | 10   | -      | 10           |
| 2010          | 14   | 5      | 19           |
| 2011          | 14   | 2      | 16           |
| 2012          | 4    | -      | 4            |
| 2013          | 25   | 7      | 32           |
| 2014          | 10   | 5      | 15           |
| 2015          | 7    | 2      | 9            |

The main reasons behind this phenomenon were poverty, total reliance on tourism for gaining income, the ignorance of parents who are always at work.

- Smoking and drugs:

Another dangerous phenomenon is smoking and drugs among children as a result of lack of care and good observation by parents.

- Malnutrition and fatigue:

As a result of working outside their homes, eating outside and working for long hours in the hot sun in summer and in cold weather in winter, children have many health problems. They do not get the right nutrition and they have many diseases because of hard work.

- Sexual Harassment:

Some children might be sexually harassed because of lack of care and observation by parents.

#### Women and Tourism in Umm Sayhoun:

Most of the women started to look for a job in field of tourism and when we asked them about the reasons for choosing a job in tourism, they said the rise of inflation and prices forced them to work, no matter if it is a good work or not, a suitable work or not. Some of them are left alone and unsupported especially when some of husbands marry another woman. Concerning types of jobs, some women work in tourism agencies as a servant. Some sell juices, souvenirs, in different locations of the archaeological site in Petra. In order to perform these jobs they had to go for long distances on foot to reach the Deir or the Khazneh or the theatre. Women from all ages work in tourism starting from teenagers and to old women over fifty or sixty.

Tourism gives women the chance to work and to be economically independent and to participate in the economic development of the country. It also contributes to more understanding of other's cultures. Many of the women of the Bdoul are very smart and speak languages perfectly and sometimes they can fill the gap in the case of the absence of men from the family life. However, tourism is sometimes very negative especially for women.

#### Bad upbringing of children and family:

Ignoring children and family life: Many of the women work long hours outside their homes and consequently leave their small babies and kids alone at home. This can leave children alone and unsupported. They may also leave school and adapt some bad habits like smoking.

#### Cheap work and Harassment:

Some women and because of poverty they have to take cheap work like cleaning. They work more than 11 hours a day and they get JD 190 a month. This income is very low compared to the prices of goods we need. It also exposes some women to different kinds of harassment. Unfortunately, many of the old and poor woman have to take this kind of jobs.

#### Diseases and Health Problems:

As a result of the long hours of work in unsupported areas, women may suffer from diseases and health problems.

#### Tourism and Men in Umm Sayhoun:

Since the Economy of umm Sayhoun is a tourism-based economy, therefore most of the men work in tourism. The table below shows the types of jobs men have there. It should be noted here that most of the people do not have high or university education. Jobs in tourism do not require high education and qualifications.

Table 3 - The type of jobs men take in Umm Sayhoun

| Job                                   | The number of people working |
|---------------------------------------|------------------------------|
| Cameleers                             | 23                           |
| Donkey riders                         | 146                          |
| Servant in offices                    | 15                           |
| peddlers                              | 25                           |
| Workers in Petra Regional Authority   | 58                           |
| Tour guides                           | 4                            |
| Workers in archaeological excavations | 7                            |
| owners of juices stands               | 56                           |
| Guards of juices stands               | 5                            |
| Horse riders                          | 6                            |
| Total number                          | 344                          |

- Total dependence on Tourism:

Since Jobs in tourism are easy and bring some income, men in Umm Sayhoun are completely dependent on tourism for their daily life and this is not very good because tourism fluctuates and does not provide people with secure careers. In fact, the men of Umm Sayhoun left all skills and other qualifications to seek a job in the field of tourism.

Neglecting of Agriculture and Other Types of Production:

In order to seek a job in tourism, people left agriculture and other industries and this leads to more inflation and unemployment.

Neglecting Wives and Children and multiple marriages:

Some men, who look for freedom and getting a passport of another nationality, married either women from other Arab countries or women from the western world. In the meanwhile, they left their children and wives unsupported. And when we asked them why they married western wives, they said because they do not have to pay the high expenses of marriages. However, many of such marriages were complete failure.

Illiteracy:

Because work in tourism does not require high education, many of the men left schools.

Alcohol and Drugs:

The abuse of alcohol and other drugs became common in Umm Sayhoun. It can cause or worsen many medical problems and if left untreated can destroy families and lives. Frequent abuse of alcohol and other drugs can lead to addiction, a disease that affects the brain and behavior. Some people are more vulnerable to developing a problem with alcohol or other drugs. Since 1992, 98 persons from the Bdoul became addicted to Alcohol. Some young men are between 18 and 25 years old, 49 young are between 26 and 35 years old, 23 between 36 and 50. One is over 50 years old.

Between 2008 and 2009 the number of the men addicted to drugs is 87. Among them are 21 between the age 18 and 25, 34 between the age of 26 and 35, 23 between the age of 36 and 50.

In fact, the most difficult part of the study was interviewing the people and asking them about using drugs. According to some of the interviews, we were told that Alcohol was not

known before 1992. With the beginning of the second millennium, Drugs became normal and it is rare to find a single house without having drugs. The informants told us that they get the habit from foreigners.

The main reasons for this phenomenon is the absence of parental care and observation, the lack of awareness among young men, the suppression and the lack of alternatives, real management plans from both the government and the citizens and the highly polluted area of Umm Sayhoun. Having this number of people together with their animals in small area must lead to social and physical problems. At sometimes one can hardly walk in the streets of Umm Sayhoun because of the great number of seller and their animals. This causes pollution and noise that the normal person can never endure.

### 3.2.2. Tourism in Stooth Al Naby Harun

This part of the study talks about the rest of the Bdoul who refused to leave the archaeological site and who still lives in the area of Stooth Al Naby Harun.

Jabal Haroun (Aaron's mountain) is the highest peak in the mountains few kilometres south-west from the ancient city of Petra. It's about 11 km walk to the mountain and an easy ascension followed by a little climbing on steps to the top. The whole by walk can be made about 3 - 3 ½ hours and allow as much time on your way back. There are some Bedouin homes carved in the rock, built, or simple tents. It shows the idea of the real Bedouin way of life around Petra. These Bedouin live away from the places where the tourists can reach. In fact, few scholars or tourists can afford the trip to this mountain. Therefore, their lifestyle is not affected by tourism. They are semi-nomads who raise stock and practice small scale of agriculture. They live in caves in winter and they live in tents in Summer. They cultivate wheat, barley and some pulses. They raise animals and depend mainly on dairy products for their nutrition. In addition to this they buy some canned food from the village of Umm Sayhoun. They have many children and their children go to school in Umm Sayhoun, but they leave school to work with their parents. Girls marry at early age.

Men are the head of the family and they work mainly in herding the stock and in cultivation of plants. There barely have jobs in tourism or state. Women take care of children and house and they still practice some of the traditional rural jobs like manufacturing pottery vessels, making dairy products and weaving carpets. They are very productive and they work hard in the field and the household. They have many children, too. Most of the inhabitants in Stooth Al Naby Harun are children. They have the problem of going to the school because of the long distance. Girls marry at small age. There are 16 families there consisting of 140 individuals.

One can notice that the area where they live is not polluted and it is clean and they take care of environment. Their lifestyle is barely influenced by tourism. They still wear traditional clothes and none of them drink Alcohol or addicted to drugs.

### **Conclusion**

The comparison of the Bdoul who live in Stooth Al Naby Harun and between the Bdoul who live in Umm Sayhoun is the main focus of this research. The goals are to understand the causes leading to the differentiation of the lifestyles between these two groups who were originally from the same tribe. Much of the research, including stories and the narrations, of the Bdoul

about their origins and the etymological meaning of their names and about the time they arrived at Petra are a mixture of foreign archaeologists and local communities and each dealing with a kind of mythological perception of themselves and others. The uniqueness of the city of Petra in terms of its landscape, colorful cliffs, canyons and exquisite monuments have always inspired people with strange ideas about the builders of this archaeological site. This fact has led to many controversial theories about Nabataeans. When Swiss scholar, Johann Ludwig, visited the site he was bewildered by the monuments and by the amazing nature of the stone and cliffs. His skewed writings mainly reflect his ideas about the architecture and the material remains of the old inhabitants of Petra lack the interest of the actual humans that occupied it.

The Bdoul in Umm Sayhoun changed from semi nomadic lifestyle to rural settled lifestyle. Still, even the rural lifestyle is not very authentic since it is heavily based on the foundation of Tourism. Almost all of their income depends on commercial tourism. Also, in fact, they don't cultivate any crops, which means that using the term 'rural' is somewhat misleading. When the Petra Regional Authority forced the Bdoul from Petra to Umm Sayhoun, not much consideration was given to wellbeing of the people as they were more concerned about saving the site from the daily activities of the Bdoul. This displacement led the Bdoul to complete dependence on Tourism for income. Bad management of Umm Sayhoun has led to a number of social ills in a number of Bdoul like addiction to drugs and alcohol. Unesco created a great management plan for Petra, including in it Umm Sayhoun, but not enough care was given to ensure its success.

The Bdoul living in Stooth Al Naby Harun is more natural, as is evidenced by their growing of cereals and pulses. In addition to growing wheat, barley and lentils, they also raise livestock. Their refusal to leave Petra has allowed them to conserve much more their traditions in a sustainable manner. In contrast to the Bdoul from Umm Sayhoun, this group has very little interaction with tourists because of the difficulty involved to reach the tourist destination at the top of a hill known as Harun Tomb. Thus many in this community are not influenced as heavily as the counterparts in Umm Sayhoun.

It's a sad story, I think, because this community of Bdoul that were displaced are a living and breathing people. And when we think about archaeological sites, we should also consider the people living in and around them because their lives will be affected by any plans restoration and protection. They could also be the best people to save the site from more deterioration instead of displacing them because of fear that they are themselves deteriorating the site. And when we visit the site of Naby Harun, we see that it is clean and free of debris because the Bdoul who stayed there take care of the land. In the future, it would be nice if communities living near archaeological sites are given more consideration as to their importance to the site.

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# On the UNESCO World Heritage route. Characteristics and behaviours of visitors to the University of Coimbra's Botanical Garden

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## Abstract

The distinction of sites/assets as World Heritage represents a significant opportunity for tourism, resulting in significant positive synergies. The UNESCO (United Nations Educational, Scientific and Cultural Organization) World Heritage List contains a myriad of natural and cultural sites, many of which are actually some of the best known tourist destinations on a global scale. Gardens are also on this list, as individual sites or as part of heritage cluster. The University of Coimbra Botanical Garden is one such case. Since 2013 it has been included in a classified cluster, the University of Coimbra - Alta and Sofia. In order to find out the socio-economic and demographic profile of visitors to this historical garden, as well as their interests, motivations, visiting habits and behaviours, a questionnaire survey was applied to 200 visitors during a one year period, beginning in March 2013. The results show that the garden attracts mainly young people and relies heavily on the Portuguese market, particularly local residents and people associated with the University. People visit the garden essentially for peace, calm, rest and leisure, so visitors simply looking for a pleasant and well-spent day/time account for more than half of all respondents. There is evidence of repeat visitors who mostly come weekly or monthly, and even though the garden integrates the visitors' routes it is not wholly incorporated within the classified heritage route.

## Keywords

Botanical Garden; University of Coimbra; World Heritage; Visitors; Profile; Motivations.

## 1. Introduction

The Convention for the Protection of World Heritage was launched by UNESCO in 1972 and is deemed an undeniable success in two areas: the classifying of sites/assets as World Heritage is both a means of protecting heritage of exceptional value, and it also provides a wealth of opportunity for tourism, which sees heritage as one of its key resources.

Gardens are fixture in cultures, societies and civilisations of every kind as they transcend the very concept of space and time. They span eras and absorb the different tendencies and influences. Thus, as expressions of the period of civilization of each culture they are representatives of each period in human history (Weiss, 2011), in the most varied domains, whether social, cultural, political or economic, and provide important historical and cultural evidence. However, although they are one of the richest manifestations, they are also the most delicate and fragile expression of cultural and landscape heritage, since they are considered living monuments, perishable with time and use, and there is a general perception that there is an urgent need to learn about, preserve, protect and value this heritage. And having their heritage value recognized and protected by various entities and institutions, especially UNESCO, has in most cases been a way to preserve them and enhance their value.

The UNESCO World Heritage List currently includes more than a thousand cultural sites (77.4%) and natural sites (19.3%) plus 3.3% of a mixed nature, many of them with great tourist appeal as true symbols of national and cultural identity. A number of parks and gardens

feature on the list as separate sites, as part of a monument or as part of a larger, classified heritage cluster site. This is the situation of the University of Coimbra Botanical Garden (UCBG), which falls within the classified cluster called University of Coimbra - Alta and Sofia. It has been included on the prestigious World Heritage List since 2013, although most members of the public are not aware of it.

The purpose of this work is to analyse the characteristics and behaviours of visitors to the UCBG in terms of their socio-economic and demographic profile, interests, motivations, habits and behaviours when visiting and what else visitors do on the day they visit the garden.

The research approach was supported by a review and discussion of the scientific literature on the area, the collection and processing of the statistical information and application of the questionnaire.

Thus, this article is structured in four sections. In the first one, the background to the holding of the World Heritage Convention and its original premises are explained. The focus of these premises was conservation and preservation, but they are gradually being overtaken by the importance of tourism, seen as an essential form of valuing this heritage. Section two explores the garden, a landscape designed and created deliberately by Man, as World Heritage. It describes those which, individually or as adjuncts to monuments, enjoy this distinction. It draw attention to the classification criteria and to their exceptional features. The remaining sections set out the methodology used, and this is followed by the presentation and discussion of some of the results of the research. The focus here is on the visitors to the UCBG. The last section assembles and summarizes the main conclusions that can be drawn.

## **2. World Heritage: from conservation and protection to valorization by tourism**

“The cultural and natural heritage is among the priceless and irreplaceable assets, not only of each nation, but of humanity as a whole. The loss, through deterioration or disappearance, of any of these most prized assets constitutes an impoverishment of the heritage of all the peoples of the world. Parts of that heritage, because of their exceptional qualities, can be considered to be of “Outstanding Universal Value” and as such worthy of special protection against the dangers which increasingly threaten them” (UNESCO, 2016: 1). The confirmation of the real threat of degradation and destruction of cultural and natural heritage, the impoverishment of the cultural heritage of the peoples that it represents and the inadequacy of multi-level protection mechanisms have led to a global awareness of the need to protect and preserve our heritage, especially that which is of exceptional universal value. Such action is entrusted to the international community as a whole, through the granting of collective assistance without, however, replacing the action of the State (UNESCO, 2016).

It is in this context that the World Heritage Convention was held in 1972. Its basic premises reflected the need to ensure the most effective protection and conservation and the most active development of the cultural and natural heritage of each country. Concepts and guidelines were established as to what should be recognized as World Heritage. This includes works of outstanding interest, sometimes the sole examples, which must be regarded as belonging not only to the countries in which they are found, but to all Humanity (UNESCO, 2016).

Candidate sites for the World Heritage List must meet at least one of the established selection criteria. These are regularly reviewed by the World Heritage Committee to reflect the evolution of the World Heritage concept itself<sup>22</sup>. And, given the specificity and scope of the criteria to be met before heritage properties are inscribed on the List, their potential to become attractions is clear, and they are thus of recognized importance for tourism (Rakic, 2007; Okech, 2010; Su and Lin, 2014). This honour is both a marketing tool for creating an image (Okech, 2010), and a seal of authenticity for the cultural tourist (Rakic and Leask, 2006, cited by Rakic, 2007). It is seen worldwide as a recommendation/invitation to visit these places (Poria et al., 2013), and is even one of the main incentives encouraging the arrival of tourists (Yang et al., 2010). It consequently drives the growth of local tourism markets (Patuelli et al., 2013), thereby giving rise to true icons of national and cultural identity (Sharckley, 2006). And here we find authors who uphold and confirm this relationship. This is the case of Su and Lin (2014) who investigated the relationship between World Heritage sites and world tourism demand and reported that a country that has such heritage will see more international tourists arrive, and that the positive effect is slightly greater for natural sites than for cultural sites. So, a country with World Heritage property will benefit from the development of its tourism economy. Farid (2015) reported similar findings with respect to Mali and Ethiopia, and found a positive relationship between the presence of World Heritage sites and an increase in tourists.

In fact, since the implementation of this Convention, distinction as World Heritage has contributed consistently to the conservation and preservation of heritage, playing an important role in promoting heritage recognition and management in many regions of the world (Rössler, 2007). It has rescued many sites from abandonment and destruction. However, sometimes the results do not turn out exactly as expected (Kim, 2016), and these sites are sometimes victims of their own success. One of the main purposes of creating World Heritage status was conservation, but it has become more important for tourism purposes, so today heritage professionals are more concerned with the fact that World Heritage is increasingly popular with tourists and on issues related to the balance between conservation and tourism in classified sites (Rakic, 2007).

Borg et al. (1966) drew attention many years ago to the duality of the effects produced by attracting many tourists to heritage properties in that they generate benefits but also incur costs. The authors note that tourism can threaten the vitality of local economies, the integrity

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<sup>22</sup> Until 2004 candidate properties were chosen on the basis of six cultural criteria and four natural criteria. Currently there is one set of ten criteria: i) to represent a masterpiece of human creative genius; ii) to exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town-planning or landscape design; iii) to bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared; iv) 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; v) to be an outstanding example of a traditional human settlement, land-use, or sea-use which is representative of a culture (or cultures), or human interaction with the environment especially when it has become vulnerable under the impact of irreversible change; vi) to be directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance; vii) to be outstanding examples representing major stages of earth's history, including the record of life, significant on-going geological processes in the development of landforms, or significant geomorphic or physiographic features; viii) to be outstanding examples representing significant on-going ecological and biological processes in the evolution and development of terrestrial, fresh water, coastal and marine ecosystems and communities of plants and animals; ix) to contain superlative natural phenomena or areas of exceptional natural beauty and aesthetic importance; x) to contain the most important and significant natural habitats for in-situ conservation of biological diversity, including those containing threatened species of outstanding universal value from the point of view of science or conservation (UNESCO, 2017).

of heritage properties and the quality of life of local residents. Measures to control and guide the flow of visitors must be implemented. In most cases, the recognition of sites as World Heritage leads to an increase in tourist numbers (Sharckley, 2006; Yang et al., 2010; Su and Lin, 2014; Farid, 2015). However, a number of constraints and threats to these sites underlie this increase. Recently, Kim (2016) examined the relationship between World Heritage designation and community sustainability in a historic village (Hahoe Village, Korea, inscribed in 2010). Based on the residents' perception of increased tourism, he identified the positive and negative impacts. He noted, in particular, the increased pace of change in the industrial base of the village and the influx of strangers, the deterioration of the quality of life (in physical aspects) caused by increased tourism and the prospect of conflict fuelled by the tension between preserving the historical surroundings of the village and developing tourism. Regarding World Heritage of a natural nature, Borges et al. (2011) saw increased visitor pressure as one of the most crucial issues arising from this status, along with increased traffic and the consequent pollution that can affect/change the safety, integrity, and physical characteristics of a site. The Galapagos Islands are one example of the direct and indirect impacts of tourism, having been included on the list of heritage sites at risk between 2007 and 2010. However, the authors see the development of tourism in natural sites that are World Heritage as a benefit if it is well planned and managed so that it generates various economic, social and environmental benefits.

Thus, despite the overall positive effects of stimulating increased economic growth and social and cultural, local and regional development that greater visitor numbers provide (Sharckley, 2006; Rakic, 2007; Rössler, 2007; Okech, 2010; Yang et al., 2010; Jimura, 2011; UNESCO, 2014), other authors dispute this generalized positive relationship between World Heritage and tourist flows (Patuelli et al., 2013). They question the true effect and effectiveness of this "brand" on the development of territories and communities, the image of a country/territory and the behaviour of tourists (Poria et al., 2010), especially if there is no site management plan in place to ensure sustainability and provide appropriate infrastructure (Borges et al., 2011; Farid, 2015). Following the study by Poria et al. (2010), the authors reveal that the title of World Heritage does not work like a magnet for tourists, and it even has a negative association - "overcrowded" - to these spaces.

Regarding the impacts of the classification of the University and *Alta de Coimbra* on tourism, Martins (2014) concluded that although retailers recognize the positive effects of classification in the city and the classified area, this is not necessarily demonstrated in their establishments. In a similar vein, Soldado (2015) also found divergent opinions as to the effect of this status on the life and economy of Coimbra. Thus, while on the one hand we can see greater numbers in some activities/sites, especially in the classified area, on the other, outside this area, there is a lack of dynamism, because although many excursions come and go, there is no consumption. According to the author, the UNESCO effect is more visible in the University, which has seen tourism revenues increase by 40% since 2013, with 2 million euros having been raised from the sale of tickets and merchandising in 2014. Maurício (2014) noted that the first indicators expressing the effectiveness of the promotion of place in the configuration of territorialities and perceptual maps related to the World Heritage distinction and the tourist dynamics of Coimbra are beginning to appear.

### 3. Gardens as World Heritage

Gardens are as ancestral as Humanity itself and represent the materialization of the ancient relationship between Man and Nature. Thus, according to Kimber (2004), gardens have become artefacts and elements of the cultural landscape. They are consequently cultural, artistic and historical documents of great importance in the preservation and strengthening of the cultural memory and collective identity of a society (Andrade, 2008). According to Doolittle (2004), they thus transcend time, culture, the environment/nature, gender and thought. The fact that they bring together the natural and cultural components turns them into widely visited attractions, and visiting them becomes an experience (Connell, 2002).

According to the World Heritage Convention, the cultural landscape represents the joint work of Man and Nature; it bears witness to the evolution of human society and its establishment over time, under the influence of physical constraints and restricted opportunities. These are the product of the natural environment and successive social, economic and cultural forces, external and internal and encompass the diversity of manifestations resulting from the interaction between man and the natural environment.

Cultural landscapes were thus included in three categories:

- I. landscapes designed and created by man;
- II. landscapes that evolved organically;
- III. associative cultural landscape.

Gardens and parks built for aesthetic reasons and often associated with religious buildings, monumental buildings and clusters are now included in the category of cultural landscapes intentionally created by man (i) (UNESCO, 2016).

More than one thousand cultural, natural and mixed heritage properties are on the World Heritage List, and most of them fall within the category of cultural sites. Gardens also have a place on this list; some of them are world-famous and they are therefore very popular tourist attractions. It should be noted that at present, introducing the word 'garden' in the search field of the World Heritage List results in a reference to 169 properties (165 cultural, 3 natural and 1 mixed). Most are not mentioned under their names since many of them benefit from this distinction from their inclusion in heritage clusters and/or historic centres, such as Generalife (Spain).

Just over twenty gardens feature on this List as individual or spaces attached to monuments (Table 1), whose gardens cannot be detached from the building cluster precisely because they confer an additional value to the property.

The Park of Versailles was the first to appear on the List in 1979, but the 1990s was the most prolific in distinguishing gardens/parks as World Heritage, and Germany and Italy have the highest number of classified gardens. About half are the masterpieces of a creative genius (i), a considerable number are outstanding examples of a type of building, architectural or technological group or landscape which illustrate one or more significant periods of human history (iv), and almost all exhibit an important interchange of influences in a particular period and/or cultural area (ii).



Table 1 – Gardens distinguished as World Heritage.

| Country        | Garden  | Criteria                    | Classification Year |
|----------------|---|-----------------------------|---------------------|
| Australia      | Royal Exhibition Building and Carlton Gardens             | (ii)                        | 2004                |
| Austria        | Palace and Gardens of Schönbrunn                          | (i) (iv)                    | 1996                |
| China          | Classical Gardens of Suzhou                               | (i) (ii) (iii) (iv)         | 1997/2000           |
|                | Summer Palace, an Imperial Garden in Beijing              | (v)                         | 1998                |
| Czech Republic | Gardens and Castle at Kroměříž                            | (i) (ii) (iii)<br>(ii) (iv) | 1998                |
| France         | Palace and Park of Fontainebleau                          | (ii) (vi)                   | 1981                |
|                | Palace and Park of Versailles                             | (i) (ii) (vi)               | 1979                |
| Germany        | Bergpark Wilhelmshöhe                                     | (iii) (iv)                  | 2013                |
|                | Muskauer Park/Park Mużakowski                             | (i) (iv)                    | 2004                |
|                | Garden Kingdom of Dessau-Wörlitz                          | (ii) (iv)                   | 2000                |
|                | Palaces and Parks of Potsdam and Berlin                   | (i) (ii) (iv)               | 1990/92/99          |
|                | Würzburg Residence with the Court Gardens...              | (i) (iv)                    | 1981                |
| India          | Humayun's Tomb, Delhi (Garden Tomb)                       | (ii) (iv)                   | 1993                |
| Iran           | The Persian Garden  | (i) (ii) (iii) (iv)         | 2011                |
|                |   | (vi)                        |                     |
| Italy          | 18th-Century Royal Palace at Caserta with the Park...     | (i) (ii) (iii) (iv)         | 1997                |
|                |   | (ii) (iii)                  | 1997                |
|                | Botanical Garden of Padua                                 | (i) (ii) (iii) (iv)         | 2001                |
|                | Villa d'Este, Tivoli                                      | (vi)                        | 2013                |
| Japan          | Medici Villas and Gardens in Tuscany                      | (ii) (iv) (vi)              |                     |
|                | Hiraizumi – Temples, Gardens and Archaeological Sites...  | (ii) (vi)                   | 2011                |
| Pakistan       | Fort and Shalamar Gardens in Lahore                       | (i) (ii) (iii)              | 1981                |
| Singapore      | Singapore Botanic Gardens                                 | (ii) (iv)                   | 2015                |
| Sweden         | Birka and Hovgården                                       | (iii) (iv)                  | 1993                |
|                | Skogskyrkogården  | (ii) (iv)                   | 1994                |
| United Kingdom | Royal Botanic Gardens, Kew                                | (ii) (iii) (iv)             | 2003                |
|                | Studley Royal Park including the Ruins of Fountains Abbey | (i) (iv)                    | 1986                |

Source: Prepared by the authors, based on UNESCO (2017)

Most of these gardens meet more than two criteria for their classification. The Classical Gardens of Suzhou, the Vila d'Este and the Persian Garden (Figure 1) are those with the most criteria (five in all) in this group. For the first, it is noted that "(...) This embodiment of artistic perfection has won them a reputation as the most creative gardening masterpieces of ancient China. (...) Its planning, design, construction techniques, as well as artistic effect have had a significant impact on the development of landscaping in China as well as the world. (...) are the most vivid specimens of the culture expressed in landscape garden design from the East Yangtze Delta region in the 11th to 19th centuries". According to UNESCO, "The gardens of the Villa d'Este had a profound influence on the development of garden design throughout Europe. (...) are among the earliest and finest of the giardini delle meraviglie and symbolize the flowering of Renaissance culture". And the Persian Garden was recognized as "(...) masterpiece of human creative genius. (...) exhibits an important interchange of human values, having been the principal reference for the development of garden design in Western Asia, Arab countries, and even Europe. (...) bears exceptional, and even unique, testimony to the cultural traditions that have evolved in Iran and the Middle East over some two and a half millennia. (...) has

become a prototype for the geometrically-designed garden layout, diffused across the world” (UNESCO, 2017).



Figure 1 – Classical Gardens of Suzhou, Vila d’Este and Persian Garden.

Source: UNESCO (2017)

It is also worth mentioning that the gardens of Schönbrunn were distinguished because they are a particularly well preserved example of the Baroque (i), as are the gardens of Kroměříž; while the Imperial Garden in Beijing is considered to be a powerful symbol of one of the world's major civilizations (iii).

Botanic gardens are different from others because of their scientific basis, so they are typically, even simplistically, associated with environmental conservation, education/research and historical interpretation. Although these aspects are important, studies show that visitors to botanical gardens often go there for recreational and entertainment reasons (Wassenberg et al., 2015), thus attesting to the importance of their recreational function (Crilley, 2008; Ward, et al. 2010; Karasah and Var, 2013).

This List includes three botanical gardens (Padua, Kew and Singapore) that are pioneering in terms of both conservation and tourist appeal. The Botanical Garden of Padua (sixteenth century) is acclaimed as a source of inspiration for many other gardens in Italy and throughout Europe (ii), as well as for being a scientific and cultural attestation of outstanding significance (iii). Kew Gardens (eighteenth century) are recognized for their enormous contribution to advances in many scientific areas, in particular botany and ecology (iii), while the Singapore Botanic Gardens (nineteenth century) was distinguished for its role as a centre for plant research in Southeast Asia since the nineteenth century (ii) and for being a first-rate example of a British tropical colonial botanic garden (iv) (UNESCO, 2017).

All these gardens embody an individual value that set them at the highest level of heritage importance such that they are recognized from a world point of view, and they are therefore hugely popular tourist attractions. Take the case of Versailles, which has about 6 million visitors and is the fourth most important tourist site in France (MEF/DGE, 2016) and Kew which, with 1.6 million visitors in 2015, became the third most popular paid attraction in England (VisitEngland, 2016).

In Portugal, some of the World Heritage Sites, particularly historic centres and/or heritage sites, include gardens, or else they are covered by the protection areas of the property. It is worth noting the extensive series of gardens and parks that make up the Sintra Cultural Landscape (garden of the National Palace of Sintra, Seteais and Pena, Quinta da Regaleira, Penha Verde, Ribafrias and Monserrate), that are, according to UNESCO (2017), a unique

combination that influenced the development of landscape architecture throughout Europe, and the University of Coimbra Botanical Garden, which is one of the elements of the Alta/University classified area.

### 3.1. University of Coimbra Botanical Garden

The University of Coimbra Botanical Garden (Figure 2) was created in the eighteenth century. It was an initiative of the Marquis of Pombal following the reform of the University of Coimbra, and the main objective was to bolster the study of natural history and medicine. It only opened to the public in the nineteenth century. It is organized in two main areas, the formal/classical part composed of six terraces (3 ha), polarized by the central square, and the informal part composed of the woodland/arboretum (10 ha) that stretches down the slope and is described as a botanical garden in the Baroque style, with axes and formal gardens with a regular geometric outline, forming a *parterre* layout (Carita and Cardoso, 1987; Brites, 2006; Reis and Trincão, 2014). This is the second oldest botanical garden in Portugal and one of the oldest in Europe.



Figure 2 – Botanical Garden of the University of Coimbra.

Source: Authors (2012-2015)

This garden is one of the most important attractions in Coimbra. A study conducted by Simões (2009) identified the UCBG (55.0%), the University (92.5%), Historic Centre (84.4%) and Sé Velha (71.9%), as the most visited places in the city of Coimbra. It is a garden with free admission to the public, where only visitors who came with guided tours were registered. An average figure of more than 7000 visitors was reported up to the closure of this service, in 2012 (Figure 3).

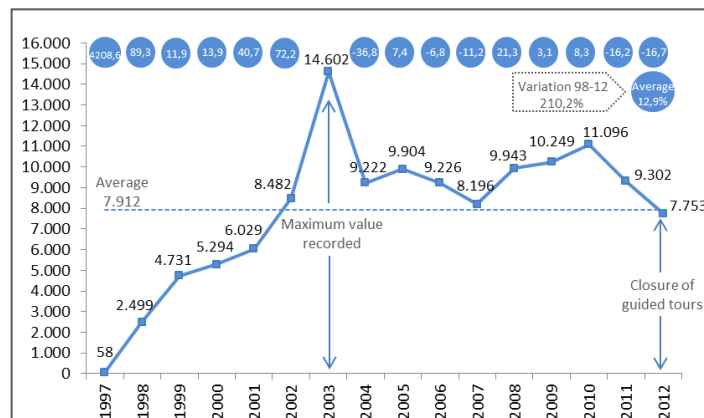


Figure 3 – Visitors on guided tours of the University of Coimbra Botanical Garden.

Source: Prepared by the authors, based on Tavares (2015)

Its importance is also borne out by its inclusion in GardenVisit<sup>23</sup>, it is featured in leading garden guides and in more than 21% of the national and international garden tours mentioned for mainland Portugal between 2011 and 2016 (Silva and Carvalho, 2014; Silva 2016). It was also awarded one of the highest potential tourist values (36) of all the gardens considered, the highest given to a botanical garden by a study carried out in the late 1990s<sup>24</sup> (Castel-Branco, 1998).

UCBG was classified as a Building of Public Interest in 1996 and has enjoyed UNESCO World Heritage status since June 2013, as it is part of the University of Coimbra - Alta and Sofia (Figure 4).

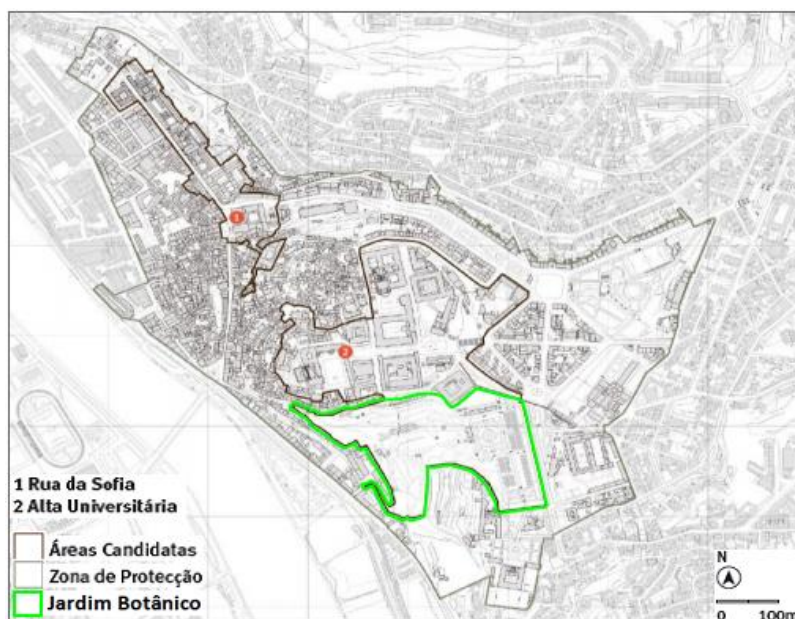


Figure 4 – Area classified as World Heritage in Coimbra; boundary of the UCBG.

Source: Adapted from World Heritage/UC(2015)

#### 4. Methodology

The purpose of the study was to find out the socio-demographic and economic profile of the visitors and the characteristics of the visit to the garden. For this, a questionnaire survey was devised and applied to 200 visitors to the UCBG, in person by the researcher, and also available online for one year (March 2013 to February 2014). It was collected a sample for each month based on a combination of the two sources (number of visitors on a guided visit (2005-2012) and the flow of tourists/visitors (foreign and national) using Coimbra's Tourist Offices (2005-2012)). The information was processed, entered into a database and analysed using the SPSS statistical analysis program.

<sup>23</sup> GardenVisit (The Garden and Landscape Guide) is the most useful international specialization site on gardens, products for gardens and gardening, history, theory and landscape architecture (winner of the *Best Garden Tourism Website* award in 2013). It has a database of the world's gardens and nurseries and also recommends garden tours. There are currently more than 30 Portuguese gardens in the database, besides the UCBG.

<sup>24</sup> This study was a survey of historical gardens undertaken for tourism purposes proposed by the Tourism Fund. It was carried out by a team of landscape architects and featured about 120 gardens. Only five gardens rank higher than UCBG in terms of tourism value, and three have the same value (Castel-Branco, 1998).

## 5. Characterization of visitors and visit to the UCBG

### 5.1. Visitor Profile

Most of the visitors are on a day trip (58%), live in Portugal (60%) and are often local residents. There is a concentration of people living near the garden (54% of visitors live in Coimbra), which thus justifies the recreational walk (39%) as the chief reason for leaving the house given by the respondents. Tourists account for less than half the visitors, and they mostly come from Spain (15%), Brazil (13%), France (11%), Germany (9%) and the UK (8%), who report being on a holiday (84%) of a cultural nature (79%).

Female visitors predominate (60%) along with people who have higher education qualifications (58%). The young-adult age group (18-39), number about 64%, especially in the 18-24 age range (33%), and people of working age/in work are well represented (47%), especially in the large group 2 – specialists in intellectual and scientific activities (27%), and students/researchers are another significant group (37%).

The facts that the garden is freely open to the public, free of charge, and located near the University influence the type of visitor that it attracts, i.e. younger people, a lot of students and local residents, thus making it an integral part of the "social and academic life" of these groups. Free admission and freedom of access also make it attractive to people with lower academic qualifications (about 34% with 1st cycle to secondary education), semi-skilled and unskilled professions (13%) and jobless people (6%), as well as retired people whose economic resources are inherently lower.

The UCBG is undoubtedly part of the life of the city, its people and its "temporary guests". Despite this overall profile, there are some differences in the sub-groups, as shown in Table 2. Tourists are more likely to be adult/elderly and have higher qualifications, while day-trippers are younger, with a high incidence of students/researchers. In the high season, foreign visitors are more numerous, even though day-trippers resident in Portugal predominate; Brazil is the second most common source country of the visitors, and there is also a higher prevalence of retired people. In the low season the garden mainly attracts Portuguese visitors and a larger number of day-trippers. Spain is the next most common source country of visitors, and this period sees a higher proportion of unemployed people visiting than the high season.

Table 2 – Socio-demographic and economic profile by visitor group.

| Visitor groups            | Socio-demographic and economic profile   |
|---------------------------|--|
| <b>Tourists (43%)</b>     | Foreign nationality (92%); resident in Spain (15%) and Brazil (13%); women (60%); aged 25-29 (19%); aged 65+ (15%); graduate (32%); in work/employee (58%); student/researcher (22%); retired (18%)                      |
| <b>Day-trippers (58%)</b> | Portuguese (78%); resident in Coimbra (57%); women (59%); aged 18-24 (45%); high school (40%); student/researcher (48%); in work/employee (38%)  |
| <b>High season (73%)</b>  | Foreign nationality (55%); day-trippers (53%); resident in Portugal (56%), Brazil (7%) and Spain (6%); women (63%); aged 18-24 (35%); high school (35%); in work/employee (47%); student/researcher (37%); retired (12%) |
| <b>Low season (28%)</b>   | Portuguese (56%); day-trippers (69%); resident in Portugal (73%), Spain (7%), France and Germany (6%); women (51%); aged 18-24 (27%); graduate (27%); in work/employee (46%); student/researcher (36%); unemployed (11%) |

Source: Prepared by the authors based on the questionnaire (2013/2014)

The public visiting the UCBG gave reading (61%) and walking/strolling (52%) as the main recreational activities engaged in and historical/cultural heritage (66%) and museums (59%) as the tourist attractions they mostly visited. Although about half of them have a garden at home (51%) and enjoy gardening (51%), regularly visit gardens (72%) and have visited various greenhouses (75%) and nurseries/garden centres (47%), it was found that the respondents did not have a more specific interest in gardens, flora/botany or design (12%), with just over 1/3 (39%) expressing a general interest and over half (55%) defining themselves as visitors who simply wanted to have a pleasant day/time.

## 5.2. Visiting the UCBG: motivations and behaviours

Although the garden was not the main reason for getting out of the house, it is an intrinsic part of daily life, as already mentioned, and perhaps because of this, the visit was decided more impulsively on the same day (67%), and it is by no means discouraging that the visit is unplanned (48%). Indeed, it appeared that the garden was part of an organized route, with 44% of the respondents having already visited other attractions before coming to the garden (University – 71%; *Sé Velha* [old cathedral] – 19%; city/historic centre – 16%) and 42% visited other attractions after the garden (University – 22%; city/historic centre – 15%; *Santa Clara-a-Velha* monastery – 13%) (Figure 5).

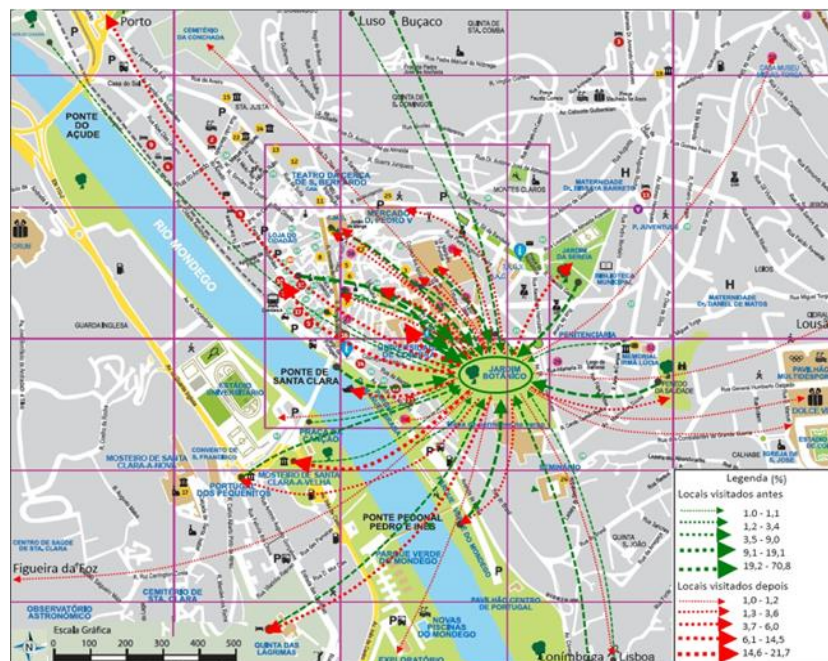


Figure 5 – Attractions/Places visited before and after the UCBG visit on the day of responding to the questionnaire.

Source: Prepared by the authors based on the questionnaire (2013/2014)

Gardens mean something different to each of us and this is why the reasons for a visit vary from person to person and are, indeed, quite fragmented, according to Connell (2002). This makes it difficult to identify and isolate motives for visiting gardens. According to Connell (2004: 232), “(...) motivation and experiences result from a multi-faceted range and combination of factors”. She sees them as intrinsically linked to emotions, attitudes and really personal factors, plus more tangible aspects related to how the attraction is managed. Decoding and understanding these experiences is thus an arduous task.

Likewise, it can be ascertained that there were various reasons for visiting the garden. However, peace, quiet and rest (54%) along with spending leisure time (42%) stood out from the rest. The natural setting (37%) and nice weather for a walk (33%) were also mentioned by many of the respondents (Table 3).

There were some differences in terms of reasons for the visit compared with Ballantyne et al. (2008), Ward et al. (2010) and Karaşah and Var (2013) who also focused on botanical gardens. While the more general motivations feature for the UCBG, relating to a more individual dimension, in the cited studies these are joined by more specific reasons such as exercising and picnicking (Ward et al., 2010), finding out about plants (Karaşah and Var, 2013) and the reference to the collective, in spending quality time with family and friends, which is the third main reason in Ballantyne et al. (2008) but is only sixth for the UCBG.

The main reasons for visiting are practically mirrored in the defined visitor groups. However, it should be noted that in the tourist group the natural setting is the second most mentioned reason and simple interest is widely mentioned, too, more than it is by the day-trippers. Day-trippers say have occupying leisure time in second place, and good weather for a stroll as well as spending quality time with family and friends are more important than they are for the tourist group. Note that although having a fairly low relative weight, reasons related to the different flower species and the architecture/design of the garden are mostly specified by tourists.

There is a higher prevalence of visiting to admire the scenery and atmosphere in the high season than in the low season. In the low season, a visit to spend leisure time takes priority, while the larger representation of good weather for a walk is the third most mentioned reason is interesting. Visitors with a general interest mainly indicate peace, quiet and rest, but good weather to stroll and admire the scenery and atmosphere have a good representation, higher than that registered in the other two groups. Among those visitors who defined themselves as having a specific interest in gardens (botanical and design) a visit because of the different flower species or out of simple interest have a greater weight; the group that is only seeking a pleasant day visits the garden essentially for reasons of peace, quiet and rest (Table 3).

The Florence Charter establishes that gardens are designed to be seen and wandered around (ICOMOS, 1982), so they have a broad social role, and are themselves social spaces (Fox and Edwards, 2008) that offer excellent opportunities for all kinds of activities that involve socializing, sharing experiences with family and friends, meeting people, walking, learning or just being (Thompson et al., 2007). There are thus a number of ways to “consume” and enjoy these spaces, resulting from their intrinsic social and recreational character.

The analysis of the data relating to the UCBG boosts this idea by confirming a wide and varied range of activities. However, taking photos (61%), chatting (55%), looking at plants (47%) or simply being (36%) are some of the activities most mentioned by the visitors surveyed, and it was found that the more passive dimension clearly overlaps the more active one (Table 4; Figure 6). These results are in line with other similar studies, apart from that by Ward et al. (2010), who found exercise was an important activity, too.

Table 3 – Reasons for visiting the UCBG (%) (total and by visitor group).

| Reason                        | Total | Visitor group |              |                  |                   |                  |             |            |
|-------------------------------|-------|---------------|--------------|------------------|-------------------|------------------|-------------|------------|
|                               |       | Tourists      | Day-trippers | General interest | Specific interest | Pleasant day out | High season | Low season |
| Occupy free time              | 41.5  | 28.2          | 51.3         | 38.4             | 47.1              | 43.9             | 37.2        | 52.7       |
| Natural environment           | 36.5  | 48.2          | 27.8         | 43.8             | 35.3              | 29.6             | 38.6        | 30.9       |
| Peace, quiet, rest            | 54.0  | 55.3          | 53.0         | 56.2             | 47.1              | 54.1             | 55.2        | 50.9       |
| The different plant species   | 10.0  | 10.6          | 9.6          | 11.0             | 17.6              | 6.1              | 9.0         | 12.7       |
| Good weather for walking      | 33.0  | 27.1          | 37.4         | 34.2             | 29.4              | 32.7             | 29.7        | 41.8       |
| Garden design/architecture    | 2.0   | 4.7           | 0.0          | 2.7              | 0.0               | 0.0              | 2.1         | 1.8        |
| Fame of the garden            | 9.5   | 18.8          | 2.6          | 11.0             | 23.5              | 5.1              | 9.7         | 9.1        |
| Admire the scenery/atmosphere | 24.0  | 32.9          | 17.4         | 30.1             | 23.5              | 20.4             | 25.5        | 20.0       |
| Spend some quality time       | 19.5  | 18.8          | 20.0         | 19.2             | 29.4              | 17.3             | 17.9        | 23.6       |
| Interest                      | 18.0  | 34.1          | 6.1          | 19.2             | 35.3              | 12.2             | 16.6        | 21.8       |
| Other reasons provided        | 24.5  | 18.8          | 18.3         | 23.3             | 29.4              | 25.5             | 23.4        | 27.3       |
| Others                        | 14.5  | 9.4           | 18.3         | 12.3             | 17.6              | 17.3             | 14.5        | 14.5       |

Source: Prepared by the authors based on the questionnaire (2013/2014). Note: % of all respondents (total and total in each group)



Figure 6 – Activities undertaken in the University of Coimbra Botanical Garden.

Source: Authors (2012-2015)

Still in terms of habits and behaviours (Table 4), we find that members of the public visiting for the first time (45%) are exceeded by repeat visitors (55%). They mostly visit on a weekly (32%) or monthly (32%) basis, at a weekly interval (30%) or on no particular day of the week (30%), with the visit lasting about an hour (42%) and between 1 and 2 hours (32%). Couples (40%) and groups of friends (23%) are the most frequent visitors to the UCBG, although a significant proportion visit on their own (29%). That facts that admission is free and that the garden is close to the university campus provide an environment where relations of this kind develop and thrive, and thus explain this tendency in terms of companionship.



Furthermore, almost 75% of the visitors are only there to visit the garden and do not take in other attractions; more than 90% do not take advantage of the existing amenities, the sky garden, nor do they participate in the activities available to the public, which reveals a gap between what is offered and what the public needs.

It is in the tourist group that we tend to find that the garden was the first reason for the trip, being a planned visit, made for the first time, with a companion, most often the spouse. For 75% of day-trippers the garden was not the main reason for the trip. There was a higher percentage of repeat visitors in this group, with the visit tending to last longer and be in the company of friends. Similarly, in the low season there were more visitors saying the garden was the main reason for the trip, who decided to visit on that day and who spent more time in the garden, essentially in the company of friends, and also on their own. There was also a higher percentage of repeat visitors in the low season who would visit every month and who were mostly accompanied by their spouse or boy/girlfriend (Table 4).

Table 4 – Habits and behaviours of visit to UCBG by visitor group.

| Visitor group                 | Habits and behaviours   |
|-------------------------------|---|
| <b>Tourists<br/>(43%)</b>     | It wasn't the main reason for going out (68%); planned visit (67%); decided to visit today (58%); take pictures (79%), look at plants (59%) and chat (57%); first time (89%); about 1 h (47%); with companion(s) (81%); spouse (31%)  |
| <b>Day-trippers<br/>(58%)</b> | It wasn't the main reason for going out (75%); unplanned visit (58%); decided to visit today (73%); talk (53%), take pictures (48%) and just be (48%); has visited other times (88%); monthly visit (30%) and weekly visit (29%); week and weekend (28%), only during the week (27%); about 1 h (37%) and more than 2 h (10%); with companion(s) (64%); friends (24%) and alone (36%) |
| <b>High season<br/>(73%)</b>  | It wasn't the first reason for going out (73%); planned visit (50%) and unplanned (50%); decided to visit today (69%); take pictures (60%), chat (52%) and look at plants (44%); has visited other times (52%); weekly visit (19%); week and weekend (17%); about 1 h (43%) and between 1 and 2 h (35%); with companion(s) (71%); friends (19%) and alone (29%)                       |
| <b>Low season<br/>(28%)</b>   | It wasn't the main reason for going out (69%); planned visit (58%); decided to visit today (60%); take pictures (64%), chat (60%) and look at plants (53%); has visited other times (62%); monthly visit (22%); weekly (18%) and weekend (18%), about 1 h (38%), with companion(s) (73%), spouse (25%) and girl/boyfriend (20%)   |

Source: Prepared by the authors based on the questionnaire (2013/2014)

It should also be noted that peace, quiet and calm (31%) and the visual beauty of the garden (28%) were the positive aspects most mentioned by the visitors. The variety of flower species was another factor (14%). However, although a large part of respondents felt satisfied with the visit and the space and had nothing to point out, issues such as lack of information (19%) and signage (10%) were mentioned as the poorest aspects of the garden. The impossibility getting into some areas, particularly the greenhouses, the poor state of repair of the structures and buildings and the lack of certain amenities (café or shop to buy plants) that would encourage people to stay in the garden longer were also mentioned as downsides. This situation needs to be changed so as to effectively develop the opportunity afforded by the distinction of this garden as World Heritage.

## 6. Concluding remarks

The "World Heritage" brand is generally conducive to an increase in visitor numbers to distinguished sites, as several authors/studies have shown. Coimbra is one such case. Never until now, and especially after the University - Alta and Sofia being placed in the highest category of heritage, has the city received such a significant number of visitors. It should be noted that the *Paço das Escolas* route alone has risen from around 146 000 visitors in 2012 to almost 450 000 in 2016, which is an average of over 36 thousand per month. At present, the questions raised are mainly concerned with the concentration of tourist demand and the consequent overcrowding of some areas, especially in the Joanine Library, one of the most conspicuous cases, especially in the high season.

However, and as Poria et al. (2010) argue, sometimes this brand might not achieve as high a level of effectiveness as hoped for in terms of attracting more visitors. This is clearly true that the UCBG, even though part of the classified area, has not benefited from the visitor flows that mainly tour the University. In 2015, only 11 000 visitors were recorded (Gastal and Palma, 2016), even though there is no charge for admission. This is an average of 900 visitors per month, merely 3% of the nearly 355 000 visitors to the University in that year. This trend must be reversed and strategies developed to attract more visitors.

The figures show that it is an area that relies heavily on the domestic market (more than half) and the so-called day-tripper, very often local residents and university students. Since it is a free and open access garden it is thus a place to meet friends and socialize from time to time, usually for no particular reason directly connected with the place itself. Tourists, however, do not account for even half the visiting public. Bearing in mind that Coimbra is welcoming ever higher numbers of tourists, the question is why are they not going to the botanical garden? It should be noted that in the period when this study was carried out (one year) only once did an organized group of tourists visit the garden who were from the University. Although the classification has now been awarded, the field work was going on for a long time, visitors were asked informally about the classification and while a reasonable number knew about it, linking it with the University, the fact that the garden was included in this classification was practically unknown. Gastal and Palma (2016) recently found the very same trend, with 50% of visitors unaware of this fact.

From what an analysis of visitor movements revealed, the garden is a regular fixture on these routes, and the UCBG-University/University-UCBG is one of the most crowded. This time, it could be important to work on information for tourists, such as signage. It should be noted that the University's online page, which shows the various visit programmes available and their prices, does not include any mention of the garden or information about its free status. Indeed, the garden is not even shown on the map offered to visitors who buy tickets at the UC Store, and there is no signage indicating the direction of the garden from the University.

The growing interest in and visits to gardens, the increasing number of visitors to the city of Coimbra and the restoration of heritage undertaken in this garden in the meantime provide good opportunities to attract more visitors to this space. The UCBG is a sustainable alternative in the spatial dispersion of tourist flows by redistributing them, thus alleviating the pressure on other places, already at saturation point, and helping the botanical garden to effectively find its place on the classified heritage route.

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# Extinct traditional Isparta Baths (Hammams), urbanization and tourism effects\*

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## Abstract

Boundaries of the daily life lived by the strata of society which constitutes the cultural geography of Ottoman, in mosque-bazaar-logde triangle, has expanded, traditional Turkish city and architecture have been shaped and Turkish baths have taken their places among the dynamics of this traditional city. Baths which are very colorful parts of traditional city architecture have come to the fore again with the tourism factor, even though they began to lose their importance in time. However, many traditional baths, located on the thoroughfare inside the historic fabric, by the reasons of increase in urbanization policies and tourism effect, have experienced protection problems at different times or destroyed. To transfer of traditional bath architecture to the next generations with authentic features, in order to make a base for conservation works, literature survey is done about the extinct traditional Isparta baths. In the direction of the obtained datas, these baths' conservation problems and destroying reasons are mentioned.

## Keywords

Isparta; Traditional Turkish Baths (Hammams); Isparta baths; Cultural Heritage.

## 1. Introduction

Isparta is located in the inner part of Turkey called "Region of Lakes" in which is the northwest part of the Mediterranean Region (Figure 1). Date of settlement begins with the Upper Palaeolithic era period, which is a pre-written history period. Luvi in 2000 BC, the settlement area of Arzava communities, Isparta city; Phrygia, Lydia, Persia, Pergamon Kingdom, Roman, Byzantine, Seljuk, Hamitoğulları Principality and 1390 entered the Ottoman administration during the period of I. Beyazid (Anonym, c.19, 1971, Anonym, 1974).



Figure 1 - The position of Isparta in Turkey

\* This article has been prepared based on the master's license thesis of the first writer titled "The Traditional Isparta Baths and Investigation of Historical Eğirdir Yeşil Ada Bath within the Scope of Preservation and Restoration" which is being prepared at the Süleyman Demirel University, Natural Sciences Institute, Architecture Department. We would like to thank Süleyman Demirel University Scientific Research Projects Administration Unit (BAP) for their financial support to this work with the Project No.3215 YL-12.

The first studies started in 1973 which is a traditional Turkish city, Isparta with its historical townscape, mosques, bazaar, baths, churches, traditional houses and organic streets. The historical center of the city, which is dated on 14.10.1977 II. And III. degree has been accepted as a protected area; Within this site, monumental and architectural structures have been preserved and registered (Tola, 1984; Sargin, 2005, p. 257). The Urban protected area regulatory studies has began in 1977, and in 1979 the has been ending and conservation development plan has been prepared. However, with this plan, the protected area is in the integrity of the site area, and it has been able to protect it until 1984 (Sargin, 2005, p.257). After 2010, a Conservation Development Plan has been revised and this plan has been completed in 2014. Protection works has gained speed on this count. However, Many historical monuments and civic buildings located inside and outside the protected area have still been in need of protection.

Isparta is one of the basic building blocks of the historical texture and architecture of the baths. The baths, like other monumental structures is protected as a single structure. The inadequacies of protection has caused municipal zoning studies, tourism, unconsciousness of the people, the rumors of traditional baths to be forgotten, cannibals in almost every house today, baths becoming increasingly less used, neglected or abandoned. For this reason, many Isparta Bath have not reached today.

## **2. Traditional Isparta Baths**

According to various archival and literature sources, It has been changing the number of traditional baths in Isparta and its surroundings. In the center of Isparta, There are 7 baths Karçinzade according to Süleyman Şükrü (1907), also there are six baths according to Böcezade (1932), in 1908, then, there are 6 baths according to Sait Demiral (1943), to 5 baths according to the 1877 Konya Province annual there are 6 baths to 1892 Annual (Anonym, 1981, c.5, s.3525; Anonym, 1999, Cilt:19, s.19; Karçinzade, 2005, s.85; Böcüzade, 1932, s.73; Demiral, 1943). According to the 1892 Konya Province Salute, there are a total of 11 baths in the accidents of Isparta, 3 in Eğirdir, 3 in Yalvac and its villages, 3 in Karaağaç and its villages, 2 in Uluborlu and its villages (Anonym, 1981, c.5, s. 3224-255; Anonym, 2003, s.472.).

Judging from the archival records, it has been detected numerous baths in Isparta and surroundings. However, the number of people who can access the baths from day to day has been very small compared to the whole. That's why baths have been divided into three classes in Isparta and surroundings. The first example of these baths are that reach to the daylight in a largely preserved state other one which are baths reaching as day-to-day massive destruction, and also the baths that can not be reached on a daily basis. It has been detected with the come up today with architectural elements reaching the whole or suffering some of the devastation 16 traditional baths and 1 thermal; 17 baths reaching by daylight with great protection, with a large part of the day has been destroyed or reached the remains of 7 pieces and 18 baths that are not reachable on a daily basis but are named in archive sources. According to this, It has been constructed 42 traditional baths daily from the past in Isparta and surroundings (Table 1).

It has been detected that the number of Isparta baths belonging to the Seljuk - Beylik period is 21, but 15 of them can reach the daily. Five of the baths known to belong to the Ottoman period reached the day-to-day. There are 11 baths that can not be determined

definitively and can not reach to the day. Two Republican Period Baths has been detected in Isparta and its districts (Table 1).

Table 1 - Traditional Isparta Baths

|   | N  | Building Name                      | Date            | Period                      |
|---|----|------------------------------------|-----------------|-----------------------------|
| The baths reached today with great protection                               | 1  | Gönen Bath                         | 1220-1237       | Seljuk                      |
|   | 2  | Yalvaç Eski Bath                   | -               | Unknown                     |
|   | 3  | Aliköyü Bath                       | -               | Unknown                     |
|   | 4  | Atabey Belediye Bath               | -               | Unknown                     |
|   | 5  | Eğirdir DüNDAR Bey Bath            | 1307-1308       | Hamitoğulları B.            |
|   | 6  | Büyükgökçeli Bath                  | 1314            | Hamitoğulları B.            |
|   | 7  | Eğirdir Yeşil Ada Bath             | 1333            | Hamitoğulları B.            |
|   | 8  | Eğirdir Barla Çaşnıgir Paşa Bath   | 14. century     | Hamitoğulları B.            |
|   | 9  | Gelendost Avşar Bath               | 14.-15. century | Hamitoğulları B.            |
|   | 10 | Ş. Aslandoğmuş Ilıcası (Bath)      | 14.-15. century | Hamitoğulları B.            |
|   | 11 | Isparta Bey Bath                   | 1429            | Ottoman E.                  |
|   | 12 | Isparta Dalboyunoğlu Bath          | 1689            | Ottoman E.                  |
|   | 13 | Isparta Karaağaç Bath              | 1722            | Ottoman E.                  |
|   | 14 | Senirkent Bath                     | 1888- 1901      | Ottoman E.                  |
|   | 15 | Isparta Cumhuriyet Bath            | 1897            | Ottoman E.                  |
|   | 16 | Keçiborlu Bath                     | 1953            | Republic                    |
|   | 17 | Uluborlu Belediye Bath             | 1962            | Republic                    |
| The baths with a large part has been destroyed or reached the remains today | 1  | Uluborlu Baltabey Bath             | 1179            | Seljuk                      |
|   | 2  | Uluborlu Karabey Bath              | 1240            | Seljuk                      |
|   | 3  | Eğirdir Burcu Bey Bath             | 1333            | Hamitoğulları B.            |
|   | 4  | Eğirdir Gökçe (Beydere) Bath       | 14. century     | Hamitoğulları B.            |
|   | 5  | Eğirdir Barla G. İbrahim Paşa Bath | 14. century     | Hamitoğulları B.            |
|   | 6  | Eğirdir Kaleburnu Bath             | -               | Unknown                     |
|   | 7  | Eğirdir Vezirler Evi Bath          | -               | Unknown                     |
| The baths are not reached today (destroyed)                                 | 1  | Isparta Sülübey Bath               | 1135            | Seljuk                      |
|   | 2  | Uluborlu Emrem Bath                | -               | Seljuk                      |
|   | 3  | Uluborlu Saraçbaşı Bath            | -               | Seljuk                      |
|   | 4  | Uluborlu Çelebiler Mah Bath        | -               | Seljuk                      |
|   | 5  | Şarkikaraağaç Eski Bath            | 1281            | Seljuk / Karamanoğulları B. |
|   | 6  | Isparta Keçeci Bath                | 1284            | Hamitoğulları               |



|    |                           |            | B.      |
|----|---------------------------|------------|---------|
| 7  | Yalvaç Yeni Bath          | 19-20. yy. | Unknown |
| 8  | Atabey Aşağı Bath         | -          | Unknown |
| 9  | Atabey Orta Bath          | -          | Unknown |
| 10 | Isparta Küçükgökçeli Bath | -          | Unknown |
| 11 | Eğirdir Yukarı Bath       | -          | Unknown |
| 12 | Uluborlu Hocaeki Bath     | -          | Unknown |
| 13 | Isparta Dere Bath         | -          | Unknown |
| 14 | Çelebiler Bath -1         | -          | Unknown |
| 15 | Çelebiler Bath -2         | -          | Unknown |
| 16 | Çelebiler Bath -3         | -          | Unknown |
| 17 | Yenice Bath               | -          | Unknown |
| 18 | Sav Bath                  | -          | Unknown |

Source: Gökarslan, 2014

In Isparta there are also traditional baths in Eğirdir, Yalvaç, Uluborlu, Gelendost, Gönen, Atabey, Senirkent and Keçiborlu districts of Isparta other than the city center. In Aksu, Sütçüler and Yenisarbademli Districts, there is no definite information about the existence of traditional baths, but according to oral sources, It is known that the presence of traditional baths in these districts. However, no data regarding these baths has not been reached. The baths have been constructed more in other regions, such as monumental structures, capital or empire, or in areas where they were used extensively under their rule. The number of baths has also increased as an indicator of economic power in the settlement units that have a certain administrative center. In Isparta, It has been detected with these baths belonging to the Seljuk Period (1060-1308) more in Uluborlu District. Isparta and surroundings, it has been observed that there has been more baths belonging to this period in Eğirdir District, which has been the capital of the Hamitoğulları Emirate, which is between 1301-1423. The baths belonging to the Ottoman period is seen that by more concentrated in the center of Isparta (Table 2).

Table 2 - Location analysis of Isparta Baths

|   | Isparta | Eğirdir | Yalvaç | Uluborlu | Keçiborlu | Şarkikaraa | Gelendost | Gönen | Atabey | Senirkent | Villages | TOTAL |
|---|---------|---------|--------|----------|-----------|------------|-----------|-------|--------|-----------|----------|-------|
| The baths reached today with great protection                               | 4       | 3       | 1      | 1        | 1         | 1          | 1         | 1     | 1      | 1         | 2        | 17    |
| The baths with a large part has been destroyed or reached the remains today |         | 5       |        | 2        |           |            |           |       |        |           |          | 7     |
| The baths are not reached today (destroyed)                                 | 8       | 1       | 1      | 4        |           | 1          |           |       | 2      |           | 1        | 18    |
| TOTAL   | 12      | 9       | 2      | 7        | 1         | 2          | 1         | 1     | 3      | 1         | 3        | 42    |

Source: Gökarslan, 2014

### 3. The Problems of Protection in the Traditional Isparta Baths

It has been divided into external and internal factors the factors that cause deterioration in historical structures by Zeynep Ahunbay (1999) The external factors have been known that to be the location of the structure (pit, rising water edge etc.), long-term natural factors (wind, frost etc.), natural disasters (flood, typhoon, earthquake, earthquake etc.) Bad use, faulty repairs, fires, wars, vandalism, public works effects, tourism, air pollution, traffic) Internal factors have been the qualification of soil properties, faults in structure design, use of faulty materials, poor workmanship and detail usage, use of materials and construction techniques.

Traditional Isparta baths have been found to be more human-induced, ie deterioration due to external factors. Especially, It has been understood that the cause of the deterioration by carelessness, neglect, abandonment, abuse, improper repairs, Tourism and vandalism. Some baths have been detected with effects of public works (reconstruction works, road construction, elevation of elevation, etc.) and deteriorations caused by intentional destruction. However, within the scope of this study, It has been divided into tourism-related and other protection problems instead of external and internal factors.

#### 3.1. Protection Problems in Tourism Impact

Isparta province which is located in the area of Lakes, It has also been increased the curiosity of the local and foreign tourists coming to the city to the historical textures in the provinces and districts. Davraz Mountain Ski Center is used intensively, many nature parks in the vicinity and so on. The intensity of nature tourism for reasons; Yalvaç Psidia St.Paul Road to the ancient city of Antiocheia still actively increase Christian religious tourism. They have begun to be re-used traditional baths which have lost its charm and are not used today. In some cases, such as the construction of the hotel, different studies for tourism have made history difficult. For example, a 5-storey hotel has been built with the permission of the board of the northern Green Island Bath. However, this hotel is close to the hamlet's original cul-hill border, and Bath Street, which provides access to the bath, has been narrowed too much (Figure 2).



Figure 2 - Green Ada Bath and the hotel built to the north

Source: Gökarslan, 2014

In many traditional baths, it has been determined that the addition of new sections with different functions or the destruction of the original sections, especially due to the influence of tourism, is required and therefore the plan layout is changed. Some baths, especially the seclusion sauna, shock pool, swimming pool and so on. The use of different functions causes deterioration in the baths. For example, in Isparta Bey and Karaağaç Baths, seclusions have been transformed into saunas, which are not included in the original bath architecture. There is a swimming pool in the tepid section of Karaağaç Bath (Figures 3 and 4).



Figure 3 - Isparta Karaağaç Bath a private room which is later turns into sauna

Source: Gökarslan, 2014



Figure 4 - Isparta Karaağaç Bath which is added to the warmth of pool

Source: Gökarslan, 2014

Sometimes, traditional baths are exposed to improper additions and faulty repairs. For example, in the Eğirdir Dünder Bey Bath, non-specific, innovation (reinforced) concrete locker rooms has been identified during the restoration process (Çelebi, 2014). Eğirdir district has increased the demand for tourism with the increase of tourism. The reinforced concrete locker rooms added to the warmth area of the bath used by local and foreign tourists has not been compatible with the natural stone material of the building and the floors has been overloaded and caused cracks. During the restoration process, It has been removing these rooms, lightening and natural locker cells has been added (Figure 5).



Figure 5 - rooms which are added later to Dünder Bey Bath

Source: Çelebi, 2011

Some baths have been exposed to improper use for additional structures such as warehouses, warehouses, toilets, garbage deposits. For example, while the Gönen Bath is used as a warehouse and toilet, it is used as a garbage dump by restaurants and hotels around Egirdir Green Island Bath (Figure 6).



Figure 6 - Misuse of Green Island Bath

Source: Gökarslan, 2014

Despite the use of baths with their original function, the most common protection problems are the replacement of bathing-specific installations. In traditional baths, Calorific or floor heating system has been applied instead of heating system Sometimes the faucets and chimneys of the bath are closed with faulty repairs. This causes the baths to explode due to high pressure. Burning of different and harmful substances instead of wood or coal in baths damages the heating system of the bath. The lighting dome (lights) located in the domes and vaults that make up the upper covering that illuminates the baths must be covered with elephant eyes (luminaires). However, most of the baths in and around Isparta have broken elephant eyes or covered with ill-fitting materials. It has not resolved that in some baths the details between the elephant eyes and the tile coating. For this reason, flow over the top cover, decay, It causes deterioration. The irregular laying of the electrical installations that are added to the baths causes fires. In baths with a moist atmosphere, the electrical components are exposed to corrosion, decay, It causes deterioration. In traditional baths, the sewage is evacuated along with sections of warmth, seclusion and warmth, with a certain curvature (ridges), and finally the toilet is emptied. Nowadays, It has been a problem in the installation due to these gutters are closed or they are left in a filthy way Aluminum, PVC and so on. Doors and windows made of materials are added, and concrete or ceramic coatings are seen on roofs and upholstery. The use of cement based mortar also causes various impairments in the

original material. Baths and taps specific to baths has being replaced by new ones that do not reflect the period (Gökarslan, 2014).

### 3.2. Other Protection Issues

In the Isparta city center and districts have affected the protection of the baths as well as many buildings with the disasters such as earthquakes, fire, floods in different periods . Many civil and monumental buildings in Isparta were destroyed due to the great earthquake of 4 October 1914 (Böcüzade, 1932, p. 309). 1. The earthquake that occurred in the 1st degree earthquake zone in Isparta was frequent from the past to the present day, which has had a negative effect on the historical structures in which no protection work against earthquake risk has been done.

When the legal statutes of the traditional Isparta baths are examined, It seems that there are problems in registering and being protected. It has been determined that some qualified baths are not registered. Protection project has not been prepared for the most of the registered baths. It has been constructed only DüNDAR Bey, Yalvaç, Bey and Projecting of Dalboyunoğlu Baths from 2010 to present. Among these only Restoration application has been made to DüNDAR Bey Bath Another major distress have been the property issue with the Traditional Isparta Baths. It is more of an effort to use or restore the foundations, municipalities or the treasury to the baths belonging to the state institutions. There is no such work in private baths. There are no restoration requests in the private baths outside Bey Bath.

It is the natural climatological conditions for a long duration which is one of the sources of the deterioration seen in the baths. Constantly exposed to factors such as rain, snow, wind, etc., natural stones or bricks constructed from bricks have been worn over time, causing the material to separate from each other and causing it to collapse. It also causes dampness marks and algae formation with the moisture rising from the roof, rains coming from the roof, walls, ceilings and eaves It has seen blooming on the body walls in some baths Wood structures of undressing units with almost all of them have been destroyed or ruined. Door and windows made of coarse wood have been corrupted by long-term weather conditions. It has been rusted due to lack of care which is plumbing pipes and copper boilers in a water tank Feats made of old stone in the channels of hell, which is a peculiar part of the baths, melted in the long term heat.

It has been observed that the distortions due to the internal factors of the constructions are mainly caused by the materials used in the construction and the poor workmanship. In many baths the lockers room has been destroyed for this reason. For example, the locker room built from adobe and wooden materials of the Yalvaç Baths from the past to present has reached a great extent in destruction In some baths, details of original door and window systems has been detected to be poor workmanship. Attachments of doors and windows has been observed at points where they were fixed to the body walls. For this reason, most of these building elements have not reached the daylight. The fact that the walls have been covered with marble up to a certain height in the heat and dark walls ensures that the shelters are protected from water and that the residents of these walls benefit from the heat by leaning against the wall (Gültekin, 2008). Most of the Isparta baths have insufficient marble finishes. This causes water to be transmitted to the body walls of the bath.

In some of the baths, deterioration experienced due to the ground feature has been detected. Barla Göçeri İ. Pasha, Uluborlu Baltabey and Karabey Baths have been found on the grounds of collapses.

#### 4. The Extinct Traditional Isparta Baths

Isparta and surroundings have been researched for traditional baths that have been destroyed, abandoned and destroyed over time due to various reasons. The existence of 18 baths has been determined according to the written sources (annual, registry, etc.) from archive sources, from visual sources and from verbal sources. These baths have been tried to reach the reasons for destruction and destruction. The reason for the destruction 10 of 18 baths have been learned. It has been determined that five of these 10 baths cause tourism-related demolition. Rural tourism, urban tourism etc. It is striking that they are structures that can be protected by reason of better functioning and disappear under the influence of tourism (Table 3).

Table 3 - Tourism effect in baths that cannot reach daily

| No | Building Name             | Constructed Date | Demolish Date    | Demolish Reason                             |
|----|---------------------------|------------------|------------------|---|
| 1  | Isparta Sülübey Bath      | 1135             | 1940-50          | Municipality zoning works                   |
| 2  | Uluborlu Emrem Bath       | -                | -                | -   |
| 3  | Uluborlu Saraçbaşı Bath   | -                | 1853             | Uncared (dilapidate), School construction   |
| 4  | Uluborlu Çelebiler Bath   | -                | -                | Uncared (dilapidate), House Construction    |
| 5  | Şarkikaraağaç Eski Bath   | 1281             | 1980             | Hotel Construction                          |
| 6  | Isparta Keçeci Bath       | 1284             | 1980-86          | Municipality zoning works                   |
| 7  | Yalvaç Yeni Bath          | 19-20. century   | 2007-08          | Auto park construction (For city festivals) |
| 8  | Atabey Aşağı Bath         | -                | -                | -   |
| 9  | Atabey Orta Bath          | -                | 1976 / 2005 - 06 | Uncared (dilapidate), park construction     |
| 10 | Isparta Küçükgökçeli Bath | -                | -                | Summer house construction                   |
| 11 | Eğirdir Yukarı Bath       | -                | 2001             | Uncared (dilapidate), park construction     |
| 2  | Uluborlu Hocaeki Bath     | -                | -                | -   |
| 13 | Isparta Dere Bath         | -                | -                | -   |
| 14 | Çelebiler Bath - 1        | -                | -                | -   |
| 15 | Çelebiler Bath - 2        | -                | -                | -   |
| 16 | Çelebiler Bath - 3        | -                | -                | -   |
| 17 | Yenice Bath               | -                | -                | House Construction                          |
| 18 | Sav Bath                  | -                | -                | -   |

Source: Gökarslan, 2014

#### 4.1. Baths without Tourism Impact

##### 4.1.1. Şarkikarağaç Bath

While the Şarkikarağaç Bath which is thought to have been built in 1281 is in a state of dereliction, it was demolished in order to construct a bath which provides a better service to the hotel built in 1980 in the north. Instead of the demolished bath, today's Şarkikarağaç Bath has been built (Onar, 1973, p.15, Böcezade, 1932, p.56, 218, 1334, Köseoğlu, 1936. Erdem, 1937)(Figure 7).



Figure 7 - The old and new version of Şarkikarağaç Bath

Source: Onar, 1973, p.15, Gökarslan, 2014

##### 4.1.2. Yalvaç New Bath

It is located in the center of Yalvac district. The Yalvac New Bath, which is thought to be the structure of the century, was demolished by the municipality in 2008 (Founder, 2005, p.177), showing the increase of various festivals made in the city and the increase of tourists coming to the city. Instead of the ruined bath in Yalvac City center, a multi-storey car park belonging to Yalvac Municipality has been constructed (Figure 8).



Figure 8 - Demolished Yalvac New Bath and Yalvac Municipal car park built in its place

Source: Gökarslan, 2014

##### 4.1.3. Eğirdir Yukarı Bath

Eğirdir Yukarı Bath which is located in the Hamam Mahallesi of Eğirdir is one of the most popular and biggest baths of Eğirdir. However, the bath has been abandoned in the 1960s (Veziroğlu, 2005, p. 248 In 2001, it has been destroyed by the Mayor of Eğirdir to play the children's playground.

#### 4.1.4. Atabey Central Bath

The Atabey Central Bath (Mufti H.), which is located in the Mufti Quarter of Atabey District, which is believed to have been built during the Ottoman period, It has been demolished by the municipality in 1976 and replaced with a concrete bath (Demirgil, 1970-71, p.51; Koç, 1983, p. 321; Kıyıcı, 1995, p.51). Atabey Orta Bath, according to the information provided by Şükrü Durgut, reinforced concrete bath has been closed at the beginning of 2000s and destroyed by the municipality between 2004-2005. Instead of a green parking area has been built. Although it seems to be a product of the park-making municipal zoning studies, it is clear that this park, which is close to Atabey Ertokus Bey Medresa, is regulated for the visitors who visit Medrese (Figure 9).

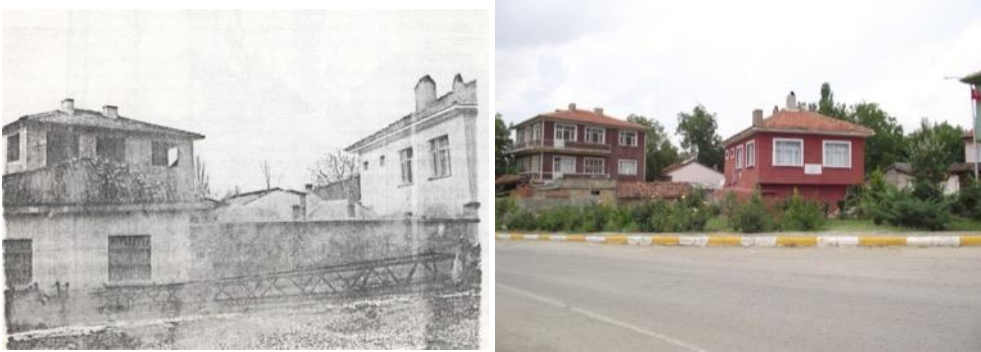


Figure 9 - Atabey Orta (Mufti) Bath

Source: Demirgil, 1970-1971, Gökarslan, 2014

#### 4.1.5. Küçükgökçeli Bath

A cottage villa has been built on the area where the construction date is unknown, which is located on the ground about 1 km north of Küçükgökçeli Town today. Surrounded by completely empty fields, the question of why this bathhouse is converted into a villa area (Figure 10). Of the residents of Küçükgökçeli Town only the location of the bath has been determined and no one knew that the bath was used. It is believed that Bath is the structure of two desperate Seljuk Periods from archival sources (Bukuzade 1932, p.41, Ersumer, 1968, pp. 23-24). Sadık Ersumer stated that the bath was filled with the earth until the top cover in the previous case before being demolished and waited idle.



Figure 10 - Summer villa in the vicinity of Küçükgökçeli Bath

Source: Gökarslan, 2014



#### 4.2. Other Baths Destroyed

It has been destroyed shortly after the registration of the Keçeci Bath which was registered according to the decision no. 280 of 13.05.1977 day of General Directorate of Antiquities and Mines of the Ministry of Culture. Before the demolition of Mustafa Orhon (1956), the residents of the neighborhood has been told that the bath was in ruins and that it was not used in the 1970s (Gökarslan, 2014). According to Sumer Senol, the Keçeci Bath was destroyed between 1985 and 1986 (Şenol, 2003) (Figure 11).



Figure 11 - The first state of the Keçeci Baths, the state of the city in 1983 and the road that was destroyed today

Source: Anonym, 1983, s.150; Isparta 1880 - 1980, 2001, s.107; Gökarslan, 2014

Which is located in the Sulübey (bath) Quarter, the name of which is the center of Isparta; The Sulübey Bath, which was thought to have been built in 1135, has not reached the present (Böcüzade, 1932, s.113; Katircioğlu, 1958, s.27; Koç, 1983, s.47; Demirgil, 2007, s.291; Anonym, 2009, c.1, s.171).

Enver Süldür stated in his book "The History of Second Isparta" published in 1951 that this bath had been standing and dilapidated until recently, but was destroyed by the municipality due to road construction works (Süldür, 1951, p.15). It is estimated that the location cannot be determined precisely and it is close to the Serpentine Fountain, also known as the Sülübey Fountain (Figure 12).



Figure 12 - Snake Fountain

Source: Çelebi Yakartepe and Gökarslan, 2014

The other bath which is destroyed due to unconsciousness about municipal reconstruction works and public protection is Atabey Lower Bath (Figure 13).



Figure 13 - Atabey Down (Onaç) Bath

Source: Demirgil, 1970-1971; Gökarslan, 2014

## Conclusions

When the destroyed Isparta baths are examined, it is seen that these baths are destroyed due to municipal zoning studies and tourism increase. Serious user errors from tourism have also been identified in existing baths. Some conservation recommendations have been made so that the baths arriving at as a result of this reason daily can be transferred to future generations.

Documentation is the most important step to protect historic buildings with their original qualities. Unregistered baths need to be taken under legal protection. However, it is not enough to prepare and register only inventory slips in the process of securing and documenting traditional baths. It is understood that in the study bathing-specific systems are experiencing serious protection problems due to improper use. For this reason, It should be prepared with this inventory receipts containing information on these installations. It has been doing a lot of inventory work to preservation and promotion of historical buildings in our country. In addition to these activities, Create a special database for traditional baths will promote both local and foreign tourists who are interested in the bath culture and will increase it.

Protection of baths should be made by the public, that is, by the general and local governments. For the protection of private baths, the owners of the baths should be applied by the support given by the Ministry of Culture of the Republic of Turkey. Local governments should be encouraged by the government in this regard. Restoration applications should be initiated with funding research and support from various institutions and organizations. Subsequently, detailed documentation, protection recommendations development and reuse studies should be carried out within the scope of protection of these baths.

One of the most important decisions in the protection of baths is the functioning. Although the use of traditional baths with their original functions is considered to be the most appropriate, it will be a very difficult application to maintain the bathrooms with today's comfort conditions and maintain their sustainability. For this reason, the baths should be used either by operating in the existing capacity which is original function of the original installation system and spaces, or by giving a function that does not damage the structure. In the baths where the new function suggestion is considered, restoration should be done without damaging the structure of the bath. Heavy and multi-programmed functions should not be given. If contemporary supplements are thought to be made, these supplements should be made without harming the original function, material and form of the bathhouse. The

continuity of the original for the reuse of the bathhouse architecture function or the functioning of the new function should be done in accordance with the needs in the regions. Traditional baths are known to have acoustic qualities in their original architecture. It determines the acoustic qualities of the original forms and materials of the baths. For this reason, the original construction system and materials of the baths must be carefully examined during the restoration phase (Tavukçuoğlu et al., 2011). In addition to restoration, acoustic qualities should also be considered when changing the function. When these acoustically sensitive structures take on a function with silent places such as a library, a small chest can turn into an annoying place.

In most of the traditional baths, the problems they have experienced due to the location they are located have been identified. Environmental arrangements should be made for these constructions not to be influenced by zoning studies and to avoid spatial problems. The solution to the problems of keeping the road under the road or compressing the surrounding structures should be sought. In addition, the preservation of the baths with ruins such as Eğirdir Kaleburnu and Eğirdir Vezirler Evi Önü Baths, which have remained in ruins as a result of conservation works done in archaeological areas, will be a tourism attraction.

If the baths are taken under protection together with structures such as mosque, madrasah, inn, school which they are built as foundation, higher areas of cultural and touristic value will be provided within the whole city. Introductory brochures and catalogs should be printed by local institutions such as the Cultural Directorate and the Municipality for the preparation of the cultural and touristic grounds for these baths. In addition, seminars and conferences should be organized to promote local culture and tradition of the local people and increase the awareness of conservation. These activities will lay the foundation for public ownership of the baths and for the provision of public support.

Traditional bath architecture, which is the focus of local and foreign tourists, is an important structure that will contribute to the city both in terms of cultural - historical value and tourist attraction. For this reason, as well as restoration applications, Isparta bath architecture, traditions and cultural publications should be made and local and foreign tourists should be introduced.

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# How to turn Europe/EU's 'Unity and Diversity' motto into key-rings for tourist to buy.

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Pomagrande is the symbol of '...unity of many under a single authority, secular or ecclesiastical' Tresidder 2000: 69

'United in Diversity' is the motto of the European Union. The motto means that, via the EU, Europeans are united in working together for peace and prosperity, and that the many different cultures, traditions and languages in Europe are positive asset for the continent'.<sup>25</sup>

## Preface Explanation

This paper and its contents are an analysis of how collective groups are created, manifest their internal and external identities and then reinforce that creation to others. This paper is neutral to any current political or socio-political happenings in Turkey. The analysis provided here can and has been applied to other nations/collective groups in their attempt to join the EU and preserve their cultural intangible and tangible heritage.

## Abstract

This paper is about how to brand two seemingly disparate concepts of 'unity' and 'diversity' that Europe/EU has adopted as their collective motto to demonstrate their 'multicultural' aspirations/collective group identity. How should these two opposing thoughts be manifested in tangible form for all Europe/EU's members? That is, how to brand 'unity in diversity' to visually represent the multitudes of Europe/EU's cultures. There are no fridge-magnets that symbolically/visually manifest this motto for either people of Europe/EU or any of their visitors to purchase. These missing visual objects demonstrate that there is a black-spot between Europe/EU's motto and its 'created' collective group identity. The two do not match. Europe/EU's collective group identity is polycultural that is dominated by a dominant monoculture that is Greco-Roman. It is this Greco-Roman internal identity that is reflected and reinforced in all Europe/EU's external logos and merchandise. 'Unity in diversity' means multiculturalism for the multitudes of cultures for all who are part of Europe/EU – be it directly or indirectly. This paper demonstrates visibly how Europe/EU's invisible motto can become a tangible manifestation of its multicultural collective group identity. Turkey has been added to this mixture for two reasons. First, to visually demonstrate how a new member's internal identity would visibly look like once it is blended/united into the 'diversity' of Europe/EU's collective group external identity. Second reason is more complex. Turkey has, and continues to play a triple role to the 'creation' of Europe + EU's internal identity, as expressed in this formula 'us/other + other' (Sitki: 2009). As such, either to brand Europe/EU's internal identity or to attempt to demonstrate its multiculturalism without Turkey would only give a lop-sided/incomplete perspective.

## Keywords

Turkey, Europe/EU, Polyculture, Multiculture, branding national myths and symbols (BNMS).

## Introduction

This paper examines how an invisible concept/motto of a collective group can be changed into a tangible form to become inclusive to all its members. Europe/EU's motto of 'United in Diversity' has never been attempted to be connected to their internal collective identity. The internal collective group identity of Europe/EU remains dominant, different, aloof and disconnected from the multitudes of cultures below it. Europe/EU's dominant mono-culture is made up of Greco-Roman culture that is visually reinforced by their matching myths and symbols. Europe/EU cannot achieve multiculturalism as per the true meaning of its motto if it remains in a polycultural state of existence. This paper demonstrates how Europe/EU's

<sup>25</sup> [www.europa.eu/abc/symbols/motto/index\\_en.htm](http://www.europa.eu/abc/symbols/motto/index_en.htm)

multiculturalism would be in souvenirs/tourist merchandise to show their 'unity in diversity'. There are number of merchandise sites about EU merchandise but none is about selling 'unity in diversity' as a souvenir/merchandise. They either sell products representing the member-nation's own collective group identity or official EU endorsed symbols. All these products reinforce Europe/EU as a polycultural collective group identity rather than a multicultural one that it is aspiring to be and become. The image of the pomegranate has been chosen and superimposed on all these obvious merchandises to symbolise and visually represent the 'unity' of the 'diversity' of multitudes of cultures within Europe/EU. In other words, pomegranate represents the multitude of cultures within Europe/EU individually, but united under one banner – that includes the Greco-Roman dominant mono-culture of Europe/EU at present. Two factors needs to be explained here. Europe and EU has been written in the 'Composite word formula' (Sitki: 2009) of Europe/EU, to demonstrate that they share one internal identity. Europe is the internal engine and EU is its external identity. Second point to be explained is that Türkiye has been written with umlauts to demonstrate two points: a/ that all EU's members have and need to keep their own identities when they are part of its collective group identity; b/ Anglicizing a nation's name is language colonialism that submerges their own internal identity in favour of the dominating one.

#### **Europe/EU + Türkiye: a polycultural or multicultural enlargement?**

As Europe/EU continues to absorb new members – like Croatia in 2013, its '*United in Diversity*' needs to be examined in detail to ascertain two factors: a/ if their motto represents their 'diversified' but not yet 'united' internal identity and; b/ if this motto is polycultural or multicultural to represent the collective group identity of all its members' internal identity. Europe/EU's internal collective group identity is polycultural, and not yet multicultural as per its '*United in Diversity*' motto. The concept of polyculture is a borrowed term from the discipline of agriculture. Clifford Geertz (1963) defines the concept of polyculture in agriculture as:

*'...swiddens in low-density areas ....were not only polycultural but in addition were structurally similar to the natural forest ecosystem in the following three ways: (a) they exhibited a high species diversity,...' (Hames 1983:14 (italics added)) and that '...swiddens are basically in tune with the natural ecosystem...'* (Geertz quoted in Hames 1983:14). *'The portion of the garden which comes close to mimicking the structure and diversity of the rainforest, and hence is truly polycultural'* (Hames 1983: 18 (italics added))

In this agricultural context, there are multitudes of plants planted in a field, with the 'farmer' as the external control. Raymond Hames expands on the 'poly-culture' definition as the:

*'...type of planting arrangement whereby a variety of cultigens are systematically interplanted in a garden so as to mimic the structure and diversity of the natural ecosystem'* (Hames 1983:13 (italics added)).

The pure practice of poly-culture in agriculture, all these species interacts equally with each other *without one species dominating* the others. In other words, they are a 'multi-cultural' society and as such there would be:

*'...a transformation of culture rather than a loss of one's "own" culture, traditions, and identity or a strict adjustment to "other" cultural identities. The outcome is a decline of national cultures that were formerly considered relatively homogeneous' (Dijkstra et al 2001:60).*

Nemetz defines multiculturalism as the inclusion of the 'population variation and cultural variation' and the practice of 'assimilation and acculturation' (Nemetz 1996:438). As such the culture of the Europe/EU is not included in this multi-cultural mixture. It remains on their outside, as it surrounds and externally (top-down) defines these many multi-cultures. The Europe/EU as the dominant mono-culture is the symbol of the 'farmer' who dominates, controls, and remains on their outer periphery. Uzo Igbozurike expands further that different plants can co-exist in one location (Ingbozurike 1978: 443).

There are two non-agricultural definitions of poly-cultural society as proposed by Roger Hewitt (1992) and Vijay Prasad (2002). This paper adds a third definition to these two definitions by proposing to include the dominant culture *within* the fold of the poly-culture to make it a multi-cultural society. Roger Hewitt defines poly-culture as:

*'What we have here is not a 'multiculture' as it is represented in multiculturalism, not a pluralist order of discrete patches of culture, all somehow, 'equally valid' within the polity, but – to form a Greek/Roman Creole – a polyculture, or at any rate a collection of cultural entities that are not (a) discrete and complete in themselves; (b) that are not in any sense 'intrinsically' 'equal'; and (c) are active together and hence bound up with change' (Hewitt 2003: 190)*

In Hewitt's definition, there is no interaction between the multitudes of cultures and the dominant mono-culture above it. It's a one-way interaction. That is, Europe/EU as the dominant mono-culture continues to '*silently + visibly*' (Sitki: 2009) play the 'farmer' role with the many cultures, but refusing to absorb any/some of the collective group identities of these many cultures below it. There are three reasons why Hewitt's definition needs to be expanded further.

- to include the Europe/EU's culture *within* the poly-culture field
- the Europe/EU can 'imagine' a 'multicultural' society which acknowledges the '*us/other +other's*' (Sitki: 2009) contribution to the collective group identity of the Europe/EU.
- through this 'imagining' a new 'multi-cultural' collective group identity will emerge with its own recently 'created' internal myths and symbols, which will include the internal culture of the Europe/EU as well as the multitudes of cultures within it.

Vijay Prasad, on the other hand, focuses on amelioration of anti-racism and ethnicity by proposing that poly-culture is 'dynamic' as opposed to the 'static perspective of the 'multiculturalist perspective of history' (Prasad 2001: 66). Polyculturalism is a '...provisional concept grounded in antiracism rather than in diversity. Polyculturalism is a ferocious engagement with the political world of culture, a painful embrace of the skin and all its contradictions (Prasad 2001: xi-xii). By including the cultures of the:



*'Afro-American (including African American-Asian American) political economic, and cultural interaction. ...polyculturalism as an antiracist framework' (Prashad quoted in Endo 2003:1314).*

The culture of the collective group which dominates these various groups is still left out in both these definitions, whether it is in a 'multi-cultural setting or a poly-cultural setting. Prashad writes that there is a:

*'...need for conceptual parameteres for polyculturalism that will guide its further development and resist incorporation into existing ideologies and models' (Prashad quoted in Endo 2003: 1314)*

Prashad gives the example of the Portuguese shop-keepers. They represent the dominant monoculture. Their only interaction with East Indian or Caribbeans is one of commercial interaction by supplying and making of 'Hussein's tomb'.

*'The procession would leave the plantation, join with those other states, march along a route that included the grog shops of the Portuguese...and then end back at their respective plantations' (Prashad quoted in Endo 2001:79 (italics added))*

These shop-keepers do not culturally interact with the East Indians or with the Caribbeans who actively see this festival as part of their collective identity (Prashad in Endo 2001: 79). In other words, these Portuguese traders are not 'assimilated' nor 'acculturalised' back into the cultures of the other two, but remain as their outsider in keeping with their 'farmer' role. (Prashad quoted in Endo 2001: 69). Prashad fails to specify how the interaction within polyculturalism or multi-culturalism will or can manifest in an external identity symbols for any of these collective groups interacting within these concepts. In both Prashad's and Hewitt's perspectives, the subordinated culture does not interact with the dominant mono-culture. The two entities remain apart and disconnected. Their interactions are top-down and one way.

This paper proposes that for multiculturalism to occur the culture of the farmer or, Europe/EU needs to interact and be blended *into* the multitudes of cultures below it. This moves them as the dominant monoculture to be one of the cultures below them. From this interaction a new collective group identity emerges with its own set of collective myths and symbols that is multicultural that represents their '*unity in diversity*'

### **The origins of '*Unity in Diversity*' from Asia/Minor or Turkey**

A possible origin of EU's motto can be found in the New Testament of the Bible. After arriving in Ephesus (now known by its Turkish name of Efes) in 50 AD, St Paul writes his Epistle to the Ephesians praising the church there, and urges them to spread the gospel 'almost throughout all Asia' (Ephesians 19:26 (Holman edition:1881)). Briefly, St Paul's letter writes of two different concepts: *unity and diversity* within the church [organisation]. In Ephesians 4:1-6, the first verses, are about 'unity' of the church [organisation] followed by 'disunity' of the church [organisation] in verses 7-16. To preserve the 'unity of the Spirit in the bond of peace' (Ephesians 4:1-3) which has its basis in one body [organisation], one spirit [non religious, but ideal] and one hope [aspirations/motto of EU]. The later verses starting at 4:7-8 are about diversity or undoing the unity of an organisation and in the final verse '...the whole body, being fitted and held together by what every joint, supplies according to the proper working of each

individual part' (Ephesians 4:16). The 'unity' can only be achieved if all members act separately based on their 'gifts' and act in unison. If we substitute the church in this instance with another organisation, the EU, then the first part of its motto of 'unity' can only be applicable if each of the members separate 'gifts' [national identity] are recognized and incorporated in EU's external identity. That is for 'Jews and Gentiles' [divergent identities, or Christians and Islam] to live together (Ephesians 3:2 ff) and that there is a 'call to walk in unity' ['walk' towards one external identity] (Ephesians 4:1-16). In the second part of EU's motto, 'diversity' means unless all its members accept the 'unity of faith' [which in this case can be the ideology of national identity for EU] it will not continue. Most importantly, the gifts refer to gifts of communication between the faithful, the followers, or the EU members.

St Paul's Epistle to the Ephesians in Part 1-3 is the doctrinal and theme developing the concept of unity as the backbone of the verse, while the remaining parts explain how this doctrine can be practically applied to the lives of the followers. St Paul explains that unity of one purpose, three commands, Seven Bonds and Millions of Unique Giftings'. The concept of 'One Purpose' is to reiterate that there will be conflict (externally and internally) and to be able to '...learn how to deal with it so that unity might prevail' (Ephesians 1:10) through 'every effort to keep the unity of the Spirit through the bond of peace' (Ephesians 4-3). St Paul's letter reiterates the Three Commands (Ephesians 4:1-3) that the followers should 'Live a life worthy of the calling which you have received' (Ephesians 4:1), and can be easily applied to the terms and conditions of EU membership that they must achieve independent economic, political and cultural prosperity and then strive to preserve this life-style within the EU. Once EU membership is achieved, 'Seven Bonds (Ephesians 4:4-5) or for 'Seven elements [to] unite us' (Ephesians 2:4-6), members' common aim of 'unity' and 'diversity' of 'Millions of Unique Giftings' (Ephesians 4:7-10) explains the diverse and divergent national identity of its members.

### **Multiculturalism in 'Unity in Diversity'?**

A simple definition of multiculturalism is the inclusion of the 'population variation and cultural variation' and the practice of 'assimilation and acculturation'. Uzo Igbozurike's definition of polyculture has been expanded to explain how a multicultural society would co-exist in one location. In this agricultural context, there are multitudes of plants planted in a field, with the 'farmer' as the external control. Uzo M Igbozurike defines poly-culture as:

*'intercropping, interplanting, mixed cropping, or multiple cropping...and is the phenomenon in which two or more, and usually very many more agricultural crops are grown at the same time on a pilot land. Polyculture involves simultaneity of agricultural operations...'* (Igbozurike 1978:443 italics added).

In a 'multicultural' society, there would be:

*'...a transformation of culture rather than a loss of one's "own" culture, traditions, and identity or a strict adjustment to "other" cultural identities. The outcome is a decline of national cultures that were formerly considered relatively homogeneous'.*

In this ideal society that is 'multicultural' the culture of the 'farmer' as the dominant monoculture is included/blended into the multitudes of cultures below it. There is no

dominant mono-culture in this mixture. Europe/EU can achieve multiculturalism by acknowledging their 'us/other+other's' (Sitki: 2009) contribution to their identity which still remains, 'not visible + silent' (Sitki: 2009). From here, it is necessary to trace how the three groups of:

*'Europe + Turkey + Others' (Sitki:2008)*

Or

*'Us/Others + Others' (Sitki: 2009)*

**Europe + Turkey** (in its triple role as 'us/others + others' (Sitki: 2009)) + **others** (living in Europe/EU and not of European 'white' ancestry),

make up Europe/EU's 'united' internal collective group identity. Can Europe/EU achieve a 'united' external identity by organically absorbing the '...diverse nationalities by offering a stable system of norms'? Or is the answer to this question to be found in continuation of the concept of 'others' outside Europe's carefully chosen borders as a way to achieve its internal unity (Delanty 1995: 155). Michael J Wintle gives the following warning about Europe trying to unify itself at the expense of its cultural diversity:

*'...the identity of Europe is contested, and its culture, although occasionally and partially shared, can never be defined into a single coherent dominant. To sloganize that into 'unity in diversity' is perhaps to cheapen it...' (Wintle 1996: 5).*

Delanty writes that 'the history of European civilisation demonstrates that it is possible to speak of the unity of a distinct European civilisation only by ignoring the 'non-European' elements, in particular the Oriental and Jewish contributions. But these are non-European only by virtue of the ability of the dominant culture to construct an ideology of Europeanism as a myth of civilisation with its roots in nature' (Delanty 1995:98).

Under the 'common foreign and security policy' of 'The Amsterdam Treaty' that the EU can

*'assert its identity on the international scene, in particular through the implementation of a common foreign and security policy, including the eventual framing of a common defence policy, which might in time lead to a common defence'<sup>26</sup>.*

This quote raises quite a number of questions about the external identity of the EU. Firstly how do you 'assert ...identity' if that identity is not clearly defined? Can this identity be 'asserted' by force against internal and external threatening forces? Secondly, who is the 'other' that the EU is fighting, defending their collective identity against? Would Turkey, with the second largest standing armed force after the USA in NATO, take over this role of being the defence arm and enforcer might of the EU? <sup>27</sup>. Paul Cornish and Geoffrey Edwards point out that for the EU's defence culture to exist, the EU needs to have the 'institutional confidence and processes to manage and deploy military force as part of the accepted range of legitimate and effective policy instruments, together with general recognition of the EU's legitimacy as an international actor with military capabilities (albeit limited)' and that there is a '...positive

<sup>26</sup> The Amsterdam Treaty: An effective and coherent external policy, [www.europa.eu/scadplus/leg/en/lvb/a19000.htm](http://www.europa.eu/scadplus/leg/en/lvb/a19000.htm)

<sup>27</sup> J Juncker The Economist, June 18, 2005 : 23

approach among the military, as well as others, to the inclusion of the military dimension within the EU' (Cornish and Edwards 2001:587-603).

Lessar writes that EU's external identity is '...not identity of similarity, but identity understood as a deep perception of the self' (Lessaar 2001:184). The identity of Europe had been previously defined by its own sense of geography of being European '...however ambiguous [this definition of its borders are] and by the values and principles which the EU defends (the rule of Law, democracy, human rights, minority rights and the market economy)' (Torreblanca 2004: 3); and their common history (including conflict between each other and together against each other). Linguistically which of the EU members' languages should be chosen to fulfil the role of 'lingua franca' as an accurate representation of its 'unity'? The linguistic diversity of EU is comparable to the linguistic diversity within India. To overcome fragmentation within their internal identity, India chose to impose English as its second national language.

This multi-faceted identity perceived as an aggregate whole can only be understood and defined through its numerous members' national identities. Therefore 'unity' for EU's external identity can only be achieved by accepting this multi-faceted 'diversity' of its members. EU's future external identity will need to accurately reflect its internal identity. Will the EU need to add another clause to its 'Article 2' to nominate which of its member country's language will enjoy the 'hegemonic' role over other member-languages? Is this 'linguistic hegemony' (Lessaar 2001:186) to be one of rotation by which all members' languages enjoy the dominant role for a period of time – a role similar to the EU's president? Lessaar explains that Europe's identity can only be achieved through its 'high degree of cultural unity, of which diversity has been an important constituent part' (Lessaar 2001: 186) one that is mainly created from 'Greco-Roman and Christian elements (Lessaar 2001; Delanty 1996; Bryder 2005).

### **Europe/EU + Turkey: How to Brand the 'Elephant'**

*'Make no friendships with an elephant-keeper*

*If you have no room to entertain an elephant' (Sââdi of Shiraz in Shah 1990:96)*

There are two issues here that need to be addressed. First is how to demonstrate an intangible concept like '*Unity in Diversity*' into a tangible form that everyone can have and own? The second hurdle was figuring out a way to 'undo' the unquestioned and unapproachable 'facts' that have formed the internal and external identities of Europe and EU. How should these existing internal/external Europe/EU identity perceptions that they have of themselves and of their perceived 'others' be, undone? These perceptions, which have started their lives with this dictum, that Europe '...must ...form a federation or a European entity that would make them into a common economic unit'.<sup>28</sup> I have struggled with how to demonstrate the myths and symbols of Europe + EU have constructed their internal and external identities.

Added to my above dilemma, was how to demonstrate my third premise of folding in the concept of 'Branding'. Branding, I was convinced, made up the last layer/final stage of any collective group's internal + external identity. Branding is the outward 'selling' or commercialisation of a collective group's internal myths for external 'other's' consumption. I will attempt to demonstrate this proposition through this formula:

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<sup>28</sup> [www.historiasiglo20.org/europe/monnet.htm](http://www.historiasiglo20.org/europe/monnet.htm)

*'myths + symbols = branding' (Sitki: 2009)*

From here I needed to be able to prove my premise. The existing 'branding' matrices available presently were inadequate for my purpose. These branding formulas, failed to take into account *how* Europe's internal identity had been 'created' through their homogeneous culture. This European culture that is believed to be 'unified' and assumed to include all of its 'diversity' needs to be promoted as its true identity. But what is the true definition of Europe's culture? Europe's collective group's internal identity is made up of *Christianity + Greek + Roman* myths and symbols. And its diversity is made up of *Islam + internal others + external others* which shall be expand on further down.

To find the answers to these questions, I started with the European Commission's 'Welcome to the Culture website'<sup>29</sup> in detail. As all logos represent the 'culture' of the collective group they represent. That is, a logo is an outward reinforcement of a collective group's perceptions about their internal identity. The EU has adopted a hand drawn Ionic column as their collective group logo. On the left hand side of this site are three items, which appear to be interconnected with one another:

*Twelve Stars + Three broken Ionic/Doric/Corinthian (styled) columns + (and the) word Culture (Sitki:2008)*

If we deconstruct this collection, we have the following information revealed to us. The *Twelve stars* signify Europe and EU's Christian religious/faith internal identity. The *broken (Ionic) columns* as an adopted EU 'cultural' logo, represents their Greco-Roman cultural heritage, myths and symbols. These two symbols signify their Christian religion, as blended into their 'homogeneous' culture. If we express these thoughts in this formula and if taken from a wider perspective reveals the *silent* but not *missing* messages within these symbols. These *silent* but not *missing* messages can be demonstrated in this way:

*Twelve Stars + Three broken Ionic/Doric/Corinthian (styled) columns + (and the) word Culture (Sitki:2008)*

And if we interchange the above words with the words of this formula:

*'Personal identity + Occupational identity + National identity' (words by A A Berger 1999: 128; formula by Sitki: 2009).*

We have the following outcome. The *Twelve Stars* as synonymous with Christianity is Europe's *personal* + internal identity. The Greek *Ionian columns* form its *occupational* identity. Finally, the word 'culture' combines the *Twelve Stars* + Greek *Ionic columns* to form Europe/EU's external + *national* identity. This is the trinity of unity, but where or when does the word 'diversity' apply? There are no signs in the above formulas which point to Europe + EU's acceptance of their internal + external others. I have divided the term 'others' into two distinctive (that is partially inter-related) groups. The first group of 'others' are the 'internal others' who currently live in Europe/EU. This group could be from Europe's former colonies, be of different faiths to them, but all have Europe/EU citizenship. The external others are Europe/EU's Islamic heritage, and the people who embody it – or, *Islam/Saracens/Selçuks/Osmans/Türkey*. This group of external others have always played a

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<sup>29</sup> [www.ec.europa.eu/culture/eac/index\\_en.html](http://www.ec.europa.eu/culture/eac/index_en.html)

dual role to Europe/EU's internal identity, and the forming of their external identity. As such this group is a mirror image of Europe + EU as 'us' in the,

*'...construction of our own self. The frame of reference of this construction is not the "real" other, a presumably existing reality which we only have to reveal, but the immense web of cultural intertextualities which comprises not only our discourse about the others, but also the others' discourse about their cultural self...' (Roth 2001: 247-248).*

Once I was able to include these two elements, then the identity puzzle of Europe + EU became more balanced than initially perceived. To carry out a 'branding' exercise of EU's identity would be surely lopsided and definitely incomplete without the inclusion of these two 'others'. As the existing marketing analyses have omitted how Europe's internal identity was created, they have also omitted these two others. Instead, I felt these branding matrixes focused on achieving a higher economic return within the global market place for the nation-state<sup>30</sup>. But Europe/EU already has its economic superiority position assured, and therefore, does not need a boost to its economy. What Europe + EU needs is a promotion of their 'inner soul' that is achieved from their own 'culture' which then can be branded in the global market place. If these two elements are added in, then we can have 'unity' *within* 'diversity' as part of Europe/EU's internal identity. But as Europe + EU's internal identity has been 'created' in direct response to internal + external others, then an acknowledgement and an acceptance of them needs to happen. As the role of these others have been pivotal in shaping, creating and (most importantly, of) preserving of 'us' as the

*'...hallmark is coexistence: that in the preservation of the other is a condition for the preservation of the self; we are not we until they are they, for to whom else shall we speak, with whom else shall we think, if not those who are different from ourselves?' (Gitlin in Massey 1999:216)*

Thus, in this way, Europe/EU's collective identity and its 'inner soul' can shine through and not be super-imposed from above. This new collective identity would be 'unitingly' grown from its 'diverse' cultural roots to wholly represent all its existing past, present and future diversity.

Europe/EU as a '...a continent open to culture...'<sup>31</sup> has recently launched their '*The New EU Culture Programme (2007-2013)*<sup>32</sup> to promote 'unity of diversity through mobility – 'Crossing Borders – Connecting Cultures'<sup>33</sup>. I wanted to understand the meaning of these two phrases: 'common heritage' and 'common European cultural heritage' as they state on their web-site. Is there a general inherent collective assumption of the definition of their 'common heritage'? If so, is it the same as their 'common European cultural heritage'? Are these the two threads that will be 'unified' in the minds of their perceivers?

There is a given assumption for the reader to know what this 'common heritage' refers to, and that they share part in it or in the development of it:

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<sup>30</sup> Council of the European Union 19 December 2005

<sup>31</sup> [www.news.bbc.co.uk/1/shared/bsp/hi/pdfs/09\\_01\\_05\\_constitution.pdf](http://www.news.bbc.co.uk/1/shared/bsp/hi/pdfs/09_01_05_constitution.pdf)

<sup>32</sup> [www.ec.europa.eu/culture/eac/culture2007/launch\\_en.html](http://www.ec.europa.eu/culture/eac/culture2007/launch_en.html)

<sup>33</sup> [www.ec.europa.eu/culture/eac/culture2007/launch\\_en.html](http://www.ec.europa.eu/culture/eac/culture2007/launch_en.html)

‘(1) The Union shall contribute to the flowering of the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the *common heritage* to the fore.’<sup>34</sup> (Italics added).

‘(1) It is essential to promote cooperation and cultural exchanges in order to respect and promote the diversity of cultures and languages in Europe and improve knowledge among European citizens of European cultures other than their own, while at the same time heightening their awareness of the *common European cultural heritage* they share. Promoting cultural and linguistic cooperation and diversity thus helps to make European citizenship a tangible reality by encouraging direct participation by European citizens in the integration process’<sup>35</sup> (Italics added).

And under the heading, ‘Uniting Europe step by step’ the founding principles of the Union, it is written in the introduction that:

*‘...a Constitution for Europe is preceded by a Preamble which recalls, ...Europe’s cultural, religious and humanist inheritance, and invokes the desire of the peoples of Europe to transcend their ancient divisions in order to forge a common destiny, while remaining proud of their national identities and history.’*<sup>36</sup> (Italics are added).

This ‘culture programme’ is aimed at encouraging (specific and controlled) border integration, but without defining where and whose borders they are to be integrated. This ‘common heritage’ that is stated, but *not* defined needs to be stated clearly what it is in the ‘founding principles of the Union’. In comparison, the preamble written for the Constitution of the Republic of Turkey, clearly states what their ‘common heritage’ and ‘culture’ are. In Article III of the Constitution of the Republic of Turkey it is written that the:

*‘Integrity of the State, Official Language, Flag, National Anthem, and Capital.  
Article 3. The Turkish state, with its territory and nation, is an indivisible entity. Its language is Turkish.  
Its flag, the form of which is prescribed by the relevant law, is composed of a white crescent and star on a red background.  
Its national anthem is the “Independence March”.*

**Its capital is Ankara.’**<sup>37</sup>

How can Europe + EU ‘unify’ its diverse factors to achieve multiculturalism, if there are no clear definition of its common culture and heritage? The preamble written at the beginning of these Acts, only imply what these common factors are, and are vague and fluid as Europe/EU’s borders. Furthermore, what is the true meaning of the phrase ‘ancient divisions’? Do these ‘ancient divisions’ refer to religious/race/cultural segregations which have happened in Europe with internal and external others? How are these ‘divisions’ really decided, and who (or which member states) decides the true meaning of these divisions?

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<sup>34</sup> [www.news.bbc.co.uk/1/shared/bsp/hi/pdfs/09\\_01\\_05\\_constitution.pdf](http://www.news.bbc.co.uk/1/shared/bsp/hi/pdfs/09_01_05_constitution.pdf)

<sup>35</sup> Decision No. 1855/2006/EC of The European Parliament and of the Council of 12 December 2006 establishing the Culture Programme (2007 to 2013) published by Official Journal of the European Union, from this site: [www.eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l\\_372/l\\_37220061227en00010011.pdf](http://www.eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_372/l_37220061227en00010011.pdf)

<sup>36</sup> [www.europa.eu/scadplus/constitution/objectives\\_en.htm](http://www.europa.eu/scadplus/constitution/objectives_en.htm)

<sup>37</sup> The Constitution of the Republic of Turkey, from this site [www.byegm.gov.tr/mevzuat/anasaya/anasaya-ing.htm](http://www.byegm.gov.tr/mevzuat/anasaya/anasaya-ing.htm)

Eschewing any existing branding matrixes, I drew up a 'branding matrix' called '*How to Brand the Elephant*' (Sitki: 2009). The '*Elephant Matrix*' demonstrates the hypothesis that the concept of *branding* is the final and last stage in a collective group's external identity. In other words, *branding* is the outward display of a collective group's internal identity. The branding matrices available at present have tended to focus on improving a nation's political or economic standing in the global market place. At other times these branding matrices have been used to artificially stimulate a collective group's internal identity from above, as it was the case for Europe, recently. As such, these matrices have either ignored, or have paid little attention to the reasons why and how these collective group's myths and symbols were 'created'.

An example of this 'Elephant Matrix' formula is the collective myths of Turkey+Europe/EU. The 'Elephant Matrix' is based on the Sufi tale of *Blind Men of Ghor* (Shah 1974). In this parable, the blind men of Ghor must rely on each other to understand and ultimately 'see' the elephant. The collective group identities of Turkey+Europe/EU were substituted for the figures of the blind men of Ghor. Like the blind men of Ghor, Turkey and Europe are dependent upon each other for their collective group identities. This dependency takes three forms: as one of 'us'; as our 'other'; and lastly, as the *silent* + but not *missing* combination of 'us/other'. I have included Turkey in this 'Elephant Matrix' for three reasons. Turkey has tied (temporarily/permanently?) its external identity to Europe/EU's internal/external identity. Secondly, as Turkey has been trying to gain Europe + EU identity/membership, it needs to be included here. And lastly, Turkey's own internal identity is indelibly interwoven with that of Europe + EU's internal identity that omitting them would give an incomplete portrait. In this way I was able to ascertain the true essence of the word 'unified'. Does this word, to unify mean, a blending of the diverse *cultures + faiths + "ethnie"* which exist within, and where ever Europe is defined to be? Therefore, I felt Europe is the Elephant which is so elusive to all who try to perceive and understand its true form.

Through this '*Elephant Matrix*' (Sitki: 2009) I have attempted to demonstrate that the collective identities of Europe/EU and Turkey are the two sides of the same coin. These two collective groups' identities are not only *interchangeable*, but *interdependent* for their survival. To be able to accurately demonstrate my premise, I have compiled six simple questions – whose answers - I have found are unclear, volatile, forever shifting and changing depending on their circumstances. These questions are:

- Who are the Europeans? Who is NOT European?
- Why are some nation states considered European and some are not?
- Where do Europe's geographical borders start and/or end?
- What is the internal/external identity of Europe/EU?
- When and how will Europe/EU achieve and manifest their 'diversity'?
- How should Europe/EU's internal/external identity be achieved?

The '*Elephant Matrix*' (Sitki: 2009) attempts to answer these questions by using the thoughts of A A Berger with those of H Musurillo and of K W Deutche. Their perceptions are used to construct the structure of this cause-effect diagram. This matrix is drawn up using Kaoru Ishikawa's cause and effect or fish-bone diagram (Kondo 1994 86-91). H Musurillo's terms provided the internal identity factors, while the three terms of A A Berger provided the 'imaginary' time-line for this diagram. As the collective group identities of Turkey + Europe +



EU are inter-dependant it is necessary to demonstrate this *silent* + but not *missing* relationship. Admittedly, this ‘Elephant Matrix’ is a simple model of the complex inter-related history of these two collective groups. This model is not extensive nor is it a complete piece, but one which continues to evolve. It represents selected historical events which have had great political and social impact on both collective groups. This ‘*Elephant Matrix*’ can be completed once an extensive plebiscite is carried out where ever Europe/EU borders are drawn/decided to be. Either way Turkey will have to be involved in this plebiscite. Then these questions will be answered from below, instead of a ‘common’ theme being imposed from above to below.

**Europe/EU, Turkey: ‘Unity in Diversity’ multiculturalism into key-rings**

To demonstrate Europe/EU’s commitment to their motto of ‘Unity in Diversity’ would visibly manifest as these images below. All these items are common touristic merchandise that reinforce/confirm a collective group’s internal identity, externally. They are the last output of an internal ideology. At the moment, there is a clash between: Europe/EU’s internal identity; its motto; its ‘multicultural’ aspirations; and the blending in the internal identities of all its member’s into its collective group identity. In other words, Europe/EU remains a polycultural entity which all its touristic merchandise visibly reflects and reinforces.



Figures 1 -24

## Conclusion

This paper examined and demonstrated how Europe/EU's motto of 'United in Diversity' would manifest visually to confirm its multiculturalism. At present Europe/EU's 'created' internal identity does not match its official motto of being united with its diversity or the multitudes of cultures that exist within and without its 'imaginary' borders. As such, there seems to be two sets of collective group identities co-existing within the Europe/EU. One is Europe/EU's Greco-Roman culture as the dominant monoculture co-existing with- but not together – the remaining multitudes of cultures that are disconnected from this top-culture.

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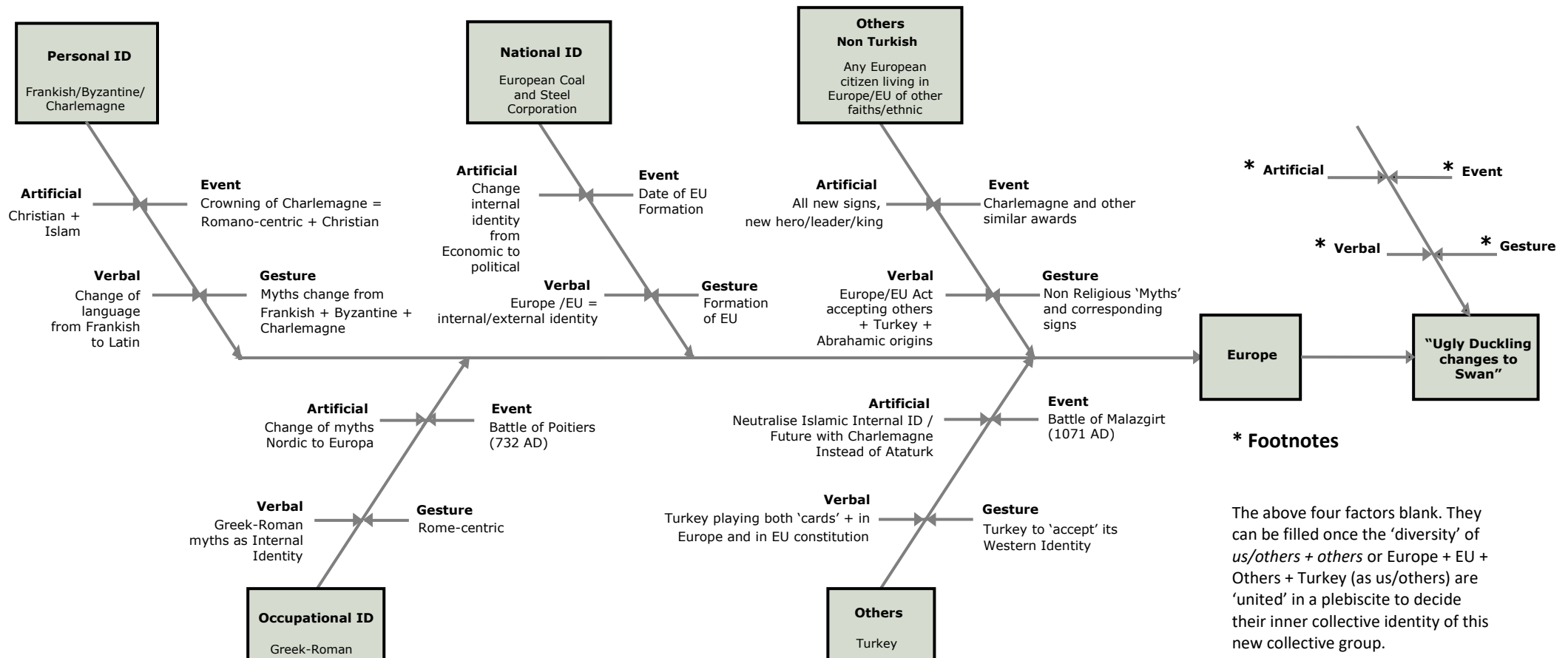


FIGURE 1

This 'Elephant Matrix' illustrates the *silent + not missing* factors that need to be included in the 'creation' of a new collective group who are 'unified' in their internal 'diversity' and 'visibly' display it externally.

Dr Hatice Sitki 2008. This diagram is copyright and cannot be used without permission

## **O passado em permanente construção. O património em transformação. O caso da Universidade de Coimbra – Alta e Sofia Património Mundial.**

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### **Resumo**

Quatro anos após a inscrição da Universidade de Coimbra – Alta e Sofia na Lista do Património Mundial, será certamente um bom momento para se fazer uma reflexão sobre que transformações ocorreram, ou estão a ocorrer, no contexto urbano da cidade, quer no espaço físico do bem classificado e da sua área urbana de influência, quer nas suas dinâmicas socioculturais. Deste modo, este artigo incidirá, criticamente, sobre o processo transformativo da cidade de Coimbra, tendo em conta três eixos estratégicos para uma gestão integrada e de desenvolvimento sustentável no seu contexto urbano: a proteção e salvaguarda do património, a Paisagem Urbana Histórica e o desenvolvimento urbano, incidindo sobre a dinâmica de reabilitação do parque edificado e do espaço público. Verifica-se que a Universidade assumiu um ímpeto propositivo no primeiro eixo estratégico e que, o poder local, pela lógica da gestão espacial, assume esse ímpeto no terceiro eixo. Pela leitura transversal das transformações e dinâmicas urbanas ocorridas nos eixos equacionados, pelo contexto urbano, enquanto plataforma agregadora dos espaços físico e social dados por uma matriz cultural territorial, é possível trabalhar num planeamento urbano, de forma integrada e ajustada às exigências que se vão colocando contemporaneamente, para alcançar uma maior qualidade de vida.

### **Palavras chave**

Transformações urbanas; Património Mundial; proteção e salvaguarda do património; Paisagem Urbana Histórica; desenvolvimento urbano.

### **Introdução**

Uma candidatura para efeitos de reconhecimento patrimonial pode – e deve – ser um ativo para a gestão e para o desenvolvimento urbano de uma cidade. É um processo de intensa produção de conteúdos que promove o estudo e o conhecimento do bem proposto à classificação, quer pelos seus utilizadores comuns, quer pelas várias entidades que, nas práticas quotidianas, o gerem e o dinamizam. Mas, também é um processo que, apesar de poder não alcançar o título desejado, não deixa de ser um projeto político de intenções, de estratégia e de intervenção para a área que se pretende classificar, para a sua área circundante e, no limite, para todo o seu território de influência.

Quando a classificação patrimonial assume o nível atribuído pelo Comité do Património Mundial, da Organização das Nações Unidas para a Educação, a Ciência e a Cultura (UNESCO), para inscrição de um bem na Lista do Património Mundial (LPM), a responsabilidade pela sua proteção e salvaguarda, assumem proporções e dinâmicas globalizadas, de visibilidade à escala mundial, capazes de transformar o património “*num instrumento indispensável de atracção social, usufruto alargado das populações e lugar de encontro de gentes e culturas*” (Custódio, 2010, p. 346). Para além da perspetiva da proteção do património subjacente a qualquer candidatura, alguns estudos sugerem que, uma das grandes metas dos Estados proponentes de um bem à UNESCO, sobretudo, nos paradigmas ocidentais, é conseguir o estatuto de

reconhecimento internacional, como recurso de dinamização/recuperação das economias locais e regionais, através do turismo (Askew, 2010, p. 33), visto que, a inscrição na LPM coincide com o aumento significativo do seu número de visitantes (Salazar, 2010, p. 134).

O resultado do reconhecimento do estatuto de Património Mundial (PM) pode, contudo, induzir a um processo de criogenização, levando a que o conjunto classificado se apresente com pouca propensão para a transformação e impeditivo a que cada geração lhe possa acrescentar valor (Capela de Campos e Murinho, 2016b, p. 39). Tendo em conta esta perspectiva e, pensando no seu contrário, considera-se que qualquer título patrimonial deve ser um processo de continuada reflexão, de modo a haver um efetivo contributo para a sua interligação com a comunidade. Assim, as transformações são necessárias, para incorporar novos modos de vida e de utilização, aceitando as marcas geracionais, sem pôr em causa a autenticidade inerente ao legado patrimonial. Porque, no que diz respeito à proteção e salvaguarda do património, o campo disciplinar da arquitetura ensina que esta *“nunca está terminada, prolonga-se no uso”* (Almeida, 2005, p. 139). Sendo assim, o melhor modo de pensar a sua sustentabilidade é a sua manutenção, através da sua continuada utilização, mesmo que, exista um interesse expectável em torno da sua exploração, preponderantemente, turística.

Desta forma, interessa pensar sobre qual o contributo que uma candidatura patrimonial pode ter para o desenvolvimento de uma cidade. Por isso, assume-se a Universidade de Coimbra – Alta e Sofia (UC-AS) como estudo de caso, enquanto laboratório privilegiado de experiências e dinâmicas próprias, por reunir parâmetros e conteúdos que, apesar de específicos à sua condição histórica, cultural e territorial (Figura 1), podem lançar pistas para qualquer outro futuro processo de candidatura patrimonial com contornos similares a este, retirando as lições necessárias para a implementação e melhoramento de boas práticas, no planeamento ou na gestão sustentável de um sítio PM.



Figura 1 – Pátio das Escolas.

Fonte: Fernando Guerra + Sérgio Guerra, UC.

Em alinhamento com a agenda da UNESCO, que elegeu 2017 como o Ano Internacional do Turismo Sustentável para o Desenvolvimento, com o tema “Património Cultural e Turismo Sustentável”, torna-se quase imperativo, meditar sobre o contributo de um título patrimonial. Ou, pelo menos, importa avaliar as formas de apropriação da concretização da oportunidade

desse título e qual o seu impacto, nas dinâmicas quotidianas da cidade, podendo permitir a correção e o ajuste de algumas metodologias de intervenção urbana.



Figura 2 – Delimitação da área UC-AS PM.

Fonte: (N. R. Lopes, 2012a, p. 224).

Assim, quatro anos após a inscrição da UC-AS na LPM (Figura 2), em 22/06/2013, será pertinente fazer um balanço sobre as transformações que entretanto ocorreram, ou estão a ocorrer, em contexto urbano. Por uma questão metodológica, este trabalho considera que o contexto urbano pode ser refletido sob uma valência material, através do espaço físico do bem classificado e da sua área urbana de influência, que se delimita pelas linhas de cumeeira circundantes à colina da Alta, criando a plataforma de análise Alta/Baixa/Santa-Clara; e sob uma valência imaterial, através das dinâmicas socioculturais da cidade e dos usos que vão sendo feitos nos espaços urbanos, que traduzem novas formas de estar e de viver a cidade.

Para tal, propõe-se refletir sobre as transformações ocorridas na cidade, sob a perspetiva de três eixos estratégicos de desenvolvimento, assumidos na candidatura a PM, para Coimbra e o seu devir:

O primeiro eixo assenta na proteção e salvaguarda do património, onde se pretende abordar as dinâmicas de transformação ocorridas no contexto equacionado, mas assumindo, maior ênfase, no espaço do bem classificado.

No segundo eixo, a perspetiva assenta na Paisagem Urbana Histórica (PUH), enquanto tendência, cada vez maior, de se candidatarem e classificarem bens, ao nível do PM, que criam relações territoriais abrangentes, o que no caso de Coimbra, não deve ser desvalorizada.

E por último, o terceiro eixo pretende fazer alusão ao desenvolvimento urbano, através do comportamento das atividades económicas que têm impacto nas dinâmicas de reabilitação do parque edificado e do espaço público, como a turístico-cultural e o comércio (Figura 3), sendo, por isso, um eixo paralelo e complementar do primeiro.

Esta leitura, das várias especificidades locais e conexões, que estes eixos estratégicos estabeleceram com o processo de candidatura e título PM, pode ser desenvolvida através da apresentação de acontecimentos, que se podem constatar, quer no contexto urbano com valência material, quer no contexto urbano com valência imaterial, sublinhando alguns

exemplos enfáticos. Assim, apreciando essas transformações urbanas consequentes da candidatura e título PM, será possível contribuir com uma perspectiva, para a discussão de medidas e estratégias que, embora queiram manter aceso o interesse num bem comunitário, não deixam de ser uma posição de princípio pela democratização do património e, por contaminação, da própria cidade.



Figura 3 – Baixa de Coimbra, Rua Ferreira Borges.

Fonte: Joana Capela de Campos (JCC), 2017.

### 1. Proteção e salvaguarda do património

Enquanto conjunto de bens com um determinado valor e lugar de plataforma de diálogo/encontro de gerações, o património não é uma memória do passado, mas antes um ativo da contemporaneidade para o futuro. Neste sentido, qualquer sociedade tem o dever de conservar para transmitir, mantendo e continuando a corrente entre os nossos antepassados e os nossos filhos, sob pena, de não ser simplesmente a memória coletiva a se esvanecer, mas, sobretudo, de se perder a identidade coletiva (Guillaume, 1980, pp. 14–15).

A noção de que o património está associado a espaços de continuidade geracional, pela reprodução das memórias e vivências adaptadas aos usos e costumes de uma vida contemporânea, é pertinente. Muitos espaços e edifícios da cidade são, de facto, essenciais para mapear e identificar o espaço de representação comum, da ligação do indivíduo com a cidade e a comunidade, onde é evocada, também, a relação intrínseca entre as pessoas e os espaços urbanos, que se vão estabelecendo nas dinâmicas quotidianas de uso, apropriação, conhecimento, compreensão e pertença.

E esta noção de continuidade no uso, adaptação e transformação do espaço, de modo a responder às exigências que em cada contemporaneidade eram colocadas, foi uma tônica na dinâmica evolutiva da UC, na qual, o processo de candidatura a PM se baseia para justificar o Valor Universal Excepcional (VUE) do bem<sup>38</sup>.

Assim, em 2003<sup>39</sup>, o Reitor Fernando Seabra Santos propõe, visionariamente, que seja a Universidade, o bem a ser inscrito na LPM, ao constatar que a instituição era o principal

<sup>38</sup> Cf. (N. R. Lopes, 2012a, p. 149).

<sup>39</sup> Resumidamente, interessa perceber que a cidade vai absorver muito conteúdo, da sucessão de propostas do processo de candidatura de Coimbra a PM, cuja dimensão e evolução contextualiza, no espaço e no tempo, a relação de influência e consequência com as transformações urbanas contemporâneas. O processo dividiu-se por três fases, onde foram desenvolvidas propostas de intervenção, pelas áreas da Alta e da Baixa, com grande

motivo de interesse dos visitantes, que procuravam Coimbra, “*pela riqueza da sua história e tradição*” (Santos in Universidade de Coimbra, 2005, p. 5). E a propósito do dever e do compromisso geracional, Seabra Santos justificava o enquadramento estratégico da candidatura, afirmando que esta não visaria “*reforçar a luminosidade de uma inesquecível viagem pelo passado*” (Santos in Universidade de Coimbra, 2005, p. 5), mas teria “*um fortíssimo sentido de futuro: o de prevenir a agressão patrimonial e a dispersão da memória colectiva*” (Santos in Universidade de Coimbra, 2005, p. 5).

A partir deste momento, a UC assume-se como o *grande estaleiro de obras do país*, comumente referenciado, numa antevisão consensual do impacto que uma candidatura a PM tem nas dinâmicas de transformação do espaço urbano. Falamos de uma área considerável, que ocupa 117 hectares no espaço vital da cidade e que era proposta a classificação para inscrição na LPM: 35,5 hectares de área da UC-AS PM, compreendendo os 29 hectares da Alta e 6,5 hectares da Baixa, acrescido dos 81,5 hectares de área de proteção da denominada zona tampão.

O próprio texto da candidatura da UC-AS também é bastante claro, nesse aspeto, quando afirma que a candidatura a PM passava por uma estratégia de intervenção de reabilitação no património, acrescentando valor ao existente (N. R. Lopes, 2012a, p. 9). A complexidade e a dimensão da pretensão de proteção e salvaguarda do património universitário, ganhou uma dinâmica, de tal modo, que deu origem a um dos Livros que fizeram parte do dossiê de candidatura à UNESCO, o Livro 2, referente ao Plano de Gestão (N. R. Lopes, 2012b). Este documento, para além de referenciar as etapas de gestão e de monitorização das intervenções no património, desde o projeto à fase de empreitada, era a efetivação do compromisso que a UC estipulou com a cidade e com o mundo, de proteger e salvaguardar um património com VUE, que é de todos.

Muitos projetos e obras de intervenção foram feitas durante o processo de candidatura, para garantir o cumprimento dos objetivos estipulados. A construção dos polos 2 (Ciências e Tecnologias) e 3 (Ciências da Saúde), induziu a uma necessidade de transformação e reabilitação do espaço existente, nos polos fundadores da UC, a Sofia e a Alta, quer ao nível urbano, quer ao nível dos usos. A UC apostou na Alta, de administração universitária, pela valorização do existente, promovendo a pedonização do espaço público e a readaptação de espaços pedagógicos, entretanto desocupados pela descentralização. No Polo da Sofia, a abertura para uma intervenção profunda não era tão fácil, uma vez que, a questão da propriedade do bem, excecionalmente a UC, noutros o Estado e, noutros casos, privados, levanta algumas restrições e impedimentos, que terão que ser mediados noutras bases.

De qualquer modo, esse ímpeto da UC, para a intervenção, tem sido contínuo, mesmo depois do título atribuído, porque este não foi assumido como um fim em si próprio, mas antes, o início de uma maior responsabilização assumida à escala global. Assim, o caso de Coimbra assume uma característica, que lhe afere um estatuto paradigmático na LPM: Coimbra inscreve património que antes de ser, já era PM.

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reconhecimento territorial para os cidadãos: a primeira fase (1982-1998) caracterizou-se por fazer sobressair a evolução conceptual dos entendimentos da área da cidade com valor; a segunda (1998-2003) caracterizou-se como sendo um período de transição; e a terceira (2004-2013) caracterizou-se pela construção, desenvolvimento e formalização da candidatura da UC-AS à UNESCO. Cf. (Capela e Murtinho, 2014a, 2014b, 2015).



Muitos dos elementos que compõem o bem UC-AS ainda não estavam reabilitados, à data da inscrição da UC-AS na LPM. Alguns dos espaços foram inscritos, estando em fase de projeto de arquitetura, com todas as transformações que no decorrer do seu processo lhe podem estar associadas, demonstrando uma abertura da UNESCO e das suas entidades conselheiras, como o International Council on Monuments and Sites (ICOMOS), o International Union for Conservation of Nature e o International Centre for the Study of the Preservation and Restoration of Cultural Property, para a diversidade de abordagem para cada caso, principalmente quando a evolução é justificativa válida para o seu VUE.



Figura 4 – A Porta Férrea e o seu largo.

Fonte: JCC, 2016.

Assim, podem ser destacadas quatro referências das variadas intervenções que a UC tem vindo a realizar, em espaços emblemáticos do bem inscrito na LPM, que foram classificados como PM antes das intervenções que sofreram.

Com intervenção realizada em 2014 (já depois da atribuição do título), no âmbito da conservação e restauro da Porta Férrea, a principal entrada do complexo do Pátio das Escolas e dos grupos escultóricos do seu Largo (Figura 4), foram identificadas, analisadas e corrigidas diversas patologias, que ameaçavam as cantarias com perdas patrimoniais irreversíveis no material, pedra de Ançã e, conseqüentemente, nas formas esculpidas.

A proposta de intervenção assentou numa metodologia geral e específica, definida previamente e de acordo com o responsável pela intervenção, o engenheiro Fernando Marques, em “Memória descritiva e justificativa” de Fevereiro de 2014, sendo que, o projeto de execução foi desenvolvido com o decorrer dos trabalhos de intervenção, por haver uma *“necessidade de compatibilizar metodologias e ações específicas com os resultados dos estudos e testes laboratoriais”*, recorrendo a uma *“filosofia de intervenção mínima”*.

Assim, foram realizados estudos de diagnóstico e análise recorrendo à investigação e ao enquadramento histórico-arquitetónico do objeto pela arqueologia da arquitetura, bem como ao desenho do levantamento arquitetónico e fotogramétrico com o mapeamento das patologias. Ainda se destaca o recurso a testes laboratoriais referentes à realização de análises *“aos sais solúveis presentes”* na pedra calcária, testes à *“resistência mecânica do calcário in situ”*, à avaliação dos *“mecanismos de degradação superficial e respectiva monitorização dos tratamentos de consolidação e da colonização microbiológica”* e à verificação das *“condições*

*termo-higrométricas e eólicas locais*”, bem como, a realização de “*testes prévios dos métodos de limpeza e harmonização cromática das superfícies*” (Fernando Marques, 2014). O processo dos trabalhos foi informado, consultado, analisado e aprovado pelas entidades que tutelam o património, neste caso, a Direção Regional de Cultura do Centro. Esta intervenção fez parte de um conjunto mais vasto, realizado ou a realizar no complexo do Paço das Escolas.

Neste momento, já se encontra concluída a reabilitação da Capela de São Miguel, a Substituição/reparação de caixilharia, nas fachadas norte e poente do Palácio Real. E, depois da reabilitação da porta de entrada principal da Biblioteca Joanina, está prestes a iniciar-se a reabilitação da fachada principal (nascente) e do portal da mesma biblioteca. No conjunto de intervenções está prevista a reabilitação de coberturas e de fachadas do Palácio Real, do Colégio de São Pedro (Figura 5), dos Gerais e do antigo Museu de Arte Sacra. Cumulativamente, estão previstas ações de limpeza da Torre e Via Latina, bem como a implementação de acessibilidades ao Palácio de São Pedro e a instalação de mobiliário urbano no Pátio das Escolas que, como espaço emblemático da Universidade onde se concentram vários elementos e espaços notáveis, recebe o maior número de visitantes da UC.



Figura 5 – Colégio de São Pedro, no Pátio das Escolas.

Fonte: JCC, 2017.

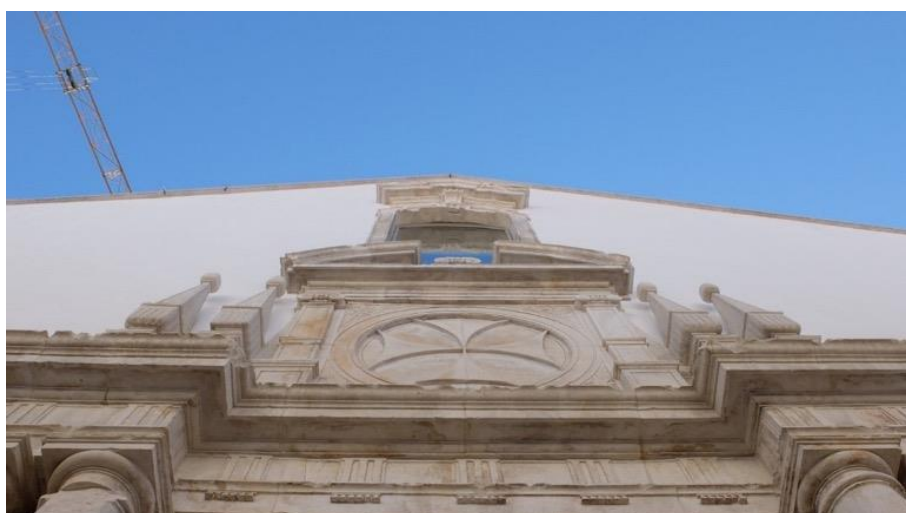


Figura 6 – Colégio da Santíssima Trindade, pormenor do pórtico de entrada.

Fonte: JCC, 2016.

Uma intervenção, terminada em fevereiro de 2017, que se torna pertinente abordar para a leitura do PM que antes de o ser, já o era, é a realizada no Colégio da Santíssima Trindade (Figura 6), propriedade da UC e localizado na Alta, para albergar a Casa da Jurisprudência da Faculdade de Direito da UC.

O projeto de reabilitação do colégio foi assinado pelos irmãos Francisco e Manuel Aires Mateus (Aires Mateus Associados, Lda.) e teve início em 2001, quando a UC lançou um concurso público para a reabilitação deste Colégio, que se encontrava em ruína e risco de colapso total, tendo em vista, na altura, o funcionamento do futuro Colégio Europeu da UC. Em 2004, foi aprovado o projeto de licenciamento com condicionantes, pela CMC. A partir daí, foi realizada uma campanha de intervenção arqueológica preventiva, sob responsabilidade da Reitoria da UC e tendo sido aprovada pelo IGESPAR, I.P., com a realização de três sondagens prévias e acompanhamento das escavações, das picagens de paredes e transporte de entulho, de acordo com o “Relatório Prévio do Projecto de Reabilitação do Colégio da Trindade”, em 17/06/2011 (Manuel Rocha de Aires Mateus, 2011).

A partir de 2007, já a decorrer o processo de candidatura da UC-AS a PM, o projeto de arquitetura sofreu transformações, solicitadas pela Universidade, decorrentes da alteração de programa e, também, para incorporar as diretrizes, entretanto, equacionadas com o estudo arqueológico realizado, conforme referido na “Memória Descritiva”, de 23/07/2010.

Com a evolução dos acontecimentos, o processo de composição e organização do espaço sofreu com as suas próprias condicionantes, ficando ancorado não só ao estudo arqueológico, que possibilitou acrescentar conteúdo e conhecimento das sucessivas fases de ocupação do edifício e permitindo, assim, um ajuste do programa ao uso do espaço no futuro. Mas também, porque foram expostos os elementos que, na ruína, conseguiram subsistir, ganhando e reclamando, por inerência própria, um estatuto intemporal de continuidade “*capazes de induzir o projecto*”, que “*pretende explorar a enorme carga telúrica e poética*” das ruínas (Manuel Rocha de Aires Mateus, 2010).

Nesse sentido, a ruína preexistente foi a matéria-prima usada no discurso de projeto que é refletido na obra, onde se assiste à transformação da antiga igreja do Colégio, num primeiro momento, numa sala de audiências e depois num auditório ou então, à transformação da área residencial do Colégio em gabinetes de trabalho. Neste princípio, e garantindo os vários tempos do edifício como sua narrativa, os arquitetos assumem a construção de espaços dentro de espaços, tornando a compartimentação interior autónoma em relação às paredes antigas, através do seu apoio pontual em molduras dos vãos exteriores e as paredes exteriores numa cápsula protetora que resiste a todas as transformações impostas nas várias contemporaneidades.

Mas o projeto também soube ir absorvendo os achados e hipóteses que da obra e do estudo arqueológico decorriam, como a redução de construção de espaços enterrados. Porque o pavimento recolhe memórias que se vão acumulando ao longo do tempo, criando mais um arquivo, que juntamente com os arquivos dos elementos portantes, que ao se manterem, iam contando a história do edifício: da construção, da alteração de uso, da derrocada, da ruína e do abandono. O processo de projeto foi absorvendo todas estas etapas da vida do edifício e procurou dar-lhes um discurso de unidade. Importava dar coerência e consistência na leitura do objeto, através do desenho, e não criar um somatório das intervenções e histórias que lhe

foram acontecendo ao longo dos séculos. E a estratégia era aparentemente simples: intervenção mínima nos *arquivos* recebidos e presunção de ligeireza e reversibilidade na proposta nova.

Todos os elementos que “sobreviveram ao tempo”, as fachadas, a área do claustro e a igreja, seriam mantidos com intervenções “pontuais, mínimas, e avaliadas caso a caso, sempre decididas com integral respeito pela verdade histórica do edifício” (Manuel Rocha de Aires Mateus, 2010). A proposta nova seria feita com maior intensidade e densidade no espaço vazio, de modo que este fosse sendo ocupado com novos espaços de resposta ao programa, preenchendo as lacunas decorrentes das derrocadas e da ruína e, desta forma, restituir o volume do edifício original. No entanto convém referir que a determinado momento, quando se questionou a sustentabilidade estrutural da ruína, foram cirurgicamente feitas algumas demolições, não refletindo o valor de cada uma dessas porções, mas essencialmente visando a adaptação e o forçar da existência ao projeto dos irmãos Mateus.

Mas talvez seja na cobertura, que melhor se compreenda toda a estratégia da intervenção: pela introdução de uma fenda contínua, entre as paredes antigas e as águas novas que se desenharam, “*tornando legíveis os estratos dos diferentes tempos*” e, pela “*feliz coincidência*” entre as cotas da cércea do Colégio e do pavimento do Pátio das Escolas, “*aliada à reduzida largura da rua que as separa*” (Manuel Rocha de Aires Mateus, 2010). O projeto procura, assim, enfatizar a leitura do espaço de cobertura como um prolongamento do miradouro do Pátio, tendo sido decidido, por isso, a utilização de lajedo de pedra lioz para o seu revestimento, “*dando continuidade visual ao pavimento*” (Manuel Rocha de Aires Mateus, 2010), repondo a integridade do edifício na sua circunstância contemporânea e com a preocupação do contexto urbano.



Figura 7 – Colégio da Graça.

Fonte: PM, UC.

No complexo da Rua da Sofia, será de salientar a intervenção de reabilitação de uma ala do Colégio da Graça (Figura 7), cuja empreitada de execução das obras terminou em 2015, para receber o Centro de Documentação 25 de Abril e uma parte do Centro de Estudos Sociais, partilhando o edifício com a Liga dos Combatentes, por decisão ministerial de 15/03/1999. O projeto esteve a cargo do arquiteto José Paulo dos Santos, que em “Memória Descritiva e Justificativa” assume a sua postura de intervenção no património: “*com serenidade e em “silêncio”*”.

O projeto teria que ser considerado um processo aberto, uma vez que deveria estar sujeito às investigações arqueológicas, que seriam realizadas em simultâneo à intervenção, cujo início de trabalhos aconteceu em 2010, que por sua vez, deveriam respeitar o projeto, que se ia corrigindo, adaptando e incorporando novas possibilidades de desenho decorrentes da investigação, num exercício de ajuste constante do plano de trabalhos ao que ia acontecendo. Mas, esta intervenção, desde cedo, esteve sujeita a outras condicionantes decorrentes da sua própria contemporaneidade e da sua condição de património: só a igreja é Monumento Nacional, à data (embora, houvesse um processo para classificar o prédio todo); por se enquadrar na zona de proteção da Rua da Sofia (Imóvel de Interesse Público); e, ainda, por ser parte de um bem proposto a PM. Só por estes três enunciados, haveria uma dificuldade acrescida para uma intervenção. Contudo, ainda estavam em curso, alterações na legislação, não só subordinadas à candidatura da UC-AS a PM, mas também pela transformação da estrutura tutelar que estava a decorrer. Toda esta conjuntura implicou alterações de projeto, influenciadas pelos atrasos e adiamentos consecutivos de decisões, emissão de pareceres e de propostas (Sónia Filipe, 2013).

As afetações espaciais, que iriam influenciar a escolha dos percursos, tiveram interferência no projeto: foi proposto, um reajuste na distribuição espacial, entre a UC e a Liga dos Combatentes, de modo a se conseguir clarificar os acessos, até aí, labirínticos e pouco legíveis.

Este exemplo traduz a complexidade de intervenção em espaços classificados, num cenário de múltiplos proprietários ou gestores do espaço. Esta questão lança um paralelismo à própria contingência da candidatura da UC-AS a PM, por ter que responder a várias entidades competentes na gestão do seu espaço. Um paralelismo, que embora resolvido de modo diverso, até pela natureza do objeto em causa, resultou no sucesso de um e outro caso.



Figura 8 – Estufas Tropicais do Jardim Botânico da UC.

Fonte: JCC, 2017.

Para finalizar, sublinhamos um quarto exemplo que ganhou o Prémio Nacional de Reabilitação Urbana, anunciado a 29/03/2017, na categoria de Melhor Intervenção com Impacto Social. Falamos da requalificação das Estufas Tropicais e Espaço Ciência *in Situ* (Figura 8), do Jardim Botânico da UC, um projeto do arquiteto João Mendes Ribeiro, aprovado em 09/01/2015, tendo a obra decorrido entre fevereiro e dezembro de 2015.

O projeto pautou-se por uma “limpeza”, no desenho final, do espaço das estufas, havendo o redesenho de alguns espaços, como a ala central ou como a galeria superior, construída por laje e pilares de betão armado, substituídos por estrutura metálica, mais leve e integrada na restante construção. Também os pormenores construtivos foram alvo de redesenho com recurso a perfis metálicos e vidro, repondo o princípio construtivo primitivo e, ainda, a intensificação da transparência, inerente a todo o espaço da estufa, com substituição das portas interiores de madeira por portas de vidro (João Mendes Ribeiro, 2013, p. 6).

Por uma questão técnica, os vidros foram todos substituídos com características específicas para um espaço destinado a estufa, complementados com sistemas de sombreamento, que para além de responderem à exigência térmica e proteção solar do espaço, permite conferir variações de imagem, consoante as estações do ano e a necessidade de sombreamento (João Mendes Ribeiro, 2013, p. 7). Assim, o resultado assumiu o princípio por uma intervenção mínima e limpeza dos elementos que não fizessem parte da filosofia construtiva e cénica do edifício principal – um dos primeiros exemplos da arquitetura do ferro no país, inspirado nas estufas inglesas de Kew Garden (João Mendes Ribeiro, 2013, p. 5).

O Espaço de Ciência *in Situ* será polivalente e foi projetado para substituir o antigo edifício do viveiro a norte do lago Victória. Este novo edifício, que não fazia parte do processo de candidatura, assume uma forte presença na plataforma poente das estufas e, graças à sua construção marcada pelo uso da madeira de riga e pedra calcária, facilmente asseguram uma integração na envolvente. Já o lago Victória foi construído no lugar da antiga Estufa Victória, cuja estrutura apresentava deformações e cujas soluções arquitetónica e construtiva não apresentavam a qualidade da estufa principal. A intervenção compreendeu, ainda, o arranjo e aumento do edifício da caldeira, de forma a responder a requisitos técnicos e, ainda, trabalhos de conservação e restauro, não só dos edifícios mas também dos seus pátios e espaços adjacentes.

Estes são quatro exemplos, dentro de um universo bem mais dilatado a que a Universidade se propôs e, continua a propor, para garantir o passado em permanente construção, através da salvaguarda e da proteção do valor patrimonial recebido, por um lado, e, acrescentando valor ao existente, porque *o tempo novo é uma realidade e existe independentemente do facto de nós o aceitarmos ou recusarmos* (Van der Rohe, 1996, p. 304).

Assim, qualquer obra de arquitetura implementa uma ideia de mudança e transformação, podemos considerar que o processo de arquitetura não deve ser visto como um acontecimento linear ou fechado, ainda que na aparência, as intervenções sejam pouco evidentes. Fazer arquitetura é ter consciência do tempo nos seus vários estágios e contemporaneidades para introduzir o tempo novo, com todas as influências e interferências socioculturais a que está sujeita.

Apesar de ser ao nível do bem classificado, que este eixo se faz sentir, não deixa de ser verificado, na sua área urbana de influência, a reabilitação e requalificação de algum património classificado, que acrescenta dinâmicas urbanas complementares, como equipamentos potenciadores de uma vida cultural para a cidade. Casos como a requalificação do Convento de Santa Clara-a-Velha<sup>40</sup> (2002-2008) ou, a ampliação e remodelação do Museu

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<sup>40</sup> Arquitetura de Atelier15 (Alexandre Alves Costa, Sérgio Fernandez e Luís Urbano).

Nacional de Machado de Castro<sup>41</sup> (1999-2013) são exemplos de intervenções na área de influência do bem PM.

Mas a transformação, que opera no contexto urbano, também se verifica no plano imaterial, pelo número de visitantes nestes espaços, 442 510<sup>42</sup>, que pela rúbrica “Visitantes aos espaços turísticos”, no ano letivo 2015/2016, foram contabilizados pela UC. Este número de visitantes assume uma tendência geral de crescimento, verificada entre 2012 e 2016<sup>43</sup>, e reforça a procura e intensificação do turismo cultural<sup>44</sup>, sobre os sítios PM, onde o património físico é o suporte dorsal dos acontecimentos.

## 2. Paisagem Urbana Histórica: *Lusa Atenas* como matriz cultural

A designação de PUH ganhou estatuto oficial de instrumento político para a gestão patrimonial, na *Recomendação sobre a PUH*, em 2011, pela UNESCO. A exigência da definição do conceito foi sendo cada vez mais acentuada devido às circunstâncias de práticas e desenvolvimentos urbanos europeus, sobretudo, no período da transição do milénio.

As tensões existentes entre o desenvolvimento local e os processos de globalização estavam a assumir um impacto pronunciado na identidade e nos seus limites espaciais das cidades, alterando a sua configuração e imagem territorial na sua integridade visual, por vezes com alteração total da *skyline* e, inevitavelmente, assumindo um impacto sobre as populações que viviam nesses assentamentos urbanos. A UNESCO entendia que esta pressão, para um desenvolvimento rápido, traria consequências para as cidades, já que esta era uma nova ameaça à conservação das cidades com um forte carácter cultural e, em particular, daquelas inscritas na LPM (UNESCO, 2009). Por ser um tema quase transversal ao desenvolvimento urbano europeu, o caso de Viena<sup>45</sup> (Áustria) transformou-se num ponto-chave para o reconhecimento da necessidade de um debate específico sobre o conceito da PUH e todas as suas implicações.

Assim, a PUH<sup>46</sup> reflete sobre a evolução e expansão concetual em torno do *património cultural*, codificada pelas camadas sobrepostas de desenvolvimento social, cultural e económico, assumindo as dimensões material e imaterial do território (Sonkoly, 2011; UNESCO, 2011, pp. 50–55). Por ter vindo a ser moldado pelos textos e debates promovidos pela UNESCO, ao longo dos anos, uma vez que as “Cidades Históricas” eram a categoria mais representada na LPM, podemos assumir a PUH como uma matriz cultural do território.

Pela pertinência desta implicação, cujo processo de definição do conceito ocorreu em simultâneo ao processo de candidatura da UC-AS a PM, este eixo estratégico deverá ser equacionado como sendo mais uma oportunidade de abordagem para uma avaliação e uma

<sup>41</sup> Arquitetura de Gonçalo Byrne Arquitectos, ganhou o Piranesi Prix de Rome 2014.

<sup>42</sup> Cf. <http://www.uc.pt/dados>, acessado em 19/05/2017.

<sup>43</sup> Informação avançada por Pedro Machado, presidente da Turismo Centro de Portugal, em 09/05/2017 (Agência Lusa, 2017).

<sup>44</sup> De acordo com Pedro Machado à Agência Lusa, de 09/05/2017, a propósito da aprovação da candidatura a fundos comunitários, no âmbito do Programa Operacional da Região Centro 2020, do projeto “Lugares Património Mundial do Centro” (Agência Lusa, 2017).

<sup>45</sup> Em 2005, o caso de Viena foi o motivo da primeira conferência específica sobre a PUH, dando origem ao *Vienna Memorandum*, sendo assumido como a primeira tentativa de definição do conceito, que se pretendia operativo. Cf. (Bandarin e Oers, 2012; Sonkoly, 2011).

<sup>46</sup> A *Recomendação sobre a PUH* define-a, como sendo “the urban area understood as the result of a historic layering of cultural and natural values and attributes, extending beyond the notion of “historic centre” or “ensemble” to include the broader urban context and its geographical setting” (UNESCO, 2011, p. 52).

gestão integrada do espaço urbano, de modo a fomentar a sustentabilidade e o desenvolvimento das próprias cidades. Porque, se a PUH é uma matriz cultural territorial, então permite estabelecer as correlações existentes em vários *layers* que a compõem, desde as vertentes materiais, construídas ou naturais, até às imateriais, como as vivências, os usos e as tradições, que se embrenham e se estabelecem por apropriação em determinado território. E Coimbra tem essa particularidade: a sua PUH é uma matriz cultural territorial. E o bem classificado e inscrito na LPM, a UC-AS, faz parte integrante daquele que é considerado o valor refúgio da imagem da cidade.



Figura 9 – *Lusa Atenas*.

Fonte: JCC, 2016.

De forma mais expressiva, a Alta com o núcleo do Paço das Escolas, como corolário daquela que, foi e é conhecida como a *Lusa Atenas* (Figura 9), ao longo dos séculos que, sobre as águas do Mondego, é referida, vezes sem conta ao longo dos séculos, para inequivocamente se associar à Universidade e à própria cidade. Sendo assim, a singularidade desta realidade assume uma vertente material, relacionada com o resultado da ocupação territorial ao longo dos tempos para estabelecer a cidade existente. Mas também, assume uma vertente imaterial, precisamente por ter uma identidade muito própria e intrínseca à relação com o seu espaço, onde as vivências urbanas se vão realizando e estabelecendo na apropriação e promoção da sua imagem.

Tendo em conta a particularidade da PUH, da colina da *Lusa Atenas* e do seu território de influência, importava verificar que transformações sofreu ou tem vindo a sofrer, com o processo de candidatura e título PM, no contexto urbano.

No contexto do bem classificado, podemos identificar a intervenção no Colégio da Trindade, como sendo o caso que mais contribui para este eixo após a atribuição do título PM, pela sua visibilidade e interferência com as vistas do e sobre o Pátio das Escolas, como já foi referido.

Também não é despiciente o processo que se avizinha de concretização de um percurso de ligação entre a Universidade e a Baixa, através do Jardim Botânico, feito por acesso pedonal ou por um pequeno veículo municipal para transporte coletivo. E, esta situação só é concretizável devido à conjugação da reabilitação de alguns dos percursos dentro do Jardim Botânico (com apoio da CMC), da qualificação da entrada norte junto ao edifício das Física/Química e da



reabilitação da Capela de São Bento, situada em pleno jardim, no limite poente do bambuzal. Com esta intervenção, irá ocorrer a abertura pública deste notável espaço verde da cidade, tornando parte da mata acessível.

Mas consideramos, sobretudo, que tem uma maior afirmação para a sustentabilidade do desenvolvimento e gestão deste eixo estratégico, alguns acontecimentos que foram sendo estipulados durante e pelo processo de candidatura, na área urbana de influência do bem classificado, por ser esse o espaço privilegiado para criar sinergias capazes de correlacionar a convivência entre as vertentes materiais e imateriais.



Figura 10 – Vista sul da *Lusa Atenas*.

Fonte: Manuel Ribeiro, UC.

Talvez, o acontecimento mais evidente seja a requalificação das zonas ribeirinhas e frente de rio. Projetos como a reabilitação dos equipamentos, Mosteiro de Santa Clara-a-Velha e Convento de São Francisco<sup>47</sup>, ou como a reabilitação de espaços de lazer, Parque Verde do Mondego<sup>48</sup> (Figura 10) com a construção da ponte pedonal Pedro e Inês<sup>49</sup>, permitiram devolver aos seus habitantes, residentes e utilizadores, esta área de cidade.

Estas dinâmicas, que foram acontecendo de forma paralela, mas com influência do processo de candidatura da cidade a PM, transformaram o rio numa plataforma de atravessamento, permanência e uso, principalmente, ao caminhante (Certeau, 1998, pp. 169–172), no contexto urbano imaterial, que percorre, deambula, pelas várias continuidades estabelecidas, que como dizia Fernando Távora, eram ações essenciais para se conhecer uma cidade<sup>50</sup>. A cidade nasce e renasce a cada dia e é preciso estar presente, para se acompanhar essa transformação, mapeando o espaço e fazendo parte da ação do território, que não deixa de ser uma condição geográfica, porque os processos de arquitetura transformam “*uma condição de natureza numa condição de cultura*” (Botta, 1996, p. 25).

Estes protocolos de relação estabelecidos pela PUH, tendo o espaço físico como suporte de modelos de intervenção e de utilização, podem unir as práticas de “conhecer para

<sup>47</sup> Arquitetura de João Luís Carrilho da Graça (2010-2016).

<sup>48</sup> Arquitetura de MVCC Arquitectos (Mercês Vieira e Camilo Cortesão) (2002- 2004).

<sup>49</sup> Engenharia de Cecil Balmond e Adão da Fonseca, inaugurada em novembro de 2006.

<sup>50</sup> Em 1954, Távora dizia que “*para avaliar uma cidade como espaço organizado, apenas uma solução: percorrê-la, vivê-la, deambular pelas suas ruas, descer as suas encostas, subir aos seus pontos mais altos, habitar as suas casas, senti-la como um organismo vivo que não para, que dia a dia se altera*” (Távora in Bandeirinha, 2012, p. 59).

compreender”, entre o indivíduo, a comunidade e a sociedade com o território. Práticas que, nesse sentido, vão criando uma diversidade de visões individuais, criando e estabelecendo laços comuns e, por fim, definindo o lugar com todas as suas características e especificidades que o tornam único. De certa forma, a PUH pode ser uma das abordagens mais operativas para a gestão do espaço urbano, pois vai permitir avaliar em simultâneo as relações e ações estabelecidas entre a população e o território.

Tendo essa hipótese como premissa válida, foi proposta uma possibilidade de ferramenta operativa emergente, para a monitorização e fiscalização das operações e intervenções realizadas nos contextos urbanos em áreas de influência de bens classificados, para a gestão da sua PUH (Capela e Murinho, 2014a). A proposta assumia a utilização de uma metodologia de projeto, a *Zona Visual de Influência* baseada na análise do sistema de vistas<sup>51</sup>, já considerada na candidatura da UC-AS a PM para justificar a questão levantada pelos especialistas do ICOMOS, sobre os limites da propriedade, a sua dimensão e a sua gestão futura (Figura 11).

Verificando que, no caso de Coimbra, o bem classificado tinha uma posição privilegiada no contexto urbano, de onde se pode ver e ser visto, era atribuída uma responsabilidade na observação para as duas posições, quer pelas entidades competentes, quer pela população. Assim, esta ferramenta do projeto urbano era assumida como uma forma preventiva de proteção e salvaguarda. Qualquer análise técnica de monitorização, feita com recurso ao sistema das vistas, em fase de projeto, podia proteger o bem e o seu contexto urbano de uma futura intervenção que pusesse em causa o equilíbrio da PUH, devendo, por isso, ser considerada como um auxílio para a gestão e manutenção não só dos bens classificados, mas também para a sustentabilidade do desenvolvimento do seu território de influência.



Figura 11 – Vista aérea da Alta.

Fonte: Filipe Jorge, UC.

### 3. Desenvolvimento urbano

Por fim, no terceiro eixo estratégico é proposto refletir sobre a oportunidade gerada em torno da atribuição de um título patrimonial, que acaba por ser um propulsor de algumas atividades económicas, a partir de três grandes componentes, a política, a turístico-cultural e a

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<sup>51</sup> De modo geral e resumido, o sistema das vistas (*viewshed*) considera a área geográfica que é visível a partir de um determinado ponto, a partir da qual se estabelece uma bacia visual (*visual bay*), que é a área física, na terra, na água ou no ar, visível pelo olho humano a partir de determinado ponto. Cf. (Capela e Murinho, 2014a).

económica (Rebanks Consulting Ltd e Trends Business Research Ltd, 2009). E nesse sentido, o desenvolvimento urbano evidencia-se, em paralelo e em complemento ao primeiro eixo, quer por contaminação quer pela oportunidade potenciadas pelas dinâmicas transformativas, inerentes ao primeiro eixo, mas que neste, se manifestam pela reabilitação urbana devido às transformações ocorridas nas novas vivências e usos urbanos.

Uma leitura sobre o processo de candidatura de Coimbra a PM verifica que, a sua primeira fase incide sobre os processos de patrimonialização que se vão intensificando na cidade, pelo reconhecimento dos seus espaços vitais e do seu valor, sobretudo, públicos. Esta abordagem permitiu que fosse expectável uma contaminação pela força transformativa no local, que resolvesse o pressuposto de requalificação urbana a partir da intervenção nesses espaços públicos, pela consecutiva integração de espaços adjacentes. Assim, este eixo assume-se como complemento do primeiro, ao nível do contexto urbano material, e também por isso, seu paralelo, porque a área urbana de influência daquele que era considerado o bem a classificar, durante o processo de candidatura, foi beneficiando das políticas adotadas e desenvolvidas para a proteção e salvaguarda do património.

Pode ser sublinhada a transformação que pode operar neste terceiro eixo, a requalificação do Convento de São Francisco (Figura 12). As obras de requalificação incidiram nos espaços conventuais e, ainda, na construção de auditório, salas polivalentes e estacionamento. Em 2015, sob o projeto de Gonçalo Byrne, foi iniciada a empreitada de recuperação da igreja do Convento. O edifício reabriu em abril de 2016, como Centro Cultural e de Congressos, assumido pela CMC como *“um agente de desenvolvimento económico do território, impulsionando diversos setores estratégicos, designadamente o turismo”*<sup>52</sup>, sendo que, já se observam resultados: Coimbra subiu 155 lugares no ranking mundial das cidades com mais congressos e convenções internacionais durante o ano 2016<sup>53</sup>.



Figura 12 – Convento de São Francisco, Centro Cultural e de Congressos.

Fonte: JCC, 2017.

A área de influência do bem classificado UC-AS é, também por isso, território atrativo para a implementação de dinâmicas socioculturais e de usos, característicos de um contexto urbano imaterial, que se afirmam, cada vez mais, globalizados, inerentes aos padrões de vida

<sup>52</sup> Cf. <http://www.coimbraconvento.pt/pt/convento-sao-francisco/historia/>, acedido em 16/05/2017.

<sup>53</sup> Cf. (Câmara Municipal de Coimbra, 2017).

européia/ocidental contemporânea, sendo conhecido, por exemplo, o aumento produtivo de algumas dinâmicas económicas, nomeadamente a turística, após uma classificação da UNESCO, mas também é conhecida a controvérsia à volta do custo do aumento desmedido dessa realidade.

Desde 2009, que o crescimento do turismo e as pressões económicas que lhe estão associadas, em cidades históricas, tem sido apontado pela UNESCO, de forma direta, como uma das maiores preocupações que os responsáveis pela gestão dos sítios inscritos na LPM, deveriam ter em consideração (Bandarin e Oers, 2012, p. 67). O próprio ICOMOS tem uma *Carta Internacional do turismo cultural*<sup>54</sup>, onde aborda algumas questões e preocupações, desde 1976, relativas ao volume turístico aceitável para um sítio classificado, sem o prejuízo de ser o início da “destruição” da sua identidade, autenticidade e integridade (F. Lopes e Correia, 2004, p. 38) e, ainda, há autores que colocam a questão do turismo cultural como sendo um *cavalo de Troia* para os sítios PM (Caraballo Perichi, 2001) (Figura 13).



Figura 13 – Turistas na cidade. Casa dos Melos, UC.

Fonte: GNI, UC.

O aumento da atividade turística<sup>55</sup>, em Coimbra, permite verificar uma realidade acessível através da simples ação de percorrer as ruas, tanto na área PM, como na sua área urbana de influência: o aumento de turistas tem gerado investimentos e proveitos económicos, cuja face mais visível se traduz na disseminação de lojas de recordações (Figura 14), no aumento do número de alojamentos turísticos e estabelecimentos de restauração, contribuindo para a reabilitação do parque edificado e dos espaços públicos. Assim, o turismo cultural, enquanto dinamizador urbano, deve contribuir para o desenvolvimento sustentável da cidade, como sendo mais um fator associado a novos estilos de vida e de consumo promovidos pela sociedade contemporânea. Por isso, desenvolver metodologias, instrumentos e técnicas capazes de garantir essa sustentabilidade, é um desafio imperativo, que vigora com o crescimento do número de visitantes da cidade.

Mas existe “a outra face”, visto que, a pressão do turismo cultural é um processo de massas, sentido à escala global. É assumido, de modo geral, que causa danos no património,

<sup>54</sup> Houve uma primeira versão que foi revista em 1976, em Bruxelas. Em 1999, a Carta foi retificada, no México. Está prevista a sua atualização, em 2017, no âmbito do Ano Internacional do Turismo Sustentável para o Desenvolvimento.

<sup>55</sup> Os números do turismo representam um crescimento de 5% (Europa), em 2015 (World Tourism Organization, 2016, p. 15). Tal facto, atribui ao turismo uma valência motriz e vital para a recuperação económica global, de acordo com a Organização Mundial do Turismo (World Tourism Organization, 2016).

na sua componente material, pelo desgaste continuado do aumento do número de visitantes. E também, na sua componente imaterial, pelos conflitos gerados com os habitantes locais, que muitas vezes, não reagem positivamente às dinâmicas dessa nova realidade, nomeadamente, na oferta de comércio de *souvenirs* e de unidades de alojamento turístico, em particular, adjacentes às áreas classificadas. Talvez, o mais visível dessa particularidade, seja o abandono de lojas tradicionais e históricas, de todo o “saber fazer” e do produto tradicional, que conferia autenticidade e especificidade ao comércio local, para dar lugar, às lojas globais com produtos tipificados, que se encontram por todo o lado e não se diferenciam de lugar para lugar



Figura 14 – Baixa, Rua Ferreira Borges.

Fonte: JCC, 2017.

O comércio direcionado ao mercado turístico, que se estabelece preferencialmente nessas áreas adjacentes ao património, deve ser discutido, porque uma das tensões entre a globalização destas práticas e o desenvolvimento local sustentável, deve abordar a qualidade, porque quantidade já existe. Se a gestão destes sítios, não passar pelo planeamento destas dinâmicas de diferenciação do local, vai ser possível, erradamente, adquirir produtos tradicionais de Coimbra, em qualquer loja “tradicional”, em Lisboa, Porto, ou até, noutra cidade europeia. Por isso, há uma maior afluência aos espaços que se diferenciam pelo produto local ou regional, ou ainda pela procura de experiências culturais, como o fado e a Canção de Coimbra, neste caso (Figura 15).



Figura 15 – Alta de Coimbra, Escadas do Quebra-Costas/Rua Joaquim António de Aguiar.

Fonte: JCC, 2017.

A autenticidade e a especificidade do local é aquilo que torna o sítio único, sendo, por isso, uma mais-valia para a preservação da identidade local. Esta diferenciação positiva, característica própria do local que se pretende único, só beneficia a qualidade da experiência de quem reside ou visita a cidade.

E por isso, deve haver um compromisso entre todos os intervenientes no processo de patrimonialização, da gestão e política do espaço urbano até às comunidades locais, para que sejam criadas condições para a permanência dos habitantes e comércio tradicional, no local, tentando não repetir os erros do passado, em que muitos Centro Históricos foram deixados ao abandono. Uma cidade não se pode privar de residentes em áreas de grande reconhecimento emocional (Figura 16). Este facto, já é o suficiente para prejudicar a cidade, porque o pior para qualquer cidade, é a falta de vida. Sem vida, a cidade cai.

Este paradigma avalia a autofagia do turismo, sendo que o seu volume incontrolável é um dos fatores de risco para o património, e no fundo, para a cidade. Contudo, é necessário reverter esta prática e tornar esta atividade em mais uma que possa contribuir para um desenvolvimento sustentável da cidade, pensando que cada caso é sempre único, e que, por isso, deve ter e deve promover as suas especificidades.

Assim, o turismo deve ser um catalisador positivo para uma cultura de sustentabilidade do património e não, um fim em si próprio. E a busca de novos conhecimentos e experiências culturais, pela viagem que é uma das atividades de lazer mais apreciadas pelas massas<sup>56</sup>, na contemporaneidade, pode ser vista como um recurso, do qual os bens inscritos na LPM se podem valer, para responder à oportunidade económica que daí resulta (Figura 17). Num cenário de gestão de sítios PM, a promoção da viagem turística pode funcionar para gerar receitas e outros recursos, capazes de contribuir na sua própria gestão, manutenção e conservação.



Figura 16 – Baixinha, Rua do Paço do Conde.

Fonte: JCC, 2016.

Foi sob esta perspetiva que o Turismo do Centro de Portugal lançou a candidatura “Lugares Património Mundial do Centro”<sup>57</sup> aos fundos europeus, que foi aprovada para realização de

<sup>56</sup> Pedro Machado referia que “o produto cultural é o mais procurado pelo turista”, para justificar o aumento que o turismo cultural representa na economia (Agência Lusa, 2017).

<sup>57</sup> A candidatura surge a partir da Rede de Património Mundial do Centro de Portugal (2016), que reúne os seus quatro sítios inscritos na LPM: o Mosteiro da Batalha e o Convento de Cristo em Tomar (1983), o Mosteiro de Alcobaça (1989) e a UC-AS (2013). Cf. (Agência Lusa, 2017).

ações direcionadas ao envolvimento da comunidade, serviço educativo, programação cultural em rede, hospitalidade turística e comunicação, permitindo, não só estabelecer dinâmicas territoriais para a promoção do património, da história e da cultura dos quatro sítios PM, mas também, evidenciar a região centro, a partir deles (Agência Lusa, 2017).



Figura 17 – Quebra-Costas.

Fonte: JCC, 2016.

Portanto, neste caso, entendendo o PM como um recurso do território e partindo da oportunidade publicitária do título patrimonial, foi possível reinventar soluções para enquadramentos não convencionais, dentro da lógica de abordagem deste terceiro eixo estratégico, mas que não deixarão de se refletir, pelo menos, nas dinâmicas socioculturais e de uso dos espaços classificados.

### **Conclusões**

A partir de três eixos estratégicos para uma gestão integrada e desenvolvimento urbano sustentável, assumidos no processo de candidatura de Coimbra a PM, foi feito um balanço sobre o processo transformativo visível e consequente da candidatura e título PM, que foi sendo operado em três níveis de contexto urbano: no do bem classificado, no da sua área urbana de influência, na vertente material, e no espaço das dinâmicas socioculturais, na vertente imaterial.

A primeira leitura que este trabalho permite salientar é que, uma candidatura patrimonial deve ser um ativo para a gestão e para o desenvolvimento urbano sustentável de uma cidade. Porque é um processo onde foi considerado um valor maior, que pelo seu reconhecimento, estabelece opções, intenções e compromissos de gestão, proteção e salvaguarda, com e para as gerações futuras.

Será, porventura, mais acessível, por ainda estar num estágio embrionário, ajustar ou redesenhar metodologias de gestão urbana, que não estejam a ser devidamente equacionadas, sobre o impacto que o processo de candidatura de Coimbra a PM teve na cidade.

O processo transformativo está visível ao nível do primeiro eixo estratégico equacionado, pelas ações a que a UC se tem proposto, através de inúmeras intervenções, na área do bem classificado, da qual é gestora, para garantir a continuidade do valor patrimonial recebido, por um lado, acrescentando valor ao existente, por outro. Com património que ainda não existia, à

data da inscrição na LPM, de acordo com o que havia sido apresentado na candidatura, a UC-AS é um caso paradigmático, onde se classifica um bem patrimonial, que antes de ser, já era.

Mas também a própria cidade tem investido na requalificação de patrimónios e espaços urbanos, aproveitando o impulso gerado pela candidatura e pelo título, potenciando, em paralelo e em complemento ao primeiro eixo, políticas e dinâmicas que permitissem a requalificação do espaço público e privado, por toda a área urbana de influência do bem classificado.

Poderia, parecer incongruente, intercalar o eixo estratégico da PUH, entre aqueles, que se consideram paralelos e complementares no âmbito do contexto urbano. No entanto, verifica-se, por tudo o que foi apresentado e considerado, que o primeiro e o terceiro eixos só são paralelos e complementares, pela leitura de unidade introduzida pela matriz cultural territorial, que é dada pela abordagem material e imaterial da PUH, estabelecendo, assim, as correlações verificadas.

Logo, a PUH, para além de eixo estratégico potenciado pelo processo de candidatura a PM, que importa desenvolver e aprofundar, torna-se, também, numa chave de leitura para as transformações urbanas visíveis consequentes do processo de candidatura e do título PM. Porque quando se fala da recuperação do património ou do aumento do número de turistas na Universidade, fala-se, também, do edifício que foi ou que vai ser recuperado, ou transformado em qualquer tipo de alojamento turístico, ou edifício habitacional ou espaço comercial reabilitados, numa qualquer rua da Alta, da Baixa ou de Santa Clara.

É, portanto, pela abordagem transversal do contexto urbano e pela consciência do sistema de coexistência, onde a parte não é mais importante do que o todo, que a PUH pode contribuir para o desafio que se coloca na gestão para o futuro, destes territórios de identidade secular, como é o caso de Coimbra. Através de um planeamento integrado e integrante do contexto urbano, considerando quer a vertente material quer a imaterial, capaz de ser dinâmico e flexível para se ir ajustando às necessidades e exigências que vão sendo colocadas e equacionadas na vivência do quotidiano, é possível propor ações para uma maior concretização da qualidade do espaço urbano, tanto ao nível do espaço físico, como ao nível do sociocultural. Mas é possível, também, prevenir ações que possam ser prejudiciais ao contexto urbano, no seu todo ou de alguma parte, permitindo conferir à PUH, a mediação mais operativa na gestão urbana, enquanto sistema, monitorizando e avaliando, continuamente, os protocolos estabelecidos entre a população sobre/e o território, com recurso a equipas multidisciplinares, pois não pode ser esquecido, que a cidade é composta por pessoas, espaços e pelas relações que se estabelecem entre ambos. Entenda-se, por isso, que é por uma questão de qualidade de vida, que os processos de gestão da cidade se devem guiar.

E uma candidatura patrimonial, para além da produção de conteúdos que promovem o estudo e o conhecimento do bem proposto, quer pelos seus utilizadores diários quer pelas entidades locais, nacionais e internacionais que o gerem e o dinamizam, é também um processo que, não deixa de ser um projeto político de intenções, de estratégia e de intervenção para a área que se pretende classificar, para a sua área circundante e, no limite, para o seu território de influência. Porque no fundo, um bem classificado e inscrito na LPM é uma promoção mediática, que deve ser aproveitada, para responder à oportunidade



económica que resulta da classificação, tendo em vista a geração de receitas e recursos capazes de contribuírem para a sua própria gestão, manutenção e conservação.

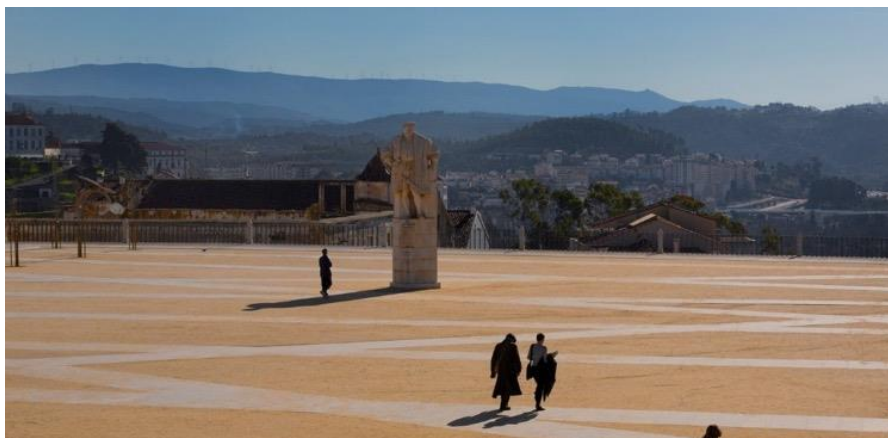


Figura 18 – Caminhos, Pátio das Escolas.

Fonte: FG+SG, UC.

O direito à cidade é para todos, quer sejam residentes, trabalhadores ou turistas (Figura 18). E nesse sentido, quem promove a sectorização da cidade através de acontecimentos para potenciar determinada indústria económica, como a do turismo, tendo como força motriz o património cultural, deve fazê-lo com equilíbrio e sensatez, sob pena de se descaracterizar aquilo que se quer preservar. Assim, um planeamento integrado e integrante permite propor, experimentar e ajustar medidas e estratégias que visem contribuir para um balanço equilibrado, entre residentes e turistas, que usam, ocupam e coexistem no mesmo espaço urbano. O aparente antagonismo que possa resultar dessa convivência, como a perda sucessiva de identidade dos sítios classificados causada pelo aumento de atividades turísticas, pode ser compatibilizado com a aceitação desse facto, através de ações direcionadas, enquanto consequência natural do processo de reconhecimento da exceção do bem.

É preciso antecipar a realidade e tomar consciência do *tempo novo* e das suas contemporaneidades, num passado em permanente construção, mas também, preservar e ir construindo memória de um património, incessantemente, em transformação.

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# **THEME B**

**NEW TOURISM AND THE  
RELATIONSHIP WITH THE  
TANGIBLE AND INTANGIBLE**

## **TEMA B**

**NOVO TURISMO E A RELAÇÃO COM O  
PATRIMÓNIO HISTÓRICO MATERIAL E  
IMATERIAL - GASTRONOMIA, VINHOS,  
RELIGIÃO**

## THEME B

Some elements formerly considered of minor relevance in its capacity to attract tourists to tourist sites now play a fundamental role. The same happens with the demand for wine and food tourism.

There has also been a change in the supply structure of some products that have long been centred in mass commercial offers, as in religious tourism. What actually happens nowadays is a combination between the attraction of pilgrimage places, which tend to be mass-marked based, as happens in Fatima, Portugal, and a more cultural, monumental demand, increasingly present in the UNESCO Heritage List.

Visitors are offered the opportunity to learn about the culture, customs, traditions and stories of the places and personalities in a very pleasant way, with expectations often exceeded, and a true enjoyment of the experience.

The demand of what we may call the alternative, niche, or creative tourism – the new tourism – has in food products and in the food for the soul (religions), meets the cultural expressions of places, the unique presence of gastronomic and religious festivities.

In both cases, the places and the motives of devotion (churches, sanctuaries, sacred art, saints, friars and nuns, in the case of religious tourism; terroirs, gourmet products, unique food cooking, wine cellars, harvests, restaurants and chefs, in the case of gastronomy and wine) have become attractive elements that motivate an increasing involvement of regulators, agencies, institutions and researchers.

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## TEMA B

Alguns elementos considerados de menor importância na sua capacidade de atração dos turistas em relação aos destinos turísticos jogam, hoje, um papel central, dificilmente perceptível há alguns anos atrás no âmbito do turismo cultural.

Assim sucede com a procura turística enogastronómica.

Também é visível uma modificação da estrutura da oferta de alguns produtos que durante muito tempo se encontraram centrados em ofertas massificadas, como sucede com o turismo religioso.

Acontece, na atualidade, uma conjugação entre uma atração associada a lugares de peregrinação, tendencialmente massificados, caso de Fátima, em Portugal, com uma outra que se baseia numa procura mais cultural, monumental, crescentemente presentes na Lista de Patrimónios da UNESCO.

Qualquer uma das tipologias de turismo referidas oferece ao visitante a possibilidade de melhor conhecer a cultura, os costumes, as tradições e as histórias dos lugares e das personalidades, de uma forma muito agradável, com frequente superação das expectativas e valorização da experiência.

A procura insistente, que se vai sentindo naquilo que podemos denominar por turismo alternativo, de nicho, criativo – o novo turismo -, tem nos produtos alimentares e no alimento para o espírito (as religiões) a forma ideal de exploração das expressões culturais dos territórios, da presença singular de festividades gastronómicas e religiosas.

Num e noutro caso, os lugares e motivos de devoção (igrejas, santuários, arte religiosa, santos, frades e freiras, no caso do turismo religioso; terroirs, produtos gourmet, confeções singulares, adegas, vindimas, vinhos, restaurantes e chefes de culinária, no caso da gastronomia e vinhos) transformaram-se em elementos atratores que motivam crescente envolvimento de reguladores, organismos, instituições e investigadores. Combinam-se sob a forma de produto turístico, suscitam movimentos de confrades, são objeto de celebração e promoção em eventos locais, regionais, nacionais e internacionais.

Neste sentido, promover estas temáticas é valorizar a cultura, o turismo e o desenvolvimento, permitindo o seu estudo dar especial significado à relação entre o património e as novas tendências do turismo.

# **A semana santa como fator de desenvolvimento turístico na cidade de Lorca (região De Múrcia, Espanha)**

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## **Resumo**

A cidade de Lorca, sofreu no dia 11 de maio de 2011 dois sismos de 5,1 e 4,5 graus de magnitude na Escala de Richter, causando 9 vítimas mortais e danos materiais em infraestruturas, vivendas e no rico património histórico da cidade. Desde o terremoto, surgiram diversas ações para reconstruir os elementos patrimoniais, com o objetivo de reposicionar Lorca como destino turístico da primeira ordem dentro do contexto regional através do turismo cultural. Nesta pesquisa os objetivos foram: (1) Analisar a importância da Semana Santa no território de estudo; e (2) Avaliar a sua importância e incidência no desenvolvimento turístico da cidade e o seu impacto territorial. Os resultados mostram que a principal atividade que identifica Lorca é a festividade original da Semana Santa, ato religioso-cultural mais importante da localidade e que cada ano atrai milhares de pessoas que vêm de varios lugares do mundo. Portanto, é um recurso turístico de primeira ordem para a cidade e para a região e é necessário desenvolver esforços no sentido da declaração como Património Cultural Imaterial da Humanidade pela UNESCO e conferir uma maior importância à festividade.

## **Palavras chave**

Semana Santa; Turismo Cultural; Património Imaterial; Lorca.

## **1. Introdução**

Prats (2003) indica que o binómio património e turismo combinam-se, complementam-se e necessitam um do outro. Atualmente, as deslocações relacionadas com peregrinações religiosas e com o turismo cultural associado ao património religioso são um dos produtos mais populares na Europa e na Espanha (Nolan y Nolan, 1992).

O termo turismo religioso é recém-criado (Garay y Cànoves, 2011). A diferença é que anteriormente foi praticado por grandes massas (Cànoves y Blanco, 2011) como ocorre hoje em cidades santas como Roma, Santiago de Compostela ou Jerusalém.

Um dos atos religiosos que mais pessoas reúne em Espanha é a Semana Santa. Várias cidades espanholas têm a distinção de Festas de Interesse Turístico Internacional, sendo Lorca uma delas. A cidade foi devastada a 11 de Maio de 2011 quando sofreu dois terremotos de alta intensidade (5,1 e 4,7 graus na Escala Richter). Desde então, a Câmara Municipal e o governo regional realizaram ações para valorizar o rico e variado património material e imaterial de Lorca, sendo a Semana Santa um elemento chave para revitalizar o turismo na cidade através do turismo cultural e religioso.

Depois do terremoto criou-se o Plano Director do Património Cultural de Lorca (2011), promovido pela Direção-Geral de Belas Artes e Bens Culturais do Ministério da Cultura, que

facilita o restauro e a reabilitação do património material, imaterial e arqueológico danificado. O seu tempo de atuação é de cinco anos, o seu objetivo centrou-se na reabilitação dos edifícios mais importantes que foram afetados pelos sismos, com obras urgentes em edifícios declarados BIC (Bem de Interesse Cultural) ou com diferentes níveis de proteção (Graus 1 e 2).

Este Plano contemplava, portanto, a reabilitação de elementos relacionados com a Semana Santa que foram muito danificados pelos terremotos (Convento e Igreja de Santo Domingo, Convento e Igreja de São Francisco, Igreja de São Mateus e Igreja de Santiago. A sua incidência no património foi espectacular, mostrando resultados rapidamente. Em 2012, o produto turístico chamado *Lorca: abierta por restauración* recebeu na FITUR (Feira Internacional de Turismo) o Prémio Excelência que distingue o melhor produto turístico ligado a catástrofes.

Os estudos sobre turismo religioso em Espanha não são muito prolixos, no entanto nos últimos anos há um aumento dos mesmos. Destacam as publicações realizadas por Llundrés (1995), Santos Solla (2002) e por Esteve Secall (2002), e em especial o número dedicado a este fenómeno pela revista *Cuadernos de Turismo* em 2006.

Os trabalhos publicados sobre a Semana Santa de Lorca são poucos, destacam-se os realizados por Munuera *et al.*, (2006), Andrés Sarasa (2016) e por Espejo Marín e García Marín (2016).

Os principais objetivos desta pesquisa foram: (1) Analisar a importância da Semana Santa no território em estudo; e (2) Avaliar a sua importância e incidência no desenvolvimento turístico da cidade e seu impacto territorial.

## **2. Área de estudo, materiais e métodos**

Lorca fica situada no sudeste de Espanha, mais concretamente na Região de Múrcia. O município tem uma área de 1675,2 km<sup>2</sup>, sendo o segundo maior município de Espanha, depois de Cáceres. Atualmente tem uma população de 91.714 pessoas (Instituto Nacional de Estadística, 2015), sendo a terceira maior cidade na região, a seguir a Múrcia e a Cartagena. A comarca natural de Lorca é maior, alcançando os 3970 km<sup>2</sup>, tendo a cidade influência direta sobre os outros dez municípios distribuídos entre as províncias de Múrcia e de Almería, estando este território povoado por 211.534 pessoas (Serrano-Martínez *et al.*, 2016).

Lorca é, tradicionalmente, uma cidade histórica, convergindo para ela diversas civilizações ao longo do tempo devido, principalmente, à sua localização no extremo oriental da Depressão Penibética, caminho entre a Andaluzia e o Levante (Gil Olcina, 1968).

Para a preparação do presente estudo foi realizada, em primeiro lugar, uma revisão da literatura. Depois, foi recolhida informação disponível sobre a Semana Santa de Lorca e sobre o seu património material e imaterial, elementos primordiais para o seu valor como fator de desenvolvimento turístico. Finalmente, foi realizado trabalho de campo para verificar *in situ* a magnitude do evento, tendo sido visitados os museus do “*Paso Blanco*” e “*Paso Azul*”. Também foram feitas entrevistas aos comerciantes e aos residentes na cidade para conhecer a sua perceção sobre o impacto no território.

### 3. Resultados e Discussão

#### 3.1. A importância da Semana Santa em Lorca

Uma das principais marcas da identidade do povo lorquino é a sua Semana Santa, declarada Festa de Interesse Turístico Internacional desde 2007 pela Secretaria Geral do Turismo do Ministério da Indústria, Turismo e Comércio de Espanha. Esta é uma das manifestações mais importantes e originais de todas quantas são celebradas em Espanha. Nasceu em 1852 sendo um ressurgimento das antigas irmandades reestruturadas no século XVIII como fraternidades do estado nobre, constituídas como organizações fechadas aos seus herdeiros. É uma festividade diferente porque as procissões não são correntes, são consideradas como *Desfiles Bíblico-Pasionales*, tendo uma personalidade única e diferente.

Lorca transforma-se, durante a Semana Santa, numa nova Jerusalém, relembrando a Paixão, Morte e Ressurreição de Jesus de Nazaré através dos *Desfiles Bíblico-Pasionales*. Reis, imperadores, sacerdotes, guerreiros da Assíria ou Babilónia, romanos e israelitas desfilam adornados com veludos e ricos bordados para reviver episódios da Bíblia, criando uma mostra que é difícil de esquecer.

Entre os Pasos que formam a Semana Santa de Lorca encontram-se: “*Paso Blanco*”, “*Paso Azul*”, “*Paso Morado*”, “*Paso Encarnado*”, “*Paso Negro*” e “*Paso del Resucitado*”. Destaca-se, principalmente, a rivalidade entre os dois primeiros, eles são os mais numerosos e os que mais paixão despertam entre as pessoas pela espectacularidade dos desfiles, sendo os precursores da festividade, tiveram origem em 1852 (*Paso Blanco*) e em 1855 (*Paso Azul*), respectivamente.

A rivalidade é herdada da luta entre as antigas fraternidades localizadas nas igrejas mais oligárquicas da cidade (*Santo Domingo* e *São Francisco*), expressada através de magníficos bordados que adornam cavalos, carruagens e tronos das imagens de maior veneração.



Figura 1 – Imagem de la *Virgen de la Amargura* (*Paso Blanco*)

Fonte: *Paso Blanco*

A Semana Santa transforma todos os anos Lorca. A maioria dos residentes na cidade são membros de um Paso e engalanam as suas varandas com estandartes dos *Pasos* o que confere



uma identidade ao evento. A principal artéria da cidade, a Rua Juan Carlos I, lugar onde decorrem os *Desfiles Bíblico-Pasionales*, é preparada para o evento. A rua é coberta com terra para que os cavalos possam desfilar sem nenhum risco e para que se recriem as características do terreno onde ocorreram os atos segundo a Bíblia. Também se colocam bancadas de lugares com cadeiras para se poder assistir aos desfiles, que são comprados pelos residentes de Lorca e por turistas. Geralmente, cada *Paso* tem um lugar destinado para agrupar os seus seguidores, que animam as imagens e desfiles da sua irmandade.

### 3.2. A singularidade dos Bordados

Uma das singularidades mais atrativas da Semana Sante de Lorca são seus bordados. Estes constituem-se como um património material e imaterial porque a arte e a técnica do bordado transmitem-se de geração em geração pelas costureiras dos *Pasos* que participam na Semana Santa.

Os conhecimentos e as técnicas relacionados com o bordado e sua mostra nos *Desfiles Bíblico-Pasionales* de Lorca, transformaram aos bordados numa manifestação artística com peculiaridades que evoluíram ao mesmo tempo que o desfile. Para manter viva a tradição e a sua transmissão de geração em geração, foi criada em colaboração com vários organismos públicos uma escola oficial do bordado em que os alunos aprendem as técnicas ensinadas pelas costureiras e pelos diretores artísticos. A transmissão destes conhecimentos e práticas permitem a aprendizagem e desenvolvimento destas técnicas, favorecendo a sua popularização e o estabelecimento de laços sociais.

Ao longo do ano são bordadas nas oficinas túnicas, mantos e outras vestimentas e complementos que são exibidos pelas personagens durante os desfiles e renovam-se as peças deterioradas pela sua utilização. Nesta função implicam-se os diretores artísticos, costureiras e os mordomos, porque todos eles desenvolvem um papel essencial nos trabalhos de conservação, limpeza e manutenção das peças que participam no desfile, que são guardadas em espaços protegidos e blindados. Os bordados são expostos nos museus dos *Pasos* para ser visitados pelos turistas. Há outros lugares nos quais existem espaços onde se podem ver peças bordadas, mas fora da cidade de Lorca não há museus das irmandades da Semana Santa destinados a mostrar os bordados.

Lorca sente-se muito identificada com este elemento cultural, o mais singular de seu património artístico, que confere prestígio à cidade e ajuda a definir a sua personalidade histórica. O bordado a ouro e sedas constitui a componente essencial dos *Desfiles Bíblico-Pasionales* de Lorca, a festa mais amada e participada da cidade, com importantes funções sociais e culturais. Os bordados são o resultado da implicação direta de muitos lorquinos que ao longo do ano se esforçam para realizar este evento. A arte do bordado lorquino é, em suma, uma manifestação artística que permite aos lorquinos expressar a sua criatividade e um símbolo reconhecido da sua identidade cultural.



Figura 2 – Museo de los Bordados del Paso Blanco

Fonte: Laura Hummer Hernández

Nos últimos anos, o Conselho do Governo da Região de Múrcia declarou Bem de Interesse Cultural, através de Decretos, várias peças de bordados da Semana Santa de Lorca. Destacam-se a decoração do trono de “*Nuestra Señora la Virgen de la Amargura del Paso Blanco de Lorca*” e o conjunto de bordados que formavam parte da ornamentação do antigo trono da “*Santísima Virgen de los Dolores del Paso Azul de Lorca*”.

Na Resolução de 27 de março de 2013 da Direção Geral de Bens Culturais da Comunidade Autónoma da Região de Múrcia, iniciou-se o procedimento para a declaração de Bem de Interesse Cultural Imaterial a favor da “Tradição do Bordado de Lorca”.

Depois dos terremotos de 11 de maio de 2011, com a reabilitação das igrejas dos dois *Pasos* principais, as irmandades “*Paso Blanco*” e “*Paso Azul*” decidiram remodelar os seus museus. O primeiro a abrir ao público foi o MUBBLA (*Museo de Bordados del Paso Blanco*). As suas instalações têm um rico e variado património dedicado à Semana Santa, sendo visitadas por milhares de pessoas cada ano. Contitui-se como uma mostra inequívoca da paixão que é vivida na festividade da cidade sendo o reflexo de um dos elementos idiossincráticos de Lorca.

### 3.3. A Semana Santa de Lorca: Candidata a Património da Humanidade pela UNESCO

A aposta para posicionar a Semana Santa de Lorca como um produto turístico de primeira ordem faz-se durante vários anos. Uma das ações mais significativas é sua candidatura a Património Cultural Imaterial da Humanidade pela UNESCO, mais concretamente dos seus bordados.



Ville de Bethléem

LA « SEMAINE SAINTE DE LORCA » PATRIMOINE DE L'HUMANITE

**Déclaration**

(Bethléem, le 4 avril 2011)

La Ville de Lorca (de la Région de Murcie, en Espagne) est une Ville historique, célèbre pour son patrimoine culturel : matériel et immatériel.

L'ensemble des cérémonies religieuses traditionnelles pour la « Semaine Sainte » de la Pâque chrétienne font partie de ce patrimoine immatériel et y occupent une place prépondérante. Les caractéristiques de ces cérémonies sont décrites dans le document « La Semaine Sainte de la Ville de Lorca », rédigé par la Municipalité de cette Ville et joint à la présente « Déclaration » .

Compte tenu de ces caractéristiques, la CONFERENCE PERMANENTE DES VILLES HISTORIQUES DE LA MEDITERRANEE (dont la Ville de Lorca est membre, et qui a été constituée dans la Ville d'Alghero en 1998 et actuellement composée de 69 Villes historiques petites et moyennes de 17 Pays méditerranéens) a décidé à l'unanimité, dans son Assemblée du 17 novembre 2007 à Carbonia (Région de Sardaigne, en Italie) d'appuyer la demande d'inscription de la « Semaine sainte de Lorca » au Patrimoine Mondial de l'Humanité.

Nous, Docteur Victor Batarseh,  
Maire de la Ville de Bethléem et

Président de la CONFERENCE PERMANENTE DES VILLES HISTORIQUES DE LA MEDITERRANEE,

avons donc l'honneur de déclarer de façon formelle que toute la CONFERENCE soutient la demande d'inscription de la « Semaine sainte de la Ville de Lorca » au Patrimoine Mondial de l'Humanité.

C'est avec d'autant plus de plaisir que la Ville de Bethléem, en tant que Ville où est né Notre-Seigneur, le "Prince de la Paix", soutient l'une des manifestations les plus populaires et séculaires d'amour et de confiance en Lui.

Dr. Victor Batarseh  
Maire de Bethléem

Figura 3 – Carta de apoio para que a UNESCO reconheça a Semana Santa de Lorca Património Cultural Imaterial da Humanidade

Fonte: Câmara Municipal de Lorca

A Semana Santa enquadra-se perfeitamente na definição de património cultural imaterial que é apresentada no artigo 2 da Convenção para a Salvaguarda do Património Cultural Imaterial. É uma manifestação popular do património imaterial, transformada em espetáculo, que mostra a identidade da cidade, sendo adornada de técnicas artesanais que surgiram de um saber popular, contempla tradições e expressões orais de uma sociedade dominada por uma elite privilegiada. Tudo isto lhe confere singularidade pelo que foi declarada de Interesse Turístico Internacional no ano 2007 e agora, no âmbito do acordo alcançado no parágrafo "A" do ponto quarto do Ordem do Dia da Assembleia da Conferência de Cidades Históricas do Mediterrâneo, celebrada na Sede do Centro Italiano da Cultura de Carbonia (Itália), a 17 de novembro de 2007, promove-se a declaração pela UNESCO da Semana Santa de Lorca como Património Cultural Imaterial da Humanidade.

Na tentativa de valorizar a Semana Santa como capital/imagem de Lorca deve ser considerada uma triple tradição que revela a idiosincrasia da cidade: a dimensão religiosa que justifica as procissões (*Desfiles Bíblico-Pasionales*); o jogo das elites lorquinas que está na base da singularidade da Semana Santa e, por último, o saber popular, através do qual os lorquinos

conferem originalidade à Páscoa, que è exaltada pelas suas tradições e pelo valor artístico que têm os bordados que luzem imagens, tronos e personagens históricos (Andrés, 2016).

Esta iniciativa é aceite pelos lorquinos. É um desejo que nasce há anos atrás, quando os *Pasos* solicitam a protecção jurídica máxima para as peças de bordados que constituem o seu património artístico, através da Declaração do Estado Espanhol de Bens de Interesse Cultural.

#### 3.4. *Atração turística da Semana Santa e repercções na cidade*

A capacidade de atração turística da Semana Santa de Lorca é inequívoca. O número de turistas aumenta cada ano devido à singularidade da festividade e das campanhas publicitárias lançadas pela administração local e regional para atrair pessoas de outros municipios da Região de Múrcia e das províncias vizinhas no sentido de se gerarem novas oportunidades de desenvolvimento.

A última campanha lançada pela Câmara Municipal de Lorca faz referência à Semana Santa e aos seus bordados. O slogan *Lorca, lo bordamos*, criado em 2016, tem como principal objetivo consolidar-se como uma marca da cidade que confere não só visibilidade a todas as atividades de Lorca junto dos turistas, como junto dos lorquinos que se sentem orgulhosos, permitindo valorizar os bordados.

A atração turística gerada pelo evento e o envolvimento dos lorquinos têm benefícios socioeconómicos na cidade. Um bom exemplo é o pequeno comércio do centro histórico, diminuído nos últimos anos pelo sugimento dos centros comerciais e pelos danos sofridos pelo terremoto em 2011, que aumenta as vendas substancialmente, como notam os comerciantes. Destaca-se a seguinte percepção:

“Durante a Semana Santa o horário comercial é diferente, chegando a abrir durante todo o dia ininterruptamente. São muitas as pessoas que visitam a cidade e os lorquinos saem mais para as ruas. Isto faz com que na Semana Santa as vendas e os benefícios sejam maiores”



Figura 4 – Slogan Lorca, lo bordamos

Fonte: Câmara Municipal de Lorca

A Rua Juan Carlos I, expoente máximo do comércio urbano de Lorca na atualidade, apresenta os mesmos sintomas que o centro histórico. Durante a Semana Santa as vendas são maiores e, por conseguinte, os benefícios económicos. O horário do comércio altera-se, as lojas abrem durante todo o dia para satisfazer as necessidades dos turistas, sendo necessário contratar pessoal durante estas datas:

“As vendas e a afluência às lojas na Semana Santa são maiores. Muitos estabelecimentos comerciais têm que contratar pessoas para poder atender às necessidades de trabalho. Eu penso que gera impactos territoriais muito positivos para a cidade, gerando um benefício económico importante, especialmente para os estabelecimentos comerciais do centro histórico que se encontram em decadência”

A Semana Santa é muito importante para bares e restaurantes, especialmente para os que se localizam no centro histórico e na Rua Juan Carlos I, que também contratam pessoas durante o evento para atender os consumidores, o que está bem patente na seguinte percepção:

“Durante a Semana Santa a atividade é muito intensa no meu restaurante, tenho que contratar novas pessoas. É a única maneira de atender a todas as reservas que os consumidores realizam. Nos dias mais intensos da festividade é normal ter uma lista de espera para o almoço e para o jantar. Para os proprietários dos restaurantes a Semana Santa é fantástica, sendo uma importante fonte de receitas, podemos ganhar numa semana o mesmo dinheiro que em dois meses”

Em suma, as procissões são decisivas para o setor comercial e hoteleiro, tendo uma repercussão positiva nos proprietários, que vêem as vendas aumentarem devido ao fluxo de milhares de turistas que cada ano viajam até Lorca para ver as *Desfiles Bíblico-Pasionales*. A chegada de turistas é uma oportunidade de desenvolvimento socioeconómico (Moreno y Lagar, 2016), porque gera benefício através do consumo de bens e de serviços e a criação de novos empregos, para além da valorização de toda a cultura e idiosincrasia de Lorca.

#### **4. Conclusões**

A Semana Santa de Lorca é, por tanto, um recurso turístico de primeira ordem para a cidade como para a Região de Múrcia. As repercussões socioeconómicas são inequívocas. É necessário desenvolver esforços para melhorar o posicionamento desta festividade a nível nacional e internacional, para gerar um desenvolvimento territorial.

A Câmara Municipal e as diferentes irmandades que organizam a festividade estão particularmente envolvidos na sua declaração como Património Cultural Imaterial da Humanidade pela UNESCO. Esta distinção constituir-se-ia como importante para atrair, segundo as previsões, um maior número de turistas ao longo de todo o ano, induzindo o surgimento de novas atividades permanentes relacionadas com a Semana Santa.

Em suma, todos os agentes devem envidar esforços para que este recurso seja um produto turístico, e que uma parte dos benefícios económicos que possa gerar se repercutam nas irmandades verdadeiras impulsionadoras da festividade.

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# Tempo e temporalidade, espaço e espacialidade: a temporalização do espaço sagrado

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## Resumo

Este artigo apresenta a dimensão temporal do espaço sagrado fortemente marcado nas transformações das práticas religiosas na sociedade brasileira no início do século XXI, período classificado de hipermodernidade. Os conceitos destacados na análise foram tempo e temporalidade, espaço e espacialidade do sagrado. A religião e religiosidade foram repensados neste processo de mudança do grupo social religioso.

## Palavras chave

Tempo sagrado; espaço sagrado; temporalidade; espacialidade.

## 1. Introdução

Este artigo visa espacializar o tempo reconhecendo o tempo contínuo e irregular em experiências religiosas espaciais. Há concepções e investigações que devem ser levadas em conta: o espaço-tempo sagrado sob o ponto de vista da ciência geográfica.

Geografia e religião são ideias pensadas desde o ano de 1989 (NORA, 1989). Na escolha do título coloquei: Tempo e Temporalidade, Espaço e Espacialidade: A Temporalização do Espaço Sagrado, pois refletem a *essência* e o *significado* de minhas pesquisas durante esses vinte e cinco anos de reflexões tanto teóricas como análises empíricas realizadas em diversos lugares religiosos.

Esses conceitos ocupam a primeira parte desse texto. Em seguida, trataremos da dimensão do sagrado nos processos de transformações culturais que marcam a sociedade do século XXI, ou seja, espaço e tempo sagrado no período denominado de hipermodernidade. A denominação hipermodernidade será atribuída às ideias de Lipovetsky e Serroy (2011) em continuidade as reflexões apresentadas por David Harvey em *Condição Pós-Moderna* (1993). Aceitaremos essas afirmações para esclarecer ligações entre os processos culturais e as experiências religiosas espaciais e temporais. Ambos apresentam um tempo de mudanças nos processos culturais. Ressalta-se que transformações do tempo-espaço estão aliados com mudanças de comportamentos e sem dúvida provocadas pelas inovações dos meios de comunicação. Nossa análise privilegiará a religião nesta dinâmica de novas relações tempo-espaço.

A religião e a religiosidade numa era marcada por múltiplas *visões de mundo*, nas quais o quadro da tradição religiosa desloca-se/desliga-se do contexto social, cultural e político de origem (GIDDENS, 1991). A ideia de sagrado, no olhar geográfico, está em comunhão com as reflexões dos estudiosos da religião. Quer como poder de coesão durkheimiano; como a força carismática de Weber; na manifestação hierofânica de Mircea Eliade e na qualidade de numinoso de Gustavo Otto. Algumas religiosidades se apresentam com aparência de triunfo entre os grupos religiosos. Já outras demonstram um enfrentamento cotidiano em sua religiosidade indicando a existência de crise religiosa na sociedade num processo de (in)tolerância religiosa com fortes implicações na religiosidade dos grupos religiosos envolvidos.



No discurso de crise ou mesmo declínios da religiosidade abordados em análises acadêmicas por sociólogos e antropólogos, podemos destacar baseado nas ideias durkheimianas, que a religião tende mais a se transformar do que a desaparecer na sociedade.

A religiosidade, sem dúvida, pode ser classificada como umas das práticas culturais mais antigas experienciadas nos grupos sociais. Ela imprime no espaço marcas simbólicas dominantes e permanentes. É conhecimento nosso que a experiência religiosa, quer do devoto, quer do profissional religioso imprime, no tempo-espaço sagrado, formas e funções simbólicas religiosas.

Retomando a ideia de que fazer geografia e religião tem como sinônimo *ver e sentir* o sagrado em sua dimensão espacial, a incorporação do conhecimento novo se faz por motivações pessoais. Assim, nossa argumentação é qualificar o sagrado em sua manifestação de temporalidade e espacialidade. Em nossa reflexão teremos: (I) Tempo Sagrado; (II) Espaço Sagrado e; (III) Temporalização do Espaço Sagrado no século XXI, na denominada hipermodernidade.

O destaque dado ao tempo como categoria de análise se refere ao homem religioso em sucessivos acontecimentos quer no presente, quer no passado e também no tempo futuro. O estudo do tempo na ciência filosófica apresenta múltiplas concepções e investigações. Tais questões não serão discutidas no texto. Nossa aproximação será aplicar a uma concepção do ponto de vista geográfico na experiência do homem religioso e suas organizações simbólicas no espaço e no tempo pois “fornecem uma estrutura para a experiência mediante a qual aprendemos quem ou o que somos na sociedade.” (HARVEY, 1993: 198).

## **2. (I) Tempo Sagrado**

Registramos a passagem do Tempo em segundos, minutos, horas, dias, meses, anos, décadas, séculos e eras como se tudo estivesse o seu lugar, numa única escala temporal objetiva. Os gregos tinham dois termos para designar o tempo: *Chronos* (Χρόνος) e *Kairós* (Καίρός). O primeiro vocábulo segundo Mora (1996: 671) significava “época de vida”, “duração da vida”, “força da vida” a noção de tempo da vida. É interessante indicar o tempo *chronos* como o tempo objetivo, o tempo mensurável. A literatura nos aponta o tempo *chronos* como o tempo sequencial associado ao movimento linear das coisas terrestres como início e fim. Iremos ressaltar as ideias de Adam (2004), Crang (1998), Corrêa (2011), Eliade (1962, 1991), Harvey (1993) entre outros. A ênfase se dará nos exemplos de análises de duas escalas temporais principais de análise: (a) escala temporal mais longa e; (b) escala temporal mais curta.

(a) A escala temporal mais longa, está associada e equivalente ao vocábulo ano. Os estudos podem ter como referência múltiplos calendários: o *calendário judaico* nos seus 5775 anos; *calendário islâmico* em seus 1437 anos do *calendário maia*, do *chinês*, do *cristão ortodoxo* e outros. Como exemplo, podemos citar o *calendário juliano* implantado em 46 AC por Júlio Cesar e o *calendário gregoriano*. A citação desses calendários é necessário, pois sabemos que suas origens não ocorreram num mesmo tempo. O calendário gregoriano será priorizado em nosso estudo por ser ele referência e por vigorar atualmente na maior parte do mundo contemporâneo.

O calendário gregoriano tem sua gênese no tempo do Papa Gregório VI, em 1582, e foi criado para substituir o calendário juliano. Tal mudança adequou-se às descobertas científicas do

Renascimento que, corrigindo o que até então se sabia, afirmar que o movimento de translação da Terra em torno do Sol se fazia em 365 dias e mais 6 horas. Permitindo que a cada quatro anos existissem outro dia a ser acrescentado ao ano.

(b) A escala temporal mais curta representada no tempo do dia, isto é, nas vinte e quatro horas variáveis de lugar a lugar em virtude do movimento de rotação da Terra em torno de seu próprio eixo. Em 1884, por motivos econômicos foi convencionado que a superfície da Terra teria vinte e quatro fusos horários com a função de regular a contagem do tempo diariamente. Estas ações permanecem até hoje e regulam nosso comportamento social, econômico, político e religioso.

Ao estudar o tempo kairós, desejamos reconhecer que o termo kairós significava *duração do tempo* e daí, *tempo como um todo* inclusive *tempo infinito*. Mora considera “que *chronos* e *kairós*, em seus sentidos primários, designavam respectivamente uma época ou parte do tempo e o tempo em geral” (1996: 671). O termo kairós pode ser explicado como o tempo intersubjetivo, tempo como um todo, tempo infinito. É qualitativamente não mensurável, mas é singular. Refere-se a um momento indeterminado no tempo *chronos*, um momento certo, o melhor instante no presente, em que algo especial aconteça caracterizado por valores e oportunidades (AQUINO, 2014).

A religião e a religiosidade podem ser interpretadas no tempo kairós, mas delimitável cronologicamente. Isto é, o tempo kairós de cada religião é próprio, não tendo necessariamente relação com o tempo kairós de outra religião. A religiosidade do homem religioso pode ser reconhecida e estar presente no tempo kairós delineado por ele em *seu ritual no lugar sagrado*, como poderá também estar na *prática religiosa*, no tempo cronológico, de comemorações próprias de sua religião. A concepção de tempo cósmico aqui tem o significado de tempo que se opõe ao tempo de caos. A concepção de tempo sagrado do historiador Mircea Eliade (1962), é um tempo mítico primordial feito presente na experiência hierofânica. É fundamental reconhecer que a manifestação do sagrado funda ontologicamente o mundo. Podemos afirmar que para o homem religioso, o espaço e o tempo não são homogêneos nem contínuos. A experiência religiosa pressupõe uma vivência no tempo sagrado. Tais experiências nos levam para fenomenologia do tempo, estamos nos referindo ao *tempo imanente e o tempo transcendente*. As vivências religiosas se expressam nestas temporalidades.

Destaca-se a temporalidade de uma religião no tempo *chronos* poderá ser de longa e de curta temporalidade com datas fixas e móveis. Na análise do tempo kairós, podemos destacar vivência do homem religioso como devoto em prática devocional ao visitar um determinado santuário que poderá ocorrer tanto em datas fixas e como em datas móveis. As pesquisas empíricas vêm demonstrando que os homens possuem necessidades religiosas e têm suas experiências de existir relacionando-se com o mundo à sua volta. As análises aos espaços sagrados priorizam os comportamentos múltiplos e inúmeras novas possibilidades de pesquisas na geografia (ROSENDAHL, 2005, 2013).

Os lugares não são somente uma série de dados acumulados no tempo. A ideia é ressaltar que os lugares envolvem também intenções humanas. Não devemos apenas contar quantos peregrinos existem no tempo sagrado de santuário religioso, mas saber o que esse santuário significa para seus devotos. Deve-se refletir sobre a essência das coisas e dos objetos. Nosso conhecimento sobre os diferentes significados que os processos, as práticas, e as formas

espaciais são criadas pelo homem, sendo assim, sugere-se que o olhar geográfico se estenda além do visível, além do evidente, para os domínios da emoção e do sentimento. Tal ação humana possui característica em sua espacialidade e em sua temporalidade.

A temporalidade religiosa origina-se num momento do tempo sagrado, Mircea Eliade (1962) o designa *in illo tempore*, e Barbara Adam (2004) nos leva a refletir nas dimensões do *timescape*. O homem religioso vivência a dimensão profana e a dimensão sagrada no tempo e no espaço. A religião é a experiência do sagrado no espaço tempo sagrado. A religiosidade é um poder coletivo em que o devoto possui sua permanência ou sua transitividade ao longo do tempo. A prática religiosa tende a desenvolver-se, atingir seu momento de apogeu e pode declinar ou mesmo desaparecer na sociedade. Os rituais religiosos qualificam temporalidades no ser religioso em sua constante busca da experiência da transcendência no tempo e no espaço.

A compreensão singular da experiência do lugar é marcada por momentos de transcendência, os quais, a cada tempo sagrado, expressam a ordem divina (ROSENDAHL, 2005, 2013), pois os diversos locais religiosos, em diferentes religiões e culturas, possuem reconhecidamente uma localização real. A geografia define o reatar do homem com o divino em suas múltiplas espacialidades e temporalidades. São singulares as emoções de *ser no mundo*, isto é o homem no sentido completo enquanto indivíduo com sua consciência e sua natureza humana.

### **3. (II) Espaço Sagrado**

A importância dos estudos geográficos da religião está em interpretar a dimensão do sagrado no espaço, particularmente como em seu arranjo espacial em seu sucessivo acúmulo do tempo. São espaços qualitativamente fortes de revelações hierofânicas que se transformam em poderosos “*centros do mundo*”, separados do espaço comum, isto é, do cotidiano profano (ELIADE, 1991). O espaço é ritualmente construído. Os estudos de Rosendahl (1996, 2001, 2005) reconhecem as forças simbólicas responsáveis pela manutenção e pela construção do espaço sagrado. A organização espacial obedece à lógica do sagrado.

É possível qualificar o *espaço sagrado* - caracterizado por sua sacralidade máxima, expressa por uma materialidade à qual se atribui valor simbólico – e o *espaço profano* em torno do espaço sagrado, caracterizado pela existência de elementos que não possuem a qualidade de sagrado (ROSENDAHL, 1996, 2003, 2012).

Ao privilegiar a localização geográfica dos espaços religiosos é possível reconhecer uma tipologia de espaço sagrado. A geógrafa reconhece três níveis. (a) *o fixo*, (b) *o não fixo ou móvel* e (c) *o imaginalis*. A pesquisa empírica realça múltiplas espacialidades do sagrado. São exemplos relacionados: (a) aos santuários, pois envolvem lugares de concentração de fiéis; (b) aos espaços de mobilidade do sagrado e; (c) aos recintos de qualidade *numinosa* que os distingue do espaço cotidiano. A categoria de numinoso trata-se de noção de sagrado investigada por Rudolf Otto (1992) como exclusivamente religiosa distinta de qualquer outra. A concepção *de lugar sagrado reside no mundo imaginalis*. Como veremos a seguir.

### **4. (III) Temporalização do espaço sagrado**

Em uma perspectiva geográfica, pode-se refletir como a temporalidade é uma realidade criada, reinventada no espaço. A temporalização do espaço sagrado adquire qualidades mensuráveis em formas espaciais, entre outros aspectos, por continuidades e/ou

descontinuidades espaço-temporais, envolvendo mudanças que ocorrem em seus processos, estratégias e formas espaciais. Ao priorizar os espaços sagrados em diferentes culturas e em diversas religiões não estamos considerando a ideia de um lugar e de uma cultura única coincidindo, pois, a ênfase estará sobre a experiência humana no momento (AUGÉ, 1955). Prioriza-se a temporalização do espaço como matriz do acontecer, ou seja, reconhecer as propriedades que o tempo sagrado impõe no espaço sagrado. A vivência religiosa no tempo-espaço não são indiferentes na experiência religiosa do devoto.

Estamos falando de um tempo transcendente, de um tempo sagrado, a experiência religiosa pressupõe uma vivência no tempo-espaço sagrado. Em nossa reflexão consideramos as ideias eliadeanas de que o tempo e o espaço não são homogêneos nem contínuos, ambos, tempo e espaço sagrado são qualitativamente marcados pela manifestação da hierofania. A dimensão espacial do sagrado (ROSENDAHL, 2003) cumpre a função de comunicação do homem religioso com a divindade. No pensar de Jorge Miklos “na dualidade espaço profano-sagrado, tempo sagrado-profano se configura a existência religiosa do homem, para quem *o religare* orienta o caminho da transcendência inscrito no tecido da cultura” (2014: 72).

Ao elaborarmos a *Figura 1 - Temporalização do Espaço Sagrado* buscamos privilegiar como o tempo é uma realidade presente no espaço. O tempo adquire qualidades mensuráveis no espaço quando se harmoniza com o tempo *chronos* e qualidades imensuráveis no espaço quando o denominamos de tempo *kairológico*. Vejamos a *Figura 1* elaborada tendo no centro o *sagrado*, vocábulo latino com relação estreita entre santidade e divindade. Este associado com a religião e religiosidade. Dois outros vocábulos formam a figura, na esquerda o *tempo cronológico* e na coluna da direita o *tempo kairológico*. No desejo de deixar claro nossas reflexões citaremos exemplos de pesquisas empíricas realizados nos últimos anos. Os exemplos ressaltam o tempo cronológico acontecendo em diferentes calendários citados no qual a localização geográfica do espaço sagrado favorece a ideia de uma tipologia já apresentada em estudos anteriores. São tempos sagrados contínuos e de fundamental importância nos estudos do homem religioso, isto é, a vivência dos devotos e dos praticantes no espaço-tempo.

(a) Cidades-santuário ou hierópolis são espaços sagrados fixos de experiência espiritual do devoto, fortemente marcada por tempo sagrado. A prática religiosa no santuário imprime no espaço a cultura do grupo religioso envolvido (ROSENDAHL, 2005, 2013). Este lugar está impregnado de simbolismo e não foi meramente descoberto, fundado ou construído, mas reivindicado, possuído e operado por uma comunidade religiosa, conforme apontam Sopher (1981), Kong (1990), Park (1994) e Rosendahl (2003, 2005, 2013). A cada tempo sagrado o espaço é ritualmente construído e comemorado como *in illo tempore* na revelação hierofânica.

Exemplos de santuários em escala mundial, temos Meca, Roma, Jerusalém; na escala regional cita-se Fátima (Portugal), Lourdes (França), Nossa Senhora Aparecida (Brasil), Nossa Senhora de Nazaré (Brasil), Cachoeira Paulista (Brasil); em escala local temos como exemplos: o Santuário de Jesus Crucificado de Porto das Caixas, Itaboraí (RJ) e o Santuário de São Judas Tadeu em diversos locais do Brasil.

A análise empírica do ponto de vista geográfico vem demonstrando que há uma pluralidade de espaços sagrados numa mesma hierópolis, os quais podem ser classificados em dois tipos: no primeiro, os espaços sagrados possuem elementos simbólicos da mesma religião dominante do santuário. O tempo sagrado permanece o mesmo. O segundo tipo, as formas e funções

especiais religiosas favorecem a celebração de rituais simbólicos da crença do grupo religioso minoritário naquele santuário. Nestes casos temos a experiência religiosa de dois tipos de credo com práticas distintas, no mesmo tempo com o espaço sagrado também distintos no santuário.

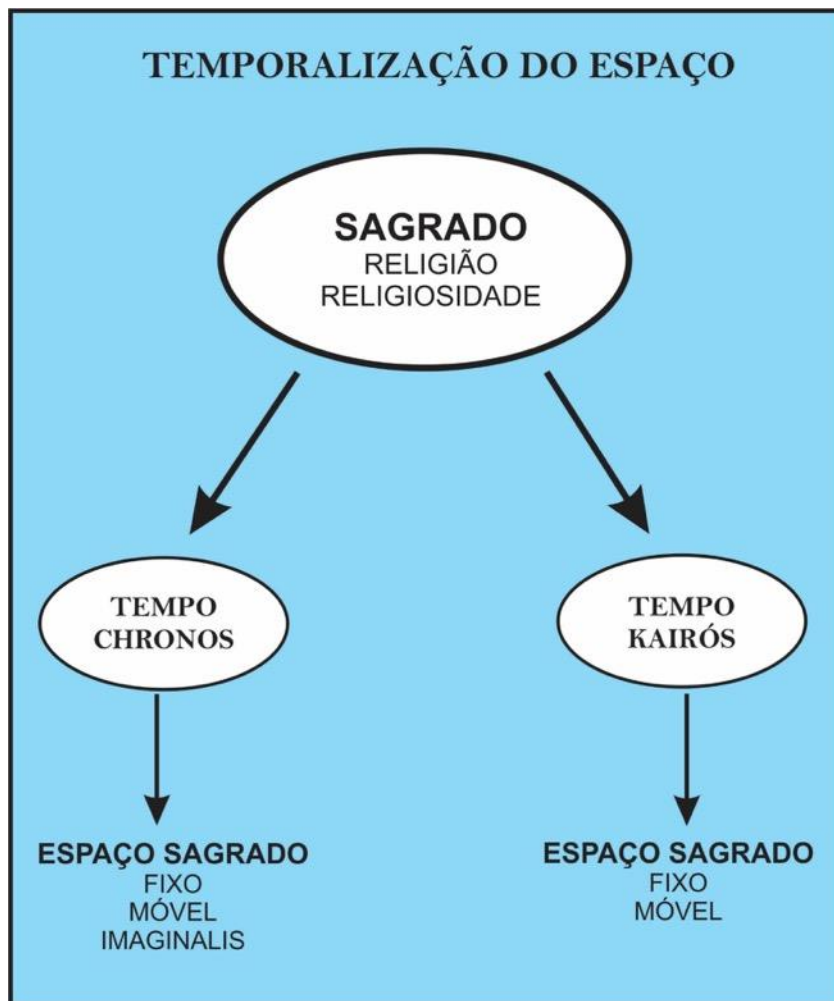


Figura 1 – Temporalização do Espaço Sagrado.

Fonte: ROSENDAHL, 2014.

(b) O espaço sagrado, não associado necessariamente a um território, pode ser denominado como espaço sagrado *não fixo* como foi denominado por Nora (1989). No exemplo de análise, o autor cita a Torá. Em sua ideia, os judeus mantiveram seu espaço sagrado móvel durante o tempo de exílio, a Torá assumia a função de reunir terra, povo e Deus. A mobilidade do espaço sagrado, no catolicismo popular brasileiro pode ser exemplificada nas festas de São Benedito - no tempo sagrado do lugar - na cidade de Jaraguá, Estado de Goiás. A festa possui característica singular. As tradições populares, da cultura do lugar, imprimem no tempo-espaço o *circuito do sagrado* (ROSENDAHL, 2013). O deslocamento da imagem do santo, símbolo do poder, à residência do festeiro durante o tempo da festa e o seu retorno à paróquia no final da festa ocorre numa comunicação individual entre o santo e o festeiro. O tempo de saída do santo da Igreja para a casa do próximo festeiro será estipulado no tempo da organização da referida festa que ocorre uma vez por ano.

(c) A concepção de espaço sagrado *imaginalis* pode estar vinculado à perspectiva humanística da geografia. A familiaridade com o lugar religioso e a experiência religiosa

compartilhada num *mundo imaginalis* são fatores que favorecem a “essência espiritual” e a qualidade poética dos lugares religiosos. Bachelard (1988) nos revela o espaço da imaginação – o espaço poético – um espaço que foi apropriado pela imaginação e não deve permanecer como espaço indiferente, sujeito às medidas e/ou estimativas do pesquisador. Para o geógrafo David Harvey (1993) esses espaços de representação imaginado estão teorizados na “grade de práticas espaciais” (HARVEY, 1993: 201). Em comunhão com o autor desejamos classificar como espaço sagrado a área onde ocorre as práticas familiares e religiosas. São espaços constituídos por rituais simbólicos religiosos. Durkheim pontua em seu livro *As Formas Elementares da Vida Religiosa* (1968) que espaço e tempo são construções sociais. A geógrafa Lily Kong (2001) relata o círculo *imaginalis* do sagrado nos rituais de Wiccan e podemos acrescentar os rituais em Stonehenge e Avebury entre muitos outros (ROSENDAHL, 2013). O espaço sagrado *imaginalis* permite uma análise em ambos os tempos sagrados: no tempo cronológico e no tempo kairológico. Desejo refletir sobre o tempo sagrado do grupo religioso e a “duração do tempo” individual do devoto, aqui a reflexão espacial nos conduz ao tempo geral da prática religiosa e de parte do tempo do devoto em sua organização tempo-espaço sagrado.

Em análise dos rituais religiosos no tempo kairológico temos exemplos de territórios sagrados fixos, as dioceses católicas no Brasil. Tais territórios religiosos estão também qualificados no período diacrônico, tempo histórico da difusão das dioceses católicas no qual se priorizou desde o início, de 1500, de sua implantação no país. Um estudo sobre o processo de difusão dos territórios religiosos católicos no Brasil aponta uma variedade de tempos conjunturais de estratégias religiosas (ROSENDAHL, 2001, 2008, 2012). O tempo da diocese é evocado como o tempo religioso verdadeiramente presente e atuante no processo de regulação e religiosidade católica. As pesquisas na temática de criação e ampliação de espaços sagrados em dioceses são exemplificadas nos estudos de Peltre (1995), Bertrand (1999), Rouvillois (1999), Torres Luna e Duran Villa (1999) e outros, pois os territórios diocesanos existem como controle da fé católica nos lugares de predominância do catolicismo romano. O bispo é o profissional religioso, gestor do território religioso e interlocutor entre a CNBB – Congresso Nacional dos Bispos do Brasil, e os fiéis das múltiplas paróquias que estão subordinadas ao território do seu bispado.

O tempo sagrado de uma comunidade religiosa é constituído por comportamentos que se inserem em territórios religiosos. A Instituição Religiosa Católica Apostólica Romana possui uma organização territorial que se espacializa em rede, *dioceses e paróquias* são configurações espaciais presentes na origem da divisão territorial do espaço brasileiro. Tais territórios religiosos têm funções distintas, porém vinculadas no tempo sagrado. A paróquia é o lugar simbólico que reflete o tempo-espaço de “organização da vida social e íntima dos habitantes, pontuando o tempo da comunidade” (LECOQUIERRE e STECK, 1999: 63).

A paróquia representa também, para os paroquianos, um lugar simbólico no qual cada habitante se insere em experiências cotidianas e em que, na maioria dos casos, desenvolve uma intensa identidade religiosa. Assim a paróquia participa como principal lugar da vida da comunidade (ROSENDAHL, 2012, 2013). A paróquia deve ser reconhecida como o território em que se dá o controle cotidiano da vida religiosa do devoto, porque ela está na escala da convivência humana. Exemplos outros, como o território religioso metodista, ocorre na difusão por contágio. Ocorre por meio de *células*, é a comunicação interpessoal da fé no encontro

semanal nas células que compõe a rede religiosa metodista, no Rio de Janeiro, no tempo kairológico investigado pela geógrafa Filipe (2014).

Gurvitch (1964) sugere a *Tipologia dos Tempos Sociais* para pensar o sentido do tempo na vida social do homem. David Harvey a partir desse estudo revela que “cada relação social contém seu próprio sentido do tempo”. (1993: 204). Também é possível usar a tipologia para examinar os diferentes sentidos de tempo em ação na vida religiosa. Ainda para Harvey (1993: 205) “o sentido de tempo implica na mudança de práticas culturais modernistas para as pós-modernistas”. Em nossa análise o tempo ilusório e o tempo cíclico serão privilegiados. O tempo ilusório nos fornece formas sociais de duração longa e desacelerada na sociedade organizada, destacando-se as sociedades carismáticas e teocráticas. Na classificação de Gurvitch (1964) analisada por Harvey (1993) o tempo cíclico apresenta-se fortemente marcado pela continuidade – passado, presente e futuro – existente em sociedades ou grupos sociais que priorizam as crenças, as mitologias, representações místicas e mágicas. Nos santuários a comemoração de um evento histórico no qual o *Todo Poderoso*, intervindo neste mundo, participou diretamente qualifica-se o tempo histórico e o tempo divino da revelação (CLAVAL, 2008).

O Tempo da Revelação Kairológica está presente na prática religiosa do judaísmo, no islamismo e no cristianismo. A comemoração ocorre no espaço sagrado fixo em tempo não mensurável com práticas religiosas diferenciadas, porém em harmonia com a cultura do lugar. O fundamental na análise é a necessidade que o crente tem de visitar estes lugares. O *Ato de Peregrinar*. O tempo da peregrinação está vinculado ao tempo sagrado cronológico de peregrinar ao espaço sagrado histórico religioso, por exemplo, o muçulmano tem a obrigação de fazer a peregrinação a Meca no mês de Dhu al-Hijja (KING, 1972).

As peregrinações podem ocorrer sem a obrigatoriedade de tal prática para o devoto, nestes casos a escolha da visita ao espaço sagrado do santuário pode ocorrer no tempo religioso de escolha do próprio devoto. O tempo sagrado adquire também o caráter de fato social de que nos fala Mauss (1979), em que a obrigação de dar, receber e retribuir se estabelece não somente entre os indivíduos, mas também na relação entre os homens e os santos, entre os homens e a divindade. “A prece participa ao mesmo tempo da natureza do rito e da natureza da crença.” (MAUSS, 1979: 103). Temos aí um ponto de vista particularmente favorável de manifestação da fé que envolve o crente num encontro subjetivo com o divino num tempo kairológico religioso.

Espaços sagrados móveis são os *itinerários simbólicos* e as *procissões*. A análise sincrônica do comportamento do peregrino em sua visita ao santuário ocorreu em seu tempo religioso kairológico. É importante ressaltar que as romarias, peregrinações e as solenes procissões são práticas tradicionais devocionais católicas impostas desde o século XVI no litoral do Brasil, como estratégia de conquista e implantação da fé católica, no entrosamento entre a cultura lusitana e a dos nativos (AZZI, 1979, 2005) durante os séculos XVII e XVIII, principalmente, no interior do Brasil. As devoções surgem do povo, e as práticas desenvolviam-se com ampla liberdade de expressão. (ROSENDAHL, 2012).

As procissões, os símbolos, os mitos e as falas sagradas são criações do grupo religioso no lugar. O tempo, ainda hoje, da realização de seus cultos religiosos são organizados com ilimitada liberdade tempo-espaço (ROSENDAHL, 2008, 2013). Alguns estudos consideram a procissão um cortejo religioso público, com elementos do clero e do povo dispostos de forma ordenada em

alas que desfilam por um trajeto predeterminado: ruas, praças e avenidas retornando á Igreja da qual partiu (BARROSO, 2004).

No Brasil destacam-se os preparativos para a passagem da procissão pelas ruas da cidade. Estudos demonstram que, além dos preparativos orquestrados pela paróquia, existe a seletividade espacial na construção do itinerário simbólico do cortejo. O momento do desfile é vivenciado no tempo kairológico dos devotos da paróquia envolvida na organização festiva. Nossa reflexão destaca que o círculo do sagrado no tempo kairológico, dando continuidade das ideias do tempo imaginalis como um todo, com qualidades imensuráveis, pode ser revelado no ritual de práticas religiosas de orações dos católicos carismáticos, principalmente em grupos de oração e encontros quando ocorre a partir de aclamações dos fiéis a vinda do Espírito Santo como ocorreu na festa de Pentecostes.

Autores diversos trataram de concepções e investigações concernentes ao tempo do final do século XX e início do século XXI. O tempo na concepção da sociedade técnico-científico-informacional – Milton Santos (2006); a sociedade em rede – Manuel Castells (1999); sociedade pós-moderna – David Harvey (1993); sociedade-mundo – Edgar Morin (2003); sociedade de consumo midiático – João Carrascoza (2014), entre muitos. Numa aproximação primeira, acreditamos não haver conflito, consideramos a análise do conceito de hipermodernidade defendido por Lipovetsky e Serroy (2011). Privilegiar a temporalização do espaço sagrado propondo espaço e tempo integrados com a prática religiosa reconhecendo a religião como um sistema de significação que qualifica o tempo-espaço.

Completando nossa reflexão na temática da temporalização do espaço sagrado no início do século XXI, denominado de hipermodernidade, apresentamos a dinâmica das relações entre *tempo, temporalidade e espaço, espacialidade*. As relações manifestadas de diversas formas e suas representações espaciais também o fazem. Os estudos enfatizam a comunicação *das online communities*, presentes na construção e manutenção de comunidades de fiéis, em suas múltiplas escalas de atuação, inclusive nesta reflexão no espaço virtual.

## **Conclusões**

A análise da dimensão do tempo *chronos* e do tempo *kairós* experienciados no domínio da emoção e do *ser no mundo* leva-nos à compreensão de que a temporalidade individual e, portanto singular, nos conduz a uma experiência. A dimensão do tempo nos conduz a uma experiência simbólica de permanecer no *tempo do mundo, o meu tempo no mundo, o tempo da oportunidade, o tempo das mudanças*. Para alguns autores, o tempo atual é considerado, o tempo da oportunidade (MORA, 1996; OLIVEIRA e ROSENDAHL, 2014), um momento de transformações e mudanças na sociedade e no grupo religioso.

A religião e a religiosidade acompanham esses processos de mudanças e criam estratégias flexíveis ao momento no tempo. Em análise a partir destas mesmas transformações, observamos que a sociedade, no século XXI, “passa por um processo crescente da busca pelo *self*, ou seja, uma busca por uma maior individualidade” (OLIVEIRA e ROSENDAHL, 2014). Isto é, um comportamento cada vez mais marcante nos grupos sociais, onde os encontros pessoais começam a ser trocados pelo uso dos *smartphones, tablets, celulares entre outras tecnologias* que vêm substituindo o convívio social físico entre as pessoas (OLIVEIRA e ROSENDAHL, 2014).



Ratificamos a preocupação atual dos geógrafos com a temporalidade-espacialidade do sagrado, através da tecnologia de comunicação em suas diferentes escalas de uso e a possibilidade do devoto num contato com o divino. Atualmente, o período hipermoderno (LIPOVETSKY e SERROY, 2011) marca a condição da sociedade pela busca do seu *self*, a busca da individualidade e a modernização da sociedade atual, o devoto pode participar de atividades e práticas religiosas que estão acontecendo no espaço sagrado que ele não está presente fisicamente, mas ele vivencia a experiência mentalmente/imaginalis no mesmo tempo do acontecer religioso.

Temos inúmeros exemplos como: a missa vista pela televisão; os relatos da vida online; aplicativos de celulares utilizados para mensagens direcionados por devotos/crentes do catolicismo, do judaísmo, do protestantismo e do islamismo, entre outros vivenciados no dia a dia da comunicação com o divino.

A relação do homem como sagrado possui múltiplas temporalidades. A subjetividade é parte fundamental na variação do ritual religioso no tempo *chronos* e no tempo *kairós*. O tempo no mundo pode ser considerado o momento de transformação, tempo de mudanças de comportamento na sociedade. Pensando assim formula-se a pergunta: Por que o espaço e tempo sagrado são diferentes?

A resposta pode ser: porque a experiência com o sagrado é vivenciada individualmente. É uma prática subjetiva no tempo e no espaço do homem religioso. É bom finalizar ressaltando que a relação do homem com o sagrado possui múltiplas temporalidades no espaço. A subjetividade faz parte da experiência do homem religioso no ritual de sua devoção no tempo *chronos* e no tempo *kairós*. Tempo e espaço sagrados estão impregnados da dinâmica da cultura no lugar e com a prática religiosa do grupo social que escolheu este lugar.

Hoje, as transformações culturais na sociedade do século XXI, destacado por nós neste artigo como *hipermodernidade*, foi no desejo de repensar a religião e a religiosidade num período marcado por múltiplas *visões de mundo* num tempo e numa temporalidade que para alguns acadêmicos apresentam um *discurso de crise* ou mesmo *declínio da religiosidade*.

Pensamos diferente! Comungo com as ideias durkheimianas: a religião *tende mais a se transformar do que desaparecer* na sociedade.

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# Os Cavalos do Vinho (Caravaca de La Cruz, Múrcia, Espanha): um património singular como atrativo turístico

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## Resumo

Parte do Patrimônio Cultural Imaterial da Espanha deriva de diferentes festividades que têm uma forte singularidade, história e beleza. Os Cavalos do Vinho são um exemplo dentre muitos. Com mais de 250 anos de idade, e cuja origem encontra-se na realização de um rito que foi destinado para abençoar o vinho, base econômica da população. Hoje é uma das celebrações mais marcantes do país, onde os cavalos adornados com *enjaezamientos* bordados realizam uma corrida singular, que atrai anualmente mais de 200.000 pessoas. Nesta pesquisa os objetivos foram: (1) Conhecer a origem e história da festividade; (2) Examinar a importância da Semana Santa no território em estudo; (3) Estudar a valorização do patrimônio material e imaterial; e (4) Analisar a candidatura dos Cavalos do Vinho como Patrimônio Imaterial da UNESCO. Os resultados mostram que a principal atividade que identifica Caravaca de la Cruz é a festividade dos Cavalos do Vinho. Portanto, é um recurso turístico de primeira ordem para a cidade e para a região e é necessário desenvolver esforços no sentido da declaração como Patrimônio Cultural Imaterial da Humanidade pela UNESCO e conferir uma maior importância à festividade.

## Palavras chave

Cavalos do Vinho; Patrimônio imaterial; Turismo; Caravaca de la Cruz.

## 1. Introdução

As festas populares na Espanha são referências culturais que estão atraindo mais visitantes, nacionais e internacionais, interessados na sua riqueza, beleza e singularidade. Há uma grande variedade de festividades, de modo que os atores nelas implicados querem distinções de qualidade para valorizar seu produto turístico, como sinônimo de prestígio e reconhecimento. Neste contexto, situam-se os Cavalos do Vinho (Caravaca de la Cruz, Múrcia, Espanha), festividade candidata a Patrimônio Imaterial da UNESCO desde 2013, e incluída nas celebrações em honra à *Santísima y Vera Cruz*, realizadas todos os anos de 1 ao 5 de Maio. Nesta celebração os cavalos são adornados com *enjaezamientos* bordados em seda, ouro e prata que representam temas muito variados. A expressão máxima desta festividade é a corrida, feita na última parte do Castelo, onde os cavalos acompanhados por quatro moços tem que subir na rampa de acesso ao Castelo que é ocupada por milhares de pessoas.

Os trabalhos publicados sobre os Cavalos do Vinho são poucos. Por isso pretendemos estabelecer um precedente que ajudará futuras publicações. Neste sentido, no marco desta pesquisa, os principais objetivos foram (1) Conhecer a origem e história da festividade; (2) Examinar a importância da Semana Santa no território em estudo; (3) Estudar a valorização do

patrimônio material e imaterial; e (4) Analisar a candidatura dos Cavalos do Vinho como Patrimônio Imaterial da UNESCO.

## 2. Área de estudo, materiais e métodos

Caravaca de la Cruz fica situada no sudeste de Espanha, mais concretamente na Região de Múrcia. O município tem uma área de 859,51 km<sup>2</sup> e uma população de 25.591 habitantes (Instituto Nacional de Estadística, 2015), sendo a cidade mais importante da Comarca do Noroeste, estando este território povoado por 71.790 pessoas. As atividades económicas são ligadas ao setor primário tradicionalmente, mas agora o turismo é o principal setor na cidade porque tem o Jubileu *in perpetuum* cada 7 anos pela Cruz de Caravaca. Atualmente é celebrado o Ano Jubilar, atraindo a milhares de pessoas da Região de Múrcia e outros territórios.

Para a preparação do presente estudo foi realizada, em primeiro lugar, uma revisão da literatura. A informação recolhida neste processo foi empregada na reconstrução da história da festividade e conhecimento das atividades de promoção da candidatura a Patrimônio da Humanidade. Depois foram feitas entrevistas aos residentes na cidade para conhecer a sua percepção sobre o evento. Finalmente, foi realizado trabalho de campo para verificar *in situ* a magnitude do evento. A pesquisa, portanto, tem um caráter exploratório e descritivo.

## 3. Resultados

### 3.1. Festas e rituais

#### 3.1.1. A lenda

A origem da festividade dos Cavalos do Vinho é ligada a numerosas lendas populares, sendo a mais difundida esta: em 1250, o Castelo de Caravaca foi sitiado pelas tropas muçulmanas e os *aljibes* estavam infestados, havendo enfermidades no Castelo. Quatro cavaleiros Templários romperam o cerco com um cavalo e depois de não conseguir água encontraram vinho. Depois de voltar e romper o cerco muçulmano banharam a *Santísima y Vera Cruz* no vinho. Posteriormente, o vinho foi ingerido pelos enfermos que se curaram rapidamente.

Esta lenda, que tem muita popularidade e é considerada por muitas pessoas como a verdadeira origem da festividade, é uma história própria do Romantismo, ela é cheia de épicos e com pouca precisão histórica, tentando fazer sentido da realização da celebração (Sánchez, 2014).

#### 3.1.2. Breve história dos Cavalos do Vinho

A genese dos Cavalos do Vinho é ligada ao ritual do Banho do Vinho, no que um pedestal colocado à *Santísima y Vera Cruz* é introduzido num jarro de prata cheio do vinho, sendo bendita. A primeira notícia da sua realização está nas primeiras décadas do século XVIII, mas é possível que fossem no século XVII (Sánchez, 2014) inspirado no Banho da Água, onde se consagram as águas que regam o campo de Caravaca e é o germe da festividade em homenagem à Virgem da cidade, e que tem sua origem no final do século XIV (Fernández, 2006). O Banho do vinho foi evoluindo, sendo provavelmente no final do século XVIII e início do XIX quando aparece a *bandeja de purificadores*, antecedente da *bandeja de flores* (Fernández, 2009), e esta da Benção das Flores, que hoje é parte da mesma cerimônia.



Figura 1 - A corrida

Fonte: Bando de los Caballos del Vino

A origem dos Cavalos do Vinho encontra-se no transporte utilizado para levar o vinho ao Castelo. A dificuldade de acesso à fortaleza pela forte inclinação e o estado da faixa de rodagem tornava impossível usar carruagens e o uso do cavalo foi a melhor opção (Sánchez, 2004). Para conduzir o cavalo dois moços estavam na parte dianteira, outros dois na traseira, com uma posição que está atualmente mantida (Figura 1), sendo uma das peculiaridades da festividade (Ballester, 1991). A Ordem de Santiago teve uma importância forte na origem do evento, sendo responsável por dar o vinho e os cavalos.

As primeiras referências documentais sobre o processo acima mencionado estão localizadas nos anos 1765 e 1767, onde é feita, por um lado, ao pagamento aos jovens que foram para o Castelo com o cavalo carregando os *odres* e, por outro, as despesas para adornar o corcel. Também se fala sobre a roupa do cavalo e nasceram os termos de bandeira e manto. No entanto, temos de esperar até 1804 para encontrar a expressão que deu seu nome como Cavalos do Vinho (Fernández, 2006).

Ao longo dos anos foram somados mais cavalos à festividade de instituições como a *Mayordomía de Caravaca* e a Comissão Organizadora, e depois de pessoas da cidade ou outros territórios. No final do século XIX há uma pequena revolução dentro deste evento pela filoxera. Os cavalos deixaram de levar vinho, mas seguiam participando com seus melhores vestuários. A rivalidade entre as famílias da mesma freguesia manteve viva a festividade. A Freguesia é conhecida como *Barrio del Hoyo*, sendo o lugar da origem de muitos *caballistas*. Hoje é o ponto de referência da competição de *Caballo a Pelo*.

Em 1921, foi realizada a primeira competição na festividade dos Cavalos do vinho. Foi feito pela Comissão Organizadora e teve como fim premiar os cavalos melhor *enjaezados*, nascendo o *Concurso de Enjaezamiento* (Fernández, 2016). Naquele momento, muitas peças foram usadas pelos cavalos em trabalhos do campo. No entanto, as peças mais marcantes do *enjaezamiento*, foram emprestadas por vizinhos e amigos porque nem todos tinham os recursos necessários para comprar peças.

Na década de 1940, nascem os *mantos* pintados, que conviveram junto aos tradicionais, e a corrida foi diferente porque os tempos foram registrados e os primeiros ganharam um prêmio (Ballester, 1991). Em 1950, foi estabelecido o vestuário *caballista*, sendo utilizada pelos velocistas, e na indumentária do cavalo inclui-se um *enjaezamiento* com as peças bordadas. Nasceu assim o primeiro Cavalo do Vinho moderno.

Em 1970, é consolidada a festividade. Constituíam-se as primeiras associações de pessoas, melhorando a qualidade do *enjaezamiento* devido a uma maior disponibilidade econômica. Também no dia antes da corrida foi introduzido um evento de exibição de mantos. Ademais, em 1978 criou-se o *Bando de los Caballos del Vino*, um órgão administrativo independente e em 1980 a competição de *Caballo a Pelo*.

### 3.1.3. *Actualidade da celebração. Competições*

Hoje são 60 associações de pessoas participantes na festividade, participando em três competições. A *primeria* é pela tarde do dia 1 de Maio, com o concurso de *Caballo a Pelo*, premiando a beleza, morfologia e nobreza do corcel. As associações apresentam seus cavalos para serem avaliados por uma comissão. Pela noite, exibem-se os *enjaezamientos* que são examinados no dia seguinte quando estão sobre os cavalos. As associações são obrigadas a fazer um novo a cada ano, mas nem todas podem ter um *enjaezamiento* novo e, portanto, a competição é dividida em várias partes. Há quatro divisões, as duas primeiras associações sobem de escalão e as duas últimas baixam. A corrida é o evento mais interessante é gerado pela contínua baixada dos tempos, o recorde atual da competição é de 7,713 segundos em 80 metros. Uma corrida é válida se os quatro *caballistas* vão agarrados ao cavalo.

Independentemente dos prêmios, o mais importante para as associações é o orgulho de ter o melhor cavalo, fazer a melhor corrida e desenvolver o melhor *enjaezamiento*.

## 3.2. Exclusividade: Patrimônio tangível e intangível

### 3.2.1. *Enquadramento teórico*

O termo *Patrimônio Cultural* vem mudando nas últimas décadas devido aos diferentes instrumentos e diretrizes desenvolvidas pela UNESCO. O patrimônio cultural não é unicamente coleções de objetos e monumentos, também inclui tradições ou expressões vivas herdadas de nossos antepassados e transmitidas a nossos descendentes, como tradições orais, rituais, conhecimentos e técnicas relacionadas com artesanato (patrimônio imaterial) (Olivera, 2011).

A UNESCO é a única agência especializada das Nações Unidas, cujo mandato aborda especificamente a cultura. Ajuda aos países a implementar medidas para salvaguardar seu patrimônio cultural. Para o patrimônio imaterial há medidas muito diversas para sua proteção, difusão e viabilidade futura. Destaca a adoção da Convenção para a Salvaguarda do Patrimônio Cultural Imaterial (2006).

Para efeitos da Convenção para a Salvaguarda do Patrimônio Cultural Imaterial, o patrimônio cultural imaterial são as práticas, representações, expressões, conhecimentos e competências – bem como os instrumentos, objectos, artefactos e espaços culturais que lhes estão associados – que as comunidades, grupos e, eventualmente, indivíduos reconhecem como fazendo parte do seu patrimônio cultural. Este patrimônio cultural imaterial, transmitido de geração em geração, é constantemente recriado pelas comunidades e grupos em função do seu

meio envolvente, da sua interação com a natureza e da sua história, e confere-lhes um sentido de identidade e de continuidade, contribuindo assim para promover o respeito da diversidade cultural e a criatividade humana. Para a presente Convenção, só será tomado em consideração o patrimônio cultural imaterial que seja compatível com os instrumentos internacionais relativos aos direitos humanos existentes, bem como com a exigência do respeito mútuo entre comunidades, grupos e indivíduos, e de um desenvolvimento sustentável.

Por outro lado, entende-se por “salvaguarda” as medidas que visam assegurar a viabilidade do patrimônio cultural imaterial, incluindo a identificação, documentação, investigação, preservação, proteção, promoção, valorização, transmissão - essencialmente pela educação formal e não formal – e revitalização dos diversos aspectos deste patrimônio.

### 3.2.2. Patrimônio os cavalos do vinho

Os cavalos do vinho nascem no mundo agrícola, como uma de tantas expressões derivadas da realização de um rito que tem como fim abençoar e proteger o campo e vinhedos. Hoje a indumentária dos caballistas é típica do campo e os *enjaizamientos* evoluídos por meio dos vestuários usados pelos cavalos em trabalho agrícola. Apesar de nascer dentro de uma instituição, sua evolução foi herdada pelo povo com famílias cuja paixão, valores e conhecimento era transmitido de geração em geração e depois pelas pessoas de Caravaca de la Cruz. A realização do *enjaizamiento*, o cuidado e treinamento do cavalo e toda a preparação para a celebração é dentro de um círculo muito próximo onde os componentes reúnem-se cada noite na véspera da grande festa. É, portanto, um patrimônio intrínseco conhecido por poucos, mas apreciado por todos.

Em relação ao patrimônio material da festividade, é necessário destacar o valor que têm os cavalos e os *enjaizamientos*. Os primeiros, são os protagonistas do evento, e o segundo é o trabalho de todo o ano nos bordados feitos artesanalmente. Depois da festa os bordados terminam nas pessoas das associações que estão muito orgulhosas destas peças. No entanto, os bordados são exibidos num museu para que turistas e visitantes desfrutem deste recurso.



Figura 2 - Detalhe do *enjaezamiento*

Fonte: *Bando de los Caballos del Vino*



Em resumo, a festividade dos Cavalos do Vinho tem todas as premissas estabelecidas pela Convenção para a Salvaguarda do Patrimônio Cultural Imaterial para ser declarado Patrimônio Cultural Imaterial da Humanidade. Alcançar esta distinção seria um grande impulso para sua proteção, difusão e viabilidade futura.

### 3.3. *Patrimônio Imaterial da Humanidade? A candidatura*

#### 3.3.1. *A candidatura*

A candidatura dos Cavalos do Vinho para fazer parte da Lista Representativa do Patrimônio Cultural Imaterial da UNESCO nasceu em 2010. No dia 23 de dezembro foi aprovado na Câmara Municipal de Caravaca de la Cruz iniciar os procedimentos necessários para sua consecução. O processo começou com uma apresentação pela Comunidade Autônoma da Região de Múrcia de um primeiro esboço com a proposta da candidatura ante o Ministério da Educação, Cultura e Desporto em Madrid.

No dia 21 de outubro de 2011, o Conselho de Patrimônio Histórico aprovou avançar com o projecto. Ademais, o Governo da Região de Múrcia, começa os procedimentos para declarar a festividade dos Cavalos do Vinho como Bens de Interesse Cultural, sendo aprovado no dia 4 de novembro de 2011. Então, o Conselho de Patrimônio Histórico selecionou em 2013 a celebração como candidata para fazer parte da Lista Representativa do Patrimônio Cultural Imaterial da UNESCO junto a outra festividade, As Fallas de Valência.

Ambas comemorações devem ser avaliadas na 8ª Sessão do Comité Intergovernamental para a Salvaguarda do Patrimônio Imaterial entre os días 2 y 8 de dezembro de 2013 em Bakú (Azerbaijão). Mas devido a uma mudança nas regras durante o ano anterior, as candidaturas não foram avaliadas porque só é possível avaliar uma por país e ano. A festividade das Fallas de Valência foi registrada na Lista Representativa do Patrimônio Cultural Imaterial da UNESCO na sessão do ano 2016 em Adis Abeba (Etiópia) porque tiveram prioridade respeito aos Cavalos do Vinho.

Atualmente, a candidatura dos Cavalos do Vinho encontra-se numa lista de arquivos não resolvidos junto com outra proposta de que o nome é desconhecido, mas tem preferência. Espanha não tem prioridade para este ano, sendo sua avaliação e possível nomeação em 2018.

#### 3.3.2. *Apoios*

Há duas fases de apoios. A primeira foi menos intensa e durou até 2014. A Segunda começa em 2016 e é um novo impulso pela candidatura por parte de instituições públicas e empresas privadas. A primeira mostra de apoio institucional foi no dia 19 de Outubro de 2011, quando o Governo Regional aprovou pedir ao Governo Espanhol começar com as iniciativas para declarar a festividade dos Cavalos do Vinho Patrimônio Imaterial da Humanidade. Em Abril de 2012, a Organização Nacional de Cegos Espanhóis, apresentou um bilhete de lotería dedicado ao Cavalos do Vinho para o sorteio do dia 2 de Maio. Um ano depois, no 20 de Abril, a Loteria Nacional também dedicou um bilhete pela celebração. Dois meses mais tarde, a Comissão de Cultura aprova as duas propostas apresentadas para apoiar a candidatura.

A segunda fase começa em Abril de 2016, com a aprovação de uma moção na Câmara Municipal para fazer atividades e ações promocionais do Governo Regional. Em Agosto, pessoas de Caravaca foram para Elche para buscar apoios numa festividade que é Patrimônio da

Humanidade (*Misterios de Elche*), estratégia repetida com a celebração da *Fiesta de la Mare de Déu de la Salut* (Algemés, Valência). No dia 17 de Novembro de 2016, o Governo Regional aprova uma moção para impulsar a declaração dos Cavalos do Vinho, e declarou feriado regional o dia 2 de Maio de 2017, aproveitando a celebração do Ano Santo Jubilar em Caravaca de la Cruz. A Câmara Municipal aprova em Dezembro relançar a candidatura. Finalmente, há um camino escrito pelo *Bando de los Caballos del Vino* para a sua promoção com base em outras festividades espanholas que já têm a honra de ser parte da Lista Representativa do Patrimônio Cultural Imaterial da UNESCO.

#### 3.4. Atração turística e incidência territorial

A festividade de honra pela *Santísima y Vera Cruz de Caravaca* é uma das mais populares da Região de Múrcia, devido a sua beleza, singularidade, originalidade e paixão. Os Cavallos do Vinho são uns dos muitos elementos atrativos destas celebrações. No entanto, há outros atos importantes: i) *Ritual del Baño de la Cruz*, feito desde há 700 anos, com a finalidade de abençoar as águas que irrigam o campo de Caravaca, sendo a origem da festividade; ii) *Missa da aparição*, onde é representada a lenda da aparição da *Santísima y Vera Cruz de Caravaca*; iii) Desfile Mouros e Cristãos, são típicos do leste espanhol, sendo o mais antigo; iv) Noite das Migas, competição gastronômica muito importante na Região de Múrcia; v) Entradas das Bandas de Música, as distintas associações musicais apresentam-se na festividade; e vi) *Cruz de Impedidos*, a cruz de Caravaca é levada às moradas de pessoas doentes. O atrativo turístico não é, portanto, dos Cavalhos do Vinho, é de toda a festividade (Andrés y Espejo, 2006).

Em 1970, O Ministério da Informação e Turismo declara as festas de Caravaca de la Cruz como “Festas de Interesse Turístico”, um título que é o germe do atual sistema de designações honoríficas: “Festas de Interesse Turístico Internacional”, “Festas de Interesse Turístico Nacional” e “Festas de Interesse Turístico Regional”.

Esta distinção significava atrair um número maior de visitantes, principalmente regionais e outras áreas próximas. Ao longo do anos, cresceu a festividade e foi feita uma promoção turística em eventos como FITUR, crescendo o número de turistas cada ano.

Durante a década de 1990, começam a chegar turistas nacionais, devido à popularidade alcançada em eventos como a Exposição Universal de Sevilla em 1992. Os turistas internacionais chegam no ano 2000, principalmente da Inglaterra e Alemanha para apreciar a festividade, mais especificamente, o dia 2 de Maio que é o mais importante e convergem os Cavalos do Vinho e os Desfiles de Mouros e Cristãos. No dia 4 de Novembro de 2004, a Secretária Geral do Turismo declara as celebrações “Festas de Interesse Turístico Internacional”, sendo a primeira na Região de Múrcia.

##### 3.4.1. Atual situação

Os cavalos do Vinho atraem hoje dia 200.000 pessoas, sendo uma das festividades mais conhecida do Leste espanhol. Tem, portanto, um forte impacto econômico no comércio, bares e hotéis no âmbito local e regional, sendo a ocupação hoteleira maior que em outros meses do ano. A festividade é decisiva para o setor comercial e hoteleiro, tendo uma repercussão positiva nos proprietários. A chegada de turistas é uma oportunidade de desenvolvimento socioeconômico (Moreno y Lagar, 2016), porque gera benefício através do consumo de bens e

serviços e a criação de novos empregos, para além da valorização de toda a cultura e idiossincrasia de Caravaca.

Por outro lado, as televisões dedicam um espaço nos telejornais para falar da festividade, fazem diretos e retransmitem a corrida. As rádios fazem seus programas desde Caravaca de la Cruz e os jornais publicam artigos sobre os Cavallos do Vinho. Nos últimos anos, cresceram os meios de comunicação internacionais. Também Internet é muito importante para a festividade porque é tendência mundial cada 2 de Maio.

#### 3.4.2. Casa Museu dos Cavalos do Vinho

Em novembro de 2014 abriu o Museu dos Cavalos de Vinho, cumprindo a demanda por muitos turistas e caravaquenhos para fazer uma demonstração permanente da festividade. Fica no centro histórico da cidade, numa casa do século XVIII reabilitada, é o museu mais visitado em Caravaca, com mais de 15000 visitas anuais em 2016. A exposição tem 8 espaços onde é possível conhecer a história da festividade e olhar peças e sua evolução e há um espaço para as crianças com jogos para elas. Também há uma amostra de festividades de outras cidades nacionais e internacionais em relação com cavalos. Para o futuro pretende-se criar uma oficina pelos bordados.

#### Conclusões

Os Cavalos do Vinho têm mais de 250 anos de historia. A festividade nasceu como forma de levar o vinho para fazer um ritual no contexto de uma instituição e evoluiu para uma celebração feita pelos habitantes da localidade onde lembram a façanha realizada por quatro Cavaleiros Templários. As consequências econômicas da festividade em geral são positivas não só para Caravaca, mas também para outros territórios próximos. A chegada de turistas estrangeiros marcou a chamada dos operadores turísticos que conheciam o atrativo turístico da festividade.

O Museu dos Cavalos do Vinho é positivo para valorizar os bens materiais como *enjaizamientos* através das exposições permanentes. A candidatura para ser da Lista Representativa do Patrimônio Cultural Imaterial da UNESCO está aguardando avaliação. A Câmara Municipal e o Governo Regional estão particularmente envolvidos na sua declaração como Patrimônio Cultural Imaterial da Humanidade. Esta distinção constituir-se-ia como importante para atrair, segundo as previsões, um maior número de turistas ao longo de todo o ano.

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# Teaching heritage to tourists – visitors involvement in the attractions

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## Abstract

Irrespectively from a site's geographical location, it represents a given culture, tradition and local identity. These cultural features, related to the way of life, working and entertainment activities, are to be locally maintained, i.e. passed from one generation to the other by teaching young people the practice with the local materials, the use of the tools and the preparation processes. By time, the number of people knowing the practice of these old professions with all their mastery, secrets and competence would decrease, if we do not change the procedure by recording it and through modern IT tools making it public for both professionals and visitors. The widely spreading eLearning technologies used for training purposes can also be very efficiently applied for this area as well. The tool can contribute to preserve and spread the knowledge of these masters. Within the EU, a new way of connection could be established among the countries, among similar types of craftsmanship undergoing different local influences. The values of these trades can be recorded and preserved by the most modern educational information and knowledge management technique and in the same time the wish of tourists for not just watching something from a distance but get involved and be participating in a local process and event can also be realised. They will take home not only memories and souvenirs but also the knowledge of local customs (intangible) and their own products (tangible).

## Keywords

heritage; education; knowledge transfer; information management.

## Changing tourism

The great questions “what is culture?”, “what is tourism?” are recurring and also the investigations about their relationship. Partly, it is evident that they have a contact, moreover they are interrelated.

Why and where? Culture represents the common knowledge of a given society including the consequences of the history of subsequent generations. Irrespectively from a site's geographical location, it denotes a given history, tradition and local identity. These cultural features, related to the way of life, working and entertainment activities are to be locally maintained. If the inhabitants collect further knowledge locally or from any distant area by travelling there and enlarging their experiences, skills, factual competencies, it will become part of the knowledge content of that given society. It also explains the reason for tourism: this is the way how we change our life temporarily by seeing, visiting new things for entertainment, for a change, for holiday but in the same time, we also want to learn something, take home something that does not exist in our home country or town, at our usual living site.

Traditions, customs, craftsmanship has passed from one generation to the other by teaching young people the practice with the local materials, the use of the tools and the preparation processes. Nowadays, it is not only for the youth we have to present and teach these local specialities but also for the tourists who come there, visit the place, in order to study something new, to get acquainted with other knowledge than theirs. They even may want to learn the production of objects, meals, tools to try themselves there, locally, in order to have an adventure and even more, to take home the product as a most valuable souvenir (more appreciated than the bought ones!).

By time, the number of people knowing the practice of these old professions with all their mastery, secrets and competence would decrease, if we do not change the procedure by recording it and through modern IT tools making it public for both professionals and visitors. The widely spreading eLearning technologies used for training purposes can also be very efficiently applied for this area, as well. The tool can contribute to preserve and spread the knowledge of these skills. Beyond the product, the tourists can even take home the technology how to make it. The souvenir industry will get another shape!

Within the EU, a new way of connection could be established among the countries, among similar types of craftsmanship undergoing different local influences. (It is not accidental that in the past, the apprentices had to wander all over various territories to learn a profession completely by learning from masters living distantly, among different conditions and circumstances from each other. Nowadays, it is also a requirement that at least at PhD level, researchers continue working in another country than where they have studied.)

The values of the trades can be recorded and preserved by the most modern educational information and knowledge management technique and in the same time, they provide tourists with the opportunity of learning them. It coincides with their wish for not just watching something from a distance, being a passive receiver of the events but get involved and be active participants of a local process or event. This way of learning is proved to be more efficient. These people will return home not only with memories and souvenirs but also with the satisfactory feeling of having done something for and with the locals as well as with the possession of a new knowledge of local customs (intangible) and even more, they can take home their own products (tangible).

This new concept of tourism modifies the traditional attitude of both the inhabitants and the visitors. The first step on behalf of the inhabitants used to be just the acceptance of having foreigners at their own place, their task was to accept it and present their special values to the tourists. Then, in order to do it properly, they have to be aware of their own values, have a wish to present it to foreigners and be capable to do it in an entertaining, attractive way besides having a firm local community identity feeling. Nevertheless, in our days, the tourists shall not be simple viewers of events or sites but primarily respecting the residential circumstances, they are going to be involved in the perception process. It is not a simple sight but they will have to carry out activities in order to get the whole information that might be involving any or several or all of their senses.

This recent trend will diminish the leisure mass tourism and increase the dynamic cultural exchange, especially among young people. As it was written in a source article "We bid farewell to an era of tourism as an isolated industry bubble of culture and leisure experts. We leave behind days of equating tourism marketing with glossy picture-perfect advertising." The new slogan is "Localhood for everyone." "As a resident, you're part of the community, and you contribute to it. The shift here is that the tourism industry can also help visitors add value to the community, instead of asking permanent residents to exchange their quality of life for money."

This type of attitudinal change will create experiences that locals will share with travellers and if they get sufficiently involved, they will become returning guests taking friends and relatives with them. This new arriving tourist community will enter into cooperation with the residents for the benefice of both sides as the newcomers will certainly have their own ideas

about activities originating from their own culture that is going to refresh the indigenous knowledge. (David Archer: <https://destinationthink.com/copenhagen-end-of-tourism-4-year-destination-strategy/>).

### **Tourism and education**

Leaving this optional but not necessarily positive vision and complete transformation, I would rather foresee a method seemingly much less shaking our world of tourism and economic background of visiting other cultures.

The key points are the following: we have to start from a clear definition of cultural heritage that has volumes of professional literature but – in brief – it represents cultural heritage consisting of the resources inherited from the past in all forms and aspects - tangible, intangible and digital (born digital and digitized), including monuments, sites, landscapes, skills, practices, knowledge and expressions of human creativity, as well as collections conserved and managed by public and private bodies such as museums, libraries and archives.

It originates from the interaction between people and places through time and it is constantly evolving. These resources are of great value to society from a cultural, environmental, social and economic point of view and thus their sustainable management constitutes a strategic choice for the 21st century (Council of Europe, 2014). This strategy can only be implemented and a given culture maintained through the transfer of the above knowledge to the next generations which is primarily done by education. The majority of the education takes place primarily in schools and training institutions but it can also be done by personal experiences, acquired e.g. by cultural tourism. In both cases, the aim is the procurement of knowledge of an unknown territory – which in the case of tourism – is meant literally. The acquiring procedure has an important role in a person's development, in the formation of his/her identity as well as in the local and visiting communities. The involved participants establish cultural networks and share information and knowledge.

The next step is the understanding the concept of heritage which is a creation of the mind, it is a mental construction. In other words it is a set of values presently given to the past, in order to build a basis of future. Nowadays the preservation of heritage is a top down movement as the process of selection is supported by international trends and agencies and the aim is to (re)create cultural identities of places and people, as the Professor of the Leuven University, Myriam Verbeke stated.

The general attitude for why it is necessary to deal with heritage education is that heritage protection must be done by experts, teaching is the task of schools, education is the responsibility of families, why should we mix up with this? Nevertheless, the reality of today is that it does not work in this way. At significant heritage sites, we do not see that the majority of people are admiring and evaluating the beauty, uniqueness, importance of a monument, exhibit or wonder of nature. What we experience at popular sites is that visitors are captured by selfies proving their presence without hardly any knowledge of the background. This clearly shows that local people have got a responsibility, as each person must be aware of his/her direct environment, of its heritage values and with the meaning that it can and should be their task to introduce this to visitors, what they can do only on condition they have sufficient knowledge about it to share with the tourists.



Our aim is to get back to real delivery and consumption of knowledge of the past. We have to examine what the principle difficulties of the process are: it is to be identified who, why, where, when and how should transmit cultural heritage as well as it is also to be clarified what our ultimate aim is and what the main reason is for us to achieve it.

### **Heritage and culture**

They are connected through education: Heritage protection is to be incorporated in trainings, education and teaching within and outside school from the very beginning. This transfer of knowledge contributes to the formation of communities with their common history and past. They have to act together for preservation: maintenance of all, but especially intangible heritage (legends, traditions, dances, music etc.). If harmonized actions of common identity and awareness are represented to preserve heritage, they can assure the continuity of their own culture. The best example of it is the United Kingdom where people including locals and foreigners cannot avoid meeting with the country's heritage and communities: even if you buy a piece of cheese in a shop, you will read on the back of the wrapping where it was made and the farm's history, webpage, noting the idea that you have already supported preservation by the procurement of this piece of goods; Museums want to involve all visitors from the youngest to the handicapped, local collections are gathered and presented by volunteers being very proud (and finding all ways to make it public) of their activity.

### **Heritage and civilization**

It sounds nearly the same as the relation between heritage and culture but it encompasses a greater scope than "just" culture: Heritage protection goes together or can be implemented exclusively by the assertion of personal development. It means a great number of professionals in a wide range of areas to be trained, representing both theoretical and practical backgrounds of preservation and presentation. Thus it represents the complex built, natural, tangible and intangible heritage territory by providing the philosophy, concepts and actual schemes of preservation as well as their implementation. Consequently, it encompasses the whole of our common heritage which is the civilization itself, whereas in the meantime, it also provides a basis for community building, the basis for the establishment of societies.

Among these circumstances, all heritage information – beside the acknowledgement of level and detail differentiation – can become a school subject contributing to the personal identity preservation and as such, guaranteeing the continuity of civilization. Sharing information and knowledge requires various, appropriately selected means, i.e. theories, methodologies for the implementation and appropriate IT tools used for it. They have to be listed, studied, evaluated, developed and adapted by technology transfer for becoming suitable for being applied in the preservation and presentation process, in order to involve people, especially the youth, whereas the same process is also used for tourists when introducing a site, legend, custom or craftsmanships.

### **Heritage and economy**

Economy is the graspable point in our everyday life where education and tourism are integral and indispensable parts representing different branches but sometimes interrelating and covering similar areas:

- Investments (meaning local, new developments that can make the life of inhabitants easier and more comfortable whereas in the same time, they can enable them for receiving tourists, thus generating jobs and income for them);
- Information systems (provide all data channels, means, methods for reaching all the involved participants by the necessary data);
- Value chains (If a tourist wants to visit a place, see the sights, will certainly buy something in the local shop [souvenir, book, object for using it and reminding him for the visit, etc.], eat in a restaurant or buy local food and sleep in a hotel);
- Environmental protection (both natural and built).

When a site is nominated on the World Heritage List, the crucial part of the documentation is to describe the way, organization and measures of heritage management. All the processes start by increasing local awareness of the outstanding values of the place so that the related cultural attributes are revealed to the inhabitants. Next, the necessary cultural and social infrastructure must be established taken into consideration the active participation in the above mentioned value chains. This is how we can establish the required conditions for sustainable tourism, a major role player of economic income. The sustainability can be maintained by adequate information provision – this is again a common point between education and appropriately managed tourism.

There are additional similarities in education and tourism that are also covered by other branches of sciences. Information is a data, relevant to the subject of communication needed/interesting for the receiver party changing the level of knowledge and having a credibility measure (authenticity). In these cases, the level of trust is to be increased among the information channels (personal/social networks).

### **Common guidelines for students and tourists**

The crucial point of all teaching, transmission of knowledge, transfer of information is that the receiving party should be open for acquiring data and could be involved in the process. So, the most important task of those who provide them with data is to make them interested in the subject.

It is equally their job to make the receivers of knowledge aware of the values they are about to meet. It will increase their attention and they will be able to evaluate the subject they are getting familiar with even better.

In our days, both school teaching and regular tourism is undergoing a thorough change. The frontal presentation does not work anymore. The efficient information provision takes place in the framework of activities where the students or tourists are personally involved and they are actually learning by doing a new occupation. It also helps to imprint the circumstances and conditions of that given action.

The involvement goes together with the use of up-to-date technical tools: internet, phones, computers etc. Students gather their knowledge, as tourists also prepare, organise their trips by them. Whether we are in the school on a lesson or participating at a university lecture or preparing holidays, visiting a monument, everyone will use an electronic tool for obtaining, recording, collecting, retrieving information. This shows the necessity for the prominent status

for providing real and accurate information and knowledge. The consequence will be that the “learners” will gain expertise, skills and comprehension based on their own experience.

It is to be noted that the above mentioned transformation of knowledge acquisition can be hindered or restrained by autocracy, compulsion or domineering pressure that have many ways and tools and always have a controversial effect.

### **The transmission**

The elements of the remains of our past are to be known by the people of today in order to be able to convey the amount of experiences gathered by now about the built, natural, tangible, intangible heritage, especially about those which are unique and exceptional. It is the task of each nation, site manager, leading body of countries or owners of properties to safeguard them for the sustainable future of their country.

When we identify and outline the information content for our receivers who can be pupils, students or visitors, the provision can be incorporated in school teaching or adult education or can be executed during visits to locations that are not the home of the visitors.

The information or knowledge provision including discovery and collection of data, scientific documentation, cultural protection and its sustainable application, as well as the publication of heritage require that related activities must be regulated by law, prescribing that the actual tasks are to be distributed efficiently, so that assigned authorities control the processes. To raise the cultural awareness of everyone is the duty of all of us our globe: to know about and learn of our common heritage – and about its maintenance, preservation, transmission to the next generations.

### **Learning by doing**

Tacit knowledge is intangible and can only be transferred by a Master, so the preservation and transmission can only be done by a direct and continuous transmission. The steps are the following: if there are discoveries made of sites or traditions collected and described, a thorough scientific documentation is to be created. The next step is to organize activities for protecting them by using sustainable applications, by setting up fora and publications of culture and introducing the innovative practices. If interest and respect is raised, information is to be transmitted on the way of life, believes, institutions, holidays, objects, customs, traditions, art, artifacts.

There is a competition for the attention of the receivers of knowledge and the service providers (schools and agencies), experts, curators, guides and media strive for delivering appropriate on-site information that has to possess additional multimedia contents, augmented reality, 3D products generating community activities and common programs in order to produce a most complex experience. Aiming at becoming primary information resources of heritage elements, they are also responsible for maintenance and operation, assure local knowledge and awareness, develop legends and stories and keep in mind the value chain vision, as well as coordination and monitoring.

Consequently, networks for heritage management (Twin Cities, World Heritage Cities, Historic Towns and Smart Cities) are created with the cooperation of cultural organizations, educational institutions and tourist agencies. They all have the same role in tourism like Cultural

Routes, connecting similar units, that are not the same but each of them has a special characteristic feature, thus they are complementing each other.

This is how networks for sharing heritage are created and through their operation, they contribute to heritage management that can efficiently be carried out by exploring and transmitting all attributes, connections, relations based on the collection of all sorts of qualities and functions of the heritage itself. It is an integrated tool for further conservation, as well as for sharing natural and human achievements. The implementation of this dream is our common responsibility.

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# Cultural journey of faith: the tourist use of historical heritage on the route alongside the procession of the cirio of Our Lady of Nazareth in Belém Pará.

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## Abstract

The Cirio of our Lady the Nazareth is held for more than two centuries in Belém, Pará State, Brazil, integrates the Representative List of the Intangible Cultural Heritage of Humanity by UNESCO (United Nations Educational, Scientific and Cultural Organization), due to the fact that it is one of the largest Catholic manifestations in Brazil and one of the largest religious gatherings in the world. Furthermore, the phenomenon Cirio of our Lady the Nazareth, represents a celebration, which is able to merge various material and immaterial cultural elements, such as gastronomy, crafts, music, dance and historical heritage. The route of the Cirio is contemplated by important cultural heritage reference points for the economic and social history of the city of Belém and the Amazon. Taking into account the abovementioned aspects, emerges the need for appreciation and awareness of existing heritage assets on the route, so that they are better understood, by means of tourist and educational activities, as the execution of interpretive tours of the heritage and guided visits to these buildings and historical monuments. However, the objectives of this article were to give awareness to the historical patrimony of the route of the Cirio, and in order to investigate the historical context of heritage assets, as well as discussing the feasibility of tourist use of the route of the Cirio from the perspective of valuation of assets. The observations and research corroborate the initial idea that it is indeed possible to idealize a tourist activity, able to interpret cultural and educational aspects and enhance the story represented by buildings and public places included in the route of the Cirio of our Lady the Nazareth.

## Keywords

Historical Heritage; Cirio of our Lady the Nazareth; Belém do Pará.

## 1. Introduction

The city of Belém, capital of the State of Pará, located in Northern Brazil, realizes 223 years of Círio<sup>1</sup> of our Lady the Nazareth, a procession which brings together approximately 2 million people on a route of 3.6 km between the Metropolitan Cathedral of Belém, the Sé, And the Basilica Sanctuary.

In December 2013, the procession was recognized and included in the Representative List of the Intangible Cultural Heritage of Humanity by UNESCO, with a favorable opinion with basis on historical and contemporary aspects, which reinforce the importance of this celebration for the memory, tradition and identity of people who live in the Amazon, in addition to considerations which evidence that the event achieves to bring Brazilians from other regions of the Country together, by its cultural and social diversity, and the point of transposing religious aspects.

The understanding of the phenomenon Cirio of our Lady the Nazareth of Belém do Pará is represented by inter- and multidisciplinary procession, taking into account all the expressiveness of events, once this annual moment, also known as the "Christmas of the

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<sup>1</sup> The word Círio originates from Latin "cereus" (wax), which means large wax candle. This is the most important offer of the faithful in the processions in Portugal, and under Portuguese influence the term Círio has become synonymous with the procession of our Lady the Nazareth of Belém do Pará.

paraenses", it consists of devotional acts, solidarity with promesseiros (people who make promises to the Lady of Nazareth) and pilgrims, strengthening of family ties - easily evidenced in the traditional Círio's lunch, cultural diversity, traditional handicrafts made with regional elements, cuisine with indigenous roots and a mix of sacred events and profane, which transform the Círio of our Lady the Nazareth in an almost inexplicable event to those, who have the opportunity to participate in one of the biggest Catholic manifestations in the world. In this period, the tourism production chain intensifies its activities due to the high demand for products and services such as *souvenirs*, wax products, sightseeing, hiring of tour guides, foodstuffs for the Círio's lunch, tapes, rosaries, custom made T-shirts, accommodation, among other economic activities directly and indirectly related to the event.

With the procession in the spotlight, which leads the pilgrim image of our Lady the Nazareth, departs from the Metropolitan Cathedral of Belém, the Sé, to the Sanctuary Square, and during the route observes at all times the manifestations of faith, the love and devotion of the pilgrims to the Holy Spirit, which arouse feelings of solidarity, respect and faith, to those who have the opportunity to enjoy the procession. In addition to the moving devotional acts evidenced in the celebration, we can observe that the route of the is contemplated by prominent buildings for the history of the Amazon, such as the Lusitânia Feliz Complex and its imposing historical buildings, Ver-o-peso complex, Warehouses of the Dock Station (Estação das Docas), public places, Republic square (Praça da República), Peace Theater (Teatro da Paz), private properties, Basilica Sanctuary, among others.

In the view to the observations of the route and the aforementioned, a questioning arises: What is the most appropriate way of valuing and recognition of the historical heritage of Círio's route by means of tourist use?

This research on the relation of tourism, Círio of our Lady the Nazareth and historical heritage material has as main objective to collect the historical aspects of buildings and monuments of the route, and also discuss the possibility of tourist use of historical heritage evidenced in the processional route of the Círio. To achieve the proposed objective, has been used the qualitative approach methodology, which basically consists in observing *in loco* of built heritage with historical representation for the city of Belém, as well as bibliographic and documentary research of conceptual aspects related to the selected theme, and conduct a survey of historical information of heritage assets highlighted in the Círio's route.

It is understood that this research, besides being supported by the aforementioned factors, which reinforce its importance, makes is necessary to observe other relevant aspects as for the choice of this theme. In the social sphere, the definition of this topic falls within the possibility of: awakening in the local society the recognition of historical heritage as an integral part of their lives, their history, their identity; deep feelings of belonging and ownership which may boost preservationist attitudes; present the city of Belém,, taking advantage of a special moment for Pará, the Círio of our Lady the Nazareth, where people come closer to the cultural elements of Pará and demonstrate pride in their traditions.

In the cultural aspect, it aims to contribute in drawing the attention of society and public and private institutions with regard to preservation attitudes, conservation, valorization, protection, recovery, planning and promotion of buildings, which comprise the Círio's route. Such actions and attitudes shall reflect on the relationship itself between society and historical

heritage, stimulation the true role of heritage, namely to educate, awakening the imagination and to encourage the search for knowledge.

From an economic aspect with the planning and execution of a tourist route, in order to value the historical heritage of the *Círio* of our Lady the Nazareth, occurs the generating of direct and indirect jobs due the visitations to the areas, as well as giving an impulse to the formal and informal market economy, which annually intensifies due to the celebrations of Nazareth, and results in a better income distribution.

In the scientific aspect, it deals with the contribution to knowledge production with regard to the buildings and monuments that are very important to the history of the colonial period and Belle-Époque in the Amazon, with a view to awakening the interest of other researchers to study and research in more detail the subject Tourism, Historical Heritage and the *Círio* of our Lady the Nazareth.

And last but not least, on a personal level to justify the choice of this theme, I quote as reasons Culture, Historical Heritage, History, Amazon and Tourism that have always been subjects that aroused my interest and curiosity, and at the same time that the scientific approaches to the *Círio* of our Lady the Nazareth always permeate more conventional subjects, encouraging the authors the need to innovate and to further deepen the discussions on this procession, allowing to transit through its wide diversity.

## **2. The *Círio* of our Lady the Nazareth, of Belém do Pará**

The cult of our Lady the Nazareth in Belém do Pará involves various celebrations. Among them stands out the *Círio*, which is the largest procession in honor of the Virgin held during the period of the Nazarene<sup>2</sup>. The procession of the *Círio* can be cited as one of the largest religious manifestations in the world, attracting nearly two million faithful and visitors every year, on the morning of the second Sunday in October.

It is very common to hear that the *Círio* goes beyond the purely religious character, which is evidenced in the Nazareth preparatory *novenas* (*a certain prayer for a number of days or weeks*) in the residences, in the processions, masses and visits to religious temples, and visits to images. There is still the profane side of this great event, gifts at family reunions *abastecidas* with alcoholic beverages and the *Festa da Chiquita* (cultural event) and its various manifestations. However, the *Círio* is much more than religious and profane, and diversity is the essence.

The *Círio* event also predominates leisure with the traditional *Arraial de Nazaré* (temporarily amusement park) and its amusement park toys, with a vast programming parallel hatching in the city with the theme of the *Círio*. It's the very moment to review family and friends, especially after the main procession, when social relationships narrow annually during a very important moment of this event, the "*Círio's lunch*", where people gather to celebrate and eat, what we call "*occasional cooking*", i.e., foods that are typical, but the ones that are appreciated only on certain occasions, as is the case with *Pato no Tucupi*<sup>3</sup> and *Maniçoba*<sup>4</sup>.

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<sup>2</sup> 15-day period with extensive programming and diverse in honor to the Virgin of Nazareth.

<sup>3</sup> The tucupi is a kind of juice of the yellow and wild, which is commonly found in the Amazon. It is necessary to boil it after extraction and fermentation to contain toxins and ready for consumption and preparation of the duck, among other delicacies.

<sup>4</sup> It is one of the typical dishes that the most represents the gastronomy of Pará, which is a kind of "*feijoada*", just by using the ingredients of *feijoada*, except for black beans. The leaves, called *maniva* should be pounded or ground in



The Círio is a living culture, represented by artistic and cultural manifestations, which occur in the city in this period, such as the Auto of Círio which is a programming that involves music, theater and poetry which is held along the narrow streets of Bairro da Cidade Velha on Friday night that precedes the Sunday procession. There is also the Miriti<sup>5</sup> fair and its traditional toys that very much represent the Amazon, and the Arrastão do Círio which is coordinated by the cultural group Arraial do Pavulagem.

From the tourism point of view, is the period of greater movement of tourists in the city of Belém. Studies show that the flow of tourists with the Círio of our Lady the Nazareth has been growing over the years. The State of Pará Tourism Bulletin (2016:44) demonstrates that in the period of the Círio in the year 2014, the number of tourists was 82 thousand people and in 2015, the figures show that there were 84.4 thousand tourists in Belém. The perspective is of a growing number of tourists, considering that each year the visibility of the Nazaré event increases in the most varied means of communication, contributing to stimulate the motivation of actual and potential tourist trips that the Círio de Nazaré possesses. It is important to observe that many tourists return to Belém and other círios, either to present the phenomenon to someone or in order to relive moments of emotion, faith, leisure and genuine paraenses experiences.

### 2.1. The History

Faith and devotion to Our Lady of Nazareth started in Portugal, after the original image of the Virgin passed through Israel and Spain. In Belém, a man named Plácido José de Souza found an image of the Saint (Santa) in 1700, on the banks of the Murutucu stream, the place where was erected the Basilica Sanctuary of Nazareth. After finding the image, the legend says that Plácido took it to its residence and on the other day, to his surprise, the image had disappeared. Thus, the man returned to the banks of the stream and there was the Saint. The story reveals that the episode happened several times, until the moment the image was sent to the then Government Palace, Lauro Sodré Palace nowadays. To pay homage to the Saint, Plácido built on the site of finding, a little chapel in devotion to Our Lady of Nazareth.

According to the Dossier, the first Círio according to IPHAN (National Historic and Artistic Heritage Institute), was held on September 8, 1793, leaving the chapel existing inside the Palace of the Government, one year after Vatican's authorization to proceed with a procession in homage to the Virgin of Nazaré, in Belém do Pará. In the beginning, there was no fixed date for the celebration, and may occur in the second half of the year, in the months of September, October or November. However, from 1901 and further the procession began to be held all the time on the second Sunday of October, composing the calendar of religious events of the Catholic Church in Pará.

On December 15, 1971, by means of Law Nr. 4,371, the Legislative Assembly of the State of Pará proclaims Our Lady of Nazareth Patron of the State of Pará and provides in Art. 1, sole Paragraph that the Government of the State of Pará will provide annually, honors to the patron saint of the Paraenses. Thus, the tributes to "Queen of the Amazon", to Our Lady of Nazareth,

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grinding machines, and cooked for 7 (seven) days before consumption. The mass of the maniva is used for the preparation of the base of the maniçoba.

<sup>5</sup> The miriti (*Mauritia flexuosa* L. f.) is a palm tree, from which is the raw material is extracted and used for the manufacture of handmade toys. It is an indigenous practice, which is passed from generation to generation, and the city of Abaetetuba is traditionally known for its production of miriti toys.

start to appear on the streets, in the residences, companies, in the media and in the daily life of the Paraenses, weeks before the beginning of the Nazarene Amusement Park, when paraenses go to "live" the expectation of another Círio.

## 2.2. The symbols

The Círio of Nazareth is represented by some symbols that depict the particularities of this religious event. Among the symbols recognized by the archdiocese are the authentic image, the pilgrim image, the mantle, the Platform, the rope, cars, posters, anthem, promesseiros, museum, rosary and Memorial of Nazareth. The following are highlighted:

### 2.2.1. Authentic image

The "found image" is a wooden Platform which was found by a man named Plácido, in 1700. The image can be found in the Basilica Sanctuary of Our Lady of Nazareth, in a dome on the high altar, called Glory. The departure of the authentic image happens only once a year, on the eve of Círio, during a ceremony known as the "Descent of the Image" or "Descent of Glory", thus getting closer to the devotees during 15 days.

### 2.2.2. Pilgrim image

At the end of the 1960s, the authentic image was replaced by the pilgrim image, in order to protect and safeguard the original image. It is a replica and it is called the Pilgrim Image, because this one that is presented during the official ceremonies and processions of Our Lady of Nazareth Festivity. In other periods of the year, the Pilgrim Image is stored in the sacristy of the Basilica Sanctuary of Nazareth, where it is waiting for the celebrations of the next Círio.

### 2.2.3. The Mantle

The legend that depicts the moment the image of the Virgin of Nazareth found by Plácido, there is the mention that the image was with a mantle when found on the banks of the stream, since that moment the tradition of making mantles continues. At the present, several faithful and famous designers take turns each year to manufacture the mantle. The pieces have already been put on display, in order that the devotees can appreciate the mantles of the past years. Touching the mantle of the pilgrim image, during the entrance and exit of the Platform, is a moment of great emotion and faith for the faithful.

### 2.2.4. Platform

The Platform is one of the most important symbols of the Círio de Nazareth, through the Platform the pilgrim image goes through the processions and approaches the devotees. From 1855, when the Platform started to be used in the procession instead of a chariot of oxen, which was carrying the Virgin. The present platform is the 5th of history, and was made in 1964 by the sculptor João Pinto, it has a baroque style, and was carved in red cedar and painted in gold. Every year the platform is decorated with natural flowers on the eve of the procession and in the Círio placed on a "car" with tires and it is pulled by devotees by a rope.

### 2.2.5. The rope

In 1855, the rope was introduced in the Círio to replace the carriage with animals that was pulling the platform. This symbol represents a link between Our Lady of Nazareth and the faithful, a fact that is evidenced every year, when the pilgrims dispute a space to hold in the

rope during the procession in order to pay their promises, or simply touch the rope during the route, as a way to ask for blessings. Pulling the rope during the procession is one of the greatest acts of faith and devotion, but “pulling the rope” requires a lot of physical effort, since the competition for a place on the rope is too intense. The rope is 400 meters long.

#### 2.2.6. Cars

Thirteen cars accompany the Círio procession so that the promesseiros can deposit their promise of objects, which are carried by each faithful during the procession.

#### 2.2.7. Poster

Every year the Círio poster is presented and distributed to the population, which has a tradition of posting on the doors of homes and businesses as a tribute to Our Lady of Nazareth.

#### 2.2.8. Anthem

“Vós Sois o Lírio Mimoso” is considered the official anthem of the Círio of Nazareth. The anthem “Virgem de Nazaré” is originally a poem authored by the poetess Ermelinda de Almeida from Pará that by the 60's was transformed into a song. “Maria de Nazaré” has lyrics and music of the priest from Minas Gerais. José Fernandes de Oliveira (Fr. Zezinho) and was composed in 1975. “Nossa Senhora da Berlinda” has lyrics and music by Fr. Antônio Maria Borges, and was composed in 1987.

#### 2.2.9. Promesseiros (the name of those who escort the said procession)

The devotional acts practiced by the promesseiros in honor of Our Lady of Nazareth, impress people with the intensity and emotion, who demonstrate in various ways their faith and payment of their promises for the sake of graces received. It is a time of great faith and commitment. There are those who walk for kilometers to Belém, coming from neighboring towns; others make the Círio route barefoot; other pull the rope; carry objects; distribute water to the pilgrims; clothe their children as angels (Figure 1); or exceed their limits by following the promise on their knees for 3.6 km. Every devotee with his way of paying promises according to his graces reached.



Figure 1 - Child dressed as an angel to pay the promise, observing the departure of the platform from the Metropolitan Cathedral of Belém.

Source: MAGALHÃES, 2016.

### 3. Cultural route of Faith: Touristic route of the Círio of Nazareth

#### 3.1. Interpretation and recognition of heritage

Prior to addressing aspects relevant to the theoretical and conceptual discussion of historical heritage, it is important to try to understand more broadly, the meaning of the term culture, which directly involves the heritage.

Casasola (2003: 32) said that culture “is the result of society's interaction with the environment. Thus, it should be understood that culture is comprised of knowledge, attitudes and habits acquired by man, as a member of a society”.

The term culture can represent a huge range of possibilities. You can find it in the dances, in popular music, handicrafts, in typical foods, in poetry, in the plastic arts, in the legends, in herbal medicine, in the habits and customs of a people, in the speech mode, how they live, but also in prehistoric and historical heritage assets of a specific place. But, what is historical heritage?

Long ago, the word heritage was related only to material goods, which people received as inheritance.

Like the identity of an individual or a family which may be defined by the possession of objects that were inherited, and which remain in the family for several generations, also the identity of a nation can be defined by its monuments – being the set of cultural assets associated with the national past. These assets constitute a special type of property: to these are attributed the ability to evoke the past and in this manner, they establish a connection between past, present and future. In other words, they ensure the continuity of the nation in time (Gonçalves, 1988: 267 *apud* Barretto, 2000: 10).

At the present, the word heritage may have different interpretations and concepts, when it is combined with other terms or words, for example, Historical Heritage. According to Camargo (2002: 95), historical heritage is the set of “cultural assets or monuments of exceptional national historical and artistic value”. The historical heritage symbolizes the cultural legacy of a society, and is the memory and the history of a people. However, it is still necessary to make people aware of the importance of heritage, in order to perpetuate the history of a particular place. In some communities, “The presence of heritage assets symbolizes for the residents “stagnation” and the impediment to “progress” (Camargo, 2002: 95). This occurs due to lack of knowledge about the subject. Raise awareness of people to the importance of preserving historical heritage is a long process, which is not achieved in the short term, where are needed Heritage Education actions together with society, with the purpose to make them multiplier agents of the patrimonial preservation.

From the foregoing, it should be noted that according to Camargo (2002: 95), historical heritage is the set of “cultural assets or monuments of exceptional national historical and artistic value”. The historical heritage symbolizes the cultural legacy of a society, and is the memory and the history of a people and not only a “paralyzed past in museums filled with objects there are to testify the existence of a collective inheritance” (Paoli, 1992: 25).

In Brazil there are good protection laws for the historical and cultural heritage. According to the Decree-Law nr 25, of November 30, 1937, which deals with the protection of the National Historical and Artistic Heritage, decrees for actions with regard to buildings, and describes that

there are four books on preservation, which are: “The book on archaeology, Ethnographic and Landscape, the book on history, the book on fine arts and the book on Applied Arts. (In: ATAS, 1996: 211).

According to the official website of IPHAN, preservation<sup>6</sup> is:

An administrative act carried out by the Government, at the federal, state or municipal levels. [...]It aims to preserve goods of historical, cultural, architectural, environmental value and also of sentimental value for the population, preventing malnutrition and/or de-characterization of such property.

This same Decree-Law nr25, Art. 1 considers as National Historical and Artistic Heritage:

all the movable and immovable property in the country, and whose conservation is in the public interest, either by their connection to memorable events in the history of Brazil, or either because of its exceptional archaeological or ethnographic value, bibliographical or artistic value. (In: ATAS, 1996: 211).

More about preservation, Fenelon (1992: 33) said “preservation does not mean freezing, crystallize or perpetuate organization modes of urban space with its buildings and uses (...) preservation should be a flexible and articulated instrument, with the dynamics of the city”.

According to Barretto (2000: 15):

Preserving means protecting, safeguarding, in order to prevent something from being hit by some other that could cause damage. Conservations means keeping, store so there is permanence in time. Since storage is different from saving, preserving the heritage implies keep it static and untouched, whereas preserving implies integrating it into the dynamism of the cultural process.

In the municipality of Belém exists several buildings protected by federal or state laws, or preserved by IPHAN. It is important to say that a property is preserved, and not necessarily be in constant observation. By Law, is being protected, and cannot be overthrown nor suffer interventions, which may abruptly modify its architectural features, not to mention that its entire area of environment, within a radius of 300 meters, is also automatically protected by law.

The policies for the preservation of historic heritage should propose the performance of the spheres of government, in a more effective way, and not in a symbolic or conceptual way, which seeks only to strengthen the collective identity of society. It is worth mentioning that these actions are also important, and valid if they support education, which can awaken in the citizens the feeling of belonging and protection against cultural heritage, since more and more the society is anxious to see the competent bodies, acting for the protection of the cultural heritage of a State or Municipality.

The historical heritage is a very sensitive to predation of men and time, thus it needs to be protected and preserved so that future generations may have the opportunity to learn more about the historical evolution of humanity.

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<sup>6</sup> According to Horta (1999: 16) the origin of the term preservation is very old and “refers to the Torre do Tombo, in Portugal, where they store books and the documents of the history of that country, and many related to the history of Brazil”.

IPHAN<sup>7</sup> is responsible for the management and protection of Heritage and Historic Archaeological Union. Even with the actions of IPHAN in order to safeguard the cultural heritage of the Nation, many things still need to be done, since the institute does not have enough professionals to attend the entire national territory, considering that Brazil is a country with a large territorial extension, which further complicates the work of IPHAN. And with respect to Pará that is no different, because the state is the second largest federation unit of the country, fact complicates the monitoring of historical and archaeological heritage registered with IPHAN.

The preservation of historical and cultural heritage has not yet reached the level of appreciation, which could be expected in Brazil. And unfortunately, many people are still not sensitive to this issue, perhaps due to lack of information on the subject, the real importance of these buildings to the memory of society or do not consider it a concern with historical heritage as priority attitude.

The historical heritage is as fragile as natural resources, but these are not renewable, are finite and unique copies of a historical era or period. Because of these and other relevant factors, the historical heritage should be managed in a sustainable manner, in order to ensure their permanence in the current and future society.

It is worth mentioning that the preservation of historical locations, and also depends on the involvement of the local community with the cultural heritage. It is necessary that the local community of the areas covered by buildings of historical or prehistory nature, and shall be informed about the laws, which protect the cultural heritage, in order to continue to enjoy the assets without the risk of breaking the law.

### 3.2. The journey of faith

The colonization of the Amazon and the protection of its lands are represented by a few buildings, which are located on course of the Círio. The procession of Our Lady of Nazareth starts in an area of great importance to the foundation of the city of Belém, on January 12, 1616, which is now known as the Feliz Lusitania complex, comprising buildings and monuments, which reveal the beginnings of the urban center of Belém, in the neighborhood that was formerly called the City and nowadays Cidade Velha (old city).

The course of the Círio passes through historical contexts, which range from the colonial period in the Amazon up to the golden age of the rubber economy (Between the years 1880 to 1912), when Belém emerged on the world stage as a unique city in beauty, sophistication, architecture, urban planning, basic sanitation and modernity with the arrival of sewage systems, electricity, running water, residence and urban transport system, which can be commonly compared the largest European cities.

During the Rubber Age, during the administration of the Intendant Antônio José de Lemos, the city of Belém received special attention with focus on the beautification of public space, the construction of imposing buildings, adaptations and renovations of public parks, all driven to boost the Paraense economy. For the time, in the height of the rubber period, Belém was synonymous with modernity and good taste. The European fashion, particularly from London

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<sup>7</sup> According to the official website of the National Historical and Artistic Heritage Institute - IPHAN, the institute was established on January 13, 1937 by the Law nr 378, in Getúlio Vargas's Government. Nowadays IPHAN is linked to the Ministry of Culture.

and Paris, and arrived in Belém to attend the elitist society, sometimes even before arriving in other urban centers of Brazil.

The city lived an intense period of cultural fervor, with social life agitated by cafes, theaters with performances of European operas, sophisticated cabarets and nighttime environments that animated the rubber barons.

It should be highlighted that the route of the Círio procession reveals a geographic division that is consistent with the historical context of the formation of the city of Belém between the end of the eighteenth century and early twentieth century. Figure 02 shows the city plan in the year 1905 during the period of the Mayor of Antônio Lemos, who was a visionary man and decided to turn Belém into a modern city by following the landscape standards, sanitation and organization of large European cities. The image below shows the 06 districts that comprised the urban area of Belém in the early twentieth century, the route of the Círio stands out as it occurs in the present day.

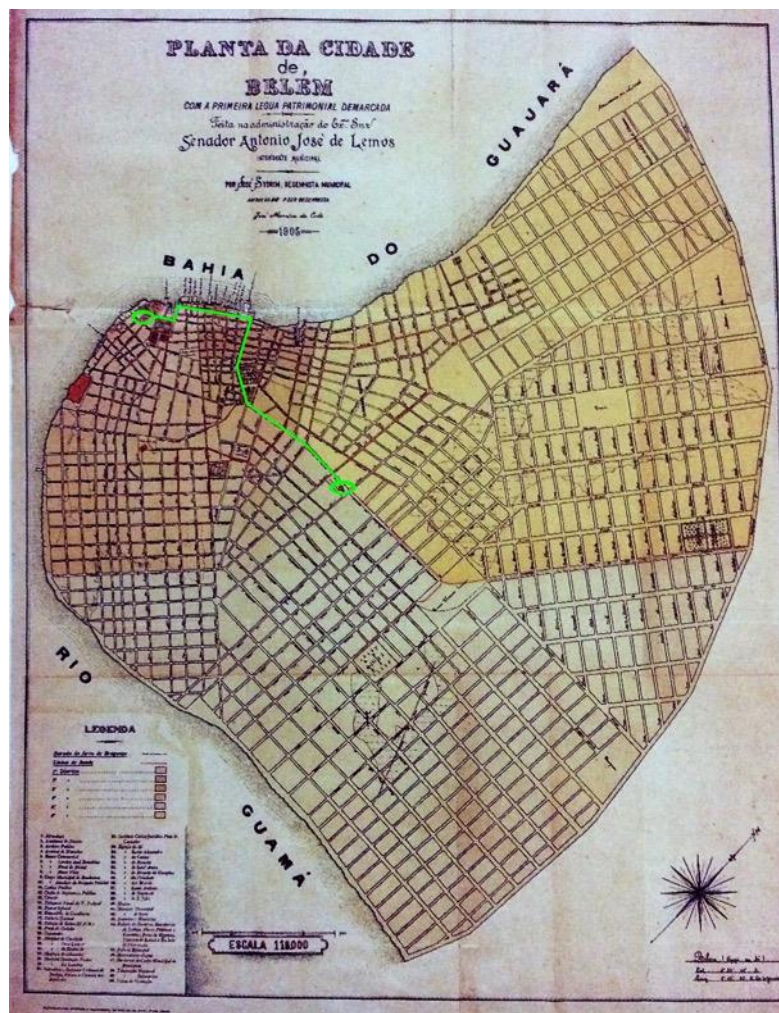


Figure 2 - Route of the Círio of Nazareth passing through the districts of Belém in the year 1905. Source: SECULT. (2004). *LONGING TO BELÉM: A MEMORY OF BELÉM FROM THE BEGINNING OF THE CENTURY ON POSTCARDS*. 3. ed. Belém: Secult.

Figure 3 is an enlarged image of the route of the Círio of the year 2016, available at Portal do Círio of Nazareth. It is possible to identify some important points on it, besides streets and avenues of the neighborhoods of Cidade Velha, Campina, Reduto and Nazaré.

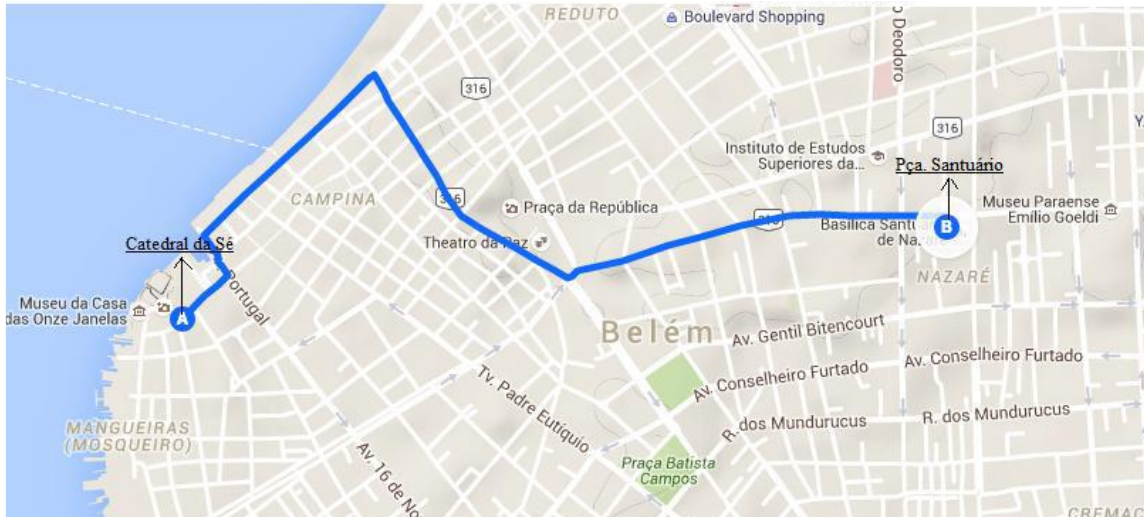


Figure 3 - Route of 3,6 km of the Círio de Nazaré, held annually on the second Sunday in October. Source: [www.ciriodenazare.com.br](http://www.ciriodenazare.com.br). Access on: Febr 02, 2017

### 3.2. Historical heritage of the route

The historical heritage present in the procession of the Círio de Nazaré represents an important legacy for the history of the Amazon and the city of Belém. However, the buildings and historical monuments cannot reveal details of their history by themselves, only with a brief passage in front of one of them. It is necessary to stimulate the experience in order to look through a guided tour of a tourist route.

The proposal of a cultural route shall take advantage of the beauty of the historical heritage of the Círio de Nazaré, and is highlighted as encouraging the valuation of heritage assets, which at the moment of the procession go unnoticed by the people due to other emotions, which are understood to be more latent at this time that is perfectly understandable. Therefore, it is proposed the “Cultural route of the Faith” which is held on different days on the second Sunday in October, if possible within the Nazarene amusement park, by enjoying the magical atmosphere involving the city because of the Cirio, and besides being another way of presenting the city to the tourists and the residents themselves, who in some cases are unaware of the true history of the place they inhabit.

According to Albano, C. and Murta, S. M. (2002: 11), a community that does not know hardly itself, is able to communicate the importance of its heritage. Theory that strengthens that the interpretation of cultural heritage of a city Needs the watchful eyes of its residents, as a manner to rediscover new looks on places that due to the dynamic race of everyday, end up being nothing new and become forgotten, allowing with this that preservationists attitudes can be developed in the city dwellers, after tourism and heritage education actions.

The tourist use of idea of the space bounded by the Círio, results in what is called “tourist territory”, or in other words are portions of the geographic space, wherein the participation of tourism in the production of space is or shall still be decisive. However, Cruz (2007: 11) points out that there are in fact no tourist territories and what exists are “tourist uses of the territory”, or in other words, space portions that are appropriate for different purposes. Based on this analysis, it is observed that one of the proposals of the Cultural Route of Faith, is to make tourist



use of the historically demarcated territory for the Círio, In order to promote another vision for this geographical area, a give value to the historical and cultural aspects present in this context.

Following the order of the starting point of the route until the arrival of the procession of the Círio de Nazaré, below are the buildings and monuments, which are worth mentioning in this cultural context.



Figure 4 - Catedral Metropolitana de Belém. Featured on the right for the Statue of Friar Caetano Brandão.

Source: MAGALHÃES, Febr 24, 2017.

*Catedral Metropolitana de Belém, the Sé (Figure 4)* – The church is dedicated to Our Lady of Grace, and had its origin in the period of foundation of the city of Belém, In a hermitage that existed inside the Fort of the Crib (Forte do Presépio). It was constructed from 1753, with basis on the architectural design of the architect Antônio José Landi. It is a fine example of colonial architecture in the Amazon, and is a religious and cultural reference to the inhabitants of the city de Belém.

*Igreja de Santo Alexandre (Figure 5)* – It was originally called the Church of St. Francisco Xavier. The church was built by the Jesuit priests at the end of the seventeenth century. For its construction, The Jesuits used the resources derived from the drugs of the wilderness and the indigenous labor force. The church was built on a stone base, lime and gurijuba oil and not with whale oil, which was more common in the constructions of the time. The College of the Jesuits, nowadays a building located next to the church, was the place where the priests held the workshops with the natives, who were part of the process of catechization. From the classes taught in these workshops were made several images of saints and angels, which are currently on display at the Museum of Sacred Art of the State of Pará, housed in this building annexed to the Church of Santo Alexandre. In the museum there is an image of Our Lady of Milk, which has

been banned by the Catholic Church for exposing the Virgin's breast. It is a rare work that has been stolen and remained missing for many years, until found buried in the backyard of a residence and returned to the church. At the present, there are only two images like this in Brazil.



Figure 5 - the Church of Santo Alexandre and former College of the Jesuits.

Source: MAGALHÃES, Febr 24, 2017.

*House of Eleven Window* – Located next to the Crib Fort, the building was designed by the Italian architect Antônio Landi, in order to be used as residence to Governor Atahyde Teive, and later it was adapted to be the Military Hospital of Belém, and currently a leisure space and temporary exhibitions of contemporary artists. It features a *pier* that permanently houses the Solimões Corvette, a boat museum which invites the visitor to a walk through the daily life of the Brazilian Navy. The vessel is an exemplary of the Second World War.

*Forte do Presépio (Crib fort ) (Figure 6)* – Formerly called Forte do Castelo, is the place of foundation of the City of Belém, by Captain-Francisco Caldeira Castelo Branco, on January 16, 1616. In the same year, according to Cruz (1973: 152), was built inside the fort the first chapel in honor of Our Lady of Grace and the second was built where today is the Se Cathedral.

*Friar Caetano Brandão Square* – Formerly known as Largo da Sé, the square pays homage to the 4th Bishop of Pará, Friar Caetano Brandão. The central monument with a statue of the Friar was inaugurated on August 15, 1900.

*Dom Pedro II Square* – First called Palace Square, and then Independence Square, later the Affonso Penna Park and currently Dom Pedro II Square, this is one of the oldest public places in Belém and features valuable architectural works in its surrounding area, such as the Palaces Antonio Lemos and Lauro Sodré, Houses, in addition to the old Solar do Barão do Guajará, nowadays the building houses the Historical and Geographical Institute of Pará, which is an exemplar of the colonial period and has its coated facade of blue tiles. On the square there is still a monument in honor of General Gurjão, a prominent fighter in the Paraguayan War, and it was inaugurated in 1882.



Figure 6: Forte do Presépio (Crib fort).

Source: MAGALHÃES, Febr 24, 2017.

*Casario da Rua Padre Champanhat* – Formerly called Rua da Calçada do Colégio, which refers to the College of Jesuits, dated from the 17th century, and subsequently became known as the Rua Padre Champanhat. Formed by an architectural complex of colonial houses, which were renovated and are currently occupied by businesses, events hall and the Museum of th Círio. In the museum visitors can learn more about the procession, its history, the stories of faithful, and view an exhibition with the votes of promesseiros, which are objects in wax, wooden houses and other curious objects.

*Antônio Lemos Palace (Figure 7)* – Formerly called the Municipal Palace and commonly known as Blue Palace (Palacete Azul), the palace is a copy of the nineteenth century, in neoclassical style, and was inaugurated on August 15, 1883. It is the seat of the municipal government and still of MABE (Museu de Arte de Belém).



Figure 7 - Antônio Lemos Palace.

Source: MAGALHÃES, Febr 24, 2017.

*Lauro Sodré Palace (Figure 8)* – Former Government Palace, the palace currently houses the Historical Museum of the State of Pará. It was designed by the architect Antônio Landi and had its work completed in the year 1771. At the time the palace represented the government seat

and was considered one of the largest palaces in Brazil, having as one of its Governor Ataíde Teive. Noteworthy is also that the chapel existing inside the palace is the place where the first procession of the Círio of Our Lady of Nazareth departed. It houses the Historical Museum of the State of Pará.



Figure 8 - Lauro Sodré Palace.

Source: MAGALHÃES, Febr 24, 2017.

*Building Hotel América* – The old building of Hotel América, houses a network of popular clothing stores nowadays. A part of the facade is partially uncharacterized.

*Ver o Peso Complex* – It is denominated Ver o Peso “complex” for bringing together various elements that symbolize the diversity of this area, which is historically very important for the social, economic and cultural formation of the city and the Amazon.

The Complex offers opportunities for those who develop craftwork; the riparians who come from the interior of Pará to sell their products; the unique opportunity for visitors to get to know the unique flavors and aromas of the Amazon. According to DIEESE-PA (Inter-union Department of Statistics and Socio-Economic Studies of the State of Pará), the fair features about 5,000 workers, who live off the economic dynamics that the Ver o Peso aggregates. Furthermore, DIEESE points out that about R\$ 1.300.000,00 is generated in the most diverse economic activities of the Complex.

Ver o Peso is a place where people can market their products, exchange experiences, living space, and cultural exchange; the place where the culture of Pará is present.

The following comprise the Ver o Peso: The Açaí fair, Building of the Former Public Morgue, Praça do Relógio (Clock Square), Mercado de Ferro (Fish market), Market Francisco Bologna (Meat Market), Solar da Beira, Praça do Pescador (Fisherman's Square) and Praça dos Velames (Velames Square), a kind of wide located in the middle of the fair.

*Praça do Relógio (Clock Square)* – Located where once was the building of the Stock Exchange, which began to be built and after the fall of the rubber cycle, the building that was on its first floor was never completed and was demolished, giving rise to the English iron clock, in an *art nouveau style*.

*Building of the former Public Morgue* – It was inaugurated in 1899, by the Mayor of Belém Antônio Lemos. The building had access to the river, in order to facilitate the receipt of corpses, which arrived in ships and neighboring towns. Currently, the building has its facade quite altered from the original design.

*Ver o Peso Docks - Vessels* – The view of the ships ankered at the Ver o Peso Docks is undoubtedly one of the city's history icon. A scene that has been repeated for centuries and still remains active in the workers' daily life of the Ver o Peso Complex.

*Ver-o-Peso market, Mercado de Ferro or Fish market* - It was engaged by construction of Antônio Lemos and had its inauguration on December 1, 1901. The market is of metallic structure both on the outside as on the inside, and this iron structure was brought from Europe, its coverage is made of French tiles, which are arranged in scales. The neoclassical style architecture is a representative of the rubber economy period.

The market is also impressive for its beautiful towers 4, which are located one on each side, and are covered with zinc "scales". It is a very visited space and admired by tourists and visitors, causing people to not forget the importance of this place to the history and culture of Pará. It is the main postcard of Belém.

*Meat Market or Francisco Bolonha Market* - The municipal market better known as the Meat Market was built in 1867 by the engineer Francisco Bolonha, who was one of the authors of many works of Belém, and who is honored with his name in the construction, which he himself designed. The market before its construction had its place on a square called “praça do pelourinho”, where those sentenced to death were executed.

The market featured only one floor until Antônio Lemos's administration, when assuming the Intendency authorized the expansion and architectural changes bringing a more harmonious appearance, with the prefabricated iron interior architecture in England as the main element, in the year 1908.

*Ver-o-Peso Market* – An icon of the expression of Paraense culture and also the largest free fair in Latin America. The history of the fair is confused with the foundation of the city of Belém, because in the seventeenth century, in 1687, the Portuguese Crown established a checkpoint, with the objective of weighing the goods coming from the interior of the State, in order to be sold in Belém. Thus, the origin of the name comes to the fact that the riparian people of the time on arrival weighted the products (checkpoint of the Crown), and began to call it ver-o-peso.

*Solar da Beira* – Since the creation of the Ver o Peso, when the goods were weighed and taxed, being the income totally converted to taxes for the Chamber of Belém. With rigorous inspections, all the goods passed through the house of Ver o Peso, and they were revised in the Building for diverse income, nowadays, Solar da Beira. The solar also served as the State Bank and Chamber of Commerce. At the present, it is abandoned by the Municipal Government of Belém.

*Praça do Pescador (Fisherman's Square)* - It was popularly called “the beach”, by the fact that in the colonial period in the place where currently the square is, there was a beach.

*Igreja das Mercês* – From the Order of Mercedaries, the primitive Church of Mercy is dated 1640, made of mud and straw roof. In the second half of the eighteenth century, the architect

Antônio Landi designed the church according to the current edification. It is an example of great historical importance for the city of Belém. Internally, the structure of the central nave of the church is cross-shaped, features two pulpits, images of saints and other details that lead us to the historical past of Belém and the Catholic Church in various periods.

It is noteworthy that the church has a different external architecture of other churches, because it features a "pediment" rounded. It is also important to note that unfortunately the church is undergoing a process of deterioration, either by the action of men (vandalism) and by the action of time.

*Fort of São Pedro Nolasco (Figure 9)* – It was built in the year 1665, as part of the strategy of protecting the colony from possible invaders. It was behind the Church of Mercy. It was bombed in the period of the Cabanagem revolt by cabanos and the Loyalists forces, getting seriously ruined the occasion. In 1841, the ruins were demolished due to the construction of the harbour quays, in front of the city, and concluded in 1842. Nowadays, it is possible to see the foundations of the old fortification, which is on the premises of the Dock Station.



Figure 9 - Stone foundations of the Fortress of St. Peter Nolasco.

Source: MAGALHÃES, Febr 24, 2017.

*Estação das Docas (Dock Stations)* – The iron sheds, which currently house a leisure center, gastronomy and tourism, *Estação das Docas (Dock Stations)*, were prefabricated in England, brought in and assembled on site where previously existed warehouses and the external sheds of Customs.

*Casario da Avenida Boulevard Castilhos França* – The avenue Boulevard Castilhos França, was first called Rua do Imperador and later Boulevard da República until its current name, since 1930. Many warehouses of steam shipping companies were located in front of the tiled houses. In the year 1909, the external sheds of Customs were demolished for the construction of the harbour quays, near the Church of Mercy. On the avenue there is the Central Bank and for its construction, part of the house was demolished.

*Escadinha (staircase)* – A small secular staircase located in the harbour quays of Belém, the place where the Pilgrim Image of Our Lady of Nazareth arrives after the River Pilgrimage, which takes place on Saturday morning preceding the procession of the Círio de Nazaré.

*Pedro Teixeira Square* – Located between the iron sheds, and features a monument in honor of the Pedro Teixeira (1570-1641), leader and settler of the Brazilian Amazon.

*Building of the Companhia de Docas do Pará* – Place where the offices of the “Port of Pará” operated, a British company, who built it and started to have the concession of the new port of Belém.

*Felinto Müller ou Praça dos Estivadores Square* – Formerly known as Praça Mauá, the Praça dos Estivadores (Dockers’ square) features an obelisk, a monument in honor of the 400 years of Belém and another in honor of Magalhães Barata. During the Círio de Nazaré, the square is traditionally known for fireworks show, which the dockers prepare in devotion to the Virgin. It takes place on the square an event called *Boulevard*, which brings together artists from various cultural events.

*Presidente Vargas Avenue* – Former Travessa 15 de agosto, after that Avenida da República. The beginning of the "mango trees" tunnels, which are icons of the city. Presidente Vargas Avenue features many buildings of a commercial and residential character worthy of note, such as Café da Paz, an important meeting point for politicians and members of the society of the Belle-Époque period, where today is located the building of the Bank of the Amazon. There was also the Grande Hotel, which was the largest hotel establishment of the time with its construction dating from the 20th century. The terrace of the Grande Hotel was an important point of reference for Belém’s society.

*Praça da República (Republic square)* – Located in the former Largo da Pólvora, where a deposit of gunpowder was installed in the eighteenth century. It is a well-wooded square, surrounded by leafy hedges. It houses on the central quadrangle the Republic Monument, which was made by a Genoese sculptor and marked the celebration of the 8th anniversary of the republican regime in Brazil.

After 1904, Mayor Antônio Lemos urbanized the square including lakes, pavilions and gazebos. Noteworthy are the Helena Magno Music Pavilion and Euterpe Music Pavilion, the latter built on the square in the year 1896, both made with prefabricated iron in Europe.

Still in the area of Praça da República (Republic square) exist two examples of built heritage, worth mentioning for their architectural beauty, the Waldemar Henrique Theater and another building with no specified function.

*Teatro da Paz (Figure 10)* – Opened in 1878, it had 7 columns that adorned the terrace. However, with the renovation of 1905, the theater had the pediment retracted, which left the terrace uncovered, in addition to having reduced the amount of column to 6 and they were included marble busts on the facade. The ceiling of the theater is distinguished by the painting of Domênico De Angelis.

During the Belle-Époque period there were performances on the stage of the theater by large theater companies and opera from Europe, what makes an even more sophisticated look to Belém.



Figure 10 - Teatro da Paz.

Source: MAGALHÃES, Febr 24, 2017.

*Bar do Parque (Park Bar)* – The building before becoming the Bar do Parque, functioned as the box office of the Teatro da Paz and according to legend, the place was transformed into a bar after the constant drinking at the ticket office during working hours. The bar is the oldest in town and over the course of decades has gained frequent, it is being considered the corner of intellectuals, students and artists. It has an architecture in *Art Nouveau* style. It is currently under renovations.



Figure 11 - Last of the old kiosks.

Source: MAGALHÃES, Febr 24, 2017.

*Kiosk (Figure 11)* – The kiosks were imported from Paris to the capital of Pará. The architect Francisco Bolonha had the concession of the kiosks which sold coffee, cigarettes, candy and



others. There were about 60 kiosks scattered around the city. Currently there is only one left, which is located on the left side of the Teatro da Paz, next to the traditional Bar do Parque.

*Cinema Olympia* – It was inaugurated on April 24, 1912, and was part of a glamorous architectural ensemble of the Rubber Age, in the area surrounding the Teatro da Paz and Grande Hotel. One of the customs of the time was to have a snack at the theater of the Grande Hotel after the film sessions in Olympia. Today is the oldest cinema in Brazil still active.

*Praça das Sereias (Mermaids Square)* – Previously called the “Chafariz das Sereias”, Praça das Sereias is an allegorical cast iron set, and imported from Europe. It was assembled in 1904 in order to give an even more Parisian look to Belém.

*IEP* – Former building of the newspaper The Province of Pará, it was burned down in 1912 by popular opposites of Antônio Lemos, but it had its reconstruction faithfully preserved to the previous building. Later it housed the Artur Bernardes School Group, also known as Normal School and currently operates as IEP (Education Institute of Pará).

*Manoel Pinto da Silva Building* – On the site of the building existed the famous Casa Outeiro, and demolished for the construction of a great and daring work, the tallest building in Belém, the Manoel Pinto da Silva Building.

*Casa da Linguagem Curro Velho Building*– Former Floriano Peixoto School Group.

*Avenida Nazaré (Nazaré Avenue)* – In the early days it was called Caminho do Utinga, later in the eighteenth century it was changed into Estrada de Nazareth, due to the first festivals in honor of the Virgin of Nazareth. The avenue features several examples of historical buildings of individuals, such as residences and mansions, in addition to the social headquarters of the two largest soccer clubs in the State of Pará, Remo and Paysandu.

*Solar do Barão do Guamá* – Located at Avenida Nazaré, the old building Solar do Barão de Guamá was built at the end of the 19th century, and designed by a French architect and also housed the office of Companhia de Eletricidade Paraense (Electricity Company of Pará). Today it is the building of CODEM (Belém Metropolitan Area Development and Administration Company).

*Marista Nossa Senhora de Nazaré School* – In the vicinity of the Basilica of Nazareth, on the avenue of the same name, the Nazaré School was inaugurated in the early 20th century, and on January 15, 1914 was founded the Institute of Our Lady of Nazareth at another address. Only in the year 1930, the building of the college was inaugurated in the place where it remains until the present day.

*Praça Santuário (Sanctuary Square)* - Formerly known as Largo de Nazareth, after that Justo Chermont, the *Sanctuary Square* is located in front of the Basilica of Nazareth. Formerly the area had a pavilion in the center and an iron gazebo, but both were demolished. Nowadays, the *Sanctuary Square* houses a devotion space to the Pilgrim Image of Nazareth after the end of the procession of the Círio, where the image is exposed for 15 days, for consideration of the faithful. There is also an Acoustic Shell which is used for artistic presentations.

*Basilica of Our Lady of Nazareth (Figure 12)* – The church began to be built from 1909, and was only completed 40 years later. With the works started in full cycle of the Rubber period, the marbles and decorations came from ships directly from Europe. In 1992 it was listed of

preservation by the Department of Historic and Cultural Heritage of the State of Pará and in 2006 the category of Sanctuary was raised.



Figure 12 - Basilica of Our Lady of Nazareth

Source: MAGALHÃES, Febr. 24, 2017.

In addition to the historical elements of each building and monument, it is worth noting that many of those cultural heritage present in the route of the *Círio* have another wealth behind their existence, namely the intangibility of oral history, which sharpens the popular imagination for centuries with its legends and myths. These stories are the result of an oral culture, which are passed on from father to son, but are increasingly rare in the everyday life of the Paraenses, and threatening an aspect of the city's collective memory.

It must be understood that all this imaginary wealth must be preserved and kept alive through disciplines in schools, during the study of the History of Pará, so that today's children can perpetuate these mysteries. In addition to the schools, during the execution of tourist and educational projects, as the preposition from the script, and it is another opportunity to keep the imagination alive, which surrounds each of these buildings.

### **Final considerations**

Taking into account the economic, Cultural, social and religious importance of the *Círio de Nazaré*, as well as the historical relevance of the buildings and monuments alongside the route of the procession on the second Sunday of October and the lack of tourist-educational activities inserted in the context in the Nazarene Square, it is concluded that the proposal of script of the official route of the *Círio de Nazaré*, the Cultural Route of Faith, deals with the possibility of appreciation, recognition and tourist use of historical heritage, which can be found on the 3.6 km of the route of the procession, and celebrated annually on the morning of the second Sunday in October.

Intimately experience a reality, which at the same time is so close and so far, is an exercise that needs to be awakened. A visit to the streets and buildings that comprised Belém in the 17th, 18th, 19th and 20th centuries are still very much present in the daily life of the residents of the city of Belém, with adaptations of course, because many of them are scrapped by time, by people's vandalism and the lack and/or absence of public policies that do not provide any aid.

However, we note that the wealth built in Belém is still present in the lives of many people, who live, work, or simply pass through areas, such as the Ver o Peso Complex, or who have to cross the streets of the historic churches every day. Nevertheless, even in the “vicinity”, does not necessary mean that people feel like parts of this history.

Thus, the perception that Belém is a city that has many wealth worn by time and not valued, and unknown to most of the population, shall be perpetuated if there are no educational actions based on the and heritage, so that in the future the residents of the city of Belém shall know that the historical buildings are part of the collective memory of society.

The field research and observation *in loco* of the patrimonial assets assisted by the course of the Círio, leads to the conclusion that it is possible the tourist use of historical spaces, with a view to providing more visibility, appreciation and recognition of this built heritage, which represents the memory and the history of the Amazon and Belém. Furthermore, the proposed script is called “Percurso Cultural da Fé” (Cultural route of the Faith) is a way to trigger emotions, disclose meanings, stimulate curiosity, entertain and inspire new looks and visitor's attitudes, by means of experiments that encourage practices of respect, protection and sense of belonging. In addition, the Círio de Nazaré is a festival, the festival of the Amazon people.

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# Mafra and Saramago. Strategies of mediation between a potential World Heritage Site and a Nobel Prize winner's literary masterpiece

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## Abstract

The growth of cultural and heritage tourism in the last decades, while offering attractive opportunities of territorial promotion and development, poses significant challenges in terms of destination management. This is especially true when the uniqueness of World Heritage Sites is considered, given UNESCO's fundamental aim of preserving the still visible traces of mankind's manifold history. The added layers provided by literary texts as discourses shaping the expectations of visitors, however, should not be disregarded in this process, given the possibilities offered to counter or expand simplified views of places and identities. Integrated in a research project dedicated to the investigation of existing fractures in the promotion and experience of cultural destinations, a study was conducted in Mafra, Portugal, considering both the potential of the Royal Complex (former Franciscan Monastery, Basilica, National Palace and Hunting Grounds) for future integration in the World Heritage Site list and the importance of the novel *Baltasar and Blimunda*, by Nobel Prize winner José Saramago, for the development of tourism in the region. A major fracture was detected between the literary text and the discursive reality of the heritage site, affecting fundamental aspects related to its promotion and experience. However, the contrasting stance provided by the novel was also seen as offering prospects for a richer and more profound understanding of the destination. Mediation strategies capable of allowing an adequate promotion and experience of the site are therefore proposed, namely taking into consideration the opportunities offered by new digital technologies.

## Keywords

Cultural and heritage tourism; literary tourism; mediation strategies; Mafra's National Palace; José Saramago.

## 1. Introduction

The General Conference of the United Nations Educational, Scientific and Cultural Organization (UNESCO), at its 17th session, in Paris, in November 1972, adopted the *Convention concerning the protection of the world cultural and natural heritage* (UNESCO, 1972). Aiming at an unbiased representation of the world's regions and cultures, UNESCO "seeks to encourage the identification, protection and preservation of cultural and natural heritage around the world considered to be of outstanding value to humanity" (UNESCO, n.d.). In terms of cultural heritage, "monuments" are defined as "architectural works, works of monumental sculpture and painting,

elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features, which are of outstanding universal value from the point of view of history, art or science” (UNESCO, 1972, art. 1). Since its adoption, the World Heritage List has been unanimously accepted as “the most effective international legal instrument for the protection of cultural and natural heritage” (Strasser, 2002: 215).

Sites must be evaluated by the Advisory Bodies to the World Heritage Committee according to ten criteria, detailed in the Operational Guidelines for the Implementation of the World Heritage Convention (UNESCO, 2005). The first six criteria refer to cultural sites and are connected with three fundamental aspects: uniqueness, historical authenticity and integrity or intactness. In 2017, a candidacy was announced for the integration of Mafra’s Royal Complex (former Franciscan Monastery, Basilica, National Palace and Hunting Grounds) in the World Heritage Site list, coinciding with the 300<sup>th</sup> anniversary of the laying of the first stone. In addition to arguments related to the consideration of the site as a “masterpiece of human creative genius” (criterion 1), the architectural expression of a political power (Royal Absolutism) and of its relation with a religion (Roman Catholicism) with a clear impact “in architecture or technology, monumental arts, town-planning or landscape design” (criterion 2), the complex is also associated with “literary works of outstanding universal significance” (criterion 6), given its close association with the most famous novel by Nobel Prize winner José Saramago, *Baltasar and Blimunda*, whose title in Portuguese, *Memorial do Convento*, directly refers to the architectural complex.

As a subsector of cultural and heritage tourism, literary tourism, in fact, has come to be seen as a privileged way not only of promoting destinations (Hoppen et al., 2014; Robinson and Andersen, 2002), by attracting both general heritage visitors and genuine literary tourists (Smith, 2003), but also of providing a different perspective into local cultures and sites, allowing a more complex and profound experience (Cohen-Hattab and Kerber, 2004). The relation between literature and the tangible and intangible heritage of destinations, however, cannot simply be taken for granted, requiring an informed and balanced mediation, given the inevitable fractures between the knowledge and expectations of visitors and the cultural reality of destinations (Giaccardi, 2012; Harrison, 2010; Kirshenblatt-Gimblett, 1998; Labadi and Long, 2010; Waterton and Watson, 2015). Integrated in a research project dedicated to the investigation of existing fractures in the promotion and experience of cultural sites, a study was carried out in Mafra in order to ascertain existing inconsistencies and to allow the development of adequate mediation proposals, considering the potential of the Royal Complex for future integration in the World Heritage list and the importance of Saramago’s novel for the development of tourism in the region – as well as the opportunities offered by new digital technologies given their non-invasiveness, innovation potential and the possibility of articulating the tangible and intangible dimensions in a single, appealing, dynamic and interactive discourse capable of incorporating Saramago’s work. This paper aims to present the principal findings of the study and the main recommendations proposed.

## **2. Theoretical framework and background**

### **2.1. Cultural and heritage tourism**

Extensive research has been conducted on general heritage issues (Howard, 2003; Messenger and Smith, 2010; Peacock and Rizzo, 2008), and on the UNESCO World Heritage

programme in particular (Bourdeau et al., 2015; Harrison and Hitchcock, 2005; Leask and Fyall, 2011), analysing the impact of the inclusion of sites in the World Heritage List. Even though most studies tend to focus on specific cases (e.g. Cuccia et al., 2016), the consequences of the classification of listed sites, especially with respect to tourism, have also been examined (Bonet, 2003; Cochrane and Tapper, 2006), with researchers generally signalling a positive relationship between listed heritage sites and tourism growth. Nevertheless, some authors, such as Bruno Frey and Lasse Steiner, while also recognizing “strong positive effects induced by the World Heritage List, in particular by drawing attention to prominent examples of our heritage, and by providing protection and conservation to specific objects” (2013: 184), also warn about potential negative effects caused by excessive tourism growth. Although assumed as inevitable, the relationship between tourism and heritage is, in fact, widely seen as combining both opportunities and threats (Benton, 2010; Boniface and Fowler, 1993; Kirshenblatt-Gimblett, 1998; Nuryanti, 1996; Timothy and Boyd, 2003; Waterton and Watson, 2015; West, 2010). The motivation to attract wider audiences must be balanced with the risks deriving from mass tourism (Messenger & Smith, 2010), its impact on site conservation (Nuryanti, 1996) and the preservation of cultural diversity (Harrison, 2010). Fundamental for an adequate management of heritage sites is, therefore, an awareness of existing discrepancies between the knowledge and expectations of visitors, informing their cognitive and emotional experience, and the cultural reality of the destination (Giaccardi, 2012; Harrison, 2010; Kirshenblatt-Gimblett, 1998; Labadi and Long, 2010; Waterton and Watson, 2015) – as well as the fact that tourism inevitably reshapes heritage discourses, for its fundamental nature “is dynamic, and its interaction with heritage often results in a reinterpretation of heritage” (Nuryanti, 1996, p. 250). Because creating a risk of inauthenticity (MacCannell, 1999; Timothy and Boyd, 2003), tourism inevitably requires a curatorship capable of balancing what is considered to be an accurate presentation of heritage with the goals of tourism development (Kirshenblatt-Gimblett, 1998). Sites can never be presented in “raw” and must be prepared for audiences through musealization processes: museographic display, textual information and communication strategies must be used as compensating factors for the gap between “reality” and the synthesis of its representation (Hede and Thyne, 2010; Olick et al., 2011), considering, in the process, the discourses that shape the expectations of visitors.

## 2.2. Literary tourism

Accompanying the growth of cultural and heritage tourism in the past decades (UNWTO, 2015), literary tourism, by attracting both general heritage visitors and true literary pilgrims (Smith, 2003), has increasingly been seen as a privileged way of promoting destinations and providing a different window into places and cultures (Hendrix, 2014; Hoppen et al., 2014; Robinson and Andersen, 2002). The Operational Guidelines for the Implementation of the World Heritage Convention (UNESCO, 2005), in fact, contemplate the inclusion of sites “directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance” (criterion 6). The importance attributed to literature by UNESCO is also evident in its Cities of Literature initiative, part of the Creative Cities network launched in 2004. Academic interest in the intersections between literature and tourism has also increased since the pioneer works of Ousby (1985) and Butler (1986), revealing a growing interest in the capacity of literature to recuperate and reconstruct memories associated with represented spaces and its potential for the constitution and valorisation of



tourism destinations (Baleiro e Quinteiro, 2014; Butler, 2005; Cunha, 2006; Hoppen et al., 2014). Joyce's Dublin or Kafka's Prague – two of UNESCO's Cities of Literature – can thus be seen as examples of the use of literature not only to promote but also to allow differentiated experiences, helping establish a more authentic link with local cultures. Considering Butler's (1986) original typology, later extended by Busby and Klug (2001), places of significance in literary works may become pivotal points of cultural visits, helping provide different perspectives into local cultures and sites – such as Mafra and the Royal Complex in Saramago's novel, a unique case of a conversion of a place into a literary destination as a metonymical effect of a work's focus on an architectural monument. Perhaps more importantly, literary texts can be seen as helping counter or diversify simplified views of places and identities, providing tourists with more complex ways of interpreting the character and cultural identity of destinations, allowing a more multifaceted and profound experience (Cohen-Hattab and Kerber, 2004). In this process, the potential of storytelling for the promotion and experience of destinations should also not be disregarded (Muniz et al., 2015; Woodside, 2010; Woodside & Martin, 2015; Woodside and Megehee, 2009), especially given the opportunities for engaging visitors in an original, lively yet informative manner based on stories and episodes associated with literary texts (Oliveira et al., 2016b).

### 2.3. Heritage interpretation and digital humanities

One of the main functions of heritage management is the interpretation of sites, presenting their historical background, relating them to formal descriptions and decoding their intangible meanings and values. Heritage interpretation (including the associated concepts of presentation, interpretive infrastructure and of site interpreter) was described in the ICOMOS Ename Charter (2007) as “the full range of potential activities intended to heighten public awareness and enhance understanding of a cultural heritage site” (p. 4). Interpretation is considered a major aspect of the visitor's experience and is one of the key issues for tourism studies (Drummond and Yeoman, 2011; Fyall et al., 2003; Grimwade and Carter, 2000; Howard, 2011; Nuryanti, 1996; Millar, 1989; Poria et al., 2009; Uzzell, 1989). It has also been considered a crucial strategy for heritage sustainability (Bramwell, & Lane, 2005; Hall and McArthur, 1993; Kuo, 2002; Moscardo, 2003; Shackley, 2011), with some author's focusing on the visitor-consumer (Poria et al., 2009; Rojas and Camarero, 2008) and others on the perspective of the supplier (Hall and McArthur, 1993; Kuo, 2002; Moscardo, 2003; Pashkevich, 2016). Moscardo (1996: 376), recognising interpretation as “the key to ensuring the quality of the tourism experience”, established that traditional static exhibits cause low interest and low satisfaction, while dynamic and interactive exhibits, with multisensory media (audio-visual presentations, models, displays), generate high interest and high satisfaction, promoting more learning and greater understanding (p. 383). Mindfulness, which is “the ability of an individual to actively process information surrounding them with the aim of using that information to draw distinctive or novel conclusions” (Dutt and Ninov, 2016: 81) is related to personal memories and experiences (Moscardo 1996, 2009). Also maintaining that the perception of authenticity is subjective, Timothy (2007) recognizes two types of education available in heritage sites: formal, similar to educational programmes; and informal, referring to the multileveled information and the diversity of strategies offered by sites, individually adaptable to the visitors and their perception of authenticity.

Digital humanities, by “bringing together the traditional tools of humanistic thinking (interpretation and critique, historical perspective, comparative cultural and social analysis, contextualization, archival research) with the tools of computational thinking (information design, statistical analysis, geographic information systems, database creation, and computer graphics) to formulate, interpret, and analyse a humanities-based research problem” (Burdick et al., 2016: 134), are capable of giving an adequate response to the needs of the interpretative model for heritage sites. Despite the vast literature about possible applications of digital humanities (Berry, 2012; Gold and Klein, 2016; Schreibman et al., 2016; Warwick et al., 2012), the research on digital projects for museums and heritage sites is still very incipient, consisting mainly of case studies: such as the Chess project, about storytelling and personalised interactive stories for visitors of cultural sites (Katifori et al., 2014); or the projects led by Kenderdine, related to immersive and interactive visualization environments (IIVE) (Kenderdine, 2016). In addition to the opportunities created for new models of data dissemination, digital humanities challenge heritage sites to find a balance between the material exhibition and storytelling, virtual object manipulation and augmented reality.

#### 2.4. Mafra and Saramago

Distancing about 40 km from Lisbon, the town of Mafra can be said to owe its renown to the Royal Complex – under whose shadow it grew, as the locals usually say – and to José Saramago’s novel *Baltasar and Blimunda*, one of the reasons for the great increase in the number of visitors to the Palace in the past decades, namely after the author was awarded the Nobel Prize and the text became required reading in Portuguese secondary schools. With 301 461 visitors in 2015, according to official information provided by the Palace, the “Royal Building”, as it was called at the time of its construction, is the largest Baroque monument in Portugal, an architectonic complex built in the 18<sup>th</sup> century comprising a monastery, a basilica and the palace, former seasonal residence of the kings of Portugal. Its construction was ordered by João V (1689-1750) as the fulfilment of a vow to the Franciscan order after the birth of his first child, Maria Bárbara – who would later become Queen consort of Spain –, and the project was commissioned to German architect Johann Friedrich Ludwig. The laying of the first stone took place in 1717 and the basilica was consecrated in 1730, although the works were only officially concluded in 1735. With the notable exception of the “Lioz” limestone used in its construction, brought from nearby quarries, most other materials and decorative elements were imported from Europe, including 58 statues in Carrara marble sculpted in Italy, the most significant collection of Italian Baroque sculpture outside that country. The basilica where they are displayed occupies the central part of the façade, signalling the union of the royal and the sacred spaces of the building and the concept of an absolute, divinized power. Six pipe organs, commissioned at the end of the eighteenth century, can there be found and two carillons are housed in the north and south towers. The library is considered one of the most significant Enlightenment libraries in Europe: with around 36 000 volumes, it occupies the largest and most admired room in the building. At a given point, around 50 000 people were involved in the construction of the complex, a clear demonstration of the power of a king who wished to emulate the splendour of the absolutist reign of Louis XIV and who, at the time, was one of the wealthiest in Europe.

Standing in front of the complex one day, Saramago is said to have exclaimed that he would like to “put it” in a novel (Saramago, 1998). The result was *Baltasar and Blimunda – Memorial do Convento*, in Portuguese – a work translated into more than fifty languages and presently in

its 54<sup>th</sup> edition in Portugal. Adapted to the theatre and inspiring the opera *Blimunda*, by Italian composer Azio Corghi, it tells the love story of Baltasar, a soldier who is abandoned by his army after losing his left hand in the War of the Spanish Succession, and Blimunda, a young woman with the supernatural capacity of seeing inside people. With the 18th century construction of Mafra’s Royal Complex as background and the presence of historical figures such as João V, the novel constitutes a compelling, ironic comment on the uses of power, especially given the author’s intention of writing a novel about a past seen from the perspective of the present (Saramago, 1998). In literary terms, the work can be considered a postmodernist historical text (Arnaut, 2002; 2008), a great example of the historiographic metafiction of the period, of works that “install and then blur the line between fiction and history” (Hutcheon, 1988: 113), a strategy that inevitably leads to a distancing of the novel from traditional discourses about the site.

### 3. Methodology

Integrated in a project dedicated to the investigation of existing fractures in the promotion and experience of cultural destinations (Oliveira et al., 2016a), a multi-method research (Robson and McCartan, 2016) was designed considering the adaptation to the area of cultural tourism, presented in Figure 1, of Parasuraman, Zeithaml, and Berry’s (1985) original gap model of service quality developed in the scope of the project:

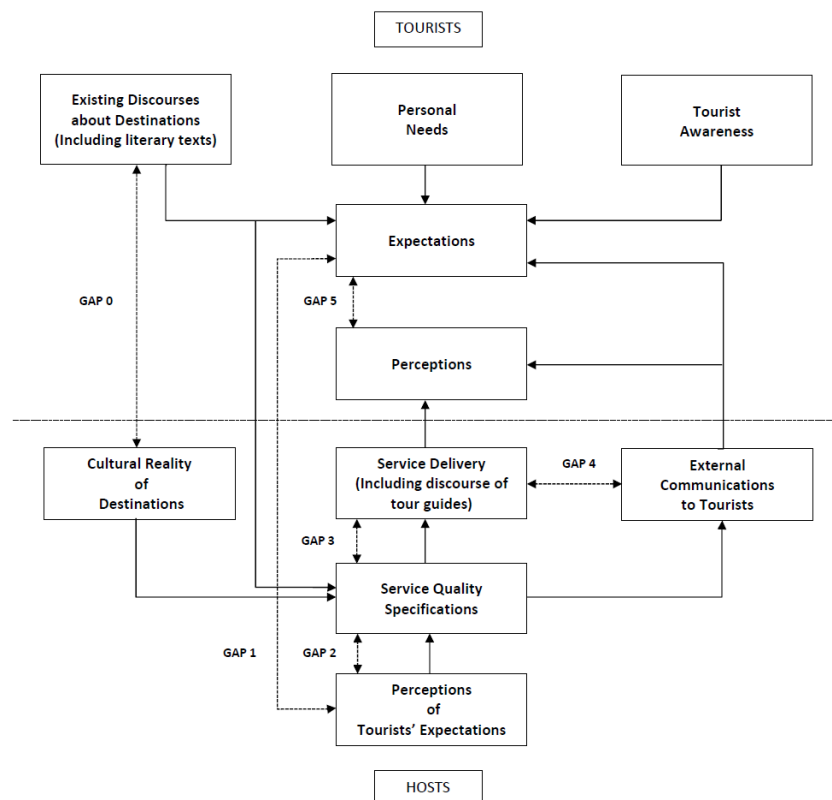


Figure 1 - Conceptual Gap Model of Service Quality in Cultural Tourism.

Source: Adapted from Parasuraman, Zeithaml, and Berry, 1985

Apart from the general adaptation to the area of cultural tourism, the main differences regarding the original model reside in the inclusion of an additional dimension – “Cultural Reality

of Destinations”, the anchor of authenticity of the present model – and a new, resulting gap – Gap 0 – established with “Existing Discourses about Destinations”, which includes not only word-of-mouth and e-WoM communications but also literary and non-literary texts or discourses influencing the expectations of visitors. In fact, concerns related to site conservation and the preservation of cultural diversity, not only in World Heritage sites but also in cultural destinations in general, as well as the desire for authenticity expressed by cultural tourists, turn the inclusion of that additional dimension into an essential requirement, especially given the emphasis of the original model on quality as perceived by consumers.

Considering the identified gaps, the study comprised: a critical analysis of the novel; documental analyses of sources about the monument; in-depth semi-structured interviews; participant observation activities; assessment of external communications; a netnographic analysis of commentaries of visitors to the Palace. A questionnaire was developed but, unfortunately, no formal answer was received from the administration of the Palace regarding the possibility of conducting the intended survey, a situation that, given the protracted time period involved, may, in fact, infringe existing legislation. Interviews (Berg, 2001) were conducted with the Director of the Educational Services of the Palace, who supervise the activity of official tour guides; with three guides of Tempo Cardinal, a private company that provides official services offered by the Palace; and with an independent tour guide. Participant observation (Schensul et al., 1999) was conducted during visits to Mafra’s city centre and Palace and included the stage play *Memorial do Convento*, an adaptation of Saramago’s novel by Filomena Oliveira and Miguel Real, coproduced by the Palace and *Éter*, an external cultural producer, and three guided tours of the monument: one with the independent tour guide and two with different guides of Tempo Cardinal. All visits and interviews took place between February and June of 2016, with the assessment of the websites of the National Palace and local Municipality preceding the visits. The netnographic analysis of online comments (Bowler, 2010; Kozinets, 2015) considered 243 commentaries (147 in Portuguese, 64 in English, 19 in French and 13 in Spanish) posted by visitors on the TripAdvisor website between September 2015 and October 2016.

For the interpretation of the results, qualitative discourse analysis (Phillips and Hardy, 2002) was used considering the dimensions implied in the different gaps of the model (e.g. for Gap 1, expectations of tourists and the host’s perceptions of those expectations). Bearing in mind that discourse analysis follows “interpretive, context-sensitive, often historical methodologies to analyse discourses empirically, [namely] to discover how ideologies permeate and manifest in these discourses” (Heracleous, 2004, p. 187), the collected data was independently interpreted by the different members of the research group and the results were later discussed so as to arrive at the main conclusions. The analysis of online comments by visitors used Keller’s (1993) brand equity model as a frame of reference to determine the brand image of the Palace and ascertain positive and negative features of the site from the visitors’ perspective.

#### **4. Results and discussion**

As some initial, circumscribed results were previously presented at international conferences and published in the respective proceedings (Oliveira et al., 2016a, 2016b), a summary of the findings will be presented, albeit now confronting the different dimensions

involved in each gap of the proposed model. These represent, therefore, the main, global findings of the study.

#### 4.1. Gap 0

Considering the new gap introduced in the model with the inclusion of the dimension related to the cultural reality of destinations, a major fracture was detected between the literary work and the discursive reality of the heritage site. The documental analysis of sources about the Royal Complex revealed a limited number of texts on which discourses about the site are based (Pimentel, 1992), namely: *Relação da Magnífica Obra de Mafra* [*Description of the Magnificent Monument of Mafra*], a manuscript datable from 1733-1735; *Principio e Fundação do Real Convento de Mafra, e sua Grandeza, e sua Sustentação, e Luxo* [*Foundation of the Royal Convent of Mafra*] (also known as *Livro das Pitanças*; see also Gorjão, 2015), a codex datable from around 1763-1770; *Monumento Sacro* [*Sacred Monument*], published in 1751 and written by Friar João de S. José do Prado, Master of Ceremonies of the Basilica; *Gabinete Histórico* [*Historical Study*], written by Friar Cláudio da Conceição and published in 1820, with its eighth tome dedicated to Mafra; and *O Monumento de Mafra: Descrição Minuciosa d'este Edifício* [*The Monument of Mafra: Comprehensive Description of the Building*], written by Joaquim da Conceição Gomes and published in 1866. These documental sources about the Palace still follow the models of the Enlightenment, focusing on the event of its construction and on the role of the king who orders it, João V, revealing apologetic manipulations of historical information and the narration of supernatural events, such as the “miraculous” conception of the royal heir. In them, the king is portrayed as a hero, the protagonist, a providential agent who is exalted and idealized, to the detriment of the people, of the workers who built the Palace, whose lives remain in the shadows.

Following his intention of writing a novel about the past from the standpoint of the present (Saramago, 1998), Saramago’s approach will not favour the royal family or the ruling classes but, instead, focus on the set of social, economic and cultural circumstances that characterized the period in which the Palace was constructed. A clear contrast is created between the king and queen and the central couple of the novel, Baltasar and Blimunda. As members of the people, they will suffer the deprivations and adversities imposed upon the general population, such the indiscriminate condemnation of men and women to the fires of the Inquisition, where Baltasar ultimately meets his end. Although revealing a profound knowledge of the period in question and of documental sources about the site, the novel distances itself from traditional historical discourses by favouring the perspective of common men and women, thus establishing an intrinsic conflict with the powers behind the very existence of the monument – the Royal family and the Catholic church of the time – and the discursive tradition associated with the site. Although some historical incongruences and deliberate manipulations can be detected in the novel, namely due to the temporal and ideological perspectives adopted – such as the reference to the Basilica as a “mere copy” –, this gap constitutes a fundamental fracture that can be seen as affecting several aspects related to the promotion and experience of the destination.

#### 4.2. Gaps 1 and 2

The interview with the Director of the Educational Services of the Palace allowed the ascertainment of aspects related to both the perception of visitor’s expectations and specifications of service quality. The main services offered by the Palace are guided tours and visits to the museological space, but, in terms of studies conducted to ascertain visitor’s

expectations and perceptions, the Director affirmed that none had yet been done. Although her indication of the Library as one of the main reasons for visiting the site – “above all, the Library” – is consistent with the results of the netnographic analysis (see 4.5), management perception of expectations is fundamentally based on informal feedbacks: “Many times, when I receive a call from a teacher who visited us, I try to know... But the answers are not registered and it should be properly done”; “We know that the quality of our guided tour based on Saramago’s novel is great [...] but we would like to know if it motivated visitors to come back with their families”. Sometimes the feedback may come in the form of complaints related to Saramago’s views, signalling the gap between the literary text and the discursive reality of the site: “We have to be very careful: we are dealing with an author who has a very concrete political orientation: he is anticlerical and a member of the Communist party”. The gap, in fact, is taken into account for service delivery specifications. Saying that Saramago “defends the people who work and ridicules the king”, the Director affirmed that some visitors “do not clearly understand” the conflict and that some precautions had to be made: “less favourable references to the Church”, for example, “are done outside the Basilica”. Summarizing her view, the Director stated that: “Our discourse doesn’t have to be his. What we have to do is to clarify everything. We do not have to adopt his perspective”. Although, in terms of service structure, the Educational Services are responsible for the training and supervision of the official tour guides, there is no pre-established script, only the indication of “fundamental aspects” to be included in the visits, especially because “each has his or her own way of capturing the audience; otherwise it becomes repetitive, tiresome”. In terms of supervision, guided tours are sometimes accompanied by members of the Educational Services, including the Director herself, who indicated that the guides who conduct the visits based on Saramago’s novel “are able to adapt” to different audiences, “interacting with them”, establishing a profound “connection with the work, with concrete chapters”. Mentioning shortcomings in terms of the museological space – “we have restrictions” – and activities that might diversify the offer and improve overall service quality – such as visits “every Thursday or Friday evening” –, the Director indicated financial and staff limitations – “we do not have enough guards, the technicians are also guards” – and the “growing bureaucracy” as the main obstacles to desired improvements.

#### 4.3. *Gap 3*

In terms of service delivery, the quality of the guided tours based on Saramago’s text mentioned by the Director of the Educational Services was confirmed during the participant observation activities. The contrast with the tour of the independent guide was clear: after a morning visit to the nearby village of Cheleiros, where one of the main episodes of the novel takes place, the afternoon tour of the Palace did not include any reference to Saramago’s work. The two visits to the Palace conducted by the official guides of Tempo Cardinal, on the other hand, were clearly organized around a deliberate mediation between the official discourse of history and Saramago’s novel. Instead of dismissed, inconsistencies were, in fact, highlighted, asserting the legitimacy of the differing perspectives. Explaining that Saramago would sometimes omit or distort information to fit his purposes, the guide indicated that working conditions, for example, may, indeed, have been dreadful at the time, but there was an infirmary and doctors available on the construction site to treat injured workers. A constant attention to the reaction of participants was also evident in both visits, which acquired a slightly different character given the different publics involved: a more conservative group in the first visit, a more

liberal one in the second, actually prompting a balanced defence of the opposing perspectives by the tour guides. The presentation of relevant, precise information about the Palace, its historical context and Saramago's novel was also an element common to both tours, and proved to be a highly convincing and effective mediation strategy, entirely convergent with the use of the text as a means of promoting and experiencing the heritage site. Humour and even irony were used, made possible by references to the literary work and the author's style. In fact, the narration of episodes from the novel, the discourse of history and folk tradition – such as episodes from the king's life, or the local legend of a woman on whom Blimunda's character may have been based – enlivened the visits and helped create a deeper involvement of the public with the visited space, allowing a more profound and personal experience of the site by making the visitor's "feel" the space in a more personal way while simultaneously establishing a common ground between the conflicting perspectives.

The limitations mentioned by the Director of the Educational Services in regard to the museological space, however, also became clear during the visits. Considering the fundamental importance attributed to heritage interpretation, the lack of information detected in the museological space can be said to seriously limit the understanding of the site: room panels with sparing textual information offer only general indications based on the original functions of the rooms (e.g. "Throne room") and few details about some of the objects on display. The analogical exhibition (see Montpetit, 1996) clearly intends to recreate historical settings in several areas of the Palace, producing a credible narrative about the ceremonial, residential and religious functions of the building. While the exhibition infrastructure provides a non-personal interpretation, tour guides assume the task of providing a personal interpretation of the site (Brochu and Merriman, 2002). References to Saramago's novel are restricted to the non-permanent discourse of the guides and other educational initiatives, such as the stage play. Permanent museography and the available textual information are exclusively related to the history and occupants of the Palace, without any allusions to the fictional text, although the historic references made by Saramago in his novel could easily be included throughout the exhibition. A non-guided visit to the Palace, in fact, would not allow for an adequate interpretation of the visited space, or a meaningful connection with its history, or the establishment of any contextual links with the Nobel Prize winner's work (also due to the lack of technological means to assist the interpretation of the site, including audio-guides).

In fact, and although the quality of the stage play *Memorial do Convento*, an adaptation of Saramago's novel by Filomena Oliveira and Miguel Real, coproduced by the Palace and an external cultural producer, "Éter – Produções Culturais", was acknowledged by all participants, it cannot be said to compensate for the lack of contextual information about Saramago's work in the museological exhibition, as there is no direct articulation with the space of the Palace, its value, from a tourism standpoint, stemming from the general atmosphere created by the enactment of selected episodes from the novel.

#### 4.4. Gap 4

According to the Director of the Educational Services, the three main channels for external communications are the institutional website, the Facebook page and email listings. Only the websites of the Palace and of the Municipality were analysed before the participant observation activities, but no reference was found to José Saramago's novel in either site apart from the

name and description of the thematic, guided tour chosen by the participants. Considering the importance attributed to the novel for the remarkable growth in the number of visitors to the area and the awareness of the fundamental gap between the literary text and the discursive tradition associated with the heritage site, it is surprising that these channels are not used to promote the destination and adequately influence the expectations and perceptions of visitors. A visit to the city centre and to the local Tourism Office later confirmed the initial impression of an almost absolute lack of information or references regarding Saramago's novel and its relation to Mafra, the only noticeable element being a billboard announcing the stage play on a sidewall of the Palace complex.

#### 4.5. *Gap 5*

In terms of the expectations and perceptions of visitors, the netnographic analysis of commentaries posted in TripAdvisor developed in the scope of the project (Faria, 2017) to determine the brand associations of the Palace (Keller, 1993) allowed the ascertainment of positive and negative features of the heritage site from the visitors' perspective. Even though the Basilica is the object of many favourable comments – “beautiful”, “with beautiful Italian sculptures of saints”, “hearing the carillons is an unforgettable experience” –, the main attraction is indeed the Library – “it alone is worth the visit”; “one of the most beautiful in the world” –, in spite of the limitations mentioned in several commentaries – “unfortunately, one cannot visit the entire library, only the entrance”. Many, in fact, reflect mixed feelings, with the constant use of adversatives in sentences such as “I liked it, but...”: “it is a very rich building and full of history, however, I was slightly disappointed because most of the Palace is closed to the public and you can only walk three meters into the library”. The building itself is the object of several strong, favourable remarks – “an imposing, historical Palace”; “one of the most beautiful and emblematic buildings in Portugal”; “with almost 300 years, the Royal Monument of Mafra is a universal heritage”. The exhibition itself, however, deserves varied comments, with adjectives ranging from “fantastic” to “poor”. Also the employees receive mixed comments, with several visitors highlighting the “antipathy” of some personnel. Although the guided tours receive positive remarks – “very interesting, and allows you to learn the most important aspects about the Palace” –, the impossibility of booking one on the same day and the lack of technological means to assist the interpretation of the site are singled out as flaws, the same happening with the sparing textual information available in the rooms of the Palace – “there is little information about the space and the history of the space”. Some visitors actually make improvement suggestions, saying, for example, that with the use of audio-visual equipment the visits could be “more intense”. In terms of the favourability of the associations, however, the positive aspects exceed the negative. The manifest connotation of the Palace with the 18<sup>th</sup>-century history of Portugal is greatly appreciated and emphasised in several commentaries – “to visit the history of this grandiose monument is to go back in time” –, the same happening with the specific aspects that distinguish it from similar sites, such as its age, the Library, the Basilica with its six pipe organs and the association of the building with José Saramago's novel *Baltasar and Blimunda*, object of strong and favourable comments – “I couldn't help remembering Saramago, the importance of his work is evident”; “visiting the Palace becomes a much more important experience after reading the novel”. Even though the brand associations of Mafra's National Palace tend to be strong and favourable, a comparison between the positive elements of the associations – Library, Basilica, Building, History of Portugal, Saramago – and the negative



– exhibition, poor information, flaws in service, lack of technology – reveals that much can be done in terms of service to bridge this particular gap – especially regarding heritage interpretation and Saramago’s novel – to take full advantage of the intrinsic merits of the site and provide visitors with a more rewarding and culturally enriching experience.

### **Conclusions and recommendations**

The sustainable management of heritage sites necessarily implies the implementation of strategies of mediation between the need to protect existing heritage and the advantages offered by tourism development (Kirshenblatt-Gimblett, 1998), strategies in which the interpretation and promotion of the destinations and innovative and creative ways of structuring and qualifying the offer play a fundamental role (Bramwell, & Lane, 2005; Hall and McArthur, 1993; Kuo, 2002; Moscardo, 2003; Shackley, 2011). Although the architectural complex in Mafra can easily be seen as fulfilling several criteria for inclusion in the World Heritage List related to aspects such as uniqueness, historical authenticity and integrity, its association with the novel *Baltasar and Blimunda*, by Nobel Prize winner José Saramago, should not be disregarded in this process – not only for providing an additional criterion for its consideration as a potential candidate but, more importantly, given its relevance for a richer, differentiated experience of the site.

As an additional element of tourism development, the use of a literary work to promote a heritage site inherently requires an informed and balanced mediation, given the existence of inevitable gaps between the text as a discourse shaping the expectations of visitors and the cultural reality of the visited space. In fact, the study of existing fractures in the promotion and experience of Mafra’s National Palace revealed a fundamental gap between Saramago’s text and the discursive reality of the destination, a gap that can be seen as affecting several aspects of service structure. As observed in the interview with the Director of the Educational Services, the ideological component of the novel can have a negative impact in terms of service delivery specifications, forcing the limitation of its use during visits to certain areas of the complex. Although a causal relationship could not be clearly established, the lack of references or information about Saramago’s novel in the websites of both the Palace and the Municipality, as well as in the local Tourism Office, also seems to indicate a certain discomfort with its use as a way of promoting the destination, especially when we consider the importance attributed to *Baltasar and Blimunda* for the remarkable growth in the number of visitors to the Palace and the area’s newfound renown. These visitors, however, dedicate strong, favourable comments to both the author and the work in the online reviews analysed, indicating the potential of the literary text for the promotion and experience of the heritage site. In fact, far from an obstacle, the contrasting stance offered by the novel proved to be highly productive in the discourse of the official tour guides (Oliveira, 2016b), offering opportunities for engaging the public in an original, lively yet informative manner that also respected the site’s legacy. For the internal provision of information to visitors and in external communications directed at its promotion based on Saramago’s novel, four main discursive strategies detected in the guides’ discourse should, in fact, be considered to allow for a richer, coherent and more profound experience of the destination: a) The highlighting – instead of the dismissal – of inconsistencies, asserting the legitimacy of the differing perspectives; b) The presentation and intersection of relevant, detailed information about the visited space, its historical context and the novel; c) Storytelling, namely the narration of episodes from the novel, the discourse of history and folk tradition; d)

The use of humour. Due to a certain discomfort with the perceived image of the author as a communist activist, however, it is recommended that communication strategies allowing a differentiated experience of the destination be based more on the novel than on the writer, namely on its main characters, Baltasar and Blimunda.

Although, as with many other heritage sites, the National Palace of Mafra faces financial constraints that may limit the implementation of desirable improvements, as suggested by the Director of the Educational Services, proposals capable of allowing an adequate promotion and experience of the location based on Saramago's novel are presented below, considering two different but complementary areas of intervention: museological information and external communications.

Considering that the number of physical panels and labels in classified monuments – elements which could provide the necessary information about the exhibition, the visited space and its context, including the novel – must be limited so as not to become intrusive, information and communication technologies should be used both for heritage interpretation and for interaction with real or virtual audiences. Based on the experience of ongoing digital projects, the creation of interactive labels and panels, with wireless web-based tools, textual and visual graphics, describing and analysing the formal and functional aspects of the objects on display, as well as their intangible meanings, should be considered. The creation of interactive displays operating on the personal devices of visitors, as tested in the QRator project, would enable “the public to collaborate and discuss object interpretation with museum curators and academic researchers” and allows visitors “to create a digital ‘living’ label that other visitors can read and respond to” (Ross, 2012: 38). Factors such as accessibility, usefulness and participation are also increasingly required by museum visitors. Commonly associated with 3D, augmented reality is a virtual reality with specific parameters, mixing computer-simulated images, videos, sound, textual data, graphics, or GPS in a real environment (Hassan, & Ramkissoon, 2017: 118). Augmented reality offers a great variety of options for heritage interpretation, without physical impact on space, and “may bridge the gaps between heritage offerings of a museum and visitor expectations” (Hassan, & Ramkissoon, 2017: 124). This remains, however, a very sophisticated and expensive technology, developed in experimental and transdisciplinary projects.

In regard to the institutional website of the Palace, it is a static collection of pages with identical layouts: header with scrolling images; a navigation top bar, complemented by a side navigation list; main field with fixed textual contents, without hyperlinks, sometimes with labelled images, without zoom. Interactivity is limited to the navigation menus and the same information is presented to all users. As with the museological exhibition, the information on the website is reductive rather than expansive. Upgrading to a more dynamic, interactive model that would allow the viewer to configure his own profile and to adapt the available information to his interests and expectations is recommended, especially as interactivity and the customization of formats and contents, in real time, enhance the level of learning and enjoyment and promotes the visitors' experience and involvement at the heritage site (Roque, 2015). By allowing the use of great amounts of data about the location and correlated discourses and representations, digital technologies could facilitate the construction of a meta-discourse based on Saramago's novel, establishing connections with physical spaces and historical resources. The Palace should also use its digital presence on the Internet to foster a dialogue with its visitors and other stakeholders. Facebook posts should not go unanswered and must be

often updated. In the same vein, comments posted on sites like TripAdvisor must be monitored constantly to avoid the risk of becoming drivers of misleading information in a context where the power of peer-to-peer recommendation is undeniable.

A consistent communications policy and related strategies should be developed in order to align the promotion and experience of the heritage site considering the Palace's mission and the attributes of its brand image, namely Saramago's novel. This should be conveyed to different target audiences using the means presented in Table 1:

Table 1 - Recommendations for External Communications.

| Targets                  | Schools | Tourists | Media | Potential sponsors | Local community | Tourism entities |
|--------------------------|---------|----------|-------|--------------------|-----------------|------------------|
| Electronic newsletter    |         | Dbase    |       |                    |                 |                  |
| Press releases           |         |          | x     |                    |                 |                  |
| Press conferences        |         |          | x     |                    |                 |                  |
| Printed ads: flyers      | x       |          |       |                    | x               |                  |
| Outdoors                 | x       | x        |       | x                  | x               | x                |
| ATM advertisement        |         | x        |       |                    | x               |                  |
| Didactic cards and games | x       |          |       |                    |                 |                  |
| Store                    | x       |          |       |                    | x               | x                |
| Facebook page            | x       | X        | x     | x                  | x               | x                |
| Institutional website    | x       | X        | x     | x                  | x               | x                |
| Blog                     | x       | X        |       |                    |                 |                  |
| Instagram                | x       | X        |       |                    | x               | x                |
| Personal meetings        |         |          |       | x                  |                 | x                |

Finally, in a logic of complementarity and harmonization of efforts, and in order to strengthen and develop the relation between the site and Saramago's novel, partnerships should be established between the Palace, the Municipality, tourism entities, public or private organizations promoting literary tours and the José Saramago Foundation.

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# **THEME C**

**MANAGEMENT OF  
DESTINATIONS AND  
SUSTAINABILITY IN WORLD  
HERITAGE SITES**

## **TEMA C**

**GESTÃO DE DESTINOS E  
SUSTENTABILIDADE EM SÍTIOS  
PATRIMÓNIO MUNDIAL**

## THEME C

The management of tourist destinations is especially relevant when dealing with sites listed as World Heritage by UNESCO. In these destinations sustainable management seems rather complex due to the quantity, diversity, uniqueness and rareness of the heritage.

The recognition of Exceptional Universal Value contributes to an exponential growth of tourism demand, posing new challenges to sustainable management of tourist destinations.

In this framework, it is crucial to understand management challenges, share experiences and reflect on best practices of planning and sustainable management of tourism activities in World Heritage Sites. Among these, several strategies are included: heritage conservation and preservation; integration and participation of the different stakeholders and interest groups; empowerment of the local community and private and public agents related to tourism and heritage; partnerships and networks; visitor management and monitoring; interpretation and promotion of destinations; innovative and creative ways of structuring and qualifying the offer and enhance the tourist experience.

Responsible tourism is a key concept in the preservation of the values and spirit of the place and to safeguard World Heritage sites.

In this context, the expected dialogues between tourism and heritage will prove crucial for the effectiveness of local actions and for the sustainability of tourist destinations as a distinctive factor in World Heritage Sites.

## TEMA C

A gestão dos destinos turísticos assume particular importância quando se está na presença de sítios inscritos na Lista representativa do Património Mundial da Humanidade. Nestes destinos a gestão sustentável afigura-se complexa face à quantidade, à diversidade, à singularidade e à raridade do património em presença. O valor universal excecional dos bens inscritos concorre para um crescimento exponencial da procura turística, realidade que lança novos desafios à gestão sustentável dos destinos turísticos.

Neste âmbito impõe-se conhecer os problemas de gestão, partilhar experiências e refletir sobre as melhores práticas de planeamento e gestão sustentável das atividades turísticas nos Sítios Património Mundial.

Entre estas incluem-se as estratégias de conservação e de preservação do património; de integração e de participação dos diferentes agentes e grupos de interesse; da capacitação da comunidade local residente e dos agentes públicos e privados, ligados ao turismo e ao património; do estabelecimento de processos de cooperação e de colaboração, de parcerias e de redes; de gestão e monitorização dos visitantes; de interpretação e de promoção dos destinos; de modos criativos e inovadores de estruturar e qualificar a oferta e de valorizar a experiência turística.

O turismo responsável é fundamental para preservar os valores e o espírito do lugar e salvaguardar os Sítios Património Mundial. Neste contexto os diálogos entre o turismo e o património, que se esperam promover, são fundamentais para a eficácia das ações locais e para a sustentabilidade dos destinos turísticos que têm no Património Mundial um fator de competitividade.

# The re-use potentials for two monuments in Walled-City Famagusta within tourism perspectives

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## Abstract

The main target of this study is illustrating steps to decide the appropriate functions for historical monuments, for the success of adaptive re-use projects, and hence for the sustainable management of tourism activities. In the light of these, the aim is finding suitable functions for two monuments in Walled City of Famagusta, which is one of the fragile World Heritage Sites. These buildings – Martinengo Bastion and Ravelin Bastion - are recently supported financially by EU, with the coordination of UNDP-PFF, for being restored by the suggestion of the Technical Committee on Cultural Heritage of Cyprus. In order to outline the reuse options for these two monuments, according to both historical and architectural features and heritage values, as well as participation of the actors, steps are shown. Methodologies for investigation of heritage values, historical and architectural features of monuments, are based on both literature review and observations on site. Besides these qualitative researches, a quantitative research has been conducted in the form of a questionnaire survey with cultural tourists, locals and experts. The questionnaires have been prepared in the light of the theoretical background of conservation, adaptive-reuse and cultural tourism. The results from questionnaire survey are interpreted for making suggestions on appropriate functions.

## Keywords

Adaptive reuse; Cultural tourism; Martinengo Bastion; Ravelin Bastion.

## 1. Introduction

Visiting new places has been qualified as an educational notion in which people can learn about different dimensions of other societies such as its culture, history and geography. Consequently, both domestic and international tourism can provide cultural exchange among different areas and create personal experiences for visitors (Günce, 2003).

As a tourism type, that aims to introduce the culture, monuments and historic sites of a destination to other communities, cultural tourism enables people to experience traditions, customs and the physical environments of other nation's life. Additionally, the target of cultural tourists is, experiencing the culture of other places with the aim of identifying different ways of lives (Hughes, 1996). Furthermore, they can explore architectural, historical, archaeological and cultural significances of a region that have survived from the past (Csapó, 2012).

Undoubtedly, tourism can have impacts on different aspects such as economic, social and environmental aspects, which are not only positive, but also negative. The Figure 1 presents the summary of these tourism industry's impacts on various aspects based on previous researches (Günce, 2003; Scholtz and Slabbert, 2016; UNDP, 2016).

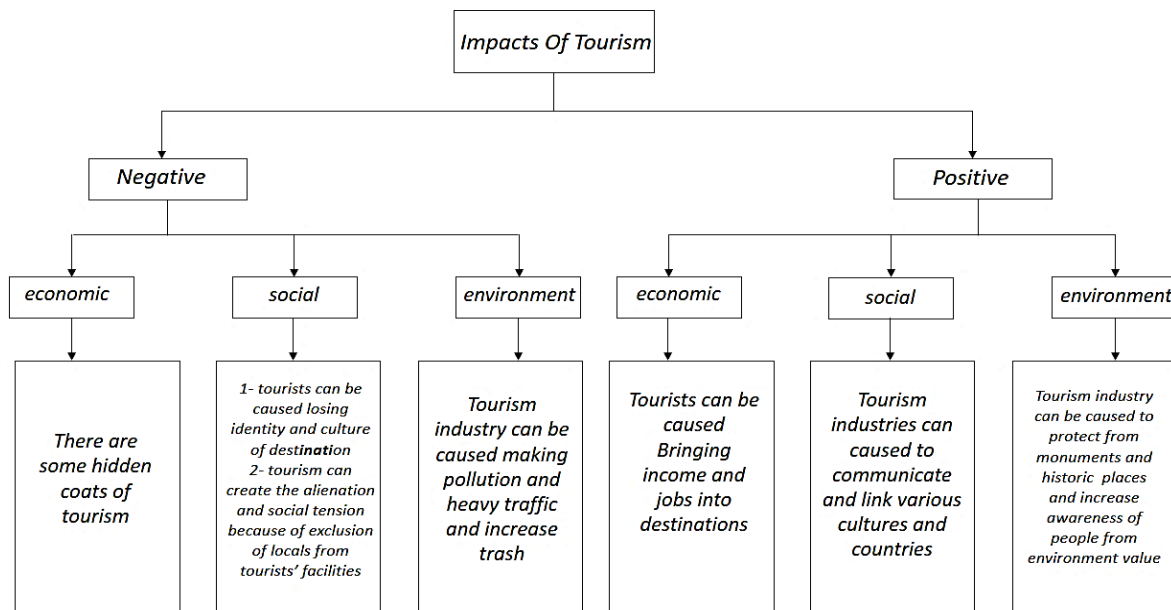


Figure 1 – Negative and positive effects of tourism; adapted by Joudifar 2016.

Source: Günce (2003); Scholtz and Slabbert (2016); UNDP (2016).

Sustainable tourism can only be created when this industry pays attention to positive impacts of tourism on all economy, society and environment. Based on perspective of tourism activity and its impact on 'economy' and 'environment', the historical and traditional parts of a city can be considered as cultural tourist attractions in many historic towns. Since tourism industry has become a major component of economy in many regions, historic urban fabric constitutes investment as an asset. Hence, historical towns, cities and areas can be known as 'productions' for the tourism industry, especially for cultural tourism.

Tourism is potentially a compound for the protection of historic fabric (Orbaşlı, 2000). "In the majority of tourism development cases, it is seen that, the interests of political and commercial activities try to lead preservation of historic places to revive and restore these places with the tourist attractions and associates commercial purposes" (Daher, 2006:171). Besides, it can be noted that, cultural tourism can serve as a tool for conservation of historic places by realising the full economic potential of an area (Teo and Huang, 1995). Besides, in order to sustain historical buildings for future generations, tourism is known as a potential item for conserving them on an urban scale. Although it can be mentioned that tourism industry is not a direct source for conserving monuments, it can improve and increase the financial sources indirectly, which were not available previously.

## 2. Historic environments as an attraction for cultural tourists

Historic environments attract cultural tourists via:

- the attractiveness related to physical features of the buildings, places and spaces as well as views and vistas;
- the characters and features which are easy to walk and explore;
- living in these specific places;
- the factors such as industry and crafts, which can be introduced amongst the identity and character of places;
- giving chance to visitors to be part of urban life;

- feeling the atmosphere of these spaces related to the past that creates the intangible value (Daher, 2006).
- the certain tastes like architecture and food as well as music and art;
- attainment of knowledge as history of visited area, foreign language; and
- improving certain social skills, for example the way to connect and communicate with local people and the manner to act suitably based on local norms (Stebbins, 1997).

According to impact of tourism on 'society', it is interesting to note that, tourism industry can raise the interest of local people to live in that specific region. The awareness of society on the influence of preservation and conservation, leads to increase the participation of locals, since the demands for preservation go up as well.

The experiences illustrate that, the places where this recreation is introduced, is a successful corporation between locals and development results (Daher, 2006). Based on ICOMOS (1999), "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".

Achieving useful interaction between locals, tourists and their expectations, causes to make many challenges and opportunities in order to develop this activity. "The participation and combined effort of local and native community, conservationists, tourism operators, property owners, policy makers, those preparing national development plans and site managers" is essential for gaining a sustainable tourism industry, increase the conservation of heritage and protect from region's value for later generations (ICOMOS, 1999).

What is important is the extent of interaction between tourists and environment as their corporation and also sustainable development. "Socially sustainable development is tourism developed in a manner that maintains or improves the integrity of the non-site communities and inhabitants" (Günce, 2003: 184). Sustainable tourism investigates the requirements and long term interests of the society, into and around the tourist regions (Saghay, 2006).

The impacts of cultural tourism lead designers, stakeholders, owners and tourism managers to use tourism industry as a financial tool for conservation of historic buildings, more than the past. In some cases, conserving and restoring old buildings, without adapting them, leads to lose some of their values, such as historical and economical values. Besides, if historical buildings are left without re-functioning, they become obsolete and deteriorated again.

The new functions are expected to respect the values of buildings, history of buildings and their surroundings and also consider their architectural characters and heritage values. In addition, based on sustainable adaptive reuse, reuse projects need actors' participation to be successful.

Due to its geographic position, Cyprus has been an attraction for many different sovereignties since very old periods, hence a significant centre of cultures, histories and different architectural styles. Therefore, protecting these significances for the next generations is vital. Walled City of Famagusta in northern Cyprus is one of the important accumulations of monuments, historic sites and heritage buildings in this island. Amongst many valuable heritage buildings, Martinengo Bastion and Ravelin Bastion are the two historic buildings, which are 'financially supported by EU, determined by Technical Committee on Cultural Heritage of Cyprus and the conservation project implementations are about to

start soon, by UNDP-PFF'. Currently, there is no official functional decision for the future of Martinengo and Ravelin Bastions.

In this study, the main target is the determination of the appropriate functions for adaptive reuse of Martinengo Bastion and Ravelin Bastion by representing their original architectural and historical features as well as heritage values, after conserving them with new functions. In addition, based on ongoing debates, these monuments can be given cultural functions, for attracting both locals and tourists in the Walled City of Famagusta.

### **3. Methodology**

In this research, a mixed technique, including both qualitative and quantitative techniques, is used to develop an approach for proposing appropriate functions for architectural monuments. This approach which is developed from various references (Washington Charter (1987); World Bank (1992); Agenda 21 United Nation (1992) as quoted in Macnaghten and Jacobs, (1997); Murtagh (1997); Weeks (2012); Kwun (2001); Park (2006); Worthing and Bond (2008), Wilkinson et.al. (2009); Aydın (2010); Fuentes (2010); Yıldırım (2012); Elsorady (2014) provides the decision-making steps. Investigation methods of heritage values, historical and architectural features of monuments, are based on both literature review and in-situ observations. A questionnaire survey was conducted with cultural and educational tourists, locals and experts, where the outcomes are interpreted for proposing the appropriate functions. This approach which is applied for two monuments in the Walled-City Famagusta, Martinengo Bastion & Ravelin Bastion, can be easily adapted to other historic buildings as well.

### **4. Extraction of Adaptive Re-Use Potentials for historical buildings**

As Aydın mentions (2010), reuse is a positive strategy instead of new construction in terms of sustainability. Brand in 1994 (as quoted in Ronda 2011:16) mentions that; "The building becomes more interesting when it leaves its original function behind. The continuing changes in function, turn into a colourful story, which become valued in its own right; the building succeeds by seeming to fail". As Brand (1994) mentions, adaptive reuse of monuments in historic cities can play a vital role to attract cultural tourists and also can develop the tourism industry in these destinations.

The other aspect playing important roles in the development of adaptive reuse is participation in these activities. It is clearly acknowledged that community participation is crucial to promote sustainable development (Agenda 21, United Nations 1992 as quoted in Macnaghten and Jacobs 1997) and to gain the preservation of historic districts and buildings (ICOMOS 1999). Similarly, Yıldırım (2012) points out, the original function of a place as the most ideal function however, from a financial point of view, the only efficient way for maintaining the building is suggesting a new use or a mixed use including the original function with a new function. This is the reason why activities such as tourism can play crucial roles in the conservation of the old buildings.

The change of form of any historic building includes the idea of form, cultural and historic values, and parallel to this, the use of materials, location of the building, architectural character, space gain, space change and structural analysis are required in adaptive reuse projects (Elsorady 2014). These shared values are interpreted as collective memories, and serve as a symbol of community identity, culture, and heritage. Furthermore, in the buildings' functional discussion, several scholars, such as Murtagh (1997) and Weeks (2012) cited by Elsorady (2014) all agree on the significance of new function in adaptive reuse. Besides, Park (2006) suggests that the investigation of historic properties such as significant materials, cultural features, time periods, and physical features, have to form components

in the decision-making procedure on the kind of conservation treatments required for each historic property. Elsorady (2014) expresses about grouped features, which are concerned with the building unit itself, its users and its connection to the community. These indicators include architectural integrity, sustainable adaptation, form of building and building function.

As Martinengo Bastion and Ravelin Bastion are monuments with various historical layers, rich architectural features and many heritage values, they have high potential for adaptive reuse as well as attracting cultural tourism.

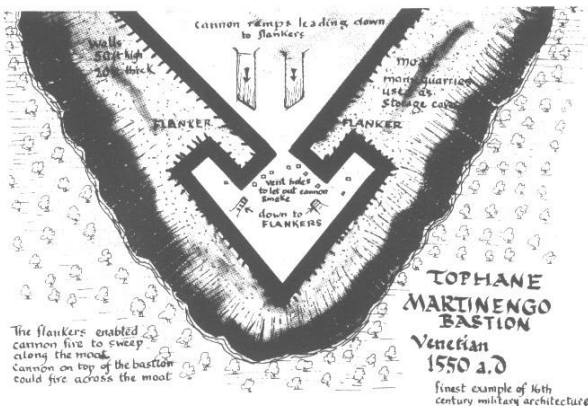
#### 4.1. Historical Features

Historic and prehistoric buildings are often the resource of much of humans’ information and art from the cultures of past civilisations. Moreover, investigating historic building can help to obtain information and knowledge about the past people’s lifestyle, behaviours and habits as well as the previous technologies which were used in the architecture of the past periods. Hence, in order to protect culture and identity of a region, not only examining the history of a building for adaptation, but also touching and reflecting the past events and history are needed.

##### 4.1.1. Martinengo Bastion

One of the most adsorbed Venetian additions to the walls, (the walls which embrace the city of Famagusta) is the Martinengo Bastion. It was the most important element of the Venetians’ military architecture of Famagusta because of its triangular design in Mediterranean lands in the Middle Ages (Renaissance) (Langdale, 2010). The architect of this building was ‘Giovanni San Micheli’, who was Italian (Cosmescu, 2015). “The Martinengo would be Famagusta’s most modern configuration in keeping with recent innovations in bastion design, which took modern cannons and artillery into account, and increased both the defensive and offensive capabilities of the bastion” (Langdale, 2010: 167). The Martinengo Bastion was built in preparation for an Ottoman siege, and it dominates the northeast corner of these fortifications (Langdale and Walsh, 2009). The Table 1 shows the historical evolution of Martinengo Bastion.

Table 1 – Martinengo Bastion history.

| <b>History of Martinengo Bastion</b>  |                            |
|---|----------------------------|
|  <p style="text-align: center;"><a href="http://www.cypnet.co.uk/ncyprus/city/famagusta/walls/bastion-martinengo.htm">http://www.cypnet.co.uk/ncyprus/city/famagusta/walls/bastion-martinengo.htm</a></p> |                            |
| 1192-1489   | Lusignan period in Cyprus. |



|            |  |
|------------|--|
|            | The Lusignan fortifications surrounding the Famagusta Walled-City, although they were tall walls, were not strong enough until 1489.   |
| 1489-1571  | Venetian period in Cyprus  |
| 1550-1559  | Giovanni San Micheli' redesigned and strengthened Martinengo Bastion in this period. Because the northwest side of the old city in the terms of defence, was weak in Venetian period. They realised that an appropriate modern defence building was needed. Therefore, Venetians attempted to set a huge construction project for this problem and changed the entrance of Martinengo Bastion.<br>It is believed that redesign of Martinengo Bastion by Giovani San Michele is inspired from fortifications of Florence (1528) by Michelangelo (1475-1564) and Leonardo da Vinci's studies on theory of fortifications (Walsh et.al., 2012; Cosmescu, 2015). |
| 1571-1878  | Ottoman Period in Cyprus   |
| 1570-1571  | Ottomans' siege. The Ottoman commander in 1570, with his military credit, decided not to attack strong points like this bastion. In actual fact, this was the specific policy of Ottoman in winning the Famagusta, not to attack these extremely fortified bastions, but to lead an attack on the weak parts of the Walls.<br>During the siege of Famagusta by Ottomans, the death of commander of the Venetian reinforcement troops Martinengo (who was one of the famous commanders in Cyprus) led Venetians to give his name to this building.  |
| After 1571 | Ottomans repaired the demolished parts of fortifications.<br>Original name of Martinengo Bastion was changed to 'Tophane' that means armoury.  |
| 1878-1960  | British Period in Cyprus   |
| 1960       | The well protected tombs of five people, who were killed during the troubles of the mid-1960s, can be seen on the bastion.   |

Source: Developed by authors based on Cobham (1908); Langdale and Walsh (2009); Langdale (2010); Walsh et.al. (2012); Cosmescu (2015); Famagusta Walled City Association (2016b).

#### 4.1.2. Ravelin Bastion

The second most aged section of the walls after Othello Citadel, which is located at the south-west side of the walls, is Ravelin Bastion which is also called Land Gate. This is one of the two original gates of the old town and another one is called Sea Gate (Langdale and Walsh, 2009). The original name of Ravelin means half-moon shape in the old French, the Demilune lunette - or the bastion in the shape of a crescent. The Table 2 shows the historical evolution of Martinengo Bastion.

Table 2 – Ravelin Bastion history.



|                      |  |
|----------------------|--|
| 1192-1489            | Lusignan period in Cyprus.   |
| 1495- 1564           | The original Ravelin was built by the French Lusignans as a tower that stood outside Famagusta's walls.  |
| 1489-1571            | Venetian period in Cyprus  |
| mid-14th century     | Venetians decided to strengthen Walled City's defence because of foresight of Ottomans' threat. Hence, they built a new set of walls, and incorporated this building into the new city, renaming as the Rivettina Bastion. The height of this building was remodelled and reduced. It became a massive defensive structure including cannon emplacements, connected by a series of passages and chambers.  |
| 1570-1571            | During Ottoman attack, undermining started in several places, particularly near the Arsenal, and the Ravelin. When the Famagusta was surrounded, the Venetians blew Ravelin up, and thousand Ottoman soldiers and a hundred of the Venetian people were killed (Cobham, 1908).   |
| 1571-1878            | Ottoman Period in Cyprus   |
| After Ottoman attack | During the siege to the Walled City of Famagusta, the two gates for achieving the land, was the Sea Gate and the other one was the Land Gate that was protected by Ravelin Bastion. There was no way into this building except over the wooden drawbridge (Cobham, 1908). During the first attack, the Ottomans fired the mines under the Arsenal Tower and climbed up through the ruins. After the third attack, the Ravelin was surrendered to Ottomans (Mariti, 1971: 182). |
| Seizure the Ottoman  | The original name was altered into 'Akkule' or the 'White Bastion' by Ottomans (from the Turkish, "Ak" meaning white and "Kule" meaning bastion) or ("White Tower") when Venetians waived the white flag of surrender at the end of the battle 1571. It is obvious that after weeks of battling and tunnelling under the walls, finally the Ottomans could access to the Ravelin (Famagusta Walled City Association, 2016b).   |
| 19th century         | The stone bridge seen today over the main moat was built in the 19 <sup>th</sup> Century, although its elegant arches seem almost insubstantial next to the vast walls. Next to Ravelin is the sloping ramp to the walls which was originally used to wheel in the cannons.  |
| 1878-1960            | British Period in Cyprus   |
| Current time         | The Ravelin houses the Tourist Information Office for Famagusta.   |

Source: Developed by authors based on Cobham (1908); Mariti (1971); Langdale and Walsh (2009); Langdale (2010); Cosmescu (2015); Famagusta Walled City Association (2016b).

#### 4.2. Architectural Features





Kwun (2001) sees the change in function as a crucial issue in adaptive reuse projects. Kwun further suggests that the importance of the idea of building type in the architectural design practice is conspicuous in scholarly work. In a number of cases, the notion of building function turns out to be the most central in the initial phase of a building design, since it is one of the most crucial factors defining architectural integrity. It is vital to identify how and why the structure had been formed in a certain style and to discover the original relation between the detailing and how detailing is connected and integrated into the building form, since this will help deciding mechanisms to arrange the new hierarchy for the new function (Elsorady, 2014).





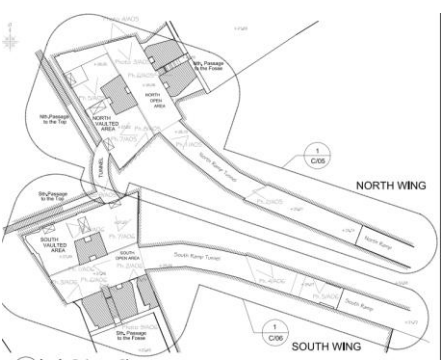
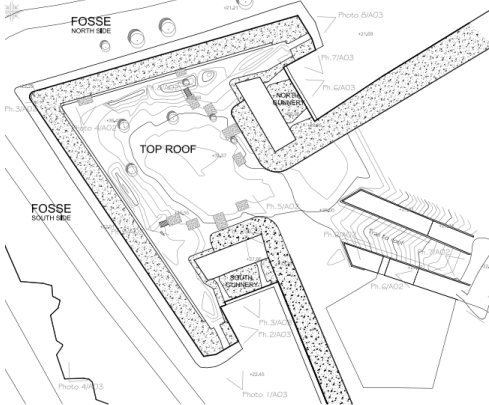
##### 4.2.1. Martinengo bastion


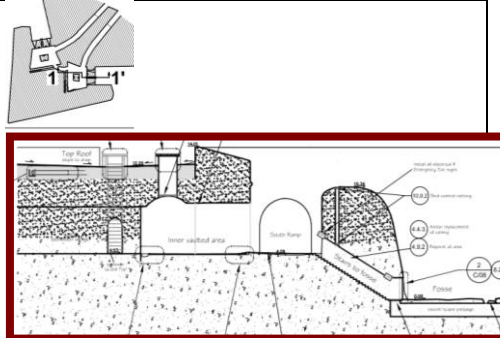

The ideal of the shape of Martinengo Bastion (pentagonal), in Venetian military architecture, was presented in about the second decades of the 15th Century. "The shape of the spur or pentagonal bastion was optimal. It was necessary to shape it for the necessities of modern artillery that required

appropriate positions for barrage fire; “supporting fire and flanking fire” (Walsh et.al. 2012: 195). Table 3 presents the architectural analysis of Martinengo Bastion within its various parts of architecture.

Table 3 – Architectural analysis of Martinengo Bastion.

| Architectural analysis of Martinengo Bastion |  |
|--|--|
| Building's functions                         | <p>Note</p> <p>The original function of the monument was a bastion built as Venetian defence architecture against Ottomans. The building was designed by military engineers and also extension into the moat increased military vision from inside.<br/>It was used as storage before but the monument is closed for conservation works.</p> |
|  | <p>Picture</p>  <p><a href="https://medium.com/@UNDP_PFF/4dcadba29139">https://medium.com/@UNDP_PFF/4dcadba29139</a></p>   |
| Materials & Structure                        | <p>Note</p> <p>Sandstone Masonry.</p>  |
|  | <p>Picture</p>   |
| Components of The Building                   | <p>Note</p> <p>Bastion consists of open and semi-open, closed spaces. In addition, it includes wide and small spaces; and narrow corridors or tunnels.</p>   |
|  | <p>Picture</p>  <p>tunnel ramp</p> <p>courtyard</p> <p>interior</p>   |
|  | <p>Picture</p>  <p>Interior-towards courtyard</p> <p>Bastion from Moat      Tunnel up to terrace</p>   |

|                              |   |   |
|------------------------------|---|---|
|                              | <p>Note</p> <p>Interior part of bastion includes two wings, north and south wings, which let movement from one side to the other by a bent passageway with vaults and arches, that reveal Venetian architecture (Cosmescu, 2015).</p>   | <p>There are three sloping ramps where one of them is reaching up to Martinengo’s roof with enough width for carrying weaponries and riding horses in the past. The other two sloping ramps are the tunnel ramps going down to reach the open area and chamber.</p>   |
|                              | <p>Picture</p>   | <p>Picture</p>    |
| <p>Physical Features</p>     | <p>Note</p> <p>Shape of bastion is for keeping away the walls from fire and locating of guns in a side place from which they could fire on the soldiers that were attempting to climb the walls (Piperno, 2013). The angular corners can be vulnerable for a bastion, therefore the architect of Martinengo Bastion knew that if he constructed two cannon flankers in both wing of this building, this problem can compensate.</p> | <p>Several chimneys were located on the roof for gunpowder smoke to be fled. The niches in the walls are for gunpowder barrels and cannon balls (Hillis, 2013). Covering more than one square mile and with a scarp 20 ft. thick. Northern face of bastion is in 262 ft. western face is 262 ft. (long) and flank of ear is 49 ft. (wide). “Martinengo presents a wonderful sloping 245 ft. ascent, a wide ramp on who side two 210 ft.” (Cosmescu, 2015: 64-65).</p> |
|                              | <p>Picture</p>    | <p>Picture</p>   |
| <p>Note</p>                  | <p>The architecture style of this building is Venetian architecture. This bastion has two Piazza-Basse, two Cavaliers, three ramps (Cosmescu, 2015).</p>  | <p>Complex and multipart plan with two symmetrical wings which are connected by a tunnel. Ramps and small spaces are included in interior plan of the building. Exterior consists of roof and two wide ramps.</p>   |
| <p>Integrity of the Plan</p> | <p>Martinengo bastion’s plans</p>  <p>Interior plan of Martinengo Bastion</p>  |  <p>Roof plan of Martinengo Bastion</p>   |

|         |   |   |
|---------|---|---|
| Picture |  |                     |
|         | Note  | The spaces in underground receive light from skylights, vaulted semi-open spaces and open courtyards. |
|         | Picture   |                     |

Section of Martinengo Bastion  
<http://www.cy.undp.org/>




The accessibility of this building is from main street (Server Somuncuoğlu Sk.).









Source: Cosmescu (2015); Piperno (2013); Hillis (2013).

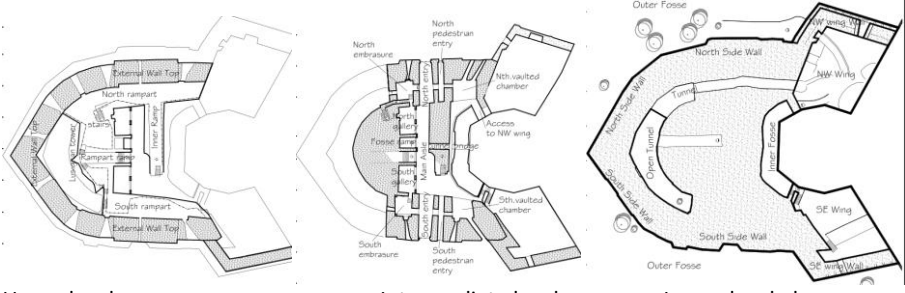
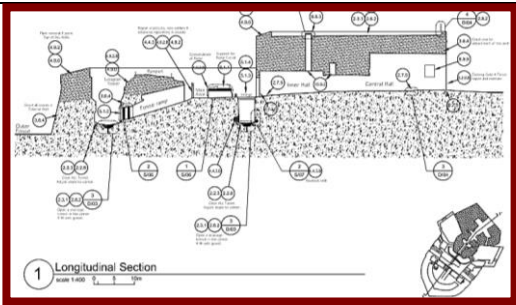

#### 4.2.2. Ravelin Bastion

Cosmescu (2015: 68) states that "the Ravelin was connected to the gate by a small drawbridge over a narrow ditch, and from the flanks of the Ravelin, two bridges were thrown over the moat. Additionally, a wide gun platform was built on top of the gate, with a tall archway on the town side, slightly unaligned with the earlier access structures of the gate". Table 4 presents the architectural analysis of Ravelin Bastion within its various parts of architecture.

Table 4 – Architectural analysis of Ravelin Bastion.

| Architectural analysis of Ravelin Bastion |         |  |
|---|---------|--|
| Building's functions                      | Note    | The original function of the monument was a bastion built in Venetian period<br>It served to guard the main entrance to the Famagusta Walled-city that was nearby.   |
|   | Picture | <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <br/> <a href="https://medium.com/@UNDP_PFF/4dcadba29139">https://medium.com/@UNDP_PFF/4dcadba29139</a> </div> <div style="text-align: center;"> <br/> <a href="https://tr.pinterest.com/explore/famagusta-cyprus/">https://tr.pinterest.com/explore/famagusta-cyprus/</a> </div> <div style="text-align: center;"> <br/>           SAVE, 2007         </div> </div> |

|                            |         |  |  |
|----------------------------|---------|--|--|
| Materials and structures   | Note    | The building is set up by different levels of constructions linked to the outside of the city through small passageways, bridges and fosses (UNDP-PFF).  | Ashlar stone<br>Masonry  |
|                            | Picture | <br><i>UNDP, 2014</i>   |    |
| Physical Features          | Note    | The main feature of Ravelin Bastion is different level inside of this building, which can connect to each other through a labyrinth of stairs, ramps and rooms. "Chamber walls, ventilation shafts, stairways, and ramps are all visible at bird's-eye level" (Walsh et.al. 2012: 194).  | Ravelin offers a unique perspective: over the embrasures, visitors can see the inside of the structure, since the roof of the lower storey is missing (Walsh, 2008).<br>This building includes upper level, intermediate level and also lower level. |
|                            | Picture | <br><a href="http://www.cy.undp.org/">http://www.cy.undp.org/</a>  |   |
| Components of The Building | Note    | Ravelin Bastion has an entrance, with a groin vault, fronting the town with an immense archway (30 ft.), to this building along with the pons over the ditch which was built in 19 <sup>th</sup> Century as well, that the grooves above the gate into the town can be seen still which led chains of the portcullis and bridge (Walsh, 2008). | In the other side of Ravelin located next to office, the sloping ramp to the walls was used in the past as ways to take away cannons.  |
|                            | Picture |   |    |
|                            | Note    | Some spaces are connected by tunnels to each other   | The building has open, semi-open and closed areas.   |
|                            | Picture | <br><a href="http://www.cy.undp.org/">http://www.cy.undp.org/</a>   |    |

|                       |                         |  |  |
|-----------------------|-------------------------|--|--|
| Integrity of the Plan | Note                    | The Ravelin Bastion has a complex and multipart plan, which includes rooms, ramps, steps, tunnels, two wings and narrow complex.   | There are arches which separate spaces that are the features of Venetian architecture.   |
|                       | Ravelin Bastion's plans |  <p>Upper level of Ravelin Bastion<br/><a href="http://www.cy.undp.org/">http://www.cy.undp.org/</a></p> <p>Intermediate level of Ravelin Bastion</p> <p>Lower level plan of Ravelin Bastion</p> |  |
|                       | Picture                 |  <p>Section of Ravelin Bastion<br/><a href="http://www.cy.undp.org/">http://www.cy.undp.org/</a></p>  | <p>The accessibility of Ravelin is from the main street (Istiklal Cd and Ramiz Gökçe Sk.)</p>  |

Source: UNDP-PFF; Walsh (2008); Cosmescu (2015)

#### 4.3. Heritage Values

Obviously the value of a building and its use are interweaved, hence, highest and best use leads directly to enhance the value, providing the highest revenue for investors and owners (Wilkinson, 2014). These values can be heritage values, architectural values as well as historical values. Other factors affecting value are political forces and local competition. In order to make decision for conserving old buildings, one of the reference points is the heritage values which are the essential components of this study. Successful adaptive reuse projects are expected to consider the significance of a heritage by examining the heritage values.

Table 5 presents the heritage values and related keywords for heritage buildings, which are derived from various studies (Riegel 1905; English Heritage 1997; Burra Charter 1999; ICOMOS 1999; Fielden 1994; Jukilehto 2002; Lipe 1983; Frey 1997; Mason 2002; Orbaşlı 2008; Peyravi 2010; Mısırlısoy 2016; Joudi 2016) besides, analyses of values of both monuments.

Table 5 – Value Analysis of both Martinengo Bastion and Ravelin Bastion, Analysed by Joudifar (2016).

| Monuments Values |                              |   |   |
|------------------|------------------------------|---|---|
| Heritage values  | Related keywords             | Explanations of Martinengo Bastion's value  | Explanations of Ravelin Bastion's value   |
| Historical Value | Historical/ identity/ layers | According to the defined deep historical background, it is clear that this building have historic value due to different historical layers ranging from Venetian, Ottoman, British and conflict period. | There are many layers of history from the original Lusignan original tower to the Venetian Ravelin to the later changes by the Ottomans and British conservation efforts. |

|   |   |   |  |
|---|---|---|--|
| Symbolic & Spiritual Value                | Religious/ sacred significance/ solemnity/ memory / commemorative   | The Martinengo Bastion is a symbol of the defence architecture against the Ottomans in Venetian Period.   | The Ravelin Bastion is a symbol of the defence of Venetians against the Ottomans and also this building was one of the two main entrances to Famagusta in that period. It is also the symbol of Walled City perceived from outside the city-walls.   |
| Archaeological, Age & Scarcity Value      | Archaeology / layers / age / being old / scarcity / rareness  | The Martinengo Bastion is remained from 15th Century, so it can be said that it has age value.  | The Ravelin Bastion is remained from Venetian period so it can be said that it has age value.  |
| Educational, Documentary Value            | Documentary/ Technical / technology & materials / academic / knowledge / academic / evidence / historical facts / Informational / Technological, Scientific | The knowledge about technology and architecture of the past can be gained from this building in the present time. Based on Dreghorn, (1985), "Even today in modern war fare would be a super defence point for the town".<br><br>This building is a good example of military architecture of medieval period that can show the technology of this period. | The methods which were used for the structure of this building can give us the evidence from past lifestyle and architectural military techniques and defence architecture in previous periods.<br><br>The knowledge about defence architecture of the period and war technology can be gained from this building. In addition, some evidence has remained from the drawbridge that was the only way for entrance into Ravelin.  |
| Architectural Value                       | Architectural style/ architectural details/ architectural features (mass, façade, layout)   | Many arches, vaults, cross-vaults and Venetian architectural elements can be observed in Martinengo Bastion, which present architectural value of this building. It explains defence architecture in fortified cities.  | Inside of Ravelin Bastion, the arches, vaulted and Venetian architectural elements can be seen and also some interventions from Ottoman period and also in British period in 19 <sup>th</sup> Century. It explains the entrance design to fortified cities.  |
| Artistic & Aesthetic Value<br>Identity    | Artistic/ Uniqueness/ good instance/ rarity<br><br>Aesthetic/ Visual quality/ sensory experience (sound, smell, sight)/ well feeling<br><br>identity        | Martinengo Bastion is a good example of architectural military heritage with the unique design and rare, so it can be said that this building has artistic value.<br><br>Martinengo Bastion has positive visual qualities due to spatial ratios and flow of spaces. It is really huge, designed by Venetian architectural elements.                       | Ravelin Bastion according to the visual qualities is really huge, designed by Venetian architectural elements. Moreover, the complex space organization, spatial ratios and different heights in this building made it a monument with aesthetic values. According to Mason (2012), artistic value refers to heritages with a good instance so, it can be concluded that Ravelin Bastion has artistic value because it is a good example of military architecture in 15 <sup>th</sup> Century with a complex plan and unique architectural elements of the period. |
| Townscape, Ecological and Landscape Value | Townscape/ ecological/ landscape/ view/ picturesque   | When visitors stand at the top of the Martinengo Bastion, they can see the great view from the bastion towards the moat, sea and  | When visitors stand at different levels of the Ravelin Bastion, they can see the great view towards the moat, the Walled-City, the new city. There is a wide visual angle from the top. The  |



|   |  |  |  |
|---|--|--|--|
|   |  | new city. The Martinengo Bastion also contributes positively to the townscape of Famagusta.  | Ravelin Bastion also contributes positively to the townscape of Famagusta.   |
| Economic / Functional / use Value         | Potential of use/ giving function<br>Use value (potential of generating income)/ none use/ non market value (altruistic, bequest, option, existence values)                | With both high and wide open and semi-open spaces with acoustical qualities; the potential for re-functioning is very high. As an existing building, it has an economic value because it can attract the cultural tourism and bring income for the Walled City of Famagusta because of the historical and unique features. | This building had various functions during different periods as military function and tourist information office. This building can attract the cultural tourism and bring income for Famagusta because of the rich historical layers and unique features.   |
| Social Value                              | Place attachment (community identity, social cohesive) shared space/ public space qualities/ social connections/ networking  | The wide spaces have the potential to gather people for social connections and shared spaces.  | This monument had always social value as one of the two main gates of Famagusta in the past, and since any trade and social cohesion occurred from this gate. The wide open spaces, semi-open spaces and limited closed spaces together with the location next to new entrance to the Walled-City, the monument carry potential for social connection. |
| Political and Ethnic Value                | Ideological causes/ protests/ other meanings of living together / civic relations  | The monument is an evidence of Venetians existence on the island as well as the defence architecture against Ottomans.   | The monument is an evidence of Venetians existence on the island as well as the defence architecture against Ottomans.   |
| Emotional & Wonder Value, Universal Value | Wonder/ Curiosity/ secular experience<br>Universal/ Exceptionality value/ outstanding or cultural significance<br>Continuity / Durability / idea and habits through time / | The bastion awakens the feeling of curiosity. The EU funded and UNDP implemented "Support to cultural heritage monuments of great importance for Cyprus" project, a study "Survey, Investigations, Assessment Project" is being implemented currently. The monument carries traces of time to today.                       | The Ravelin Bastion awakens the feeling of curiosity.<br>The EU funded and UNDP implemented "Support to cultural heritage monuments of great importance for Cyprus" project, a study "Survey, Investigations, Assessment Project" is being implemented currently.<br>The monument carries traces of time to today.                                     |

Source: Riegel (1905); English Heritage (1997); Burra Charter (1999); ICOMOS (1999); Fielden (1994); Jokilehto (2002); Lipe (1983); Frey (1997); Mason (2002); Orbaşlı (2008); Peyravi (2010); Mısırlısoy (2016); Joudifar (2016); Sayce et al. (2009)

## 5. Generating Reuse Potential for two cases

Within contemporary conservation approaches, the new functions for monuments must reveal the historical and architectural background, as well as the heritage values of these monuments in the appropriate way. Consequently, the new functions of these two monuments must be the types of

public functions to reveal the social values. Hence, cultural functions are the most appropriate for monumental buildings with rarity values. According to the international charters, the new functions should represent the original life of a historical building. In the light of this, the appropriate suggestions for new functions should embrace both tangible and intangible values of these monuments as well. As many studies discuss such as Venice Charter (1964); Orbaşlı (2000); Yüceer and İpekoğlu (2012); Petzet (2004), one of the important part in adaptive reuse activities, is interventions which need to consider historical and architectural features as well as heritage values.

### 5.1. *Martinengo Bastion*

Based on the history of Martinengo Bastion, the reason of building this bastion was fortification purposes to defence against Ottoman's attack. The function which is recommended for the new function of this building can show this history via galleries, museum as well as music and dance performances, etc.

The Martinengo Bastion has both semi-closed and open spaces to accommodate mixed functions to include a main function with a supportive function. On architectural analysis, it seems that, the complex plan of Martinengo Bastion can provide setting to make flexible appropriate new functions. Moreover, historical and architectural elements, openings and also mass of these buildings are the important information that lead designers to find ideal functions. Spite of narrow spaces, recommended functions can be places which do not need vast area such as galleries and museums. Besides, this building is not ideal to be open cinema or open theatre hall because of its mass features. Likewise, for proposing ideal supportive functions, heavy uses are not recommended such as a restaurant which needs to have large cooking spaces and special infrastructure. Besides, installation of the industrial cooking systems can threaten the integrity of the buildings. The other character of architecture which should be noticed is openings of a building. Martinengo Bastion has six entrances; therefore, some kinds of functions such as jewel museum or gallery, that needs more security, are not suitable for this building.

Some functions can block the view of this building, so they can decrease the townscape value of them; whereas some types of functions cannot introduce the history of the old buildings, since it can reduce the historical and cultural value of them. On the other side, for supportive function, some kinds of functions are not ideal, for instance, making hotels and motels can destroy this building and the values because this type of function needs heavy interventions besides blocking public access.

### 5.2. *Ravelin Bastion*

Since Ravelin Bastion's famous history is about defence against Ottomans' attack to Famagusta through this gate that led to conquest of this city, the functions which can reveal this history should be recommended.

Despite of variety of spaces and different levels of this building, there is a situation to become multi-functional building. In addition, some narrow and small spaces which are included in this bastion lead to recommend the functions which do not need wide spaces as well as Martinengo Bastion. The Ravelin Bastion has limited number of closed spaces besides, semi-closed and more open spaces with different site levels and ramps which limits the variety of new functions. Therefore, main function needs to be a single function with a supportive function.

### 6. Adaptation Decision-Making Based On Social Participation

Successful adaptive reuse can have advantages for the society, culture and environment. In addition, it should be compatible with contemporary life style while protecting identity, history and culture of the region.

Successful adaptive reuse can be achieved by participation of residents and also stakeholders. This is one of the reasons why the Conservation of Historic Towns and Urban Areas, 1987 (Washington Charter) stated corporation and participation of residents and locals as the essential factors for the success of adaptive reuse projects. It is clearly acknowledged that community participation is very important to promote sustainable development (Agenda 21, United Nations 1992 as quoted in Macnaghten and Jacobs 1997), and to gain the preservation of historic districts and buildings (ICOMOS 1999). Besides, ICOMOS mentions that heritage conservation cannot be sustained without community participation, (Article 12). All stakeholders such as the national and international, central and local governments, public, and the designers and experts (architectural historians and conservation experts), cultural tourists, developers and owners need to be included in the processes while maintaining the originality of the historical buildings, by ensuring that international contemporary conservation concepts and standards are followed.

Although, all these advices can be responded in order to propose for successful re-functioning for the selected case; at least, the important part of proposed appropriate function is preference of actors who are tourists, locals and experts. In the light of these discussions two charts are prepared for reuse options in Figure 2. First one is for the main function and the second one is for supportive functions which are inserted in structured questionnaires for this study. Hence, Figure 2 shows the questionnaires for locals and tourists (page 1 & 2). In addition, Figure 3 shows the questionnaires for experts (page 1 & 2).

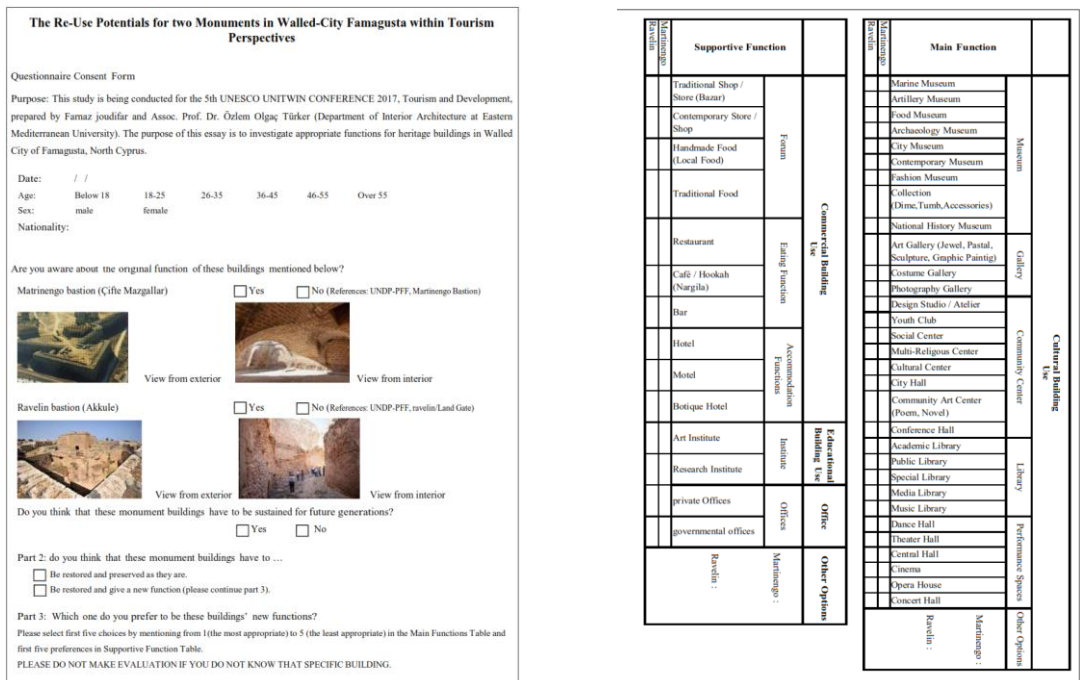


Figure 2 – Questionnaires for locals and tourist (page 1 & 2), prepared by Joudifar (2016).

Source: Adapted from Douglas (2006), Plevoets and Van Cleempoel (2012) photos from UNDP-PFF projects sheets (2016)

**The Re-Use Potentials for two Monuments in Walled-City Famagusta within Tourism Perspectives**

Questionnaire Consent Form

Purpose: This study is being conducted for the 5th UNESCO UNITWIN CONFERENCE 2017, Tourism and Development, prepared by Farnaz Joudifar and Assoc. Prof. Dr. Özlem Olgaç Türker (Department of Interior Architecture at Eastern Mediterranean University). The purpose of this essay is to investigate appropriate functions for heritage buildings in Walled City of Famagusta, North Cyprus.

Date: / /

Age: Below 18 18-25 26-35 36-45 46-55 Over 55

Sex: male female

Nationality:

Are you aware about the original function of these buildings mentioned below?

Martinengo bastion (Çifle Mazgallar)  Yes  No

Ravelin bastion (Akkule)  Yes  No

Do you think that these monument buildings have to be sustained for future generations?

Yes  No

Part 1: which of the values do you think these three monuments carry? (You can make more than one value for each buildings)

|            | Bastions | wonder | identity | Spiritual & symbolic | Continuity | Documentary | Historic | Archologic, age & rarity | Aesthetic & artistic | architectural | Townscape, ecological & landscape | Functional & economical | Social | Political & ethnic |
|------------|----------|--------|----------|----------------------|------------|-------------|----------|--------------------------|----------------------|---------------|-----------------------------------|-------------------------|--------|--------------------|
| Martinengo |          |        |          |                      |            |             |          |                          |                      |               |                                   |                         |        |                    |
| Ravelin    |          |        |          |                      |            |             |          |                          |                      |               |                                   |                         |        |                    |

Part 2: do you think that these monument buildings have to ...

Be restored and preserved as they are.

Be restored and give a new function (please continue part 3).

Part 3: Which one do you prefer to be these buildings' new functions?

Please select first five choices by mentioning from 1 (the most appropriate) to 5 (the least appropriate) in the Main Functions Table and first five preferences in Supportive Function Table.

PLEASE DO NOT MAKE EVALUATION IF YOU DO NOT KNOW THAT SPECIFIC BUILDING.

| Martinengo Bastion | Supportive Function              | Commercial Building Use | Educational Building Use | Office                  | Other Option  |
|--------------------|----------------------------------|-------------------------|--------------------------|-------------------------|---------------|
|                    | Traditional Shop / Store (Bazar) | Forum                   | Eating Function          | Accommodation Functions | Institute     |
|                    | Contemporary Store / Shop        |                         |                          |                         |               |
|                    | Handmade Food (Local Food)       |                         |                          |                         |               |
|                    | Traditional Food                 |                         |                          |                         |               |
|                    | Restaurant                       |                         |                          |                         |               |
|                    | Cafe / Hookah (Nargila)          | Bar                     | Hotel                    | Motel                   | Butique Hotel |
|                    | Bar                              |                         |                          |                         |               |
|                    | Hotel                            |                         |                          |                         |               |
|                    | Art Institute                    | private Offices         | Research Institute       | governmental offices    | Ravelin:      |
|                    | Research Institute               |                         |                          |                         |               |
|                    | private Offices                  | governmental offices    | Ravelin:                 | Ravelin:                | Ravelin:      |
|                    | governmental offices             |                         |                          |                         |               |

| Martinengo Bastion | Main Function   | Commercial Building Use | Educational Building Use | Office           | Other Option  |
|--------------------|---|-------------------------|--------------------------|------------------|---------------|
|                    | Marine Museum   | Museum                  | Gallery                  | Community Center | Library       |
|                    | Artillery Museum  |                         |                          |                  |               |
|                    | Food Museum   |                         |                          |                  |               |
|                    | Archaeology Museum                                      |                         |                          |                  |               |
|                    | City Museum   |                         |                          |                  |               |
|                    | Contemporary Museum                                     |                         |                          |                  |               |
|                    | Fashion Museum  |                         |                          |                  |               |
|                    | Collection (Dress, Tumb, Accessories)                   |                         |                          |                  |               |
|                    | National History Museum                                 |                         |                          |                  |               |
|                    | Art Gallery (Jewel, Pastal, Sculpture, Graphic Paintig) |                         |                          |                  |               |
|                    | Costume Gallery   |                         |                          |                  |               |
|                    | Photography Gallery                                     |                         |                          |                  |               |
|                    | Design Studio / Atelier                                 |                         |                          |                  |               |
|                    | Youth Club  |                         |                          |                  |               |
|                    | Social Center   |                         |                          |                  |               |
|                    | Multi-Religious Center                                  |                         |                          |                  |               |
|                    | Cultural Center   |                         |                          |                  |               |
|                    | City Hall   |                         |                          |                  |               |
|                    | Community Art Center (Poem, Novel)                      | Other Option            | Library                  | Media Library    | Music Library |
|                    | Conference Hall   |                         |                          |                  |               |
|                    | Academic Library  |                         |                          |                  |               |
|                    | Public Library  |                         |                          |                  |               |
|                    | Special Library   |                         |                          |                  |               |
|                    | Media Library   |                         |                          |                  |               |
|                    | Music Library   |                         |                          |                  |               |
|                    | Dance Hall  |                         |                          |                  |               |
|                    | Theater Hall  |                         |                          |                  |               |
|                    | Central Hall  |                         |                          |                  |               |
|                    | Cinema  | Ravelin:                | Ravelin:                 | Ravelin:         | Ravelin:      |
|                    | Opera House   |                         |                          |                  |               |
|                    | Concert Hall  |                         |                          |                  |               |

Figure 3 – Questionnaires for Experts (page 1 & 2), prepared by Joudifar (2016).

Source: Adapted from Feilden (2007); Mason (2002), Douglas (2006), Plevoets and Van Cleempoel (2012)

A questionnaire survey was realized to collect data in this research with the purpose of investigating actors' opinions in reuse of two monuments. In order to distribute this questionnaire, 100 locals and 100 tourists (50 educational tourists and 50 cultural tourists) are selected randomly, while 20 experts are selected from members of related bodies. Technical Committee on Cultural Heritage of Cyprus (TCCH) is selected since it is the internationally recognized bi-communal authority on conservation decisions in Cyprus; Department of Antiquities (northern part) is selected, since it is the central governmental authority in northern part of Cyprus on conservation decisions; conservation experts in EMU Faculty of Architecture are selected since EMU is the only university in Famagusta with the related faculty; and UNDP-PFF conservation project designers (Tecnalia Foundation) as a subcontractor of UNDP-PFF are selected since they have designed the conservation project of both of these cases.

### 7. Findings

Table 6 displays percentages of the highest preferred three functional categories in the survey for Martinengo Bastion and Ravelin Bastion that are classified as upper function and specific function for recommendations on both main and supportive functions.

Table 6 – Percentages of the highest preferred three functional categories in the survey.

|          |                                 | Martinengo bastion |             |                          |                  |                        |                          |                        |
|----------|---------------------------------|--------------------|-------------|--------------------------|------------------|------------------------|--------------------------|------------------------|
|          |                                 | 1st choice         | 2nd choice  | 3rd choice               | 1st choice       | 2nd choice             | 3rd choice               |                        |
| Tourists | Educational tourists (students) | Upper function     | Gallery     | Community Center/ Museum | Performance Hall | Eating function/ Forum | Educational building use | Accommodation Function |
|          |                                 |                    | 28.34%      | 25.67%                   | 11.23%           | 31.15%                 | 20.22%                   | 13.66%                 |
|          | Cultural                        | Sub function       | Art gallery | Photo gallery            | City hall        | Art institute          | Bar                      | Boutique hotel         |
|          |                                 |                    | 13.37%      | 10.16%                   | 8.02%            | 18.58%                 | 14.21%                   | 12.02%                 |
|          | Upper                           | Community Center   | Museum      | Library                  | Eating function  | Forum                  | Educational building use |                        |

|                 |                                 |                 |                        |                               |  |                             |                               |   |                          |
|-----------------|---------------------------------|-----------------|------------------------|-------------------------------|--|-----------------------------|-------------------------------|---|--------------------------|
|                 |                                 |                 | 38.89%                 | 35.19%                        | 18.52%   | 46.30%                      | 29.63%                        | 16.67%                                  |                          |
|                 |                                 | Sub function    | City museum            | Multi-religious center        | Music library  | Restaurant                  | Bar                           | Traditional shop                        |                          |
|                 |                                 |                 | 16.67%                 | 14.81%                        | 12.96%   | 22.22%                      | 20.37%                        | 12.96%                                  |                          |
| Locals          | Upper function                  |                 | Museum                 | Community Center              | Performance Hall                                       | Forum                       | Eating function               | Accommodation Function                  |                          |
|                 |                                 |                 | 52.38%                 | 26.19%                        | 11.90%   | 42.86%                      | 33.33%                        | 23.81%                                  |                          |
|                 | Sub function                    |                 | Marine museum          | Archeology museum             | City/collection museum, cultural center, design studio | Restaurant                  | Traditional food              | Motel, boutique hotel, handmade food    |                          |
|                 |                                 |                 | 19.05%                 | 9.52%                         | 7.14%  | 26.19%                      | 21.43%                        | 9.52%                                   |                          |
| Experts         | Upper function                  |                 | Museum                 | Gallery                       | Community Center                                       | Eating function             | Educational building use      | Forum                                   |                          |
|                 |                                 |                 | 35.48%                 | 33.87%                        | 14.52%   | 50.00%                      | 21.43%                        | 19.05%                                  |                          |
|                 | Sub function                    |                 | Art Gallery            | Artillery Museum              | 3. City Museum   | Café / Hookah (Nargila)/Bar | Restaurant/Research Institute | Contemporary Store / Shop/Art Institute |                          |
|                 |                                 |                 | 19.35%                 | 11.29%                        | 8.06%  | 19.05%                      | 11.90%                        | 9.52%                                   |                          |
| Total           | Upper function                  |                 | Museum                 | Community Center              | Gallery  | Eating function             | Forum                         | Educational building use                |                          |
|                 |                                 |                 | 32.17%                 | 25.80%                        | 23.48%   | 36.45%                      | 30.84%                        | 17.13%                                  |                          |
|                 | Sub function                    |                 | Art Gallery            | City Museum                   | Photography Gallery                                    | Restaurant                  | Bar                           | Art Institute                           |                          |
|                 |                                 |                 | 11.59%                 | 8.12%                         | 6.96%  | 14.64%                      | 14.02%                        | 13.71%                                  |                          |
| Ravelin bastion |                                 |                 |                        |                               |  |                             |                               |   |                          |
|                 |                                 |                 | 1 <sup>st</sup> choice | 2 <sup>nd</sup> choice        | 3 <sup>rd</sup> choice                                 | 1 <sup>st</sup> choice      | 2 <sup>nd</sup> choice        | 3 <sup>rd</sup> choice                  |                          |
| Tourists        | Educational tourists (students) | Upper function  | Community Center       | Performance Hall              | Museum   | Eating function             | Forum                         | Educational building use                |                          |
|                 |                                 |                 | 45.18%                 | 19.29%                        | 13.20%   | 40.91%                      | 36.87%                        | 17.17%                                  |                          |
|                 | Sub function                    |                 | Youth Club             | Social Center/Cultural Center | City Museum  | Restaurant                  | Traditional Shop              | Art Institute                           |                          |
|                 |                                 |                 | 12.18%                 | 9.14%                         | 7.11%  | 26.77%                      | 23.74%                        | 12.63%                                  |                          |
|                 | Cultural tourists               | Upper function  |                        | Community Center/Museum       | Performance Hall                                       | Gallery                     | Forum                         | Eating function                         | Educational building use |
|                 |                                 |                 |                        | 29.49%                        | 26.92%   | 7.69%                       | 46.25%                        | 42.50%                                  | 6.25%                    |
| Sub function    |                                 | Cultural Center | City Museum            | Theater Hall                  | Restaurant   | Traditional Food            | Traditional Shop              |   |                          |
|                 |                                 | 17.95%          | 16.67%                 | 16.67%                        | 30.00%   | 22.50%                      | 18.75%                        |   |                          |
| Locals          | Upper function                  |                 | Museum                 | Community Center              | Performance Hall                                       | Forum                       | Accommodation/Eating Function | Educational building use                |                          |
|                 |                                 |                 | 42.00%                 | 28.00%                        | 18.00%   | 29.17%                      | 25.00%                        | 20.83%                                  |                          |

|         |                |                  |                                 |   |                  |                                  |                          |
|---------|----------------|------------------|---------------------------------|---|------------------|----------------------------------|--------------------------|
|         | Sub function   | Conference Hall  | Contemporary/ Collection Museum | Archaeology /Fashion Museum/Social Center | Traditional Shop | Art Institute                    | Hotel/ Boutique Hotel    |
|         |                | 14.00%           | 10.00%                          | 8.00%                                     | 18.75%           | 14.58%                           | 12.50%                   |
| Experts | Upper function | Museum           | Community Center                | Gallery                                   | Eating function  | Forum                            | Educational building use |
|         |                | 45.00%           | 31.67%                          | 18.33%                                    | 51.22%           | 36.59%                           | 12.20%                   |
|         | Sub function   | City Museum      | Cultural Center                 | Artillery Museum/Photography Gallery      | Restaurant       | Café / Hookah (Nargila)          | Traditional Food         |
|         |                | 20.00%           | 18.33%                          | 13.33%                                    | 26.83%           | 19.51%                           | 17.07%                   |
| Total   | Upper function | Community Center | Museum                          | Performance Hall                          | Eating function  | Forum                            | Educational building use |
|         |                | 37.96%           | 25.39%                          | 17.54%                                    | 40.33%           | 37.87%                           | 14.71%                   |
|         | Sub function   | Cultural Center  | City Museum                     | Theater Hall                              | Restaurant       | Traditional Shop / Store (Bazar) | Art Institute            |
|         |                | 11.26%           | 10.21%                          | 6.81%                                     | 24.80%           | 20.71%                           | 10.08%                   |

According to the Martinengo Bastion's results, the experts have selected 'museum' as the main function, with 35.48% where 'art gallery' has their highest vote with 19.35% as an individual function. On the other hand, 'artillery museum' was the second highest choice of experts with 11.29%. The highest selected function in the overall number is also 'museum' preferred by 32.17%.

As supportive functions of Martinengo Bastion's results, 'eating function' is selected by experts with 50.00%, where 'café' or 'hookah', have the highest percentage with 19.05%. This is also supported by the overall actors with 42.52% where 'restaurant' and 'bar' are almost equally selected with 14.64% and 14.02% consecutively. 'Forum' is also selected by the overall actors with an important percentage of 30.84%.

Given the Ravelin Bastion's results for main function, the experts have selected 'museum' as the main function, with 45.00% where 'city museum' has their highest vote with 20.00% as an individual function. On the other hand, 'community centre' was the second highest choice of overall stakeholders with 37.96% where 'cultural centre' has the highest percentage with 11.26%. The second highest selected function in the overall stakeholders is also 'museum' preferred by 25.39% where they also selected 'city museum' with 10.21%.

Based on supportive functions of Ravelin Bastion, 'eating function' is selected by experts with 51.22%, where 'restaurant' has the highest percentage with 26.83%. This is also supported by the overall actors with 40.33% where 'restaurant' is selected with 24.80%. 'Forum' is also selected by the overall actors, with an important percentage of 37.87%.

## 8. Conclusion

The heritage values, the important architectural features and the different historical layers of two monuments are illustrated in Table 7, which provide crucial information for re-functioning in adaptive reuse projects. Furthermore, the final results of questionnaire survey are also presented with an interpretation of results.

Using the steps defined within the proposed approach, the new appropriate functions for adaptive reuse projects of Martinengo Bastion and Ravelin Bastion are determined. The new main function for

adaptive reuse project of Martinengo Bastion is determined as an artillery museum supported by a café-bar / café-hookah, whereas the new main function for adaptive reuse project of Ravelin Bastion is determined as a community centre including tourist information centre / cultural centre and a restaurant which is catering Cypriot food is determined as the supportive function.

Table 7 – Proposed Functions for Martinengo Bastion and Ravelin Bastion by the interpretation of survey results.

|           | Value Analysis of Monuments  | Architectural Analysis (Important Information)   | Historical Analysis  | Proposed Functions for monuments based on; |                |                   |   |                   |   |
|-----------|--|--|--|--|----------------|-------------------|---|-------------------|---|
|           |  |  |  | Questionnaires' Results                    |                |                   | Interpretation of Questionnaire Results |                   |   |
|           |  |  |  |  | Upper Function | Specific Function | Upper Function                          | Specific Function |   |
| Monuments | <ul style="list-style-type: none"> <li>- Historical Value</li> <li>-Symbolic &amp; Spiritual Value</li> <li>- Archaeological, Age &amp; Scarcity Value</li> <li>- Educational, Documentary Value</li> <li>- Architectural Value</li> <li>-Artistic &amp; Aesthetic Value</li> <li>-Identity</li> <li>-Townscape, Ecological and Landscape Value</li> <li>-Economic / Functional / use Value</li> <li>-Social Value</li> <li>-Political and Ethnic Value</li> <li>-Emotional &amp; Wonder Value, Universal Value</li> </ul> | <ul style="list-style-type: none"> <li>-two wings connected with a tunnel</li> <li>-Semi-underground spaces reached by long ramps</li> <li>-narrow open, semi-open spaces, tunnels, and ramps</li> <li>-sophisticated geometry</li> <li>-cross-vaults, barrel vaults on very thick walls</li> <li>-Many exit points to terrace and moat</li> </ul> | <ul style="list-style-type: none"> <li>Rich historical layers</li> <li>-Lusignan</li> <li>-Venetian</li> <li>-Ottoman</li> <li>-British</li> <li>-Republic of Cyprus</li> <li>-North Cyprus</li> </ul> | <b>MARTINENGO BASTION</b>                  |                |                   |   |                   |   |
|           |  |  |  | Main                                       | First          | Museum            | City Museum                             | Museum            | Artillery museum                            |
|           |  |  |  |  | Second         | Community centre  | Art gallery                             | Art gallery       | Temporary exhibitions                       |
|           |  |  |  | Supportive                                 | First choice   | Eating function   | Restaurant                              | Eating function   | Café-bar/ café hookah                       |
|           |  |  |  |  | Second choice  | Forum             | Bar                                     | Forum             | Contemporary art shop/open bazar            |
|           |  |  |  | <b>RAVELIN BASTION</b>                     |                |                   |   |                   |   |
|           |  |  |  | Main                                       | First          | Community centre  | Cultural centre                         | Community centre  | Tourism information centre/ cultural centre |
|           |  |  |  |  | Second         | Museum            | City museum                             | Museum            | City museum                                 |
|           |  |  |  |  | Supportive     | First             | Eating function                         | Restaurant        | Eating function                             |

|  |  |   |  |  |               |       |                  |       |               |
|--|--|---|--|--|---------------|-------|------------------|-------|---------------|
|  |  | -Complex plan and space organisation<br>Barrel vaults<br>Many exit points to moat |  |  | Second choice | Forum | Traditional shop | Forum | Souvenir shop |
|--|--|---|--|--|---------------|-------|------------------|-------|---------------|

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# How tourist value Cultural Heritage in Coimbra? Exploring the key aspects to retain in a Marketing Mix strategy

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## Abstract

The search of the difference characterizes the change of paradigm, and the ways a region or a city conceives the promotion and preservation of Cultural Heritage Assets had a significant modification over the past few years. The sociocultural paradigm we live in nowadays radically altered the concept Cultural Heritage. This has undergone a constant evolution in the last decades which gives it a new centrality in the social sciences and nonexistent scopes are reflecting over the best ways to insure a sustainable use of these assets. With this paper, we intend, through literature review and surveys, to verify the importance of Cultural Heritage values that tourists that visit Coimbra express, and how they correlate, but also relate, with the existent Tourist Product offer. We want to handle with the questions of Marketing, but above all, to explore a sketch of what could be a basis of a marketing mix strategy for the promotion of the city's Cultural Heritage. Exploiting the importance of the values attributed to the Cultural Heritage site, namely in Coimbra, and by the tourists that visit the city, we want to make a reflection about the product/service that could serve as a base to adapt and reformulate the way these assets are being offered and promoted. We should keep in mind that a Cultural Heritage Tourist product should have in consideration not only the *core* offer, but also the *actual* and the *augment* dimensions. Is it enough to have a strategy that only comprises a reflection about the Product, Price, Place and Promotion without the input from the stakeholders? And what about the need to take in consideration that the People, Processes and Physical Evidences are essential to the success of such a complex offer? As a preliminary result, we concluded that there isn't a strategic marketing mix reflection in the construction of the offered touristic product, and as such, there is no idea of the service to offer, other than, to commodify indiscriminately the different assets.

## Keywords:

Cultural Heritage, Values, Marketing Mix, Tourist Product, Service.

## 1. Introduction

The centrality hold by Cultural Heritage in our society is an extremely documented fact (Bouchenaki, 2014; Heinich, 2009; Heinich, 2011; Lipovetsky and Serroy, 2010, Macdonald, 2013; Rebelo and Brito, 2014; Worthing and Bond, 2008).

We perceive a so-called "triple extension of the concept", in other words, a typological, chronological and geographical extension of Cultural Heritage is demonstrative of its enlargement for fields that did not exist (Vecco, 2010; Graham et al., 2000).

Over the past decades, we witnessed a progressive typological expansion of heritage, where the consolidation of intangibility considerably widened the focus, but we also witnessed a progressive categorization of patrimonial materiality creating a complex Taxonomy of Cultural Heritage (Vecco, 2010: 323). It has gone from a concept defined in objective terms, for a progressive definition of the concept in subjective terms. This evolution is easily noticeable in the main conventions, recommendations and international charters, as well as, in national legislation. Incorporated in cultural heritage management are levels of importance and significance - global, national, regional, and local - but also values the heritage assets contain. These conceptual changes also made that the cultural

heritage was increasingly seen as a resource to local development, supported by a growing tourism demand and consequent “touristification” of patrimonial assets. A “touristification” due to political and economic demands more than cultural ones. Today, places look forward to assert themselves by strengthening the differentiation factors, through the inimitable (Gonçalves, 2008: 12).

As mentioned by Orbasli (2000: 159) the Leisure and Cultural Tourism industries "are attracted to historic towns as a destination; and historical town authorities look to tourism as a new, clean and profitable industry". Add to this the competition between territories refocus the cultural heritage as a distinguishing factor. The globalization process and symbolic competition, as defined by Richards and Wilson (2006: 1221), "seem to be leading to increasing serial reproduction of cultural attractions and 'commodification' of the cultural tourist product".

Therefore, it will be important to verify to what extent it is possible to incorporate the importance of the values expressed by cultural heritage, in the view of those who visit, in the management and design of the tourist product.

## **2. State of Knowledge and Methodology**

### **2.1. Cultural Heritage Values, Tourism and Marketing**

The Cultural Heritage is presently understood as having three types of functions: cultural, economic, and last, sociopolitical nature (Graham et al., 2000). The heritage, as a selection of the past for use in contemporaneity, has these features clearly distinct.

As mentioned by Macdonald (2013: 17) in the last decades the study of Cultural Heritage and the discussions around it, deviated from the conservation field to the political field, as well as to a phenomenology of Cultural Heritage. As we see, we have a wider concept of Cultural Heritage, as stated by Eriksen (2014: 14), where presentism rules, "allowing values of the present to invade and define the past not merely when it comes to selecting what is important, but also regarding the way this procedure is carried out". The patrimonial assets and historical centers are, as referred by Orbasli (2000: 159), "a set of values based on building stock, historic or other associations and life".

We must remember that the values of Cultural Heritage, are, by its very nature, diversified and often in conflict (De la Torre and Mason (2002: 5), and the study of all the values and their importance "is a useful way of understanding the contexts and socio-cultural aspects of heritage conservation", and the economic value is a value that increasingly affects the management and conservation of cultural heritage (De la Torre and Mason, 2002: 5) result of its ever-increasing “touristification” and commodification.

Any place may or may not contain all the values indicated in a particular typology, but it is likely to have a range of values. As Impey (2006:80) observes, “historic places do not have just one immutable value, but many overlapping values that reflect differing viewpoints”. The set of values that can represent cultural heritage and should be considered in its management is very diverse.

As stated by Worthing and Bond (2008:79) “the articulation of values into a typology is never going to be an ‘absolute’ definition of the cultural significance, but its usefulness as a framework which can be an organizational tool and a reference point”.

As we can see, several authors have different values typologies for Cultural Heritage (see Table 1) and on this basis, we build the survey by questionnaire in study, systematizing the values in thirteen values, corresponding with the systematization specified by literature review, with the aim of assessing how different actors on site assess the importance of each value.

Table 1 - Example of Cultural Heritage Value Typologies

| Mason (2002:10)   | Feilden (2003:6)   | Impey (2006:80)  | Throsby (2006:43)   |
|---|--|--|---|
| <b>- Sociocultural values</b><br>Historical<br>Cultural/Symbolic<br>Social<br>Spiritual/Religious<br>Aesthetic<br><b>- Economic values</b><br>Use Market value<br>Non-use Value<br>(Existence; <b>Option;</b><br><b>Bequest</b> ) | <b>- Emotional values</b><br>Wonder<br>Identity;<br>Continuity<br>Spiritual<br>Symbolic.<br><b>- Cultural values</b><br>Documentary<br>Historic<br>Archaeological<br>Age and Scarcity<br>Aesthetic and Symbolic<br>Architectural<br>Townscape, Landscape<br>and Ecological<br>Technological and<br>Scientific<br><b>- Use values</b><br>Functional<br>Economic<br>Social<br>Educational<br>Political and Ethnic. | <b>- Consequential or Instrumental</b><br>Educational<br>Recreational<br>Economic<br>Social<br><b>- Primary or Intrinsic</b><br>Evidential<br>Historical<br>Aesthetic<br>Community<br><b>- Institutional or Behavioral</b><br>Communicating<br>Listening<br>Hearing<br>Mediating | <b>- Esthetic</b><br>Beauty<br>Harmony<br><b>- Spiritual</b><br>Understanding<br>Enlightenment<br>Insight<br><b>- Social</b><br>Connection to<br>others<br>Sense of identity<br><b>- Historical</b><br>Connection with<br>past<br><b>- Symbolic</b><br>Repositories<br>Conveyors of<br>Meaning<br><b>- Authenticity</b><br>Integrity<br>Uniqueness. |

More than matching a specific typology, the most important of this study is to list a set of values that expresses the possible valuations of the different stakeholders, since only if cultural values and their interrelationships can be identified and fully comprehended, as defended by Worthing and Bond (2008: 3), "will it be possible to take this knowledge and use it to assist in taking management decisions, but also in the definition of Cultural Heritage policies".

Preserving, as mentioned by Eriksen (2014: 149), that what is considered Heritage is "not a completely arbitrary choice but it is, however, a choice made due to an enhancement in the present".

The reality is that the existence of an economy of Heritage is commonly accepted, and regarding its management, it is defended that dealing with cultural heritage as an economic resource, as stated Bouchenak (2014: 7) "has no common point with the running of an ordinary business". The author adds that handling resources that deal with identities, unique identities, is not similar to managing goods and services (Bouchenak 2014).

Given this feature, it is important to understand what the different publics that consume cultural heritage appreciate, in its dual valence, on one hand, optimizing the management and safeguarding of cultural heritage, cultural valence, but also as a support to the definition of tourist product, economic valence.

As an economic resource, Cultural Heritage will always be connected with the concept of tourist attraction. MacCannell (1999: 41) defines "tourist attraction as an empirical relation between the visitor, something that can be seen and the information about what can be seen". The Cultural Heritage

is established as the added value of the territories when it comes to offering to visitors something to be seen.

Regarding the tourist product management, however, some questions arise, because, as stated Boullon (1991: 38), from the economic point of view, the tourism offer “cannot be classified as anything other than a good or a service, however the tourism product consists of the same goods and services that are part of the offer”.

As mentioned by Moreira (2013: 492) a tourist product, is not only about the goods, that is, objects with physical existence or even services, “since the product is constituted by places, people, organizations, ideas”. This conception of the tourist product adds to it a feature increasingly considered, the experience. When you add this feature, as referred by Boullon (1991:38), the tourism product changes and can be characterized as “an *abstract product*”. In addition, we have to take into consideration what we call Cultural Heritage Tourism because scholarly debate with regard to the nature of heritage tourism still persists, suggesting that heritage is an amorphous concept and a complex phenomenon (Chhabra, 2009: 1), as we can see in the course of this article.

Thus, Cultural Heritage is evaluated and validated, not per se, but as a tourist product and framed in a concept that is an amalgam of many components or a package (Middleton et al. 2009). Given this, it is important, as written by Kotler et al. (2007), that tourism management is aware in designing marketing strategies that take notice of image, the attractions, infrastructure and the people of a certain place. The authors add (Kotler et al, 2007: 76) that the management strategy “should consider all those factors, because one may not be enough to improve the fundamental attractiveness of a place, stressing the need to invest in specific attractions”. In the first place, spaces with historic heritage as part of its tourist product, have a remarkable competitive advantage, in the inter-territorial competitiveness as we have seen. If we add to this the distinctive character, then, as mentioned by Boniface (2003: 58), the cultural item has a strong 'head start' in a competitive market.

To this you can add the search for new experiences. Cultural heritage, as a tourist product, is nowadays understood more as an experience, and this, as stated Moreira (2013: 492) “is unique among other products, it has a tangible and intangible dimension, the latter being extremely important”. Moreira (2013: 492) adds that “the quality of the tourism experiences depends mostly on the services”. It happens that when one of the components of the tourism offer fails that compromises the rest.

Thus, promoting a tourist product in a place is a challenge, as several actors are called for action, from public and private sectors, which can influence the performance and the image of a place, as stated Ocke and Ikeda (2014), but also because identity and values are such crucial matters. Chhabra (2009) refers to this purpose that extant literature has established that consumers in heritage tourism seek a symbiotic relationship with the heritage visited; and emotions are the most popular touchstone of this symbiosis. As the world is increasingly commoditized, it is important to “differentiate the offers, beyond simply making products and delivering services, today we should be able to create and manage customer *experiences*” (Kotler and Armstrong, 2015:257).

It is also important to note that the innovative marketing strategies, more than selling a product or service through a value proposition, intended to create involvement. The innovative marketing – “customer engagement marketing”, as it is called (Kotler and Armstrong, 2015: 42) aims to promote direct and continuous customer engagement, in shaping the conversations about a brand, in the brand experiences and brand community. Supporting itself in management and branding, the tourist product

expands beyond the classical definitions, and the brand intangibility now settles in management. The same opinion is shared by Ocke and Ikeda (2014) when referring to the management of a place brand, has stated that it involves a variety of people, and has a high level of intangibility and complexity, to the extent that they deal with multiple identities.

The spread of *touristification* processes of the city and culture, led to the evolution of tourism and urban planning approaches, with concerns about “the qualification of the space/heritage, the qualification of the residents’ *modus vivendi*, and the qualification of tourism offer” (Henriques, 2003: 13). However, apprehensions derived from *touristification* rarely consider the importance that visitors give to the values that heritage assets represent to them.

As mentioned by Gomes (2012: 38) “the images of the cities are being reinvented, releasing or (re)inventing for the local touristic universe, new attraction elements”. These attraction elements are characterized by the phenomena of “mining” heritage (Richards and Wilson, 2006: 1211) more than the exploitation of what, regardless of the segment and targeting, the tourist appreciate or enjoys most. These “mining” phenomena impose heritage assets to tourists, and show the struggle that the territories have in the search for elements of differentiation, promoting heritage elements with residual patrimonial value, or with lack of uniqueness and exemplary, not to mention authenticity (Ferreira and Fernandes, 2012).

Note that the tourist product definition must consider, as defined Misiura (2006), three unassailable dimensions: on the one hand the *physical* or what is given to see, the *functional*, by providing an experience, as well as the *symbolic*, the product should be representative of something. This definition holds in itself an identity and identification dimension.

The tourist product, in its conception, as pointed by Misiura (2006), must take into consideration features and components of at least three levels, the *core* level, i.e. what the consumer expects in tangible and intangible terms, the *current* level, that is the “value added” by the existing services at the visit site, and finally the *augmented*, characterized by the existence of accommodation, food and transportation, but also facilities and services, or even feelings of belonging to a brand triggered by the process of living the tourism product in question.

The aim of this article is not the design of the offered tourism product, in terms of features and levels, is however, pertinent to note that the key to success in the development of heritage products depends on the ability to match the product or service being offered with the benefits sought by the customer (Misiura, 2006). Misiura adds (2006) that by tangible we understand the consumption of the product itself, but it is also important to consider the expected intangible benefits, such as the status quo, the “feel good” benefits, this may stand up during the research process, during or after the tourism product consumption.

In the design of the tourism product in the city of Coimbra, it is still important to draw our attention into the World Heritage classification of part of its urban areas. With this in mind, we know that the city may have an added value, as far as, mentioned by Middleton et al. (2009: 460), “being endorsed with the UNESCO logo that represents not only a mark of ‘quality’ to visitors but also helps to bring the attraction to the attention of a far bigger, and more often than not, less specialized market”. Despite a less specialized market, it is important to know what are the attributes and values of the Cultural Heritage that this market stresses.



## 2.2 Methodology

The research data result from a survey by questionnaire conducted in the doctoral project on "Policies, Interventions and Representation of Cultural Heritage in university towns: the case of Heidelberg (Germany) and Coimbra (Portugal)". Data were collected in these two European cities.

This article is based on bilingual surveys by questionnaires (German or English or French or Spanish and Portuguese) distributed among the tourists and one-day-visitors in the city of Coimbra. This research was conducted between April and August 2014. The sample size definition was made in order to ensure a level of confidence of 95% and 0.05 margin of error, for a universe of 5 million tourists in the German context (Krejcie and Morgan, 1970; Kenny, 1986). The number of responders was set at 384, and the calculation result of the following formula (Krejcie and Morgan, 1970)<sup>1</sup>:

$$Size = \frac{x^2NP(1 - P)}{d^2(N - 1) + X^2P(1 - P)}$$
$$Size = \frac{3,841 * 5000000 * 0,50 * (1 - 0,5)}{0,0025 * (5000000 - 1) + 3,841 * 0,5(1 - 0,5)}$$

In the local context, we encoded and validated by 420 surveys by questionnaire, in order to meet the answers such Do Not Know/No Answer. The survey by questionnaire was based on literature review, meeting what the theoretical corpus points as the key issues in the fields of cultural heritage, and in this article, we only explore the answers to sociodemographic questions and those regarding the importance given to each cultural heritage value, as well as the possibility of grouping the same facing the latent factors.

The relevance and originality of the study goes through the analysis and thought of the importance attached to cultural heritage values and how they can be added in areas of action in the construction of the tourist product of the city. Only with the knowledge of the importance of the evaluative expressions and latent factors will it be possible to understand the dynamics underlying the broad concept of cultural heritage, and, to know the clear concerns of the consciousness of those who experience it, in this case tourists.

### 3. Results analysis and discussion - Values of Cultural Heritage

In this study, the sample consists of 44.29% of male respondents and 55.71% of female respondents. Concerning the age distribution, we found that the most represented age group among the respondents is 25-34 y/o with 24.29%, followed by the groups 45-54 y/o and 55-64 y/o each representing 16,90 % of respondents. The age groups least represented are the respondents aged 75 y/o with 3.81% and the respondents under or equal to 14 years old, with only 0.48%.

Regarding the level of education, we verified that percentage of respondents holding a Bachelor Degree are 30.71%, followed by those with a Master - 27.86%. We also should mention 15.71% of respondents with secondary school and 12.86% with a Ph.D.

The most represented professional activity is the Independent Professional with 22.14%, followed by Specialized Technician with 15.71% and Student with 11.90%. In the group of respondents, we also

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<sup>1</sup> Being  $\chi^2$  = The value of chi-square table for 1 degree of freedom to the desired confidence level ( $1.96 \times 1.96 = 3.841$ ); N = population size; P = The proportion of the population (assumed to be 0.50 since this would provide the maximum sample size); d = The accuracy score expressed as a ratio (0.05).

have 21.67% of respondents that pointed “Other” professional activity, as well as 12.38% that answered that they are Directors or Managers.

With respect to origin, we observed that tourists and one-day-visitors are mainly from Western and Southern Europe subcontinents, with 30.95% of respondents each, followed by tourists/visitors from South America with 16.19% and tourists/visitors from North America that reach 9.76%.

Regarding the visit to the city of Coimbra, we verified that 41.19% of the respondents make it as part of a tour, 36.90% as an Intermediate Stop on the journey. Of all the respondents, only 17.14% have Coimbra as Primary Destination.

Further, we intended to verify the level of importance and check which latent factors in the set of values listed in the survey by questionnaire. The answer to this question is essential because, as stated Lowenthal (2002: 24), even though the past is a topic of importance and universal concern, there is little research that explicitly focus on how people, in general, appreciates or understands it.

The question around the values that Cultural Heritage reflects is recurring and as mentioned by Worthing and Bond (2008: 59) over the last few years the discussion the range of cultural, social and economic values embodied in and represented by the built cultural heritage and the means by which these can be identified and evaluated is a central question in the cultural heritage studies field.

Regarding the values of heritage, as emphasized by Worthing and Bond (2008: 59) “it is necessary to have a more definite reference point for measuring, articulating and justifying the case for suggesting that a particular place is important and should be protected”. The authors added (Worthing and Bond 2008: 53) that the understanding of the values and the ability to “articulate what those values are and what aspects of the place embody and represent them”, is essential for a management directed by values and meanings of heritage assets. Therefore, it is important to know not only the values expressed by a certain heritage asset, but also the importance that the different values have in the minds of the visitors. Only through this knowledge it is possible to carry out an efficient management of the heritage assets, considering both the relevant values of the good, but also the importance given to each of the values by the several stakeholders. The premise is that you can only manage and protect, by valuing at the same time the heritage assets, as stated Worthing and Bond (2008), identifying what they have that is significant and how this significance is reflected in the whole place.

In order to determine the degree of importance attributed by visitors to a set of values, they were asked about a set of thirteen values (Value Pedagogical, Value Beauty, Value Historical, Value Economic, Value Community, Value Inheritance/Legacy, Value Touristic, Value Memory, Value Identity, Value Peace Promotion, Value Artistic, Value Cultural Diversity, Value Uses/Customs), having been requested to assess each value, on a degree of importance scale, data that were collected in response to the question:

- For you, what values represent Cultural Heritage? (classify being 1-Not important and 5 Extremely Important)?

Before proceeding with the analysis, it will be important to keep in mind, as regards Hofstede (1993: 23), that people in practice do not always act as answered in the survey, and, however, the research provides valuable information about the groups and categories under examination. Also, the awareness that, in interpreting the expressions of values, it is important to remember that it is important to differentiate between what respondents think of the ideal world and what they think for themselves (Hofstede 1993: 24).

In a first analysis, as can see (Table 2) the degree of importance given to the different concepts listed differs considerably. The Value Historical, with  $M = 4.74$  and  $SD = 0.490$ , is the value presenting the higher degree of importance to the respondents, approaching the upper end of the scale as Extremely Important. Following, the Value Identity with  $M = 4.58$  and  $SD = 0.596$ , and Memory with  $M = 4.50$  and  $SD = 0.689$ , considered as those with a higher degree of importance.

Table 2 - Statistics Importance of Values of Cultural Heritage: Mean and Standard Deviation

|                          | N     |         | Mean | Std. Deviation |
|--------------------------|-------|---------|------|----------------|
|                          | Valid | Missing |      |                |
| Value Historical         | 418   | 2       | 4,74 | ,490           |
| Value Identity           | 412   | 8       | 4,58 | ,596           |
| Value Memory             | 411   | 9       | 4,50 | ,689           |
| Value Beauty             | 415   | 5       | 4,28 | ,789           |
| Value Inheritance/Legacy | 410   | 10      | 4,28 | ,788           |
| Value Artistic           | 417   | 3       | 4,27 | ,793           |
| Value Pedagogical        | 410   | 10      | 4,23 | ,810           |
| Value Cultural Diversity | 412   | 8       | 4,18 | ,814           |
| Value Uses/Customs       | 411   | 9       | 4,11 | ,845           |
| Value Touristic          | 414   | 6       | 4,09 | ,899           |
| Value Community          | 398   | 22      | 3,85 | ,843           |
| Value Economic           | 412   | 8       | 3,69 | ,879           |
| Value Peace Promotion    | 400   | 20      | 3,67 | ,994           |

Regarding the values to which respondents associate a lower degree of importance, we found that they are the Value Peace Promotion, with  $M = 3.67$  and  $SD = 0.994$ , the Value Economic with  $M = 3.69$  and  $SD = 0.879$ , and the Value Community with  $M = 3.85$  e  $SD = .843$ .

We can see that although the Value Community is closely related to the Value History and the Values Beauty and Artistic, as claimed by English Heritage (2007: 31), “respondents do not confer the same degree of importance”. Note the fact that, although the Value Community arise from the meanings that a place or heritage asset have to the people who relate to it, or for which he is part of the collective experience, this association is not performed by the respondents to the extent that they attribute less importance to it than to the Value Memory. This fact is possibly justified because we face a sample of tourists and one-day-visitors, who did not make with the place visited some kind of association they have with it, or with events that occurred there (Worthing and Bond, 2008).

The analysis given to each cultural heritage value, as we can see, brings into question the dual view, contrary to our sample, the view of Graham, Ashworth and Tunbridge (2000), for whom Cultural Heritage is seen as an economic capital resource and simultaneously as cultural capital. The importance revealed by the respondents with respect to the Value Touristic, with  $M = 4:09$  and  $SD = 0.899$ , and the Value Economic with  $M = 3.69$  and  $SD = 0.879$ , is proof of that. We can conclude that the primacy of importance is refocus in the sample, in the subset of cultural values of Heritage.

We could be facing here a devaluation of the evaluation of these items as a way to combat or belittle the cultural heritage path to commercialization, and as pointed by Carvalho (2003), can lead to a hypothetical subtraction of the cultural asset from its sociocultural context.

A greater recognition of the importance of the Values Economic and Touristic, may be associated with the idea of Cultural Heritage transformed into a consumer product and that this product, result of its commercialization, will only be accessible via the new uses or new functions, and ultimately, accessible

only to the sectors of the population with greater resources (Ferreira and Santos, 2016). It will be pertinent to recall that, as referred by Hofstede (1993: 242), “the effects of mass tourism on the economy of the hosted country, may be low or even be negative”. We could say that tourism, for its versatility, is a mixed blessing for local communities, as economic resources are not kept by the communities, but the burden of these visits are (Hofstede, 1993). Thus, the empirical knowledge of this mixed blessing may be a constraint in the way the importance of the economic and the touristic values is assessed.

To verify if the educational level of the respondents took to different positions in the evaluation of importance of each of the values in study, we made One-Way ANOVA test, however, it was not possible to identify statistically significant differences, except for three values of the values on the test.

Thus, there are significant differences regarding the effect that the variable educational attainment has on the importance of Value Uses/Customs, at the significance level of 0.05, on eight conditions [ $F(7,403) = 2.92, p = .005, \eta^2 = 0.048$ ]. It was also possible to identify statistically significant differences in the effect that the variable educational attainment has on the importance of the Value Community, at the significance level of 0.05, on eight conditions [ $F(7,390) = 2.07, p = .046, \eta^2 = 0.036$ ], as well as the level of the effect on the Value Identity [ $F(7,404) = 2.83, p = .007, \eta^2 = 0.047$ ].

In order to determine in each variable, in which education levels statistically significant differences are found, and assumed the homogeneity of variances of the variable Value Uses/Customs,  $F(7,403) = 1.737, p = .099$ , we verified through the post hoc comparisons, by using the Bonferroni Test, that there are statistically significant differences in the degree of importance assigned by the respondents with a Degree and respondents with a Master ( $p = .029$ ). Among the other educational qualifications, we did not detect statistically significant differences ( $p > .05$ ).

With regard to the variable Value Community,  $F(7,390) = 2.190, p = .034$ , given the violation of homogeneity of variances, we held the post hoc comparisons using the Games-Howell test. Here we find that there are only statistically significant differences regarding the degree of importance given to the Value Community between the respondents with a Bachelor Degree and those with Primary School ( $p = .025$ ).

Based on the presented data, we can thus say that the educational attainment of the respondents, with the exception of the analyzed cases, do not change the way they are positioned with respect to the importance of the values of cultural heritage under study. The hypothesis that to a higher educational qualification could match a minor or higher valuation of each of the variables under study, cannot be confirm. Noted that it was possible to identify, using Pearson's test, a positive correlation, though weak, between the educational attainment and the importance given to Value Identity,  $r(412) = .13, p = .008$ , as well as between educational attainment and the Value Beauty,  $r(415) = .098, p = .047$ .

In order to test the hypothesis if there are significant differences between how gender ranks the importance of different values in the study conducted, we made an Independent T Test, and we could see that only some of the values in study differ significantly when we identified the degrees of importance assigned by female or male respondents.

The Independent-samples T-Test indicated that scores were significantly higher in respect:

- to the Value Economic for female ( $M = 3.83, SD = .842$ ) than for male ( $M = 3.52, SD = .898$ ),  $t(410) = -3.573, p < .001, d = 0.36$ .

- to the Value Community for female ( $M = 3.97, SD = .812$ ) than for male ( $M = 3.70, SD = .859$ ),  $t(366) = -3.239, p = .001, d = 0.32$ . Levene's test indicated unequal variances ( $F = 4.69, p = .031$ ), so degrees of freedom were adjusted from 396 to 366.
- to the Value Cultural Diversity for female ( $M = 4.29, SD = .752$ ) than for male ( $M = 4.04, SD = .867$ ),  $t(410) = -3.026, p = .003, d = 0.31$ .
- to the Value Peace Promotion for female ( $M = 3.77, SD = .946$ ) than for male ( $M = 3.54, SD = 1.041$ ),  $t(398) = -2.335, p = .020, d = 0.23$ .
- to the Value Inheritance/Legacy for female ( $M = 4.37, SD = .746$ ) than for male ( $M = 4.16, SD = .824$ ),  $t(408) = -2.752, p = .006, d = 0.27$ .
- to the Value Uses/Customs for female ( $M = 4.27, SD = .764$ ) than for male ( $M = 3.91, SD = .899$ ),  $t(409) = -4.481, p < .001, d = 0.43$ .
- to the Value Pedagogical for female ( $M = 4.37, SD = .747$ ) than for male ( $M = 4.06, SD = .855$ ),  $t(408) = -3.935, p < .001, d = 0.38$ .

As we can see, in seven of the thirteen values in study, female respondents consistently give a higher importance to the same value as male respondents.

To explore the data and verify if the importance given to certain values of cultural heritage is conditioned by the respondents' origin, we grouped in the variable Continent the respondents from Africa and Oceania, to provide a minimum set of cases, to enable the analysis. Regarding the assessment of the importance of the values of Cultural Heritage, we can also see that there are statistically significant differences among the way visitors of the American continent and visitors from the European continent value it.

By making an One-Way ANOVA test, and for convenience of the present study, only the variables Value Touristic and Value Economic were considered, it was possible to verify that there are statistically significant differences in the effect that the Continent of Origin has, in the grouped variable, in the Value Touristic, at a significance level of 0.05, in four conditions [ $F(3,410) = 7.86, p < .001, \eta^2 = 0.054$ ], as well as the effect that the Continent of Origin has, in the grouped variable, in the Value Economic, at a significance level of 0.05, in four conditions [ $F(3,408) = 5.77, p = .001, \eta^2 = 0.041$ ].

In order to verify, in each variable, in which Continent of Origin we can see statistically significant differences due to the violation of homogeneity of variances, of the variable Value Touristic,  $F(3,410) = 2.745, p = .043$ , we made comparisons using Games-Howell Post Hoc test. We could see that there are statistically significant differences regarding the degree of importance given to the Value Touristic among respondents from Europe and America ( $p = .003$ ), among respondents from America and Asia ( $p = .023$ ) and between respondents from America and Oceania & Africa ( $p = .026$ ). On the other hand, we could not verify statistically significant differences with respect to the assessment of the importance of the Value Touristic, among respondents from Europe and Asia ( $p = .231$ ), respondents from Europe and Oceania & Africa ( $p = .208$ ) and also respondents from Oceania & Africa and Asia ( $p = .996$ ).

Given the analyzed data, we can state that Coimbra's visitors coming from the American continent position themselves differently regarding the importance given to the Values Touristic and Identity. In the design of the tourist offer, it would be relevant to identify the differences regarding other values in study, in order to adapt the offer to the issuer market, particularly to the socio-demographic characteristics of the visitors. For convenience reasons, and because the present study is only an

exploratory study, we go no further in the analysis, and we selected only two values and the importance attached to these values, regarding the geographical origin of visitors.

Although the investigation of cultural differences, based on the origin or nationality, as referred Hofstede (1993: 27), should be carried out carefully, it should be noted that the investigations on the development of cultural values have repeatedly shown that there is no evidence that, with cultural contacts over time, these values have been approximated (Hofstede, 1993: 268).

With regard to the factor analysis, it is intended to find an answer to the question: how many latent factors are likely to exist in the set of original variables and the importance the values of Cultural Heritage represent for the respondents.

The relevance of the response to the research subject is also important for the valuation of the past (Eriksen, 2014), and consequently of cultural heritage, is a process of the present. Eirksen adds (2014), that the valuation is shaped by values and problems of the present, thus deeply marked by what is determined by the present context. Through factorial analysis, we can discover, or identify, which latent factors influence how respondents are positioned regarding the values of cultural heritage.

Literature review, as we have seen, suggests that Cultural Heritage has a diverse set of values, as we have seen. In the absence of a consensual selection of values, we aimed, based on a factor analysis, to understand and verify which latent dimensions could be found in the set of values in question and make a reduction.

As stated Field (2009: 650), if we are to generalize the results of the factor analysis to the universe, we needed to test the normal distribution of the original variables and we concluded that it is not possible to assume the normality of variables, and so to generalize the results.

To do a factor Analysis, initially, the factorability of the 13 Cultural Heritage Values was examined. The correlation matrix was used to have every variable in units of standard deviation. Several well recognized criteria for the factorability of a correlation were used. Firstly, it was observed that 13 of the 13 items correlated at least .3 with at least one other item, suggesting reasonable factorability (see Appendix A - Table 1).

Secondly, the Kaiser-Meyer-Olkin measure of sampling adequacy was .863, above the commonly recommended value of .6. We have to keep in mind that Hutcheson and Sofroniou (1999, cited by Field, 2009: 647; Marôco, 2011: 477) show us that Kaiser-Meyer-Olk results with rates between 0.8 and 0.9 are very good and rates above 0.9 are excellent.

Thirdly, the Bartlett's test of sphericity was significant ( $\chi^2(78) = 1560.494$ ,  $p < .001$ ). The diagonals of the anti-image correlation matrix were also all over .5. And finally, the communalities were all above .3 in the three factor solution (see Table 1) or in the five factor solution (see Table 2), further confirming that each item shared some common variance with other items in both solutions. Given these overall indicators, factor analysis was deemed to be suitable with all 13 items.

Because we wanted to do an Exploratory Factor Analysis, principal components analysis with rotations of the data was used because the primary purpose was to identify and compute composite scores for the factors underlying the thirteen variables of values for the Cultural Heritage that were used in the questionnaires.

The Initial Eigenvalues indicated that the first three factors explained 36,9%, 12,5%, and 7,7% of the variance respectively. As Field stated (2009:640) Eigenvalues over 1 represent a substantial amount of

variance explained by a factor. However, Jolliffe (1972, 1986 cited by Field, 2009: 640) noted that the Kaiser criteria is very restrictive and presents the possibility of retaining factors with Eigenvalue superior to .70.

Therefore, we could consider the retention factor 4 with .956, explaining 7.4% variance, and factor 5 with .837, explaining 6.4% variance. These two factors explain 13.8% of the variance, with, however, Eigenvalues lower to 1, despite higher than .70.

Solutions for three, four and five factors were each examined using Quartimax rotation of the factor loading matrix. As we are in an exploratory factor analysis we will proceed with three and five factor solution. Analyzing each on, a separate basis, in accordance to theoretical support.

The three factor solution, which explained 57,1% of the variance, can be considered preferred because of: (a) the previous theoretical review; (b) the “leveling off” of Eigenvalues on the scree plot after three factors.

The five factor solution, which explained 70,9% of the variance, can be considered preferred because of: (a) the previous theoretical review and because it is not so restrictive in terms of the dimensions expressed by those factors; (b) also because the definitive “leveling off” of Eigenvalues, on the scree plot after five factors considering, here that we accept Eigenvalues above 0.7, as stated by Jolliffe (1972, 1986 cited by Field, 2009:640) and that the fourth and fifth factors extract at least 5% of the total variance (Marôco, 2011:483); and (c) the insufficient number of primary loadings and difficulty of interpreting the subsequent factors.

In the analysis, we didn't eliminate any item because all of them contribute to a simple factor structure and meet the minimum criteria of having a primary factor loading of .4 or above, or they meet the criteria of having a cross-loading of .3 or above in the three factors solution. In the five factors solution, all items had primary loadings over .5. Three items had a cross-loading above .3 (Value Touristic; Value Artistic; Value Pedagogical), however these items had a strong primary loading namely .74, .65, and .70. respectively. The factor loading matrix for the solution with three factors is presented in Appendix A - Table 2. The factor loading matrix for the solution with five factors is presented in Appendix A - Table 3.

For the final stage, principal components factor analysis was done using the 13 items, using Quartimax rotation, was conducted, with the solution with three factors explaining 57,1% of the variance, and the solution with five factors explaining 70,9% of the variance.

The name of the factors, by us proposed, was given underlying variables that they represent, and thereof latent dimension. In the three factors solution, it was possible to identify a Factor 1 that in our view is the latent *Collectivity* dimension on Cultural Heritage, presenting high values in a wide range of variables under study. It was also possible to identify a Factor 2, representing the *Emotional* dimension and a third factor which represents the *Product* dimension.

In the solution with five factors, it is possible to verify a latent *Collectivity* dimension on Factor 1, whereby Factor 2, similarly to the solution with three factors, refers to the *Emotional* dimension. Concerning Factor 3, this seems to show a *Use* dimension. Factor 4 refers to *Aesthetics* dimension of Cultural Heritage, and Factor 5 to a dimension of Cultural Heritage as a *Product* or merchandise.

The Internal consistency for each of the scales, on the three factors solutions, was examined using Cronbach's alpha (see Table 3). The alphas were moderate: .69 for *Product* (4 items), .74 for *Emotional*

(3 items), but the number of items is small, and good .82 for *Collectivity* (6 items). The skewness and kurtosis were well within a tolerable range for assuming a normal distribution, except for Factor *Emotional* with a Kurtosis > 2.

The Internal consistency for each of the scales, on the five factors solutions, was examined using Cronbach's alpha (see Table 4). The alphas were moderate: .60 for *Product* (2 items), .65 for *Aesthetics* (2 items), .74 for *Use* (3 items), .74 for *Emotional* (3 items), and .77 for *Collectivity* (3 items), but the number of items is small. The skewness and kurtosis were well within a tolerable range for assuming a normal distribution, except for Factor *Emotional* with a Kurtosis > 2.

No substantial increases in alpha for any of the scales and solutions could have been achieved by eliminating more items. Composite scores were created for each of the three factors, based on the mean of the items which had their primary loadings on each factor.

Based on a factorial analysis with three factors (see Appendix A - Table 4) we can see that the *Emotional* factor is one that has a higher value among respondents, sustained by a higher negative Skewness. The same is true in the *Collectivity* and *Product* factors, however, its negative Skewness is lower. Note that, for the respondents, the *Product* dimension of Cultural Heritage is the less important.

In what concerns the factorial analysis with five factors (see Appendix A - Table 5), we found that the factor to which respondents give more importance remains the *Emotional*, followed closely by the *Aesthetic* and *Use* factors. The skewness remains negative in all factors, it is worth noting that the *Collectivity* and the *Product* factors constitute themselves as the less valued dimensions of Cultural Heritage.

#### **4. Final Considerations**

What is heritage tourism? As stated by Halewood and Hannam (2001:566) what should be a simple question is indeed a difficult one to answer because so many definitions of heritage tourism adorn the academic radar. The authors point out that "Heritage Tourism includes museums, landscapes, artifacts and activities that focus on representing different aspects of the past".

Adding to the thrift goods understood as cultural heritage, we have a range of activities, goods and services that represent the past and act as a tourism product. As we have seen, very few studies focused on the cultural heritage values, and even less on the importance that those values have in the minds of the visitors.

If the classification as World Heritage Site of part of the heritage assets of the city allowed, in a first instance, a renewed visibility, we considered also important to know the important axes that stand out from visitors point of view, in a touristic flow less and less specialized and more general, as noted.

Thus, concerning the tourism product definition, we believe that there are gaps on the communities that experience it, and the knowledge of what is important for tourists regarding cultural heritage, so that the targeting is more accurate. We observed, in the evaluation of the importance of the cultural heritage values, even though it is an exploratory study, that there are significant differences in how the origin of the visitors affects the perception and importance of a given value. We were able to verify that based on the typology of values presented to respondents, those considered most important were the Value Historic, Value Identity and Value Memory. On the opposite side, the least important values in the minds of respondents were the Value Peace Promotion, Value Economic and Value Community.



We can, immediately, notice a contradiction between the importance of the Economic value given to cultural heritage by the literature review and the importance given by the respondents. Further, the Community value has been sidelined, despite heritage being considered as an expression of a community. While Graham et al. (2000) envisage that Cultural Heritage is increasingly seen as a lever for the communities' progress, that gave rise and vivifies it, both Economic and Community values are considered, in this study, as those with less importance. Stand out, for their part, the Historic, Identity and Memory values, those values which may be the expression of a generic Emotional value (Feilden, 2003) or those who may be the essence of the construction of Heritage as means of representation (Graham et al., 2000).

So, the design of the tourism product in Coimbra should have in mind not the exploitation of values considered less important, and clearly focus on a concept where History, Identity and Memory were the central axis of the product. The commodification of cultural heritage should strategically be based on these differentiating values, promoting this product axis, at the expense of the axis in use. This can be characterized by the quick visits, where more than the existence reasons, the whys of existence and memories of the existence of cultural assets visited in the city, an imaginary is built based on the generalization and decontextualization of the visited assets.

Consider the image of a "Rua Larga" in Coimbra full of parked buses, and certainly the perception of the good, in this case the University of Coimbra, and its subsequent valorization, is due more to the influx of tourists than the values that this heritage good owns. The defined marketing strategy must be distinctive to continue to be able to attract tourists from a superior segment, to attract significant investment and development, to attract new residents, to maintain the atmosphere of the place, but above all to provide the experience that meets with what visitors consider relevant in a heritage asset.

In the tourism product conception, it is also important to have a differentiated offer depending on the tourists' origin. Though, this is an exploratory study, further investigations and analyses of all the values in question, will confirm the existence of this dual vision of the values of cultural heritage among visitors from the American continent and visitors from the other continents. We found that regarding the value Touristic and value Economic, these respondents are positioned differently in relation to other respondents. A worldview acculturated to the commodification and *touristification* of heritage assets could justify this predisposition.

Perhaps this dual vision can also be the result of the common global perception that the standardized historical forms produced for tourist will make communities "lose their sense of identity to the extent that they are manipulated into putting performances of themselves or their past for commercial ends" (Macdonald, 2013: 109), and consequently this valorization is fought.

The uniqueness of this dual vision lies in the need for 'de-market' actions as referred by Middleton et al. (2009), because the excess of visitors can influence the perception of heritage assets by visitors, reducing fulfilment with the experience, but above all, creating dissonance regarding what was expected and the importance given to cultural heritage values.

It was also interesting to see that the educational qualifications of the visitors turned out not to be breakthrough in the importance of cultural heritage values. Except in the analyzed cases, we can state that the respondents' educational qualifications and gender do not change the way they position themselves, regarding the importance of the cultural heritage values under study. As we could see, in seven of the thirteen values under study, we can only note that female respondents constantly give greater importance to the same value when compared to male respondents.

Several authors found problems concerning Coimbra's tourism offer. Ferreira and Silveira (2013: 391) stated "that the cultural assets and the cultural heritage of the University does not have a structured offer in the tourism market of Coimbra". On the one hand, there are few planning initiatives being taken by the University and by the other public institutions with responsibilities in the management of Coimbra's Cultural Heritage. For example, Santos (2013: 201) considers that "there are in the city countless of heritage elements, material and immaterial, which may be incorporated into Coimbra tourism product, such as the Student Parties ("Latada" and "Queima das Fitas") and the Processions of Queen Santa Isabel". The author says that this would allow an inclusive participation of the river and the evidence of the existence of a historical center that goes beyond the "Alta/Baixa" (upper/downtown areas of the city). The incorporation of these heritage assets would meet the values that are more important to visitors, contextualizing the visit in historical terms of identity, but also the memories of the city. Other authors, such as Fortuna and Gomes (2013: 264) claim that "the focus should go through the diversification of tourist routes within the city in order to raise the quality and quantity of the tourism offer, but also that the tourism offer of the city would only make sense based on a developed and refined regional tourism policy, to establish relations between the existing offer in Coimbra and the surrounding Center Region".

Why the recommendations of these authors are not followed? As says Gomes (2012) is it the need to hide the city that is not seen as sufficiently attractive to be commodified, to hide alternative versions of history and culture of the city, invisible elements, disregarded as prohibited or forget. Is it possible that there isn't a sense of tourism product design and offer, or simply the idea of the UNESCO logo is the salvation of the city? Or in addition will the future of the tourism offer go through what is referred to as a common strategy to highlight the attractiveness of a place (Kotler et al., 2007), as is the construction of gigantic exhibition and convention centers.

Regardless of the strategy used in the tourism product design, and based on the factorial analysis, we can identify three to five latent factors that bring together a series of cultural heritage values, consistent with those disclosed in several typologies and with internal consistency, capable of sustaining decisions regarding the tourism product design based with heritage assets. A development axis based on Emotional, Historic, Identity and Memory values, allowing that the tourism offer to be an expression of these singularities, combined with the safeguarding of the Aesthetics, a factor that expresses the Beauty and Art of the goods, not forgetting the importance of Use, a factor that expresses the Legacy, Uses and Customs values, as well as Pedagogical values. In a typology of cultural heritage values that is not reductive, as it turns out to be the solution verified with three factors, and as such using the solution the five factors, we realize that among these, Emotional, Use and Aesthetic, constitute themselves as the three structural factors in the definition a cultural heritage tourism product that considers the valuations and importance, as such, in the broadest sense, the needs of those who visit it.



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# **Between sacred and profane. New tourism, destination management and other challenges in the Serbian medieval monasteries that are World Heritage Sites**

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## **Abstract**

Magnificent medieval monasteries in Studenica, Sopoćani, Stari Ras and Dečani in South-West Serbia are both the World Heritage Sites protected by UNESCO and pilgrimage centers of the Serbian Orthodox Church. Although under watchful supervision of monument protection institutions, they are governed by church administration and they function like hundreds of years ago when founded by the Serbian rulers of the Nemanjić dynasty (1168-1371). That particular fact problematizes their indubitable potentials in tourism since the monastic life, according to the Orthodox tradition, implies a high degree of hermeticity, asceticism and seclusion that hamper communication with tourists that is important for the promotion and presentation of both tangible and intangible cultural heritage. Bearing in mind that these monuments are the backbone of the Serbian tourist offer, different interests of the Church on one hand and of the organizers of tourism and related programs on the other are in direct collision, especially when it comes to heritage, gastronomy and creative tourism that involves authentic monastic cuisine and the culture of dining, as well as highly respected icon painting schools that the Serbian Orthodox monks and nuns are renowned for. Such conflict of interest results in inactivity that affects a number of stakeholders, primarily small, poor local communities in the rural regions of Serbia where those monasteries are situated. This paper deals with new tourism as a platform for the management of destinations in highly sensitive environment that includes stakeholders in the conflict of interest.

## **Key words**

world heritage sites; new tourism; destination management; communication; sustainability.

## **1. Introduction**

When the medieval complex of Stari Ras (Old Ras) and the Sopoćani monastery came under the protection of United Nations Educational, Scientific and Cultural Organization (UNESCO) as world heritage sites in the 1970s, the process of desacralization of church heritage in the territory of the former Yugoslavia had been going on for some time (Djukić and Djukić 2015: 721-723). Although the primary aim of the former state was international recognition of this complex as part of an extremely valuable museum-type monument heritage, the political climate that would radically change in the following decades restored the primary function of these structures as monastic centers. In order to fully understand the complexity of the process, we need to go back to the years immediately following World War II, when the history of Yugoslavia saw not only the period of peace, but the period of a new social system. The new, socialist society and the entire legislation that accompanied it, with a special consideration of the provisions of the Constitution adopted in the post-war years, commenced the separation of the state and the church, the nationalization of church property and systematic anti-religious propaganda culminating in the museification of many medieval monastic complexes (Djukić, 2016: 265-267). Thus, the representative churches, the pearls of medieval masonry and art, became cultural monuments deprived of their primary function as church centers, operating according to the rules of Orthodox Christian dogma and related religious daily rituals. At the time when it came under UNESCO protection in 1979, the Medieval Ras complex, an archeological site comprising the heart of the so called Nemanjić-dynasty Serbia, which also included the Church of the Holy Apostles Peter and Paul in Novi Pazar, and the nearby Đurđevi Stupovi (Tracts of Saint George) monastery – a nearby endowment of the Grand Prince of Serbia, Stefan Nemanja – this space primarily had the status of an

archeological and art “museum” (UNESCO, 1979). The same applies to the Sopoćani monastery, protected along with Old Ras in 1979, which thus became an integral part of the complex monument site situated in an authentic environment, since those sacral structures were almost entirely neglected at the time (Djukić, 2016:271-273). The restoration of the Sopoćani monastery community and major works on the restoration of an almost completely demolished and derelict church and dormitory of the Đurđevi Stupovi monastery in Ras were launched in the 1990s. The process of reconstruction of monastic centers in their functional, religious sense grew in intensity after the death of Josip Broz Tito, the Yugoslav marshal for life, in 1980, to reach its climax at the end of the 20th and in early 21st century, when the Serbian Orthodox Church managed to regain in a short time a considerable part of its property taken over by nationalization. Although without the status of the official state religion enjoyed in the Kingdom of Yugoslavia, the modern Serbian Orthodox Church established the authority it used to have prior to World War II in only twenty years or so.

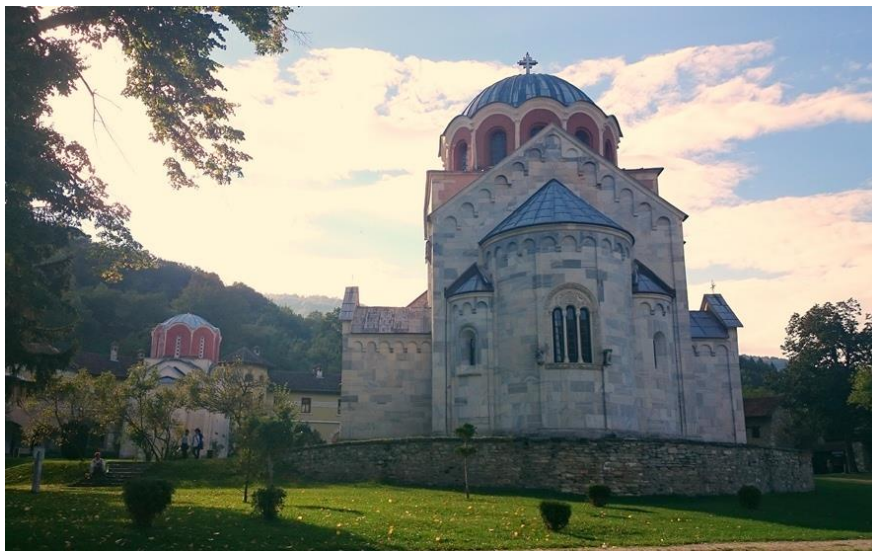


Figure 1 – Studenica Monastery was protected as UNESCO World heritage site in 1986.

*Photo Tamara Ognjević*

### 1.1. Church and National Identity

Just as the shaping of characteristic cultural identity of the socialist Yugoslavia had the most immediate effect on the treatment of church heritage within the context in which the entire religious heritage was to be desacralized, the breakup of the state in 1990s brought about the development of new values, or – more precisely – the collective tendency to reestablish the generally idealized “traditional national identity”. The backbone of this intricate search for national identity at the time of major political and economic crisis was, first of all, turning to orthodoxy as the ancestors’ religion (Ćirković, 2015: 448-450). The signs of inevitable changes were felt as soon as the 1980s, when the restoration of monastic centers began. That was the time when the mausoleum of the founder of the Serbian medieval state, Stefan Nemanja, in the Studenica monastery came under UNESCO protection in 1986. This large monastery complex dating from the late 12th century is one of the most important structures of the Serbian cultural heritage as a whole, having always been an attractive destination when the creation of products in cultural tourism is concerned.

Together with Dubrovnik in Croatia, Lake Bled in Slovenia, the Bay of Kotor in Montenegro and Lake Ohrid in Macedonia, Studenica Monastery (Figure 1) formed the backbone of cultural tourism in the socialist Yugoslavia. True enough, it was treated as an extraordinarily important architectural and

artistic monument of the so called Byzantine artistic circle, with the cult of Saint Stefan Nemanja, the founder of Serbian state and church, and his son Saint Sava, the first Serbian archbishop, being minimized.

In the context of its protection by UNESCO, the church heritage of Kosovo and Metohija became a topical issue in the spring of 2004, when Albanian separatists set fire to, tore down and desecrated a large number of Serbian Orthodox churches in Kosovo. At that time, Serbia managed to protect Dečani (2004), Gračanica, the Serbian Patriarchate of Peć and Our Lady of Ljeviš (2006) within the shortest possible time under a common denominator – medieval monuments in Kosovo (UNESCO,2006). In the same year when those structures were protected, they were marked as the heritage in danger – the status they still have today (UNESCO, 2006).



Figure 2 – Religious tourism practitioners in the Studenica Monastery

Photo Tamara Ognjević

It should be pointed out that Old Ras, Sopoćani and Studenica, just like the medieval monasteries in Kosovo, are protected as cultural heritage of great artistic and architectural value, and that, irrelevant of the fact that they have been inherited by the church as an independent institution, in all relevant UNESCO documents they are registered as state property run by a government institution – Republic Institute for the Protection of Cultural Monuments (UNESCO, 1979-2006). In the circumstances following the breakup of Yugoslavia, when the Church regained a considerable part of its former autonomy and institutional power, exactly the above fact became the subject of an ongoing conflict among the stakeholders – the monastic administrative bodies, on one side, with a need to renovate old churches and ancillary buildings, build additional facilities, and decorate them with new frescoes, icons and relevant pieces of furniture, and the protectors, on the other side, insisting on preserving the intact appearance of these complexes since each innovation would undermine their status as protected monuments. Therefore, there are many examples of works being undertaken by the administrators of old monasteries and churches on their own initiative, without consulting the protectors who can only reluctantly accept the completed works in the changed structure of the relations of power.

### 1.2. *Lack of Strategy*



Owing to the changes that took place in the late 20th and early 21st centuries, both locally and globally, the medieval monasteries under UNESCO protection in Serbia are becoming more and more vibrant monastic centers, and popular pilgrimage destinations as well, thus establishing a new type of tourism unfamiliar to the socialist Yugoslavia – the religious tourism (Figure 2). Even UNESCO experts noticed this remarkable change pointing to it as a significant novelty in the video records of the Studenica monastery made in the late 20th century (UNESCO, 2013). All these elements suggest the need of designing a strategy and providing the infrastructure required for the implementation of programs in cultural and religious tourism (Radisavljević-Čiparizović, 2013: 59-64). With this in mind, in addition to the existing motel nearby, a large dormitory primarily intended for pilgrims was built within the confines of Studenica monastery in the late 20th century. The dormitory includes a restaurant where meals are prepared in accordance with the orthodox dietary rules, so during fasting seasons meatless meals are served. Similar, although less successful, efforts to provide accommodation facilities have been made by the administrations of Sopoćani and Dečani monasteries.

Nevertheless, despite the phenomenon of religious metamorphosis during the crisis years of the civil war and NATO aggression, the specific lifestyle of monks and the lack of experience on the part of the Serbian Orthodox Church with respect to religious tourism, have not had a profound effect on the shaping of strategies in this branch of tourism (Strategija, 2016: 73-76), which would be as important for the popularization of the Serbian medieval monasteries under UNESCO protection as travel destinations, as it would be for the survival of small, rural communities in their immediate vicinity.

If we exclude the activities of “Dobročinstvo”, a church travel agency organizing pilgrimages, established in 1990, offering all of their package tours mainly to Orthodox Serbs (Dobročinstvo, 2016) the only one travel agency engaged in religious tourism in Serbia is “Dveri”, a travel agency founded by a political party of the same name, advocating Orthodox, patriarchal lifestyle and the so called traditional Serbian values (Dveri, 2017). As a counterpart to these agencies promoting a specific type of religious Orthodox tourism, there are typical travel agencies which, in the context of new tour programs in receptive tourism, quickly and easily give up the opportunity of creating authentic offers leaning on the models of the so called new tourism, comprising gastronomy and wine tourism with the elements of creative tourism i.e. workshops based on local particularities.

### 1.3. *Obstacles in Tourism*

In view of the above, the first obstacle to the modernization of a receptive tourist offer are the agencies themselves, which not only fail to understand the operation of monasteries, but are also not capable enough to create tours adapted to the particular lifestyle of monks, which tourists find quite interesting. Chiefly interested in commercial effects, Serbian agencies most often opt for tour programs offered by large tour operators. In reality, this mostly means fitting in with the so called Balkan tours, dictated in recent years primarily by Turkish and Macedonian tour operators, which have been bringing an increasing number of foreign tourists to Serbia. For local agencies this means a higher frequency of visitors in relatively non-demanding programs. Since these groups include at least 50 tourists, any attempt at creating a more sophisticated tourist offer is thwarted early on. As they are mainly coming from Islamic countries, as a rule they are not interested in Serbian medieval monasteries and the additional programs they could offer.

The second and definitely a more serious obstacle is the Orthodox lifestyle of monks, implying asceticism and refraining from communication with the outer world. The day-to-day-life in Orthodox monkhood is based on solitude and obedience, continuous prayer and silence. It is a lifestyle requiring

getting up before sunrise and going to bed at dusk. These are the elements that keep the monks at the diametric distance both from religious and particularly from new tourism. The monastic administrations are adamant in this respect, as well. Their facilities are open for tourists during short intervals between two prayers, they are reluctant to receive outsiders, and not willing to make special arrangements which would include food and drink tasting, particularly those creative ones involving workshops or some other, more dynamic programs. At the same time, the Serbian Orthodox Church – as a tax-exempt institution – has considerable financial funds at its disposal, which are beyond any government control. Therefore, it does not need to recognize tourism as one of vital mechanisms for making additional income. Thus the resistance of the church towards a polite, curious tourist who is not drawn to the famous temples of the Serbian Orthodox Church by religious motives might indicate the lack of understanding on the part of the church for its immediate environment – in most cases, small communities – which would significantly benefit from properly designed travel programs.

#### 1.4. *Experience Based on Artis' Programs*

Taking into account the integrity of monastic centers, as well as the need to maintain small, rural communities, in the period from 2014–2016, Artis Center created two programs in the field of cultural tourism, with a number of elements which laid foundations for a new type of tourism. The implementation of those programs was preceded by on-site research, while Artis' multidisciplinary scientific and artistic project "Living the Past – Serbian Medieval Gastronomy" was the starting point in terms of defining certain elements that were to be implemented in the programs. In that respect, it is of utmost importance to underline that medieval gastronomic heritage lies on a considerable discrepancy between the food eaten by royals and by monks, and that Orthodox monasteries in Serbia have never been considered the centers of gastronomic innovations, unlike monastic communities in Western Europe in the monastic centers of the Roman Catholic Church (Ognjević, 2014: 25). Namely, one of the most common mistakes committed by Serbian receptive agencies when making the programs in the field of creative and gastronomic tourism is the idea to organize rich royal-like feasts in monastic dining rooms – a concept which, by all means, departs a lot from both historical facts and the actual, live monastic practice<sup>2</sup>.



<sup>2</sup> Artis Center received several requests to assist creation of such programs.

Figure 3 – Women dominate Artis Center programs founded on new tourism

Photo Tamara Ognjević

The second important element is based on a direct knowledge that women are predominant consumers of programs in the field of cultural tourism (Ognjević, 2015:40) (Figure 3), and that was exactly what inspired us to implement in both experimental programs so called female themes, i.e. such elements of cultural history that focus on women, thus providing room for intercultural dialogue and easier identification with medieval heritage in Serbia, since we also had a number of visitors coming from abroad. This approach is based on a historical fact that the spouses of Serbian medieval rulers were mostly of foreign origin, very often Catholic, and, as a rule, women coming from a cultural environment quite different from the one typical of medieval Serbia (Jireček and Radonić, 2004:263-269).

A two-day program "Crown and Cross – Female Royalty of the Nemanjić Dynasty, the Valley of Lilacs and the Old Ras" was organized three times in the period from 2015–2016. It included visits to Serbian medieval monasteries, churches, fortresses and archeological sites (Studenica, Gradac, Sopoćani, Đurđevi stupovi at Ras, the Church of the Holy Apostles Peter and Paul at Ras, Pazarište-Stari Ras, Maglič), an easy mountaineering trip (climbing to the Maglič fortress), visits to monastic dining rooms and encounters with local monks and nuns, both in their capacity as hosts and guides, tasting of carefully selected local specialties, putting special emphasis on the specific multicultural aspects of that area since a considerable Moslem community has been living in Novi Pazar – the town in the heart of former Serbian medieval state of Ras since 15th century (Ognjević, 2016: 401), an overnight stay in a small town of Raška, as well as visits to its Art gallery and County Museum which is in the process of establishment. The program narrative was based on a story about the wives of Serbian rulers, as these women, having come to this land, were trying – each of them in her own particular way – to leave their personal marks on the Serbian history and culture. The story about female rulers served as a cue to encourage the talks in a predominantly female group about changes women experience when they get married. Such an approach enables a high level of identification with people from the past and better understanding of the heritage. Although Artis program was experimental by nature, with an intention to draw the attention of the Tourist Organization of Serbia and other potential interested parties to such a useful experience, a considerable number of people who follow our activities very often require that this program be repeated whenever possible.

"Gourmet Tales 2", a part of an experimental program integrating the knowledge of gastronomic heritage and patterns in the culture of eating into a new type of tourism, implies the most direct interaction with the monastic lifestyle. In order to implement such a program, the first step was to find a monastic community which was more dedicated to cooking, and then establish a high degree of confidence and provide warranties that our plans would not interfere with the everyday routine of the monks. Finally, since this kind of programs cannot be realized unless approved by the competent bishop, they needed to be meticulously prepared and explained in detail. In addition, a lot of patience is required as time measuring and prioritization at church are different from that of ordinary people. However, the results have justified all such efforts. The experimental workshop of the reconstruction of a Byzantine wine of roses based on a 9th century recipe that was organized by Artis Center in collaboration with nuns' community of the Končul monastery in autumn 2015 was really a crown of success of the program which was meticulously designed and carried out with a lot of patience. Thus, our lady guests from Japan had an opportunity to get to know not only the Southwestern Serbia, but also a monastic lifestyle typical of an ancient monastery in that region (Figure 4) and, following a

successful workshop in which they actively participated, they also had a chance to sit at the monastic table and eat together with nuns in the same way as the nuns' community does on a daily basis (Ognjević, 2016: 400). Our guests were allowed access to a monastic intimacy in a way far exceeding even the boldest of all expectations. Local community was entrusted with the tasks of tourist guides, demonstrators, curators and entertainers. Local accommodation was used and full capacities were employed for gastronomy workshops without the need to bring extra food or any other aids. Artis' collaborators at Raška, Novi Pazar and Jošanička banja were highly motivated to take part in this or similar programs, proving that a wisely devised tourism strategy may yield exceptional results. Moreover, the church is an extremely compatible partner when the interests and the mode of communication coincide appropriately, with due respect for the specificities of all interested parties.



Figure 4 – Japanese tourist in the Končul Monastery during Gourmet Tales of Serbia 2 program  
*Photo Tamara Ognjević*

Direct experience in creating a program in the segment of cultural tourism when one of the key stakeholders is the Serbian Orthodox Church, i.e. monastic communities in the Serbian medieval monasteries, particularly those under UNESCO protection due to their artistic and architectural heritage of utmost importance and significant locations offering high potential in terms of tourism, indicates that the agreement of all interested stakeholders may indeed lead to an exceptional outcome. However, in order to establish such a relationship, mutual respect and transparent presentation of interests of all participants in the process are required. The mediation by experts who do understand the needs of all stakeholders is highly recommended as it implies steering the interests and pointing to the ways to overcome conflicts. It is clear that monastic communities in Serbia are not the places where mass tourism concept could be implemented for the above mentioned reasons, particularly for the ones related to monastic way of life. On the other hand, it is evident that in the 21st century no church can expect that its visitors would be composed only of believers or people possessing a considerable prior knowledge of advisable code of dressing and conduct in sacred places. In that respect, the starting point would be appropriate signage within the confines of monasteries, as well as the preparation of travelers for the programs that include visits to monasteries, which is the responsibility of the organizer. Readiness to work jointly on shaping the tourism strategies, along with appropriate mediation, is an issue that should be initiated by the most interested party in this process,

and that is the government with its relevant ministries. The party that can most directly influence the initiation of such processes is a local government which, in the case of significant complexes under UNESCO protection, does have the most direct interest – economic and developmental. Namely, migrations from rural areas of the country where, as a rule, medieval monasteries are located, have been ringing the alarm bell for a long time and a good tourism strategy could significantly help improve the well-being of local communities.

## Conclusion

In less than one century, Serbia has changed several systems of government – from the Kingdom of Serbia which in 1918 became a constitutive element of the Kingdom of Yugoslavia, through being one of the six republics of the Socialist Federal Republic of Yugoslavia, to its breakup in the 90s and the actual Republic of Serbia in the early 21st century. On such a historical background, the Serbian Orthodox Church had a long way to go from an institution representing a state religion to total secularization and anti-religious propaganda following World War II. When in the last decade of the past century a search for a new yet old national identity was initiated, the Serbian Orthodox Church managed to restore much of its institutional powers in a short period. Serbian medieval monasteries, abandoned until recently, but enjoying the status of important cultural monuments and quite deprived of their real purpose – to be the epicenters of monastic life, have become alive again as the centers of religious practice. In the meantime, some of them were included in the UNESCO list of World Heritage Sites and while that process was underway they became a kind of museums managed by the government. All these elements led to a serious conflict among stakeholders when at the beginning of the new millennium an issue of both cultural and religious (pilgrimage) tourism was raised – the issue that could be easily resolved if all stakeholders were ready to start a constructive dialogue with due respect for the differences and various interests, but in the first place if the state, as a prospective mediator, would recognize its role in the process of spurring the dialogue with an intention to shape tourism strategy that would reflect general interest. The programs in the field of cultural and new tourism that were carried out by Artis Center on an experimental basis in the period from 2014–2016 undoubtedly indicate that there are indeed modalities acceptable to all stakeholders and that the role of a mediator – in this case the state – would be to establish a dialogue that would make all stakeholders aware of real potentials for the development of a tourist product. The lack of such an initiative could seriously jeopardize the survival of small communities in undeveloped, rural areas featuring most of the medieval monasteries and other sites on the UNESCO World Heritage List. Therefore, it would also directly jeopardize the cultural monuments themselves which are recognized as significant world heritage.

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# Challenges and development of the bulgarian unesco tourism sites in the context of the position of director Mrs. Irina Bokova

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## Abstract

Bulgaria is part of United Nations Educational, Scientific and Cultural Organization (UNESCO) from 1956 and owns 7 cultural, 2 natural sites and 5 intangible heritages. In recent years the activity of Bulgaria under UNESCO has evolved in line with the trends and initiatives undertaken by the international organization in the field of cultural policy, protection of tangible and intangible heritage, and development of cultural tourism as a factor for economic and social cohesion. From 2009 the General Director of UNESCO is Mrs. Irina Bokova, of Bulgarian origin. During her governance and with the trust fund of UNESCO was established a regional center for intangible cultural heritage in Bulgaria. Her policy was directed at the transforming culture as a priority for the development of Bulgarian tourism which is both an important and strategic move, especially in the context of long-term foreign goals. The direct benefits for the country are the promotion on international level of the rich cultural and natural heritage and also their management as tourism sites. The following text aims to present the protection policies and sustainable tourism management created by UNESCO in the last years in Bulgaria. Practical examples of projects are used as case studies to demonstrate the development of tourism activities. The research on the subject demonstrate a strong safeguard of the intangible and natural bulgarian heritage as a possibility to protect the customs and the environment of the population in period of globalization. A dialogue between tourism institutions and UNESCO destinations is forming.

## Keywords

Sustainable tourism; cultural policies; Bulgarian UNESCO sites; management.

## 1. Introduction

The definition of "sustainable development" is done in 1987 by the United Nations in the Brundland Report "Our Common future": "Sustainable development must respond to the needs of the present, without compromising the ability of future generations to meet their own needs". The Earth Summit (1992) established it as the most important policy during 21<sup>st</sup> century. In the same time, the Report Pérez de Cuéllar of the World Commission on Culture and Development (1996) and the UNESCO Universal Declaration on Cultural Diversity (2001) spread in parallel the discussions about the culture.

Hawkes (2001) and Agenda 21 of Culture (2004) present the idea that culture is the fourth pillar of sustainable development. Indicator for the civility of a nation is not only the amount of its industrial development, its material wealth, the size of the cities and its villages but also the abundance of natural and cultural resources and intellectual elevation of its citizens, the brightness of its talent and the deep roots of its culture, developed and enriched in time. "Organizations such as the European Union, UNESCO or the United Nations see culture as a "feasible option for economic development", or a "new capital inherent in the modern economy".<sup>3</sup>

The World Tourism Organization defines sustainable tourism as a form of tourism or a balance between the dimensions of sustainability – environmental, economic and social-cultural. From an anthropological and social point of view, culture is recognized as an economic resource, especially in regional development (Barrere et al., 2005). In this perspective, cultural tourism can be seen as a sustainable form of heritage and territorial development resulting from interactions with other

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<sup>3</sup> "Lieux culturels et valorisation du territoire", Tome 1 – Tour d'Horizon International, Institut d'aménagement et d'urbanisme – (IAU Ile de France, 2016 : 5)



cultures. Thanks to the culture it's possible to safeguarding the heritage in the sustainable way and UNESCO is one of the international organizations who work on long term to protect it. Sustainable management and development of tourism activities in Bulgaria UNESCO Sites is in strong relation with the strategies for safeguarding of local culture and identity. "Culture and tourism are now recognized as engines of economic and territorial development in their own right".<sup>4</sup>

Bulgaria is one of the countries, which have touristic potential that is still at an early stage in its development as tourist destination. One of the reasons for that delay is the bad management and the lack of organization between institutions dealing with tourism and preservation of cultural and natural heritage. Some international organizations such as UNESCO have been playing a key role for the development of a new model of management in the last years and are one of the solutions of these problems. The organization introduces a number of programs and projects, to meet the challenges of the international new tourism trends. The main actions in the sector are the exchange of goods practices, integration of interest foreign groups, international partnerships and networks.

## 2. Hypothesis

- Article 1 of the World Heritage Convention designated that the construction of cultural landscape is a "combination of work of nature and of man". The hypothesis represents the fact that natural and cultural landscapes and their sustainable management as tourism destinations by the institutions and the population reflected the evolution and development of local community. This kind of "mirror", indicator for the civility, is the best demonstration to understand the necessity of efforts to achieve the desired results to protect and save the Bulgarian cultural and natural heritage.
- In one of his books ("A qui profite le développement durable?", éd. Larousse, 2008) the French geographer Sylvie Brunel expresses the hypothesis that the rich countries (such as western countries) have a "sustainable" way of thinking and government, while the poorer countries have their "developing" way of management. In this sense, Bulgaria is developing a lot of international programs and tourism projects have become a model of uniform management that are not always adapting to the context and the real necessities of the local people and the complexity of the Bulgarian regions.

## 3. UNESCO Bulgarian Institutions and policies

### 3.1. National Commission of the Republic of Bulgaria to UNESCO

National Commission of the Republic of Bulgaria to UNESCO (NC) was established by order of the Council of Ministers in 1956. The international legal basis for the activities of this committee is the Charter of National Commissions adopted at the 20th General Conference of UNESCO.

The institution consists of representatives of key ministries, departments and institutes, eminent scientists, figures of culture and education and solves major issues in the selection of Bulgarian projects in UNESCO.

In addition to official government institutions, the NC works actively with society, national and international NGOs in the field of culture and communications, on the implementation of the country's

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<sup>4</sup> "Lieux culturels et valorisation du territoire", Tome 1 – Tour d'Horizon International, Institut d'aménagement et d'urbanisme – (IAU Ile de France, 2016 : 5)

participation in program activities of UNESCO. The Secretariat maintains relations with UNESCO Clubs in the capital Sofia and in the country.

### 3.2. *Bulgarian Regional Center for the Safeguarding of Intangible Cultural Heritage*<sup>5</sup>

In recent years, under the leadership of Mrs. Bokova carried out numerous projects, but the most notable of these is the creation in Bulgaria of Center for the Safeguarding of Intangible Cultural Heritage. It plays a key role in the development of management of Intangible Heritage in Southeastern Europe.

Development of policies for the safeguarding and promotion of intangible cultural heritage is complex in its nature and manifesting process. This process is regarded to the need and the desire to preserve the knowledge and the skills of cultural expression as they have significant historical, artistic and cultural value to the development of mankind and encourages their transmission through generations by implementation of effective programs in this area.

Regional Centers for the protection of intangible cultural heritage Category 2 UNESCO are specific type organizations. They develop their activities in a given territorial area. After its establishment are tasked to coordinate activities in the field of intangible cultural heritage in several countries of the region, as well as each other. "The Association "Regional Center for the Safeguarding of Intangible Cultural Heritage in South-Eastern Europe Under the Auspices of UNESCO", here in after referred to as the "Center", is a non-governmental organization, a Bulgarian legal entity performing coordination functions for the countries in the region to promote the implementation of UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage ("The 2003 Convention") and the successful Implementation of UNESCO program initiatives related to the intangible cultural heritage".<sup>6</sup>

The center is grouped in two main directions: first – actively promote cooperation in the field of intangible cultural heritage policies for preservation and promote it on national, regional and international levels; and secondly – Initiate and implement concrete steps towards preservation and promotion of intangible cultural heritage of South-East countries through training, sharing best practice, coordination, exchange, spread information, promote regional and international cooperation and more. In this respect Bulgaria has highlighted a wealth of experience, which is based on numerous implemented workshops, seminars and work actively implementing and promoting the UNESCO Convention on Intangible Cultural Heritage.

Worship and observance of traditional customs and rituals is deeply enshrined in the Bulgarian national psychology and passed on to each succeeding generation. The "Center" works actively for the preservation and promotion of Intangible Cultural Heritage in Bulgaria also by support local communities in their efforts to preservation of Bulgarian eternal values.

### 3.2. *National Bulgarian UNESCO Clubs*

UNESCO Clubs are organizations that bring together people of all ages who share the ideas enshrined in UNESCO activities and work for their implementation and spread. Currently, the movement includes

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<sup>5</sup> Culture Sector Strategy for category 2 institutes and centers : [http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/BSP/images/CLT\\_strategy\\_final\\_01.pdf](http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/BSP/images/CLT_strategy_final_01.pdf)

<sup>6</sup> Status of the "Regional Centre for the safeguarding of the intangible cultural heritage in the south-eastern Europe under the auspices of UNESCO" Association, Article 1 - <http://www.unesco-centerbg.org/bg>

over 3,500 clubs in more than 100 countries internationally coordinated by the World Federation of Clubs, Centers and Associations UNESCO.<sup>7</sup>

Bulgaria currently has four clubs in different cities. It is interesting to note the latest project “Friends of Bulgarian Treasures”<sup>8</sup> of the science club in Sofia, which aims to collect, classify, digitalize and then present on free internet web site the entire cultural and natural wealth and heritage of the state. This project will help conserve Bulgarian Treasures and preserve the family memory for future generations. The project is unique in its scale - many regions and areas with different scales have been digitized, but never throughout the country. The project duration is from 2016 to 2020 and executed by the work of more than 1,200 volunteers who are mainly young researchers wanting to be professionally engaged in sciences such as history, archeology, culture, ethnology and others.

### 3.3. Bulgarian tourism sites managed by UNESCO

As a country with rich history and legacy of ancient civilizations, Bulgaria has something to offer to its guests with an interest in history, culture, ethnography, religion, architecture and art. Although it only takes 2% of the territory of Europe, Bulgaria registered about 40,000 historical monuments, 36 cultural reserves, 160 monasteries, 330 museums and galleries. This includes prehistoric finds, Thracian tombs, sites from the Greek Age, Roman fortresses, historical monuments from the First and Second Bulgarian Kingdom and architectural landmarks of the Renaissance. Bulgaria is visited by more than 8,2 million foreigners tourists every year and that represents about 3,3% of GDP of the country<sup>9</sup>.

As emblematic of Bulgaria can be mentioned the monuments included in the UNESCO List (Figure 1) : the Kazanlak Tomb (IV-III century BC.), The Thracian tomb in Sveshtari (III century BC.), Madara Horseman (VIII c.), Boyana church (X-XI c.), Ivanovo rock churches (X-XIV c.), the Rila Monastery (X c.), the Old town of Nessebar etc.



Figure 1 – UNESCO Bulgarian sites

Source: Official Tourism Portal of Bulgaria - <http://bulgariatravel.org/>

## 4. Intangible Bulgarian UNESCO heritage

“The “intangible cultural heritage” means the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artifacts and cultural spaces associated there with – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their

<sup>7</sup> Web site of the UNESCO Bulgaria - <http://www.unesco-bg.org/>

<sup>8</sup> Web site of the project “Friends of Bulgarian Treasures” - <http://friends-bulgaria.eu/en/>

<sup>9</sup> Official Statistic of Ministry of Tourism of Bulgaria for 2016 : [http://www.tourism.government.bg/sites/tourism.government.bg/files/documents/2017-01/bg\\_tourism\\_january\\_december\\_2016.pdf](http://www.tourism.government.bg/sites/tourism.government.bg/files/documents/2017-01/bg_tourism_january_december_2016.pdf)

history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity”.<sup>10</sup>

Bulgaria has a lot of folklore activities. They include many traditions and customs through which tourists can touch the Bulgarian customs and culture. This intangible heritage, transmitted from generation to generation, is recreated by local communities, depending on their local environment, their interaction with nature and their history and form their sense of identity and continuity. (Hawkes, 2001) explain us this transmission of identities - meanings, knowledge, beliefs, values, cuisine, language, arts, science, technology, religion, rituals etc. as definition for culture. This “oldest heritage” provides a unique atmosphere for tourists through it people can “touch” the soul of local population and discover a unique tourism destinations.

#### 4.1. Case study 1 – The tradition of Fire dancing

Fire dancing is one of the oldest Bulgarian customs, which is preserved today only in a few villages in South-East of Bulgaria. In 2009, the ritual was included in the UNESCO List of the Intangible Cultural Heritage.



Figure 2 – UNESCO Bulgarian intangible heritage – Fire dancing

Source: Official Tourism Portal of Bulgaria – <http://bulgariatravel.org/>, <http://infobulgaria.info/>

The ritual lies in pagan past of this land and derived from the cult to the sun by the Thracians. Today the fire-dancing is best preserved in the village of Bulgari in Strandja mountain, which is held each year on 3 June evening and attracts a large audience and tourists worldwide. “The ritual is held to ensure the well-being and fertility of the village”.<sup>11</sup> The dancers “Nestinari”, who are spiritual and physical leaders enter in trance in the circle with shouts, the first crosses the embers of the cross, then in the

<sup>10</sup> Text of the Convention for the Safeguarding of the Intangible Cultural Heritage, Article 2 Definitions – <http://www.unesco.org/culture/ich/en/convention>

<sup>11</sup> Presentation of the tradition “Nestinari” - <http://www.unesco.org/culture/ich/en/RL/nestinarstvo-messages-from-the-past-the-panagyr-of-saints-constantine-and-helena-in-the-village-of-bulgari-00191>

fiery circle entering other fire-dancers (Figure 2). After ritual dance ended, all people hang on traditional dance for health, under the sounds of traditional music.

#### 4.2. Case Study 2 – “Living Human Treasures”

“Living Human Treasures” are persons who possess to a very high degree the knowledge and skills required for performing or re-creating specific elements of the intangible cultural heritage”.<sup>12</sup>

For a number of nations intangible cultural heritage is a major source of identity and was significantly correlated with their history. Unfortunately, a large amount of cultural events such as music, dance, speech, rituals, fairs or traditional cultural skills are endangered. On the hand, a significant part for this process is active enforcement of a globalized international culture, related to technical and informative progress, on the other, the very vulnerable nature of this heritage, fragile and transient in time.

The pilot program of UNESCO “Living Human Treasures” from which “Living Human Treasures – Bulgaria” is a part, aims to prevent further losses. It is especially important to encourage holders of this intangible cultural heritage to practice activities and transmit knowledge and skills to future generations. Bulgaria has significantly unique kind of folk culture – as inseparable combination of sound, movement, speech, ritual and so on.<sup>13</sup> The specific historical and cultural development of Bulgaria has enabled the preservation of traditional cultural skills, technology and values today (Figure 3). However, modernization threatens their normal functioning, survival and transmission. This requires the theoretical systematization list of articles in a typical Bulgaria live cultural possession of highly qualified experts. The steps for the elaboration of this project were:

- Summary and understanding of international and Bulgarian experience in the study and definition of traditional skills, technologies and cultural practices and their transmission
- Define criteria for their recognition characteristic of Bulgarian cultural realities
- Identifying typical Bulgarian national and regional traditional activities – skills, technologies and practices that are stored in the form of a living human experience
- Development of a questionnaire to collect information on the project. Dissemination of prepared instructions, criteria and questionnaires. National educational seminar (organized in the Ministry of Culture), with representatives of regional cultural institutions.
- Expert processing of data from questionnaires. Making a mission of experts in the country to verify the received data
- Post project the internet and Implement a national roundtable with experts from the Ministry of Culture and representatives of other cultural institutions to discuss it
- Development of national and regional nomenclatures “Living Human Treasures” for Bulgaria and its submission to the Ministry of Culture of Bulgaria
- Publication of the nomenclature of Bulgarian and English on the internet

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<sup>12</sup> Guidelines for the Establishment of National “Living Human Treasures” Systems, Definitions - <http://www.unesco.org/culture/ich/doc/src/00031-EN.pdf>

<sup>13</sup> Official Bulgarian web site “Living Human Treasures” - <http://www.treasuresbulgaria.com>



Figure 3 – Bulgarian traditions – dances, clothes, music instruments and songs

Source: Official Bulgarian web site "Living Human Treasures" - <http://www.treasuresbulgaria.com>

## 5. Sustainable tourism in UNESCO sites

Tourism is a highly spatial activity which territory is the primary resource. Beyond aesthetics of spaces in a quest to attract tourists, the sustainable development of tourism requires the search for local identity, the enhancement of territorial attributes and respect for territorial priorities in development. It also allows for the rehabilitation of the spaces and a valorization or revalorization of the festive dimension and leisure of the territories. This identification of territorial identity, values and ambitions is important in any tourism setting.

### 5.1. Case study 1 - UNESCO Bulgarian site - Monastery of Rila. Tourism management of destination

The monastery of Rila (Figure 4) was included in the List of World Heritage by UNESCO in 1983. It is the largest monastery in Bulgaria. Located in the heart of Rila Mountain, it was founded in the tenth century and during the centuries of its existence was the guardian of the Christian faith and Bulgarian education and culture, a spiritual center. Orthodox monasteries are very characteristic cultural elements in the

Balkan region. The specific geographical position of the Balkans assures them the historical function of cultural mediator in relations between East and West.<sup>14</sup>

Today Rila Monastery is one of the symbols of Bulgaria and it is one of the most visited landmarks and tourism destination in the country. The complex covers an area of 8800 sq meters, there are nearly 300 rooms, 100 of which are monastic cells. Before the two monastery gates there is parking areas for cars and buses. The monastery offers accommodation, bookstore and shops of the fortress tower. In the area around the monastery it's possible to buy icons, albums, postcards, souvenirs and products of traditional Bulgarian crafts.<sup>15</sup>



Figure 4 – UNESCO Bulgarian site – Rila Monastery

Source: Official Tourism Portal of Bulgaria - <http://bulgariatravel.org/>

Since the end of XIX century in Rila monastery there is a museum where are exhibited specimens related to the history of the monastery over the centuries. It's a place where tourists can learn the remarkable story of the monastery. The museum exhibition includes valuable examples of Bulgarian and foreign art during XIV-XIX centuries.

The destination "Monastery of Rila" is managed by the "Natural Park of Rila Monastery" (Figure 5). Is one of the eleven natural parks in Bulgaria and the second most visited in Bulgaria. As the Rila Monastery is a functioning monastery requires the establishment of an independent institution to take over its management as tourist and natural destination. An interesting approach, in which the management of the site is divided: the preservation of the temple as a religious and spiritual institution is given to clerics and management regard to nature conservation around the monastery and management of commercial services related to tourism are performed by specially established organization. The objectives of "Natural Park Monastery of Rila" are related to the Implementation of coordination between the Bulgarian Orthodox Church and the state institutions, development of scientific, educational and recreational activities, development of tourism with responsibility for nature, preservation of harmony between nature and monasteries existed for centuries.

<sup>14</sup> "Les Monastères orthodoxes dans les Balkans", *Etude thématique*, Occasional Papers for the World Heritage Convention, (Prof. Dr Todor Krestev, Prof. Dr Elka Bakalova, ICOMOS 2003 : 1-3)

<sup>15</sup> Web site of the Rila Monastery - <http://www.rilamonastery.pmg-blg.com/>



Figure 5 – UNESCO Bulgarian site – Rila Natural Park with the Seven Rila Lakes

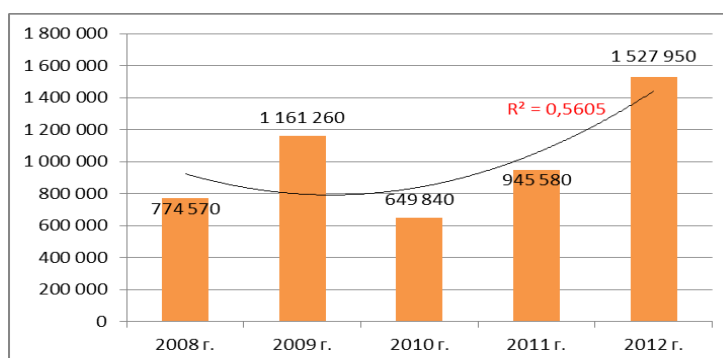
Source: Official Tourism Portal of Bulgaria - <http://bulgariatravel.org/>

In 2008 he was visited by 1 002 204 tourists<sup>16</sup> discovering many hiking routes with high intensity attendance. In the Park is build a Tourism Center who provide adequate opportunities for arranging permanent and thematic exhibitions, interactive applications in the field of environmental practices and biodiversity conservation, conducting informal training, knowledge of nature and acquire specific skills to environmental protection, seminars and workshops meetings related to the activity of the nature and environmental internships. The Park can be visited by tourists with modern electronic guide system GPS and electronic compass.<sup>17</sup>

### 5.2. Case study 2 - UNESCO Bulgarian site - National Park of Pirin. Tourism management of destination

National Park Pirin (Figure 6) is included in UNESCO in 1983 and that confirms the exceptional universal value of the nature that deserves to be preserved for the benefit of all mankind. It is located in the Pirin Mountains, in southwestern Bulgaria, and preserves a number of natural attractions, glacial lakes, coniferous forests and rich biodiversity. Within the park there are two reserves and the biodiversity is represented by 1315 species of plants and 159 bird species. Here is the oldest tree in Bulgaria - Baykusheva fir, whose age is more than 1,300 years. From 2007 the Park is also part of Natura 2000.

Table 1 – Number of tourists in the National Park of Pirin for the period 2008 -2012



Source: Ministry of Environment and Water of Bulgaria - <http://www5.moew.government.bg/>

Besides the main task to protect the conservation area and preserve the natural character of the mountain for future generations, officials from the Direction of National Park Pirin successfully

<sup>16</sup> Web site of Natural Park Rila Monastery - <http://www.parkriiski-manastir.eu/>

<sup>17</sup> Web site of the Natural Park Rila - <http://www.parkriiski-manastir.eu/>



implements planned programs and projects that build better partnerships with local people and administrations of adjacent municipalities and works with young people to promote a new, modern approach to nature.

The National Park Directorate establishes a unified informational strategy whose implementation allows all guests in the mountains to get diverse, interesting and useful information about the mountains and the park. The goal is to have official marked tourist routes and places for relaxation around the informational and educational boards. At each hut, Pirin tourists (Table 1) can obtain information on tourist routes and rules prevailing in a protected area for the geological characteristics of the Pirin Mountains, its owners, the wildlife, forests and flowers, and also interesting facts about the mountain. The territory of the National park allows different forms of alternative tourism – cycling and horse riding, photography, etc. and the conservation take special care. It is unacceptable for visitors to pollute the environment and are strictly prohibited hunting, fishing in some rivers, illegal logging and damage to the mark.

"Pirin National Park" won a project approved and funded by UNESCO - "Sustainable management of natural resources by promoting sustainable tourism in the National Park "Pirin". The implementation of this project is foreseen in the Management Plan of the park, aiming protection of nature and landscape, balanced use of recreational opportunities and natural resources of the territory, as well as conversion of the protected area in the socio-economic factor for regional development. The project prepares a strategy to promote sustainable tourism aimed at effective management of tourist flows and protection of natural resources in the National Park. The main task of the strategy is to outline guidelines for the development of local communities, increase economic benefits for local people from business related to mountain and to achieve greater marketability and higher prices for local products and services using the international value of the park to attract tourists.<sup>18</sup>



Figure 6 – UNESCO Bulgarian site – National Park of Pirin

Source: Official Tourism Portal of Bulgaria - <http://bulgariatravel.org/>

“In 2011 is created a Strategy for sustainable management of natural resources by promoting sustainable tourism in the Pirin National Park. Such strengths are marked greatest natural treasure of nature, rich cultural and historical heritage, production of local products, many cultural events, and access to destination. The weaknesses are - lack of aggregated information database for tourist sites, lack of policy and a common strategy for tourism development in the region, weak environmental culture of the population, lack of good marketing, lack of staff in the field of tourism. Strategic objectives include notably improving all the weaknesses, they are divided into long-term and short

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<sup>18</sup> Web site of National Park of Pirin - <http://www.pirin.bg>

deadlines. In order to realize these objectives is foreseeing implementation of a network of partnerships at the local level, training of personnel, information campaigns".<sup>19</sup>

***Problematic issue:*** In recent years the city of Bansko (Figure 7) and adjacent territories of Pirin National Park have become a very attractive ski and winter center. Ski center Bansko has established itself as one of the best ski resorts in Europe. This is evidenced by the hosting of the World Cup ski alpine. Excellent conditions have been created for the practice of alpine skiing, cross-country skiing, biathlon and snowboarding. The modern ski lift has a capacity of 2400 people per hour. The highest point of the ski center is 2560, the lowest 1000m. The total length of ski runs and roads is 75km.

"According to Skidata for ski area with the city center. Bansko, for the period from 01/12/2014 until 30/04/2015, there were 545,309 visitors to the ski area. Data by nationality are: 24.38% English, 23.51% Bulgarians, 18.87% Greeks, 17.58% Russians, followed by Romanians, Turks, Serbs with almost equal contribution from 5.05% to 3.02%".<sup>20</sup>



Figure 7 – The city of Bansko and the ski resort in Pirin Mountain

Source: Official Tourism Portal of Bulgaria - <http://bulgariatravel.org/>

The city of Bansko located in the most beautiful part of the Pirin mountains offers rooms for more than 16,000 guests in residences, apartments, family hotels and guest houses. On the other hand, a large number of luxurious four and five star hotels offer high standards of service and professionally equipped spa and wellness centers.<sup>21</sup> Bansko possesses extraordinary charm and creates a local atmosphere with a high quality cuisine and selection of wines. The tourists find here ancient architecture, heroic history, folklore, preserved traditions and customs. Renaissance town, Bansko is a kind of symbol of the Bulgaria.

The Visitor Information Centre of the National Park "Pirin" is situated in Bansko.<sup>22</sup> There is an exhibition in the center calls "Pirin forest" - through 22 interactive modules visitors can learn interesting and curious facts about the owners of the mountain - trees, plants and wildlife. Projection room with 30 seats equipped with multimedia and big screen, more than 150 scientific films about animals, plants, specialty films for the National Park "Pirin" and other protected areas in Bulgaria illustrate lectures prepared by park experts. The center conducted training for children and adults, organized hiking, educational pathways and "classrooms" in the open.

<sup>19</sup> "Strategy for sustainable management of natural resources by promoting sustainable tourism in the Pirin National Park", 2011, Ministry of Environment and Water of Bulgaria - <http://www5.moew.government.bg/>

<sup>20</sup> Web site of the Ministry of Environment and Water of Bulgaria - <http://www5.moew.government.bg/>

<sup>21</sup> "Pirin National Park. Benefits for People and Nature" – Administration of Pirin National Park, Project N 5655006003 with the financial support of UNESCO

<sup>22</sup> Official Tourism Portal of Bulgaria - <http://bulgariatravel.org/>

One of the most discussed and widely spread causes all over the world suggests the need for equilibrium and balance between nature and man, responsible behavior and respect by protecting the national heritage simultaneously achieved global engagement.<sup>23</sup> During the last 34th session of the Committee of UNESCO were discussed and adopted measures affecting individual Member States. Among them was the decision about Pirin National Park. Commission reported serious negative impact on the tourism sector and agreed to exclude the (proposed by the country) designated areas with 150,6 ha area in the periphery of the site and tourist zones Bansko and Dobrinishte (1078,28 ha) included in the "buffer zone". It has an ultimatum to Bulgaria, where each subsequent construction and development of the ski runs and facilities, inflicting substantial negatives of nature will lead to the inclusion of this item in the list of sites in danger. For this purpose Bulgaria should provide a new management plan. "The development of sustainable tourism must be based on a dynamic that articulates responsible production and consumption patterns, while providing equally distributed socio-economic benefits to the people living, working or staying in the area. This development requires integrated management of resources, as well as the participation of local actors, in order to reconcile its implementation with the needs and capacities of the territory".<sup>24</sup>

## Conclusions

- Direct benefits for the tourism destinations : prestige and promotion of Bulgaria as an attractive tourist destination, a country with a rich cultural and natural heritage. The prestige that brings the program for World Heritage brings in its wake popularity and interest for tourists. How successful will be the realization of projects and local management depends on government policy in relation to its marketing and its segments, as well as various industry associations of local and national level. During the research we found that it's necessary to make efforts for his implementation and attract tourist contingent without compromising the development and management of sites as sustainable destinations.
- It's noticeable that the immense influence in the last years (Bulgaria is part of European Union from 2007) of west policies and government in Bulgaria. During the study and the fieldwork was found that a lot of projects and programs are financed by funds from international organizations and managed by them. We found a new methods of "colonization" and transformation of some regions by the change of the mentalities and the thinking, but also with the implementation of new modern practices of management not always adapted for the reality of the territory.
- This west influence provoked the population and they feel the need to protect his spiritual wealth. That's why we consider a strong safeguard of the intangible Bulgarian heritage – national dances, songs, stories, legends etc. which become also an opportunity for tourists to experience the local culture.
- On one part, by the local projects in the natural area of Rila and Pirin we understand about the sensitization of people of natural, cultural and ethnographic landscapes. In the other part the culture is consider as a possibility for transformation of some regions, but also to their image. Or the cultural heritage and the sustainable tourism are tools for change. Both (tourism and heritage) refer to the same desire to convey: the logic of preservation seeks to fulfill its

<sup>23</sup> Web site of the National Park of Pirin - <http://www.pirin.bg/>

<sup>24</sup> "Tourisme et développement durable. De la connaissance des marchés à l'action marketing", (Edition ATOUT France, 2011 : 100)

duty of affiliation, to transmit to future generations what previous generations have bequeathed to us.

- Territory is a social construction, the fruit of a long-term interaction of human groups in their process of appropriation and transformation of nature. It reflects the history, identity and values of the people who live there. The territory carries a cultural dimension that is essential for the quality of life of the inhabitants. To the extent the spatial planning recognizes, inventories and develop natural and cultural resources, by bringing them into line with the future aspirations of a society, these acts are cultural acts. Cultural heritage, in the multiplicity of its dimensions – from memory to landscape – is the testimony of human creativity, a resource for the identity of people. The projects and the programs of UNESCO demonstrate the ability to affect the ideas for positive change for some Bulgarian regions in the cultural tourism sector and help to reinforce his role in building a more sustainable future.
- The main purpose of the list of World Cultural and Natural Heritage is to promote and protect places that appear unique. The organization has a strong international reputation and no country made off site from the List. The entry of a place in the List is not the end of the effort. Site managers and local authorities continuously work towards managing, monitoring and conservation of them. No responsibility for the maintenance and development of these sites is largely in local authorities and the local population. That's why the local government of National Park of Pirin need to protect the area under the protection of UNESCO, create a new management plan and stop the construction of second ski zone for mass tourism.

Each site from the List of World Heritage is owned by the country whose territory is situated, but it is believed that in the interest of the international community is to keep each of them for future generations and the UNESCO sites become one of the modes to safe the cultural heritage and develop a sustainable tourism for the future generations. From the informations that we gathered, we understand that Bulgaria actively participated in the programs of UNESCO and they made efforts to safeguard their heritage. These efforts and the primarily strategies are concentrated in supporting exchanges of experiences, intercultural dialogues with other countries, creation of partnerships and networks, promotion of destinations. The economy of culture and tourism play a key role in territorial attractiveness, in particular, contribute to landscape regeneration, employment, growth and the dynamism of a region's tourism offer. Culture and local environmental management practices can make a significant contribution to environmental sustainability. These practices and traditional knowledge, which constitute a valuable intangible cultural heritage, are useful tools for ensuring sustainability of the territory. The sustainable development of touristic sites and the participation of local communities in the protection, management and enjoyment of heritage contribute to improving the living conditions of the population and create sustainable sites. Cultural policies must establish a close relationship with sustainable development in order to innovate, enrich themselves, be more central to governance and better respond to the needs of citizens. Since 2009 a Bulgarian has headed the position of General Director of UNESCO Mrs. Irina Bokova. Despite controversial discussions and even extreme oppositions who were born after the election (criticisms are mainly about the lack of reforms and the failure of the financial challenges in UNESCO), its success is undeniable.

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# Proposal for the arrangement of space through interpretation, protection and presentation of World Heritage Site. Eco-Museums of the Republic of Srpska

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## Abstract

By means of a qualitative research and analysis of the understanding of the relation between tourism and the preservation and presentation of heritage, the main characteristics of the locations of the Republic of Srpska, Bosnia and Herzegovina from the United Nations Educational, Scientific and Cultural Organization World Heritage List will be presented and described in this paper, and at the same time, the possibilities for a wider and better organisation with the aim of their protection, sustainable development and tourism will be suggested. It may indeed be the case that those values have not been sufficiently researched, or that their significance is incomprehensible and less respected and promoted as a cultural and tourist resource, but they are nonetheless protected as cultural goods at the national, regional and world level. The integrated approach to heritage represents the initial hypothesis in this paper, which provides for huge possibilities in the development and realization of specific forms of tourism, diversification of products and protection of the heritage, as well as the promotion of tourist destinations. Accordingly, the work on the study of the arrangement, protection and presentation of the cultural heritage is based on the analysis of the literature from museology and tourism, as well as an overview of the relevant material and information available on the Internet, that is, research work on eco-museums.

## Keywords

World Cultural Heritage; Eco Museum and interpretation; heritage as a brand and presentation.

### 1. Presentation and tourist valorization of heritage of Republic of Srpska

Working in tourism and tourism organization I understood and accepted as a possibility of creative expression, interpretation and presentation. A place where cultural tourism is important in order to preserve and appreciate the value of cultural heritage, familiarize people with it, as well as to establish and improve cooperation in the field of the protection and presentation of the cultural and natural beauty of an area. A place where a large role as equal partners, indeed, have museums. In this paper, they together *create* a brand (a word with universal application) that represents the manner in which the consumer, tourist and *heritologist* (Šola, 2011) see and understand a certain product/cultural good, whereby interpretation has a key role.

Museums are no longer considered just a place where certain artefacts are kept, but, above all, a place of the creation of regional, local and individual identity. Likewise, tourism is no longer just a service activity, but a sustainable industry with close connections in the management, availability and communication, to the cultural heritage via the valuing of the tourist motives/resources, protection and presentation of these fundamental segments, that is, drivers in the development of the cultural tourism. Each on their own sides – tourism as a living, dynamic organism, and museums with new missions and visions – has become a partner in the essential processes of the conservation and sustainable development of the cultural diversity.

In this paper, the main characteristics of the locations of the Republic of Srpska, Bosnia and Herzegovina, from the UNESCO's World Heritage List, will be represented and described through a qualitative research and analysis of the understanding of the relation between tourism and the preservation and presentation of the heritage.



### 1.1. Republic of Srpska, Bosnia and Herzegovina

The Republic of Srpska (TORS, 2016) is located in the Southeast Europe, in the western part of the Balkan Peninsula. It was founded on 9 January 1992, and was internationally recognized by way of the Dayton Peace Agreement, on 21 November 1995, as one of the entities in Bosnia and Herzegovina. The largest city in the Republic of Srpska is Banja Luka, which represents the administrative, economic and university center of the same. The Republic of Srpska is characterized by significant cultural and historical heritage, and the archaeological findings show that this was a region which was passable even in the age of the old era, the age of first tools and weapons; and that it was a favorable place for life is testified by the remains of the Neolithic settlements, traces in caves, buildings, castles as well as the artefacts that we keep and present through museum collections and expositions, as well as the city centers such as Banja Luka, Trebinje, and Bijeljina. These places are situated next to the watercourses of Vrbas, the rivers Sava, Trebišnjica and Drina, and are characterized by the wealth of the cultural heritage, good position and road accessibility.

The borders of the Republic of Srpska are determined by the internationally recognized borders towards the Republic of Serbia, the Republic of Montenegro and the Republic of Croatia, as well as by the inter-entity line towards the Federation of Bosnia and Herzegovina. Its territory is located between the northern latitude of 42°33' and 45°16', and the eastern longitude of 16°11' and 19°37'.

The Republic of Srpska belongs to the group of continental countries and is landlocked, but it is located at the point of contact of two huge natural-geographic and social-economic regional wholes – the Pannonian and Mediterranean. The network of the Parks of the Dinaric Arch features the national parks of the Republic of Srpska, the monumental complexes and a still-undiscovered world of the Dinarides, which is made up of the Kozara air spas and fruitful plains, as well as the regions of the most beautiful parts of Herzegovina, namely the mountains Maglić (2 386m, the highest top in RS and Bosnia and Herzegovina), Volujak, Zelengora, ... together with the mediaeval monasteries, tombstones, bridges, but also various events and manifestations. The region of the Republic of Srpska is filled with significant touristic values, which represent all the more often drivers of touristic movements.

#### 1.1.1. The National park “Sutjeska” and the National park “Kozara”

NP Sutjeska is the biggest and oldest national park in the Republic of Srpska and Bosnia and Herzegovina, which was founded in 1962. It represents a region of protected natural and cultural-historical values. The area of Sutjeska with the strict natural reservation of Perućica includes parts of the mountains Maglić, Volujak, Vučevo and Zelengora.

The area of Tjentište (lat.Tentorium), on which our national park spreads for the most part, is mentioned as far back as the medieval century, and the remains of the castles-cities of Vratar and Tođevac, which are found in the immediate vicinity, are silent witnesses of those past times. The events of the more recent past are recalled by the memorial complex Tjentište, formally opened in 1971 (Figure 1), as a memorial of the *Battle on Sutjeska* from World War II.



Figure 1-NP “Sutjeska”, Tjentište

Source: *Tourist organization Republic of Srpska*

NP Kozara was formally opened in 1967. The green beauty of the Krajina, the mountain Kozara, was pronounced an air spa in the times of ban Milosavljević (the ban of the Vrbaska banovina from 1929 to 1934), with summer houses on Mrakovica, a certain quantity of residential houses and two guest houses with 22 rooms for staying overnight.



Figure 2-NP “Kozara”

Source: *Tourist organization Republic of Srpska*

Today, this region with the area of 3493, 5 hectares represents the National park "Kozara" with the monumental complex on Mrakovica, erected as a sign of memory of the fighters and the people of the Kozara region that suffered in the World War II (Figure 2). Literary meetings, art colonies and various manifestations are part of the numerous events taking place on Kozara. What stands out in particular are ethno-festivals, which are sometimes placed next to the monastery walls, and offer the opportunity to get to know the people of Kozara, their lifestyle of the past and present.

"The parks of the Dinaric Arch" make up the network of the protected areas from Slovenia to Macedonia, under the WWF (World Wide Found For Nature) project, and among them there are also the National parks of the Republic of Srpska, Bosnia and Herzegovina. They represent the beauty of

nature and the cultural-historical values, the wealth that attracts, and it is necessary to protect it and to offer their specificities to tourists under the slogan *Undiscovered World of the Dinarides, People of the Dinarides* (Figure 3). Among them, of course, are also the touristic values in the valley of the river Drina, the natural and cultural values of the future National park “Drina”, on the territory of the municipalities of Srebrenica, Rogatica and Višegrad in the Republic of Srpska, Bosnia and Herzegovina.



Figure 3-Stećci Medieval Tombstones Graveyards

Source: *Tourist organization Republic of Srpska*

## 1.2. Cultural good of the Republic of Srpska from the World Heritage Site, UNESCO

World Heritage List, Cultural site

Mehmed Paša Sokolović Bridge in Višegrad

Sarajevo Macro Region, Republic of Srpska, Bosnia and Herzegovina

The universal value of the bridge at Višegrad is unquestionable for all the historical reasons and in view of the architectural values it has. It represents a major stage in the history of civil engineering and bridge architecture, erected by one of the most celebrated builders of the Ottoman Empire.

The bridge particularly bears witness to the transmission and adaptation of techniques in the course of a long historical process. It also bears witness to important cultural exchanges between areas of different civilizations. It is an exceptional representative of Ottoman architecture and civil engineering at its classical apogee. Its symbolic role has been important through the course of history, and particularly in the many conflicts that took place in the 20th century. Its cultural value transcends both national and cultural borders.

Criteria:

(ii) to exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town/planning or landscape design;

Located in a position of geostrategic importance, the bridge bears witness to important cultural exchanges between the Balkans, the Ottoman Empire and the Mediterranean world, between Christianity and Islam, through the long course of history. The management of the bridge and repairs made it to have also involved different political and cultural powers: after the Ottomans came the Austro-Hungarians, the Yugoslav Federation, and the Republic of Bosnia and Herzegovina.

(iv) 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;

The Višegrad Bridge is a remarkable architectural testimony to the apogee of the classical age of the Ottoman Empire, whose values and achievements mark an important stage in the history of humankind.

World Heritage List, Cultural site

Stećci Medieval Tombstones Graveyards

Bosnia and Herzegovina, Serbia, Croatia, Montenegro

This serial property combines 28 sites, located in Bosnia and Herzegovina, western Serbia, western Montenegro and central and southern Croatia, representing these cemeteries and regionally distinctive medieval tombstones, or stećci. The cemeteries, which date from the 12th to 16th centuries CE, are laid out in rows, as was the common custom in Europe from the middle Ages. The stećci are mostly carved from limestone. They feature a wide range of decorative motifs and inscriptions that represent iconographic continuities within medieval Europe as well as locally distinctive traditions.

Criteria:

(iii) to bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared;

(vi) to be directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance

Representative List of the Intangible Cultural Heritage of Humanity

Bosnia and Herzegovina

Inscribed in 2014 on the Representative List of the Intangible Cultural Heritage of Humanity

Zmijanje embroidery is a specific technique practiced by the women of Zmijanje villages in Bosnia and Herzegovina. Traditionally, Zmijanje embroidery is used to decorate female costumes and household items, including wedding dresses, scarves, garments and bed linen. The main characteristic is the use of a deep blue thread, handmade with vegetable dyes, to embroider improvised geometrical shapes. The richness and variations of the embroidered designs determine the social status of the village women. Embroidery is usually performed among groups of women, who engage in needlework while singing and chatting. Each embroiderer adapts and reinvents the required knowledge and skills, as part of the process of transmission. The knowledge is conveyed orally and through practical work, mostly in formal educational environments. Students learn by watching experienced embroiderers combine pre-determined elements into numerous variations, and through regular and continuous practice. Zmijanje embroidery incorporates respect for diversity, creativity and non-verbal communication. It also has a sentimental and emotional value particularly for displaced populations, who use embroidered garments as an expression of national and local identity and pride. Embroidery ties

together many elements of cultural heritage, such as music, rituals, oral traditions, handicrafts and symbolic expressions.

Besides that, from the information included in the file, the nomination satisfies the following criteria for inscription on the Representative List:

R.1: Carrying strong symbolic meanings and transmitted from generation to generation, even during turbulent historical circumstances, Zmijanje embroidery promotes creativity, social unity and diversity in its region and beyond;

R.2: Its inscription on the Representative List could enhance the visibility of intangible cultural heritage and promote social unity, integration and diversity within Bosnia and Herzegovina and beyond;

R.3: The proposed safeguarding measures are broad, realistic and well-designed, including training, education, documentation, raising awareness, research and international cooperation; a broad participation is foreseen and the role of each stakeholder is clearly demonstrated together with the commitment of the State Party; integration of intangible cultural heritage within the formal education curriculum is particularly noteworthy;

R.4: The communities were involved in every stage of the nomination, mainly through non-governmental organizations, and provided their free, prior and informed consent;

R.5: The element was included in 2011 in the inventory of the Official List of Intangible Cultural Heritage of the Republic of Srpska, maintained and regularly updated by the Ministry of Civil Affairs

The cultural goods of the Republic of Srpska that are found on the UNESCO's World Heritage List, as well as the criteria for being entered into the List, are represented on the following pages. But at the same time, the goal is to point through the process of creating meaning to the sources of studying and thinking about the past, understanding, protection and presentation of cultural goods, via a literary review and a few photographs of the area, material and immaterial values, to which the stated heritage belongs. In another words, the tendency is to aim for a better organization with the goal of establishing sustainable development and tourism.

## **2. Methodology**

The integrated approach to heritage represents the initial hypothesis in this paper, which provides for huge possibilities in the development and realization of specific forms of tourism, diversification of products and protection of the heritage, as well as the promotion of tourist destinations. Accordingly, the work on the study of the arrangement, protection and presentation of the cultural heritage is based on the analysis of the literature from museology and tourism, as well as an overview of the relevant material and information available on the Internet, that is, research work on eco-museums.

Given the complexities and novelties in the stated branches of activity, the methodology is based on *Interpretation* as the process of creating meaning from material and immaterial remains of the past, by means of which the locations of cultural heritage are turned into the places and sources of studying and thinking about the past, which contributes to their understanding and better use. Through interpretation, objects and places represent significant resources for the development of the community. With the creation of experiences, innovative and quality communication with consumers, subject *tourists that seek what evades them* related to an already potential touristic destination, the

development and formation of a tourist product is encouraged, that is, potential eco-museums in the Republic of Srpska, Bosnia and Herzegovina.

### 3. Cultural-historical and natural value presented as proposal for development of destination for the purpose of their protection and promotion

According to UNESCO's definition, the concept of immaterial or intangible cultural heritage “denotes practices, representations, expressions, knowledge, skills, as well as instruments, subjects, artefacts and cultural spaces associated with them, which the communities, groups and in some cases individuals accept as part of their cultural heritage” (Tilden, 1957). It is also known that the definitions and conventions represent certain guidelines in what is being preserved, how and why it is being preserved, as well as that the national law on the protection and preservation of cultural goods takes over those international provisions in a literally identical manner. This represents *the good* that had to be extremely important in the past, for otherwise it would not be good and would not have been kept and preserved until today.

Of exceptional significance as cultural goods are our antiquities, which represent our heritage and which are also our property implying the obligation to maintain, preserve and protect, and which are represented through the form of eco-museum. These places keep the memory of the native people and many visitors, hence we always have to ask ourselves what *brand* is – the style, craft and function as prominent features of goods. Certainly, we should bear in mind that the word brand has a universal application and represents the manner in which the consumer, tourist, tourismologist, museologist and heritologist see and understand a certain product/cultural good, where interpretation plays a huge role.

#### 3.1. Eco-museum “Drina” (Table 1)

The bridge of Višegrad was constructed in the period from 1571 to 1577, according to the wish and order of the Grand Vizier in the Ottoman Empire, Mehmed paša Sokolović. He is one of the great army commanders and builders coming from Bosnia, that is, the countryside Sokolovići next to Rudo, and his bridge represents a masterpiece of the building construction of the time. It was built according to the drafts made by the famous Turkish architect, Kodža Mimar Sinan.

The legendary stony bridge is the symbol of the city of Višegrad and the *main character* of the novel "The Bridge on the Drina", written by the famous Nobel Prize Winner, Ivo Andrić. It has been protected by UNESCO since the year 2007.

Table 1 - Heritage as a brand, Eco-museum „Drina“

#### *Testimony by model documentation*

- *AS a picture of the world*; presented the views of historians, guardians of heritage, tourismologists, population
- *WITH* (direct traces of skills); The bridge on the Drina, Višegrad
- *IN* (testimony)

Source: Bulatović D. (2004)

*AS a picture of the world*

In the old times it used to be called Drinos, while the folk name, given after the color of the water, is Zelenika (zelen – green). Around its banks spread basin expansions with process able and inhabited fields, but so do the steep banks of the ravine and canyon type, overgrown by willows, poplars and low bushes.



Figure 4 – Drina canyon

Source: *Tourist organization of Republic of Srpska*

Today, the river Drina, with its surrounding landscape, is famous for its attractive canyon areas, artificial lakes, the wealth of the river fish and reservations and natural monuments, such as "Pančićeva omorika", "Vilina vlas", the "Drina canyon" etc. (Figure 4) Its wealth is also found in the cultural goods, the bridges in Višegrad and Žepa, monastery Dobrun, as well as the archaeological findings on the area of the future reservation of the biosphere "Drina". The river Drina is known as the cradle of rafting, famous for its angry rapids and cascades, nowadays obedient and quiet in its lakes. Every year, at the end of August, Pančićeva regatta, that is, cruising the lake in the wonderful natural ambience offered by the Drina canyon, is held on the lake Perućac with the aim of promoting and developing the river and lake tourism.

#### *Direct traces of skills*

It is interesting to say that the lake Perućac, with the length of 52km, spreads from Višegrad and the famous Andric's "The Bridge on the Drina". This magnificent bridge on the Drina is protected by UNESCO, while the records from 1577 say the following:

*"His Excellency, the benefactor Mehmed-pasa, who was a loyal grand vizier to three rulers, maketh the biggest wonderful memorial, may God enter it into the good for him. In a pure intent he maketh by his merciful look a huge bridge over the river Drina. Its production was so beautiful that anyone who sees it, thinks that is a grain of pearl in water, with the celestial arch being its shell".*

It marked the city of Višegrad, a place in the wide basin of the river Drina, and all this was glorified by the famous Nobel Prize Winner, Ivo Andric. To his honour, the cultural manifestation "Višegradska staza" (The Višegrad Pathway) is held each year through art exhibitions, theatre plays, literary nights and orations. (Figure5)



Figure 5 – Mehmed Paša Sokolović Bridge in Višegrad

Source: *Tourist organization of Republic of Srpska*

*Testimony in the social function*

The complex of the archaeological museum "Roman municipium" is about to be opened and arranged in Skelani, with one of the biggest preserved mosaic areas in the Republic of Srpska, the remaining of Roman buildings, frescos and epigraphic monuments of the Roman cities, settlements and mining capitals of the then provinces of Pannonia and Dalmatia. The story of archaeological findings is an essential, attractive part of the touristic story of Podrinje and it is necessary to support it with the aim of protection and adequate presentation.

3.2. *Eco-museum "Zmijanje" (Table 2)*

"Zmijanski vez" ('vez' meaning embroidery), the world cultural good, is considered the oldest hand embroidery on the Balkan Peninsula, and is specific for the cross technique and the constant dark blue color; since the year 2014 it has been entered on the UNESCO's representative list of intangible cultural heritage of humanity.

It comes from Zmijanje, the region of the Northwestern Bosnia and Herzegovina that is characterized by the untamed beauty of the wind and plateau of the mountain Manjača, and is kept from oblivion by the skilful hands of the Krajina's embroiderers and presented by the Cultural and Art Societies through the people's costumes and games from Zmijanje.

Table 2. Heritage as a brand, Eco-museum "Zmijanje"

|   |
|---|
| <p><i>Testimony by model documentation</i></p> <ul style="list-style-type: none"> <li>• <i>AS a picture of the world</i>; presented the views of historians, guardians of heritage, tourismologists, population</li> <li>• <i>WITH</i> (direct traces of sciles); Monastery Gomionica and „Zmijanjski vez“</li> <li>• <i>IN</i> (artistic testimony)</li> </ul> |
|---|

Source: Bulatović D. (2004)

*As a picture of the world*



The area of Zmijanje is an area of the Northwestern Bosnia and Herzegovina. It occupies the territory of the Eastern part of the Bosnian Krajina, a historical-geographical whole on which traces of pre-historic and Roman settlements, cities from the mediaeval and Ottoman age were found; however, from the end of XIII to XVI century, Zmijanje was the parish Zemljanik. In the XVI century it fell under the rule of the Turks, and from that time until the beginning of the XIX century it was organized as a nahija. Zmijanje sometimes occupied a larger, and sometimes a smaller area, between the rivers Vrbas and Sana and the mountains Kozara, Dimitor and Lisina. The broken-type mountain villages with several houses of Mrkonjić Grad, Ribnik and Banja Luka, are settled there.

What makes them special are the houses made of wood, or perhaps the reefs around which grow hundred-year old forests of spruce, fir, pine and beech, which are intersected by huge and steep mountain plains and river courses. Here lie the beginnings of the tradition, which is represented through folklore, musters and gatherings next to churches and monasteries, as well as through old crafts and handicraft business. What we have here are hand-made products of woodcarving, blacksmith's trade – metal processing, which represent the basis of the economic and cultural development of the humankind, as well as weavers and embroiderers with ethno-motives that are part of the contemporary interior.

#### *Direct traces of skills*

Monastery Gomionica (Figure 6), with a church dedicated to The Presentation of the Virgin Mary, is located 42 kilometers from Banja Luka, next to the upper course of the rivulet bearing the same name. This is the monastery that Petar Kočić glorified in his short stories, and which marked his childhood. It is here that Petar first went to school. Today, a pedestrian pathway leads via *Kočić's pathways* to these treasuries of hand-written books and issues of old Serbian printing houses and artistic objects. The area of Zmijanje, the old say, stretched from the river Sana to the river Vrbas. This is an area that is characterized by natural resources that provide a rich offer to sports-adventurous activities on the waters, land and in air. Above all, we are speaking about the river Vrbas, which intersects two canyons – Tijesno and Podmilačje – and offers huge possibilities for doing sports, including those extreme ones such as rafting, kayaking, canoeing, canyoning.



Figure 6 – Monastery Gomionica

Source: *Tourist organization of Republic of Srpska*

Zmijanjski vez – *cultural heritage of the humankind* – On the face of it, an untamed beauty of the wind of Zmijanje's plateaus of the Manjača mountain, the birthplace of the famous Serbian writer and the

people's tribune, Petar Kočić, has been interwoven since the old times by firm threads of the blue embroidery of Zmijanje (Figure 7), which is even today kept from oblivion by the skilful hands of Krajina's embroiderers with the aim of preserving and treating the tradition and culture of their region. Since the middle of the XIX century, it has kept the dark-blue colour and ornaments on the fabric woven by the cross technique, said Grozda Rogodić, a member of the ZD "Zmijanje". These ornaments represent the circle folk dance/Krajina's circle dance, the central motive of the embroidered ornaments, in the form of flowers and diamonds, which is the symbol of family, hearth and faith in the community.



Figure 7 – Zmijanje embroidery

Source 8: *Tourist organization of Republic of Srpska*

#### *Artistic testimony*

„The female T-shirt decorated by the embroidery from Zmijanje was pronounced the most beautiful at the Fair of Folk Wear in Paris, back in 1936"; the same embroidery that embellishes the female and male T-shirts, dresses, wedding dresses, scarves, doilies for the household and linen, is entered into the UNESCO's representative list of intangible cultural heritage. Folk wear and games from Zmijanje are publicly represented by the KUD "Ribnik" from Donja Prevljaka, together with many cultural-art societies of the Banja Luka's region, and the same is done by the embroiderers that actively decorate the clothes and numerous handicraft by the embroidery of Zmijanje, such as the members of the Women Association "Duga" in Banja Luka. They also have their ethno-gallery with unique ethno-souvenirs and unique works. The "Handicraft Business R" is a shop owned by the embroiderer, keeper and master of old crafts, Radenka Jungić. She deals with the production of embroidery in cross technique, production of frames made of knitted wood of the wild cherry, inlaying the wood with the embroidery, as well as adding the golden and silver embroidery into the blue embroidery of Zmijanje. The souvenirs and works of this shop are found in the homes and institutions across the world. They are also found in the monasteries of Hilandar, Studenica, Gračanica ... within all those monuments that testify about our heritage; and all this makes her happy, because she thinks that these ornaments will be preserved in that way, said Jungić (Budimir, 2015, p. 70-77).

#### **4. Definition of the term eco-museum**

To represent the natural beauties and the cultural-historical, that is, touristic values of the Republic of Srpska as the eco-museums of the Republic of Srpska, Bosnia and Herzegovina, offers a wonderful opportunity to point out the sense of preserving and arranging the cultural heritage through a strategy of smart, sustainable and comprehensive development, which is, in fact, the vision of the European social market economy for the 21st century (European Commission, 2010). This time this will not be

seen through the goals and initiatives of the EU strategy; rather, the tendency is to point out the significance of its priorities: smart and sustainable development, as well as the integrated approach to the general, that is, the protection and presentation of the heritage that make up the starting point in a specific manner of agency of one of the drivers of the sustainable development of cultural tourism – eco museum – which represents a brand as well as a part of promotional activities in tourism through the name, expression, image, symbol or any other way of communication.

Eco-museum tends to avoid the barriers of institutionalism, the final shelter of the testimonies into the national institutions, and places its accent on the conceptions, while involving the whole territory and everything that is valorized and recorded as important; through space and time, natural individualities or ensembles, events, individuals ..., recognizable in the place that gives off the monumental spirit and specialty in the very name. Its characteristics are:

- Organization and determination of the place of event and the starting point for researching the region, interpretation of the historical development of space and the presentation of everyday life of the citizens and their industrial and artistic production;
- Development of specific, fragmentary museum, where the elements of the landscape and the associated material and/or immaterial testimonies have been processed museum-wise and interpreted *in situ*
- Organization of cultural routes<sup>25</sup>, packages, clusters that can include familiarization with some other cultural goods by touring the spaces via pedestrian, mountaineering and cycling lanes
- Research laboratory for new theories, practices and ideas.

*The advantage* of an eco-museum, the museum of space, in situ, is certainly the determination of the place of event and the starting point for the research/visit of the region/destination. In the space these can be info-centers, that is, tangible and intangible heritage with immeasurable possibilities of recording the reality, where the interpretation “as an educational activity with the aim of discovering the significance by using the original objects, personal experience and illustrative media, rather than just dealing with the facts” (Tilden, 1957) has a huge role.

#### 4.1. *The cultural good as “resource”*

If we accept that “*he who inherits increases or maintains by his property the wealth of general property; and increases the heir's wealth by transferring the property, while relinquishing, patrimonial peacefully from his nominal participation in the general good*”, then we say that the heritage is a resource. (Bulatović, 2009)

In the preservation of memory lies the purpose of collecting, preserving and presenting the museum activity, while the museum as the institution that bears the process of production and exchange occupies its unique place in the world of heritage, where the *musealia* are expressly communicational objects. In relation to the social and spatial context, the *musealia* develop informational processes, production, that is, the creation of message, *museum offer*.

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<sup>25</sup> The creation and representation of the cultural-historical routes is certainly one of the goals within the development of tourism, specific and thematic cultural-touristic products, presentation of the cultural-historical heritage and branding of tourist destinations, while the inclusion into the routes of the Council of Europe should definitely be used as a huge possibility as part of a wider promotion and development of touristic potential and products of the Republic of Srpska all the same.

This message cannot be any piece of information, but only that which in that process can be *novus*, intangible and as a *service*, though thwarted many times and sometimes characterized as *slow benefit*, that is, as a long-term investment with too large a grace period.

An assessment of this kind, for an integrated approach to heritage, brings into question the exclusivity of the state institution in this area, because it is only a nominal title holder, but also a signatory of the UN Convention on Sustainable Development, and as such it ought to know: UN Convention on Sustainable Development also obligates one to preserve the cultural landscape, which is reminiscent of and initiates the formation of the *museum at the place of heritage*, eco-museum, by proclaiming the areas of nature, culture, history, economic heritage as an unstoppable life and protected production, lifestyle and customs, together with all the inhabitants as heirs and protectors.

Therefore, the external arrangement of the national museums of the civic model, including the eco-museums according to which we tend to arrange the area of "Zmijanje" and park "Drina", by establishing the criteria of irrefutable represent ability, formally corresponds to the form of museum collections, and the very name itself implies the content of testimony. Thus it follows and is implied that sustainable development, and with it the globalist model of museum institutions, need benefactors, that is, possible foundations that can invest, as well as new definitions of museum products. It is about a conscious and responsible participation in the sessions of *counselling on common issues*, about participation in determining the tasks of the developmental policy. That means that citizens as agents have to take huge responsibility for the realization of sustainable development, but they also have to be supported by the relevant institutions.

This is why the following tends to be emphasized in this paper:

*For the recognize ability of unquestionable values one has to fight with a well thought-out and organized activity with the aim of protecting the cultural heritage and presenting this unavoidable part of the Tourism of special needs, because someone else will tell our story and perhaps reduce the importance of what are already potential motives of huge touristic movements.*

## **5. Instead of conclusion**

Eco-museum, as an instrument which has been thought out and shaped by the public sector, e.g. local authorities that act through it, as well as the local population act, changes and adjusts depending on the time, space and most importantly, depending on the population and community in which it acts and the needs of its development. In his book *Eco museums: a Séance of Place*, Peter Davies concludes: „...one characteristic appears as the common characteristic of all eco-museums, the pride they take in the place they represent... eco-museums tend to capture the spirit of the place and, in my opinion, this is what makes them special” (cited in the interpretation of Darko Babić: *Iskustva i (skrivene) vrijednosti eko-muzeja*, 2009, page 220), which is what we want to present to others through a specific tourist offer of specific forms of tourism and cultural heritage branding.

The goal of their work is the organization and arrangement which implies the wisdom of management, the process of brand management with a focus on the exceptional significance of emotional branding, that is, branding of touristic experiences, where the tourist product, a chain of permanent values, is presented through economic rationalization, all with an end to protecting the cultural heritage and developing the tourism of special interests, educational tourism, eco-tourism, heritage tourism, cultural tourism with manifestation activities, workshops and presentations of the life and customs of the local population.

Today, the concept of cultural tourism has spread from the past visits to museums and galleries; it now represents almost all the manifestations of life, work and history of a certain nation. Tourists become active participants of events, and are thus informally educated as well, which contributes to the development of staff, future tourismologists, museologists, protectors, as well as to the understanding, valuing and creating partnerships between educational centers, cultural institutions and organizations, and the subjects of touristic business dealings. On the other hand, a firm connection is established in eco-museums, by reviving the traditional manner of production and cherishing the traditional forms of social life, between the local community and museums, not only in the rural but also in the city environments. A specific form of economy based on old crafts and trades, hotel management and tourism develops in them.

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# An evaluation of tourism potential and sustainability in Cappadocia, Turkey

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## **Abstract**

This study aims to discuss the current problems in the region and possible solutions within the boundaries of sustainability. The study employs qualitative methods and uses semi-structured interviews to collect data. The informants are selected based on their professional and academic involvement in Cappadocia's tourism development. Three respondents are entrepreneurs running a business in the region; and three are faculty members who undertook academic studies on sustainability and the tourism development in Cappadocia. The interviews are also supplemented by government documents and other relevant data. Findings will enable us to identify the regional problems, the tourism potential and the sustainability of resources. In line with the objectives of the study, the first part of the paper discusses the tourism potential and sustainability issues in Cappadocia. Methodology utilized is described in the following section. Thereafter, findings of the study are presented. Finally, discussions and implication of the study are presented.

## **Keywords**

Natural and cultural heritage, tourism potential, sustainability, Cappadocia.

## **1. Introduction**

Cappadocia, a historical region in Central Anatolia, Turkey, owes its uniqueness and authenticity to fairy chimneys, tall columns topped with rocks formed as a result of erosion by wind and water. As the "land of beautiful horses and fairies", Cappadocia not only holds the hallmarks of many ancient civilizations but also hosts fairy chimneys, valleys, underground cities, carved out churches and houses, wineries, and pottery. Cappadocia is currently an important tourist destination thanks to its fabulous landscape, exceptional natural beauties, and a unique historical and cultural heritage. Consequently, Goreme National Park and Rock Sites of Cappadocia have been included into UNESCO World Heritage List since 1985 due to their natural and cultural heritage. The inscription of a site on the World Heritage List brings an inevitable and welcome awareness and curiosity about the site and its outstanding values. It also increases the kinds of activities that are offered at the site and the number of tourists who visit it. When these are well planned and organized, respecting sustainable tourism principles, they can attract important funds and contributions to the site and to the local economy (UNESCO, 2008: 21). However, since the regulations and their enforcement is limited in scope, damages and degradation are observed in Cappadocia. Moreover, as Tosun (1998) notes, development of tourism as a viable economic activity in the region, and the emergence of large-scale accommodation establishments, souvenir shops, and bars have threatened the historical, cultural and natural attractions. As such, the use of local culture as a commodity and the over-commercialization of the values have resulted in a bundle of complicated problems that should be dealt with.

Goreme National Park and the Rock Sites of Cappadocia, having been extensively modified and used by man for centuries, is a landscape of harmony combining human interaction and settlement with dramatic natural landforms. There has been some earthquake damage to some of the cones and the pillars, but this is seen as a naturally occurring phenomenon. Overuse by tourists and some vandalism have been reported and some incompatible structures have been introduced (UNESCO, 2017). As one



of the major tourist regions in Turkey, intense visitor pressure in this area has also increased the damaging of the site (Somuncu and Yiğit, 2007; Somuncu and Yiğit, 2010). The number of tourists has increased by 3–5% every year since 2010. Far Eastern and South American tourists have begun traveling to the region in recent years, while Europeans comprised the majority during the 1980s and 1990s. Cappadocia also has a wide variety of recreational activities ranging from the International Mountain Bike Race, World Cross-Country Championships (Cappadocia Rally), hiking, bicycle tourism, camping and caravan tourism to horse trekking, paragliding and balloon travel. Cappadocia also attracts the attention of both domestic visitors and foreign tourists with the impacts of TV series and movies shot in the region. The development of transport facilities by road and air also contributed to the development of tourism in Cappadocia. Parallel to those developments, tourism has undoubtedly changed the lifestyle of Cappadocia's residents (Özel and Kozak, 2016: 288). Unfortunately, the development of mass tourism in the region in an irresponsible manner has not only damaged the natural and historical heritage but also altered the social structure and locals' attitudes toward tourism and the tourists (Yolal, 2016). In the course of time, many authentic cultural values have been over-commercialized by being used at the wrong place, wrong time, and with the wrong standards by mostly untrained performers (Tosun, 1998).

Thanks to its importance and uniqueness as a tourist destination, Cappadocia has long been an important area of research for the academics. Previous research has focused on tourism development in Cappadocia (Tosun and Jenkins, 1996; Tosun, 1998; Emge, 2003), managing a world heritage site (Tucker, 2001; Tucker and Emge, 2010), alternative tourism potential of Cappadocia (Oral and Başarır, 1995; Ersun and Arslan, 2009; Şamiloğlu and Karacaer, 2011; Karameşe, 2014; Berkmen, 2015), host perceptions of tourism impact (Tosun, 2002; Özel and Kozak, 2017), resident support (Turan and Kozak, 2016), community participation (Tosun, 2006), physical deterioration (Garcia-Valle, Topal and Vendrell-Saz, 2003; Yakar and Yılmaz, 2011), protection of natural and historical monuments (Erdoğan and Tosun, 2009; Varnacı-Uzun and Somuncu, 2014), and sustainability issues in Cappadocia (Tosun, 1998). In these studies, researchers use different stakeholders such as local people, tourists, tour guides, hotel managers and college students as information sources. However, the issue of sustainability is a long-lasting problem for any destination, and Cappadocia is not an exception to this. Hence, further studies are needed on the sustainability of the destination.

Therefore, this study aims to discuss current problems in the region, and discuss solutions within the boundaries of sustainability. The use of collective experiences, knowledge, and insights of tourism academics, and others (Crouch, 2011) who have spent time addressing the challenge of sustainability can provide a useful starting point for understanding the current problems and solutions, and the study reports the data gathered from faculty members who are working in the sustainability issues in Cappadocia. A comprehensive review of sustainability literature and the impact of tourism on Cappadocia is provided in the next section. Methodology utilized in this study is described in the following section. Findings of the study are presented. Finally, discussions and managerial implications of the study and recommendations are presented.

## **2. Literature Review**

The term sustainable tourism has long been debated in the literature and has been explained in multiple meanings depending on the context. The concept of sustainability embraces the environment, people and economic systems. Environmental standpoint suggests that reducing pollution including greenhouse gas emissions, water and energy consumption so as to protect local ecosystems are

sustainability measures (De Lange and Dodds, 2017). On the other hand, social perspective requires the protection of local people and the culture. Finally, economic perspective encompasses an approach to tourism which recognizes the importance of the host community, the way people are treated and the desire to maximize the economic benefits of tourism development for the host community (Swarbrooke, 1999). Overall, as it is suggested by Dowling and Fennell (2003), sustainable tourism development is envisaged as leading to the management of all resources in such a way that it can fulfil economic, social and aesthetic needs while maintaining cultural integrity, essential environment and life support systems. Although sustainability measures have been debated and tried to be implemented for decades, there is little progress in the application of sustainability in most of the destinations.

The United Nations Educational, Scientific and Cultural Organization (UNESCO) was established immediately after World War II with the thought of opening the channels of peace and dialogue among societies through education, science and culture. The international societal leaders who founded the UNESCO perceived that a lack of tolerance among peoples and societies was one of the basic reasons for the major destruction behind this war (UNESCO, 2013: 5). In 1972, a convention concerning the Protection of the World Cultural and Natural Heritage was developed from the merging of two separate movements: the first focusing on the preservation of cultural sites, and the other dealing with the conservation of nature (UNESCO, 2008). Cultural heritage refers to monuments, groups of buildings and sites with historical, aesthetic, archaeological, scientific, ethnological or anthropological value. Natural heritage refers to outstanding physical, biological and geological formations, habitats of threatened species of animals and plants and areas with scientific, conservation or aesthetic value (UNESCO, 2008). Turkey signed the World Heritage Convention in 1983 and started to prepare nomination files for its significant sites. The Historic Areas of Istanbul and Cappadocia were the first two files (UNESCO, 2013:27-28). Inscription to the World Heritage List not only confers recognition in terms of conservation, but also raises a site's profile and stimulates tourist demand. In internationally well-known sites, such as the Tower of London, World Heritage status may have little impact on visitor numbers, but in less established destinations, inscription is usually accompanied by an upsurge in tourism (Bandarin, 2004)

Cappadocia was included in the UNESCO World Heritage List in 1985 and since then increasing numbers of tourists have visited the area to appreciate its unique cultural heritage and natural beauty. The Goreme National Park and the Rock Sites of Cappadocia cover the region between the cities of Nevşehir, Ürgüp and Avanos, the sites of Karain, Karlık, Yeşilöz, Soğanlı and the subterranean cities of Kaymaklı and Derinkuyu. Owing to their quality and density, the rupestrian sanctuaries of Cappadocia constitute a unique artistic achievement offering irreplaceable testimony to the post iconoclastic period Byzantine art (UNESCO, 2013: 50). The traditional living rural culture of a weird, wonderful, moonlike landscape of 'fairy chimneys' formed by wind erosion bizarre formations, rock houses, historical monuments such as caved Byzantine churches, and underground cities are the main tourist attractions (Tosun, 2006: 497). However, over the last three decades, developments surrounding the increase in cultural tourism to the area have led to a problematic relationship between key heritage attraction(s) in the area, tourism interests and the local community (Tucker and Emge, 2010: 41).

Designation of a destination as World Heritage Site is often valued for the increased visitation and associated economic benefits; however, it can simultaneously lead to the disenfranchisement and marginalization of local communities (Tucker and Emge, 2010). Although Cappadocia is one of the most important tourism destinations in Turkey, it is clear that there are several problems regarding the

proper evolution of its tourism potential (Yılmaz, 2001). The unique scenery, geological structure, religious relics and historical sites are the primary attractions for tourists. These characteristics distinguish Cappadocia from other local tourist destinations in Turkey.

Since there are no strict planning regulations or empowered local authorities to implement existing regulations, ribbon development has occurred along the scenic routes and in areas of volcanic beauty (Tosun, 2001). Therefore, the damages inflicted on the natural and cultural structures in Goreme National Park and the Rock Sites of Cappadocia are the most important issues to be considered. Distortions, crackings and collapses have occurred due to weathering in “fairy chimneys” and churches of the valley along with other valuable sites of historical and natural importance (Somuncu and Yiğit, 2007). In the rock churches, man-made damage cannot be avoided. Construction of illegal buildings has damaged the natural and historical texture in the area despite the prohibition of new construction activities. Moreover, construction of new buildings which are not integrated with the superstructure of the tourism industry results in ‘architectural pollution’ as termed by Pearce (1978). At the same time, development of tourism service areas that are incompatible with the natural and cultural identity of the region has resulted in increased scenery pollution in Goreme Valley. Various problems, such as the implementation of the electricity, water and sewage systems of the upper settlements and infrastructure in a destructive manner, have been noticed in the underground city of Derinkuyu (Somuncu and Yiğit, 2010).

Apart from the natural impacts on the destination, authors have noted that most of the problems in the region are associated with human activities (Tunusluoğlu and Zorlu, 2009; Tosun, 1999, 2001; Güلكal, 1999). For example, Tosun (2001) notes that the tourists who are not interested in religious relics and natural attractions have damaged these antique man-made and natural values by behaving in an irresponsible way. Further, some of the rock houses have been used as tea gardens, bars, etc. and some have been bought by foreigners, who visit the region every year, to use as housing during their stay in Cappadocia. Moreover, in their study in Turkey Somuncu and Yiğit (2010) report that local people residing within the surrounding areas of historical and natural importance are poorly aware of their value and protected status. As observed by Tucker and Emge (2010), the Goreme community continuing to use rock dwellings as both private homes and commercial tourism ventures, there is particular contention surrounding government appropriation and preservation of all rock dwellings in the Goreme valleys. In this regard, Coşkun and Karakul (2013) underline the lack of a comprehensive management plan in the region. As such, Tosun and Jenkins (1996) observe that Turkey has, with the collaboration of international bodies, tried to implement an environmental protection program for Cappadocia, but that program seems to have failed, most probably due to lack of organization at the regional level to manage and control the program. A report by UNESCO (2017) reports that “Monuments in danger due to erosion, including the El Nazar, Elmali, and Meryemana (Virgin Mary) churches, have been listed as monuments requiring priority action. Specific measures for their protection, restoration and maintenance are required at the site level. While conservation plans and protection measures are in place for individual sites, it is recognized by the principal parties responsible for site management that an integrated Regional Plan for the Cappadocia Cultural and Tourism Conservation and Development Area is required to protect the World Heritage values of the property. Adequate financial, political and technical support is also required to secure the management of the property”. In this regard, Tucker and Emge (2010) suggest a need to develop a platform to facilitate cooperation and dialogue between relevant local, regional, national and international stakeholders in order to develop an understanding of the World Heritage Site of Cappadocia.

### **3. Methodology**

This study aims to discuss current problems in the region and possible solutions within the boundaries of sustainability. For the purpose of the study, a qualitative approach was employed to collect data from the faculty members using semi-structured interviews. The participants were selected from the faculty members who were working in the Cappadocia region on the basis of their expertise in the region and tourism development. Therefore, a purposive sampling method was used. Interview questions were mailed to the faculty members in February, 2017. The survey form included five questions prepared on the basis of an extensive literature review:

- 1) In your point of view, what are the fundamental problems of tourism development in Cappadocia?
- 2) What are the impacts of tourism development in Cappadocia on natural attractions? What are your suggestions?
- 3) What are the impacts of tourism development in Cappadocia on cultural resources? What are your suggestions?
- 4) What are the impacts of tourism development in Cappadocia on historical resources? What are your suggestions?
- 5) In your point of view, what should be done by the stakeholders (decision-makers, tourism businesses, non-governmental organizations, educational institutes and the local people) in the region to maintain a sustainable tourism approach in the region?

Participants were reminded about the survey questions one week after the first delivery. A total of 12 responses were attained at the end of data collection process on March, 2nd, 2017. In the literature, the saturation of the responses was suggested as a cut-off point for the qualitative research designs, and the sample size is suggested to be around 15 participants or responses (Mason, 2010: 3). Qualitative data analysis is the conceptual interpretation of the dataset as a whole, using specific analytic strategies to convert the raw data into a logical description and explanation of the phenomenon under study (Altinay, Paraskevas and Jang, 2016). Descriptive analysis was used for analyzing the data. Descriptive analysis is the summarization and interpretation of data on the basis of previously determined themes, and the purpose is to reflect individuals' opinions in a salient way. In this type of analysis, the aim is to report the information in an organized way.

### **4. Findings**

The findings of the study were reported under five headings in line with the survey questions.

#### *4.1. Problems associated with tourism*

Participants of the study indicated that Cappadocia has been an important destination for Turkish tourism and summarized the associated problems as (1) the lack of visitor and management plans for the destination, (2) the absence of adequate security for the protection of historical attractions at the destination, (3) construction of new buildings that are discordant with authentic pattern of the region, (4) insufficient infrastructure and superstructure especially during the high season, (5) lack of coordination in marketing and promotional efforts, (6) problems associated with diversification of tourism products, (7) relatively low nights spent at the destination, (8) high commissions in souvenir sales, (9) lack of trained and educated employees, (10) lack of coordination and cooperation among stakeholders, and (11) inadequate benefits of tourism development for the local residents. In this regard, one of the respondents noted that:

“Cappadocia is a worldwide destination as an alternative to sea, sun, and sand tourism with its abundant potential and attractions. However, the structure of the tourism development in the region is full of errors and flaws. The most important problem of Cappadocia is being a passing destination rather than being a destination of its own. Therefore, a vacation destination that solely includes Cappadocia should be created. ... One of the noteworthy problems is the low quality and quantity of accommodation establishments. Moreover, the service quality of guesthouses operated by their owners is insufficient and they are not qualified for customer satisfaction. On the other hand, recreational activities to entertain visitors, especially during the night time, are lacking in the region. Promotional efforts focusing on typical facilities undermines other tourist attractions” (Respondent 9).

Another respondent who had been living in the region for almost 12 years underlines the importance of human behavior, and expressed that:

“In my point of view, regional problems are mostly associated with haphazard actions on natural, cultural and historical assets. When I compared past and present of Cappadocia, which has abundant unique beauties, I can say that people are disrespectful about the attractions: they write their names or graffiti on the walls of the fairy chimneys; harm the frescos and the wall paintings in the caves and rock formations; use flash while taking photos in the prohibited areas; litter the environment rather than using waste baskets.... Further, unauthorized tours are increasing. Careless use of natural, cultural and historical places as a filming location are also influencing the environment” (Respondent 7).

#### *4.2. Impacts of tourism development on natural attractions*

Extremely interesting geological formations were created under the influence of water, wind and volcanoes that erupted repeatedly millions of years ago and produced their final shape on earth (Coşkun and Karakul, 2013: 51). As a result of said impacts, wonderful, moonlike landscape of ‘fairy chimneys’ (Tosun, 2006. 497) and other surface forms were developed on the badlands topography (Somuncu and Yiğit, 2007: 391). Where there is no basalt layer to protect the tuff, lovely valleys have been formed connected to the plateau by steep canyons of andesite and basalt. The canyons of Soğanlı and Ihlara are particularly stunning examples, Ihlara canyon being 650 feet in depth in some parts (Yıldız, 2003: 67). However, all these stunning landmarks have been under the threat of human activity and climate.

Fairy chimneys and distinct natural forms of the region are subject to corrosion, cracking and corruption by natural phenomena such as underground water, humidity, growth of vegetation roots etc. Apart from natural reasons, the region experiences problems associated with tourism development. Participants summarized these problems as: (1) vandalism by the local people and the visitors resulting in deterioration of the natural forms of the region, (2) uncontrolled and easy access to natural resources, (3) unauthorized use of fairy chimneys and caves for tourism, and (4) the use of fertile agricultural lands for construction and housing.

In this sense, Respondent 8 expressed his observation regarding the construction of new buildings:

“Negative impacts of over-construction on the natural beauties in recent times were also increasing, and covered much space in the media. Texture of the region has also been destroyed by large hotel constructions and new residential areas. Moreover, newly built buildings have shattered the mystical atmosphere of the region. There have been lawsuits against illegal construction but the trials for a court order take a long time. Therefore, serious precautions and inspections are needed to cope with

unlawful construction. Problems in the region can be resolved by specific regulations tailored to the characteristics of Cappadocia” (Respondent 8).

Another participant stated that the most important problem of the natural attractions was the lack of managerial and administrative plans:

“There is no management plan for the World Cultural Heritage site. Separate visitor management plans should be prepared for each specific ruin, attraction and tour route. All the fairy chimneys, caves and rocks in the region should be included into the national park, and should be used just for tourist visits after making the necessary restorations. In preparing the visitor management plans, tour operators’ and the tour guides’ opinions and views should be taken, and carrying capacity should be taken as a yardstick. Excessive tourist visitation hinders the protection of natural and cultural attractions” (Respondent 4).

#### 4.3. *Impacts of tourism development on cultural attractions*

Cappadocia region bears witness to the entire history of humankind with its cultural and historical characteristics. The region has the traces of many civilizations and hosts sacred places of interest for monotheistic religions. Traces and the heritage of diverse civilizations render the region one of the most important attractions for both the country and the globe (Yılmaz, 2001). Inevitably, tourism development has resulted in some impacts on the cultural attractions. In this regard, Tosun (1998) notes that authentic cultural values have been over-commercialized by being used at the wrong place, wrong time, and with the wrong standards by mostly untrained performers. Similarly, participants of the survey summarized these impacts as: (1) commodification and over-commercialization of cultural elements, (2) loss of authentic value and importance in cultural resources, (3) damages on the cultural resources as a result of over-construction.

“Although tourism revitalizes cultural values, it also causes degeneration of cultural values as a result of over-commercialization. For example, ‘Turkish Nights’ organized in the region contains both fun and entertainment such as folkloric and oriental belly dances and religious rituals in the form of *semah* (swirling dervishes). Melting religious and entertaining events in the same pot results in degeneration of cultural values. Moreover, they play pop music at the end of the event” (Respondent 7).

One of the participants claimed that the cultural values in the region lost their authenticity as a result of commodification:

“Tourism impacts on handicrafts is twofold. First, it revitalizes the local arts and prevents their extinction. On the other hand, tourism causes commodification as a result of over-commercialization. Higher demand in souvenirs as a result of mass tourism has altered the way the local artifacts are produced, changing the quality of these goods. Moreover, this trend has also resulted in a decrease in craftsmanship and distinguished meanings of the products; in addition to selling fake handicrafts, produced according to the tastes of the tourists, as originals. Currently, in some souvenir shops in Cappadocia, mass produced goods are sold instead of handmade pottery, carpets and rugs. Therefore, local people should be informed about the importance of original cultural values in maintaining the sustainability of the tourism in the region, and the significance of transferring these values to the future generations. Further, projects to promote people to protect cultural values should be initiated.” (Respondent 1).

#### 4.4. Impacts of tourism development on historical attractions

Cappadocia has hosted many civilizations since prehistory, from times before there was writing until the present-day and is unique in the world, not only with its fairy chimneys, but also with the rock tombs hewn in the fairy chimneys, the rock hewn houses and churches, storage depots, dovecotes and subterranean settlements (Coşkun and Karakul, 2013: 51). The region has become a crossroad for trade and culture over the course of time (Aslan and Çokal, 2016: 60). Using the topography in a rational way, people of the past have bestowed abundant cultural and historical heritage to future generations (Somuncu and Yiğit, 2007: 391). However, tourism development has also increased the negative impacts on historical attractions (UNESCO, 2009: 185). In this regard, participants expressed these impacts as: (1) protection problems of historical buildings and fairy chimneys, (2) lack of security; (3) uncontrolled development without considering carrying capacity, and (4) harms caused by the local residents' insensibleness.

One of the participants underlines the impacts of people's insensibleness regarding the historical attractions:

"Highly demanded Goreme and Zelve open air museums are partially under protection, while less attractive places are being left to their destiny. It is observed that historical places are constantly being distorted because of overcapacity, low restoration precautions etc. Some of the places under protection are used for storing vegetables, they make a fire inside or even use them as shelter for their animals. At this point, it is crucial to take the inventory of the historical places, and highly damaged ones should be taken under protection instantly" (Respondent 10).

One of the participants claimed that the negative impacts on the historical attractions associated with tourism development in the region ensued as a result of the lack of tourism administration plans specific to the region, insufficient collaboration among the stakeholders and inadequate inspection. As such, he stressed the harms caused by illegal tour organizations:

"As in the national parks in other countries, carrying capacity should be taken into account in Cappadocia, fragile attractions should be kept under protection, and not all parts should be allowed for visitation. I also think that illegal tour organizations cause much harm. Under the control of pirate tour guides, participants of these tours misbehave, sometimes vandalize and damage frescos, churches, caves and the natural environment" (Respondent 7).

In the past, people used the topography in a rational way and they founded underground cities, they built houses and churches carving the rocks, and they left a gorgeous heritage for the future (Somuncu & Yiğit, 2007: 391). However, local people corrode this irreplaceable heritage in an insensible manner, even harm the region more than tourism development. This was also mentioned by a respondent:

"Most of the local people are unaware of the importance of the cultural and historical heritage they have. They protect the sites and the buildings only if they have an economical benefit. Otherwise, they do not care. In fact, local people harm these buildings more than the visitors." (Respondent 5).

#### 4.5. Stakeholders' role in the sustainability of tourism

Cooperation is defined as collaboration based on contractual agreements between legal and economically independent organizations with the aim of following and achieving a common goal (Laubenheimer, Carlsson, Cordero and Makinen, 1999). Focusing on destinations, Buhalis and Keeling (1999) suggest that closer collaboration at the local level will also enable the destination to maximize

the tourism impacts for both the public and the private sectors. Such a collaboration requires all the stakeholders at the destination level to participate in planning and decision-making processes in the region. Therefore, stakeholders' role in the administration of tourism development cannot be underestimated, especially when providing sustainable tourism services. Participants were also asked about stakeholders' role in the sustainability of tourism in the region. Participants all agreed with the fact that central and local governments, tourism businesses, tourist guides, educational institutes, non-governmental organizations, local residents and tourists should collaborate to promote sustainable tourism in Cappadocia. They underlined the importance of coordination among the stakeholders in a collaborative way to solve current problems associated with tourism. They also noted that the destination would gain competitive edge with sustainable tourism development. When asked about each stakeholders' role in providing sustainable tourism services, their responses were grouped under several stakeholders.

Decision-makers;

- Although construction of new buildings is prohibited in the region, unlicensed buildings (as in the form of slums, new places carved out in the rocks, souvenir shops by the highway) disrupt the historical and natural pattern. Moreover, there are no protection plans for the areas out of World Cultural Heritage site. Therefore, a comprehensive protection plan should be made to protect the whole region (Respondent 3).
- Site and visitor management plans should be prepared, and an active approach should be designed to inspect the rules. Culpable actions should be penalized heavily (Respondent 11).
- An exhaustive list of historical buildings, churches and fairy chimneys is needed. Imitations of fragile pieces can be manufactured and made open to visitation rather than the original ones (Respondent 5).
- Safety regulations for the naturally, historically and culturally important pieces should be extended (increasing the number of safety staff, alarm systems, surveillance systems etc.) (Respondent 7).
- A monitoring committee is needed to track and inspect the impacts of regulations in Goreme National Park and Cappadocia. This committee should include representatives from the international institutes, universities, local non-governmental organizations and local residents (Respondent 7).
- The infrastructure of the region and the rest areas should be rehabilitated (Respondent 1).
- A comprehensive protection and marketing plan should be made and implemented by the participation of Kayseri, Nevsehir and Aksaray municipalities. Experts are needed to conduct the required restorations in the region. To fund the projects, a certain share of the revenues of open air museum can be allocated. Further, funds of UNESCO and the European Union can be used (Respondent 2).
- In the promotion and marketing of the region, tourist businesses should also be included in plans (Respondent 8).
- An understanding and sensitivity to protect and maintain sustainability among the residents in the region should be assured by the collaborative work of Ministry of Culture and Tourism, Turkish National Commission for UNESCO, local governments, educational institutes, non-governmental organizations dealing with environmental protection, and the local residents (Respondent 12).



#### Tourism Businesses;

- Businesses should respect the environment and the cultural heritage (Respondent 5).
- Businesses should supply quality and authentic goods and services (Respondent 8).
- Businesses should recruit and employ trained tourism personnel (Respondent 6).
- Alternative attractions should be created to extend length of stay in the region (Respondent 12).
- New tour routes should be generated to get tourists to experience more natural and historical attractions (Respondent R9).
- Tour operators should focus on new and emerging markets to diversify the markets (Respondent 4).

#### Non-governmental Organizations;

- In an organized manner, they need to adopt the natural, cultural and historical heritage of the site, follow up the developments in the region, and inform the public about the inaccurate actions committed in the region (Respondent 2).
- They should organize public campaigns, seminars and workshops to inform the residents and businesses about the sustainability issues in the region (Respondent 4).
- They should support the central and the local governments in their promotion and publicity efforts (Respondent 10).

#### Universities;

- Universities should entrust related faculty members from related disciplines (history of arts, archaeology, tourism etc.) with the restoration and archaeological excavation efforts (Respondent 1).
- In collaboration with local bodies, they should start projects for the protection of natural, cultural and historical heritage (Respondent 4).
- Since most of the residents are unaware of Cappadocia's World Cultural Heritage Site status, universities should try to find ways to inform the local people and to create awareness among residents (Respondent 9).
- People who are employed in tourism businesses and rely on tourism for their survival should be trained about sustainable tourism, ethics, marketing technics and communication (Respondent 3).
- Academic studies should be increased in order to better market the destination (Respondent 12).

#### Local People;

- The region can principally be owned and protected by the local residents. Therefore, they should increase their awareness and sensitivity about the problems of the region (Respondent 5).
- Local people should be included in the planning efforts especially about the construction plans (Respondent 7).
- A creative and an effective communicative approach is needed, especially when dealing with the visitors (Respondent 12).

- Original production methods should be used in producing local products in order to maintain their authenticity, and the products should be fairly priced (Respondent 1).
- Valuable real estates in the tourist areas should not be sold to foreigners in search of higher revenues (Respondent 3).

## 5. Conclusion

Drawing data from the faculty members who were working in the Cappadocia region, Turkey, on the basis of their expertise in the region and tourism development, this study investigated current problems in the region, and solutions under the confines of sustainability. The use of collective experiences, knowledge, and insights of tourism academics, and others provided useful insights for understanding the current problems and solutions regarding the sustainability issues in Cappadocia.

The study findings suggest that Cappadocia experiences several problems such as the lack of security and efficient protection for the sites, construction of new buildings inconsistent with the authentic pattern of the region, insufficient infrastructure especially during the high season, lack of coordination in promotion and marketing efforts, problems associated with product diversification, shorter length of stay, lack of coordination among stakeholders, and inadequate economic benefits for the local people. Most of the problems derive from the region being spread out across three provinces, which results in complexity in the administration of World Heritage Site. Therefore, in line with the previous studies, study findings reveal that there is clearly a need to develop a platform to facilitate cooperation and dialogue between relevant local, regional, national and international stakeholders in order to develop an understanding of the World Heritage Site of Cappadocia (Tucker and Emge, 2010). A key reason for the growing interest in cooperation is the belief that organizations and destinations may be able to gain a competitive edge by bringing together and sharing their combined knowledge, expertise, capital and other resources. Additionally, such a cooperation has the potential to diminish communication-related problems among the stakeholders. At this point, as suggested by Çetinel and Yolal (2010), lack of organization and expertise at regional level is an important barrier for sustainability projects, and this problem can be mitigated by educating the local authorities, entrepreneurs, civil initiatives and even the local people.

Findings also show the lack of visitor management plans, a result of the wide area the heritage site covers. The problems worsen especially during the high season when the visitor numbers exceed carrying capacity. Therefore, an immediate visitor management plan, which takes the carrying capacity into account, is needed for the region. Moreover, a sound strategy is needed to limit the size and the scope of construction facilities in the region. In this regard, existing buildings should be rehabilitated in order to mitigate 'architectural pollution'. As such, benchmarking strategy can be important for Cappadocia.

Further, the results show that local people and the entrepreneurs are indifferent to the destination and its sustainability. They seem to be focused on daily interests and gains. A collaborative action is also needed among the local people and businesses. As such, both parties should be trained on the sustainability of the destination. They should also be convinced about the fact that the destination's sustainability means their well-being in terms of happiness, wealth and interests of the future generations. In this way, a general understanding of tourism resources and their sustainability can be created among the local people. Furthermore, involvement of local communities in the planning process will also contribute to the success of plans and policies.

The results of this study should be approached in the light of certain limitations. The primary limitation of this study is that only the views and opinions of faculty members, on the basis of their expertise in the region and tourism development, are taken into account. Several other stakeholders such as local people, businesses and local authorities may have valuable insights on the sustainability and the tourism potential of Cappadocia. Therefore, future studies should examine the views of other stakeholders. Furthermore, this study employed a qualitative approach which diminishes the generalizability of the study results. Future studies should also use quantitative technics. Finally, the study reports the results of a study conducted in Cappadocia. Therefore, results are specific to Cappadocia. Other destinations may experience different problems regarding sustainability. Consequently, similar studies should be conducted in other destinations as well.

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# Challenges in determining the impact of cultural heritage's value on the economic sustainability of a tourism destination – the case of the episcopal complex of the euphrasian basilica in the historic centre of Poreč

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## Abstract

The objective of this paper is to critically analyse relations between the tangible cultural heritage value and the economic sustainability of a tourism destination. Economic sustainability presumes effective economic development and optimal management of tourism resources and requires an economic valuation of those resources and inclusion of its value in the economic system of a tourism destination. Tangible cultural heritage's value could be estimated using many different quantitative or qualitative methods depending on different types of values cultural heritage possess. Additionally, economic sustainability could be estimated using many different indicators as measures of the existence or severity of current issues, signals of upcoming situations or problems etc. The main purpose of the research is to outline the challenges in determining the potential impact of cultural heritage's value on the economic sustainability of a tourism destination by identifying measurement issues and relations of afore mentioned variables. The research was conducted on a UNESCO cultural heritage site, namely The Episcopal Complex of the Euphrasian Basilica and the associated tourism destination of Poreč in Croatia. The value of the site was estimated on the basis of maintenance and promotional costs. The economic sustainability indicators of tourist arrivals and overnight stays were chosen on the basis of economic viability. Despite methodological issues the correlations indicated the existence of effects of tangible cultural heritage's promotional costs on the tourist arrivals and overnight stays in tourism destination of Poreč.

## Keywords

Tangible cultural heritage's value; economic evaluation; sustainable tourism development; economic sustainability.

## 1. The Introduction

The primary purpose of this paper is to outline the challenges in determining the potential impact of cultural heritage's value on the economic sustainability of a tourism destination. The theoretical framework of economic sustainability was used as it presupposes an economic evaluation of tourism resources and the inclusion of their value in the economic system of a tourism destination (Bartoluci, 2013). As heritage is often regarded as "a powerful engine of economic development" (World Bank, 2001) the problem of determining i.e. identifying and evaluating the consequences of the presence or the use of cultural property in the local or regional economic system is one of the major issues in analysing relations between value and economic sustainability. The economic analysis of the cultural heritage stems from the valuation of goods without a price or the environment, i.e. environmental resources and the overall aim is to determine the cost of such resources. Cultural resources, although resemble environmental resources, have their own peculiarities in the form of historic dimensions, characteristics and uniqueness and their abiotic nature (Nijkamp, 2012). Despite these differences, some authors have singled out a few pillars of economic valuation of environment that could be applied to cultural heritage such as the increasing scarcity, non-market value and specificity of place (Carruthers and Mundy 2006, Choi et al. 2010; Navrud and Ready 2002).

Additionally, tourism has been among the fastest growing activities of the world economy for more than 60 years. According to the UNWTO data, "the substantial growth of tourism clearly marks it as one of the most remarkable economic and social phenomena of the past century" (UNWTO, 2005).

The number of international tourist arrivals shows an evolution from a mere 25 million in 1950 to 1 186 million in 2015 (UNWTO, 2016). Therefore, tourism generates and is accredited with important economic and social effects. As tourism development is based on natural and socio-cultural resources, the awareness for the sustainable development grew together with tourism growth (Čavlek et al., 2011). The theory of sustainable development has emerged as a reaction to the prevailing ecological and socio-cultural problems of the post-modern era. The concept of sustainable development has become the most researched field in different disciplines as well as in tourism in the last few decades (Bramwell, 2015). Sustainable tourism development is frequently related to the preservation of ecosystems, the promotion of human welfare, inter- and intra-generational equity, and public participation in decision-making (Bramwell, 2015: 204) and sustainability can serve as policy goal for tourism activities within tourism destination (Lane, 2009; Moscardo, 2008; Weaver, 2006; Bramwell, 2015). Numerous studies have shown that tourism destinations with their distinctive cultural or natural resources represent one of the main attractions for international tourists (Deng, King, & Bauer, 2002; Bonet, 2003; Dritsakis, 2004; Bille and Schulze, 2008; Cooke and Lazzaretti, 2008;) and cultural or natural attractions lead to increased tourism demand (Yu-Wen, Hui-Lin, 2014:47). As the upward trend in the number of international tourist arrivals is present on the global tourism market and tourism has experienced continuous expansion the need to protect and preserve cultural heritage sites as cultural attractions is a reasonable response to such tourism development.

The concept of sustainable tourism development relies upon its principles which can be reduced to three basic ones: the principles of environmental, socio-cultural and economic sustainability (Owen, Witt, Gamon, 1993; Coccossis, Nijkamp, 1995; Glasson, Godfrey, Goodey, 1995; Coccossis, 1996; Gartner, 1996; Tisdell, 1999). Moreover, the practical meaning of sustainable tourism development is to some extent vague. Torres-Delgado, López Palomeque argue that “the ‘sustainable tourism’ label has been applied to many tourism practices that can hardly be said to adhere to the principles of sustainable development, or which do so in a partial way in one of the dimensions of sustainability (economic, social or environmental)” (2014:123). Therefore, sustainable development indicators became the tool for putting general theory into practice. UNWTO has been advocating the use of sustainable tourism indicators since the early 1990s as necessary instruments for policy-making, planning and management processes at destinations<sup>26</sup>. Indicators role in sustainable development in general is defined as “measures of the existence or severity of current issues, signals of upcoming situations or problems, measures of risk and potential need for action, and means to identify and measure the results of our actions” (UNWTO, 2004:8). This clearly marks their properties, practical importance and usability.

The rest of the paper is structured in four sections. Based on the literature review section 2 describes different values cultural heritage obtains and according to these values outlines the specific characteristics of economic valuation. Section 3 discusses economic sustainability indicators applied in tourism context. Section 4 presents the case study being The Episcopal Complex of The Euphrasian Basilica in The Historic Centre of Poreč and its distinguishing features. Furthermore it elaborates methodology, research results and discusses research limitations. Section 5 concludes the paper by examining potential applications of the observed relations between the cultural heritage’s value and economic sustainability, thus contributing to the overall discussion of cultural heritage's economic impacts on a tourism destination.

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<sup>26</sup> UNWTO Elibrary. Available at: <http://www.e-unwto.org/content/x53g07/?p=c1a8815e60d44ea1b5e202bd799548f2&pi=0&hl=u>. Accessed 27.4.2017

## 2. Tangible cultural heritage's value and valuation methods

Numerous authors have approached the concept of cultural value theoretically (Connor, 1992; Throsby, 1999; Negus and Pickering, 2004; Schwartz, 2006; Stephenson, 2008; Throsby and Zednik, 2014) and practically (Avrami et al., 2000; Throsby, 2003; Salazar and Marques, 2005; Tuan, Seenprachawong and Navrud, 2009; Ferretti, Bottero and Mondini, 2014) as well as the concept of economic value, both use and non-use value (Pagiola, 1996; Pearce et al., 2002; Klamer, 2003; Ruijgrok, 2006; Kim, Wong and Cho, 2007; Ecorys, 2012; Dümcke and Gnedovsky, 2013; Dalmas et al., 2015). In economic terms, it could be argued that tangible cultural heritage induces two types of values non-economic (cultural) and economic (use and non-use) values. Furthermore, various authors employed different terms describing the notion of cultural heritage's value, such as the intrinsic (Throsby, 2001; 2012; Pinnock, 2006, Nijkamp, 2012) and instrumental (Navrud and Ready, 2002; Nijkamp, 2012) and some included institutional value as a third type of a value (Moore, 1995; Holden, 2004, 2006; O'Brian, 2010). Instrumental value is reflected in the relevance of heritage in social and economic development (Dümcke and Gnedovsky, 2013:7), institutional value is connected with the cultural heritage's public nature and the institutions which generate trust or esteem in the way they engage their users (Moore, 1995; O'Brian, 2010:18). Intrinsic value represents the cultural heritage's essence or the core value. Few authors (Throsby, 2001; Avrami et al., 2000; Mason, 2002; Mason, 2008; O'Brien, 2010; Throsby, 2012) have deconstructed the tangible heritage's cultural value into the following dimensions: aesthetic value; symbolic value; spiritual/religious value; social value; historic value; authenticity value; scientific value.

However, economic valuation of "goods and services without the price" stems from environmental economics (Pagiola, 1996). Therefore the concept of total economic value (TEV) introduced two basic types of economic values which consequently could be applied to cultural heritage (Pagiola, 1996). These values are the use value (extractive, or consumptive and non-extractive use value) and non-use value of a cultural heritage (Pagiola, 1996; Navrud & Ready, 2002; Pearce et al. 2002; Armbrrecht, 2010; Thorsby, 2012)). Non-extractive use value is obtained from the services which cultural heritage site provides and non-use value represents benefits human beings may enjoy merely by knowing the cultural heritage is being preserved (Pagiola, 1996). Normally, economic values are easier to clarify considering the fact that they are regulated by market rules and expressed in monetary units. Cultural heritage being a good without the price and a merit good, having a public character, with the cost structure different from regular market goods (Snowball, 2008) enters markets indirectly or imperfectly (Pagiola, 1996). Therefore, market fails to determine adequate measure of its economic value. According to the economic "public goods" theory, a public good is interpreted as a good being "non-rival" in consumption and having "non-excludable" benefits (Samuelson, 1954; Hardin, 2013; Stiglitz, 1986; Barton 1999; Navrud and Ready, 2002; Landriani and Pozzoli, 2014). Basically it means that every individual can consume it without reducing its availability to another individual.

Accordingly, methods used in valuation studies of cultural resources are known as non-market valuation techniques. These methods, used to estimate economic benefits accumulated from accessing or preserving cultural resources, are methods which have evolved from other areas of public policy such as health and environment (O'Brian, 2010:4) as well as housing (Pagiola, 1996) . "Recent developments in environmental economic theory and social survey methodology have made it theoretically defensible and practically feasible to value the economic benefits of several types of amenities not traded in markets..." (Mourato, Mazzanti, 2002:54).



Non-market valuation techniques are Stated Preference (SP) methods such as Contingent Valuation (CV), Choice Modelling (CM), and Revealed Preference (RP) Techniques such as Travel Cost Method (TCM), Hedonic Price Method (HPM), Maintenance-cost method (MC). “CV and CM are considered to be the best techniques to estimate the total economic value of cultural resources that are not traded in the market, and which have large non-use values. CV and CM are to some extent complements” (Tuan, Navrud, 2008:326). Stated preference methods of analysis are derived from behavioural economics but have found extensive application in the case of non-market goods valuing the individual willingness to pay (Thompson, Throsby and Withers, 1983; Morrison, West, 1986; Navrud, Strand 1992; Johansson, 1993; Willis, 1994; Ready et al. 1997; Mundy, McLean 1998; Carson et al., 1999; Glass et al., 1999; Pollicino, Maddison, 2001; Mourato et al. 2002; Noonan 2003; Poor, Smith, 2004; Boter et al., 2005; Alberini, Longo,

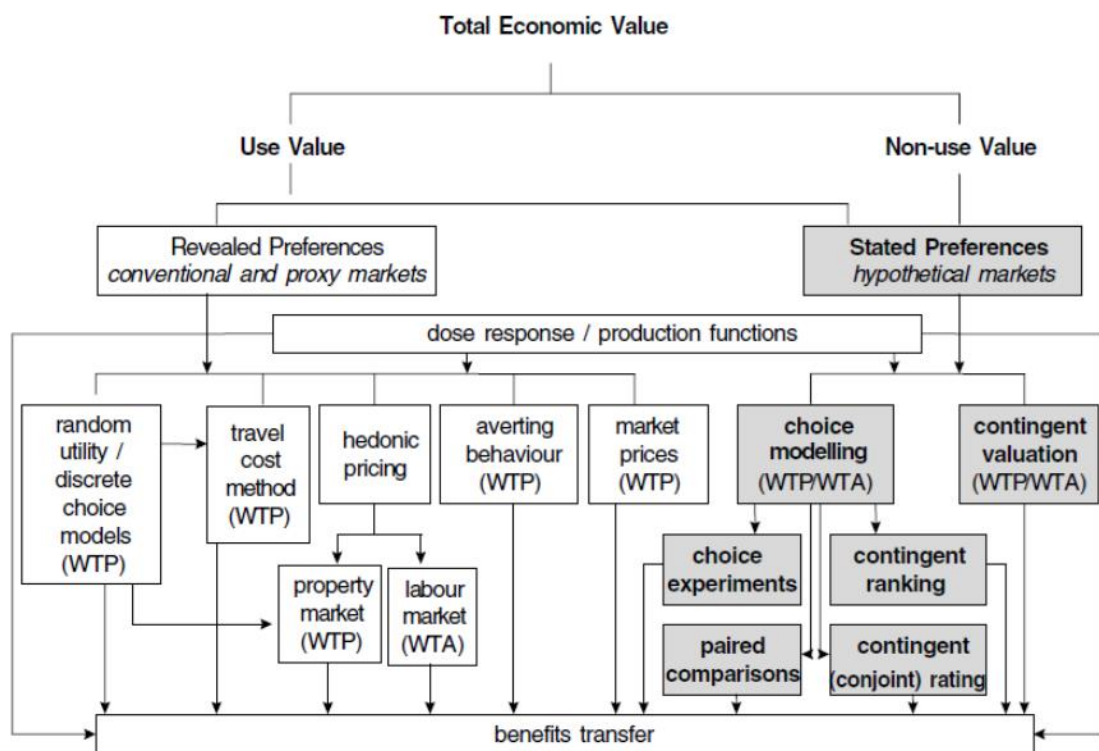


Figure 1 Economic valuation techniques

Source: Pearce et al. (2002) *Economic Valuation with Stated Preference Techniques. Summary Guide. Department for Transport, Local Government and the Regions: London. p.30. Available at: [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/191522/Economic\\_valuation\\_with\\_stated\\_preference\\_techniques.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191522/Economic_valuation_with_stated_preference_techniques.pdf)*

2006; Kim et al., 2007; Willis, 2009; Neuts and Nijkamp 2011; Nijkamp, 2012).

The choice between economic valuation techniques depends on the research subject, although environmental economics has shown that both RP and SP can be used to measure use values. A detailed scheme of valuation techniques and their use according to total economic value is presented in Figure 1. The scheme is derived from environmental economics and clearly represents possibilities of applying the abovementioned techniques. Furthermore it demonstrates an important aspect of valuation process and that is the notion of “benefits transfer”. The benefits transfer represents the process of transferring estimates or economic values obtained from one context and applies them to a different

one (Pagiola, 1996; Pearce et al.,2002). This is only possible under certain conditions: “the commodity or service being valued is identical at the site where the estimates were made and the site where they are applied; and that the populations affected have identical characteristics.” (Pagiola, 1996:10). Benefits transfer is unlikely to be successful when applied within the general cultural heritage context. As each heritage site has a unique set up this approach would be of less use. Nevertheless Pagiola argues that within benefits associated with international tourism the conditions could plausibly be thought to hold. “Since tourists at one site are likely to be drawn from the same pool of potential tourists as those at another site, it seems reasonable to assume they would place similar values on similar services” (Pagiola, 1996:10).

Market-price method is method which calculates benefits visitors accrue on the basis of paid entrance fees. The revenue obtained from those fees represents direct measure of value visitors place on being able to “use” the site (Pagiola,1996). Cultural heritage sites in tourism context induce a variety of economic benefits which could also be measured applying this method (on site restaurants, souvenir shops, or close by hotels and other recreational amenities, i.e. Mayaland Resort situated in the area of cultural heritage site of Chichen Itza).

Revealed preference techniques are pointed towards “surrogate markets” meaning that they analyse “preferences for nonmarket goods as implied by WTP behaviour in an associated market” (Mourato, Mazzanti, 2002:53). Most frequently used are travel-cost method, hedonic-price method and maintenance-cost method (Mourato, Mazzanti, 2002).

A maintenance-cost method as method of economic valuation has often been used to estimate damages to cultural materials. The advantage of this method is reflected in the fact that cost information is easier to collect than benefit information. “The method consists of calculating the cost savings implied from a reduction in maintenance cycles due to reduced damage rates. However, as noted before, maintenance costs are not the correct measure of the benefits derived by society from reduced damage to cultural resources, and the sole consideration of costs may seriously underestimate true economic values” (Mourato, Mazzanti, 2002:55). Pacheco and Erviti argue that “the valuation of the cultural asset implies the determination of an actual value that depends on the costs that occur during its useful lifecycle” (2011:6). In the case of immovable assets with an average service life of 50 years, according to Pacheco and Erviti, “the initial or production costs represent an average proportion of 20-25% of the total costs and the remaining 75-80% corresponds to maintenance and operational expenses” (2011:6). Furthermore, since the cultural heritage’s service life needs to be prolonged for the necessity of cultural value preservation (Pacheco, Erviti, 2011:6), heritage’s economic value could be reflected in maintenance costs itself. The advantage of this method is that the data is available publicly and its limitation is that the cost doesn’t reflect total economic value.

### **3. Economic sustainability indicators**

Nowadays, sustainability is, among many other important factors for tourism destination development, considered to be a key variable in the competitiveness on tourism market (ECORYS, 2009; World Economic Forum, 2013; Torres-Delgado, López Palomeque, 2014). This is one of the reasons why tourism policy makers and managers find more and more interest in practical implementations of the concept within destination management and planning.

UNWTO has proposed a number of indicators to calculate the sustainability of tourism at the national level; from economic and environmental to social indicators. Simultaneously, tourism is manifested in many different environments and therefore it is necessary to develop and adopt indicators for each specific location. As tourism is a complex system depending on the area where it is being developed, it is important to choose an appropriate set of indicators to obtain a clear picture of sustainability in that area. Rather simple approach to choosing right indicators would be “that the indicators measure the phenomena intended to be measured” (Miller, 2001:352). Unfortunately “sometimes certain phenomena are not so easy to be quantitatively defined, as is the case with most of the socio-cultural interactions in terms of tourism” (Budimski, 2014:144). The significance of indicators becomes stronger as they come closer to measuring and quantifying real circumstances of a specific area in terms of objective parameters. As regards to complexity of tourism sustainability some critics have been pointed towards a number of indicator systems stating that some of them have limitations when it comes to practical application, allowing only partial comparisons whereas others are appropriate but too complex to be useful, or the result of political consensus which is most likely to generate conflicts of interest (Torres-Delgado, López Palomeque, 2014).

General sustainable development literature argues that an indicator should be:

- “specific (must clearly relate to outcomes);
- measurable (implies that it must be a quantitative indicator);
- usable (practical);
- sensitive (must readily change as circumstances change);
- available (it must be relatively straightforward to collect the necessary data for the indicator); and
- cost-effective (it should not be a very expensive task to access the necessary data)” (Bell, Morse, 2003:31)

Furthermore, sustainable development indicators (SDI) could be examined at different levels:

- individual SDIs and the combination of SDIs
- SDIs with a narrow focus and those with a broad focus
- SDI on macro level
- SDI on micro level (Bell and Morse, 2003, 2008; Budimski, 2014; Hall, 2006; Ko, 2005).

Since numerous authors have research indicators of sustainability in general, as well as those applicable in the field of tourism (Nelson, Butler and Wall, 1993; Gartner, 1996; Eagan and Joeres, 1997; Godfrey, 1998; Callens and Tyteca, 1999; Godfrey and Clarke, 2000; Hardi and DeSouza - Huletey, 2000, Mason and Cheyne, 2000; Miller, 2001; Tosun, 2001; Veleva, Hart, Greiner and Crumbley, 2001; Maxwell and van der Vorst, 2003; Rammel and van den Bergh, 2003; Ko, 2005; Choi and Sirakaya, 2006; Hall, 2006; Yang, Wall and Smith, 2006; Alfsen and Greaker, 2007; Byrd, 2007; Vera and Langlois, 2007; Becken, 2008; Diedrich and Garcia-Buades, 2009; Castellani and Sala, 2010; Blancas et al. 2010; Mbaiwa, 2011, etc.), there are a number of tourism sustainability indicators as well as economic indicators of sustainable tourism development.

Indicators of economic sustainability present measures which indicate the movement of economy towards sustainability. To be able to enjoy more sustainable economy the mankind needs to accomplish sustainable use of resources, promote stability and competition, develop skills and reward work, and supply goods and services which meet consumers' needs whilst minimising their impact on the environment. Stable economy is prerequisite for innovation and investment and on which consequently future jobs depend (Blowfield, 2013; Holliday, Schmidheiny, Watts, 2002; Pearce, Markandya, Barbier, 1989).

Some specific SDIs connected to tourism development in regards to well-being of community in tourism destination have been researched by Choi and Syrakaya Turk (2011) and indicators for economic dimension have been singled out (Table 1).

Table 1. Economic sustainability indicators in Tourism

| Key themes   | Indicators/issues  |
|--|--|
| <b>Employment</b>                                      | Employment growth in tourism   |
|  | Unemployment rate  |
|  | Employment growth in general   |
| <b>Income distribution/capital leakage and linkage</b> | Percent of income leakage from the community   |
|  | Intersectoral linkages/partnership in tourism  |
|  | Employment and income multipliers on tourism expenditures  |
|  | Rate change of purchase of local products/value and variety  |
|  | Import contents  |
|  | Tourism as percentage of local economy   |
| <b>Capital formation in the community/investment</b>   | Percent of foreign ownership of tourist establishments   |
|  | Percent of profit/revenue reinvestment in community development  |
|  | Availability of local credit to local Business   |
|  | Entrepreneurial opportunities for local Residents  |
|  | External ownership of business in General  |
|  | Percent of profit/revenue reinvestment in reserved natural and cultural area management and protection                                   |
| <b>Nature of demand</b>                                | Percent of repeat visitors   |
|  | Seasonality of tourism/tourist visitation  |
| <b>Economic well-being</b>                             | Comparative ratio of wages in tourism sector to local average wage   |
|  | New GDP (index of sustainable economic welfare)  |
|  | Local community economic stability   |
| <b>Labour/company and job conditions</b>               | Social cost/benefit at community level for examining net benefit to local economy  |
|  | Existence of an adequate fee structure (e.g., higher entrance fee for tourists and low entrance fee for locals and additional donations) |
|  | Equal opportunity employment and promotion to women and local residents  |
| <b>Local government income</b>                         | Hotel/motel tax  |

Source: Choi, H.C., Turk, E.S. (2011) Chapter 7, Sustainability Indicators for Managing Community Tourism. In: (Budruk, M., Phillips, R., ed) Quality-of-Life Community Indicators for Parks, Recreation and Tourism Management, Social Indicators Research, Series Volume 43, 2011, p. 124.

Results of the research conducted by Choi and Turk (2011) presented top three indicators of economic sustainability in tourism as regards to community well-being and they are as follows: 1. Availability of local credit to local business, 2. Employment growth in tourism and 3. Percent of income leakage out of the community.

As regards to the sustainable tourism development, yet another research has singled out just a few most important impact indicators of economic sustainability dimension. These are: 1. Tourist spending; 2. Population employed in the tourism sector; 3. Unemployment rate in the tourism sector (Torres-Delgado, Palomeque, 2014:131). The selected indicators were applied at the local/municipal level and could be calculated based on available data and were easy to work with and communicate (Torres-Delgado, Palomeque, 2014).

For the purpose of this study the economic sustainability indicators of tourist arrivals and overnight stays were chosen on the basis of the economic viability criterion. It could be argued that these indicators at least to some extent reflect economic activity. Economic viability is listed first among a list of 12 aims of sustainable tourism development (Goodwin, 2013) and therefore represents a reasonable criterion for indicator selection. However, the indicators of tourist arrivals and overnight stays may be found unsustainable. In some cases the massive numbers of tourist arrivals and consequently overnight stays represented a risk to the environmental and socio-cultural sustainability as the carrying capacity of a tourism destination was exceeded.

#### **4. The case study - The Episcopal Complex of The Euphrasian Basilica in The Historic Centre of Poreč**

The research was carried out on a tangible cultural heritage of the highest degree of recognition, a cultural heritage site under the UNESCO patronage. Such tangible cultural heritage is included in the World Heritage List (WHL) primarily due to the size of its intrinsic values. Its non-market, cultural values (aesthetic, spiritual, historical, symbolic, social, etc.), and subsequently market or economic values, are recognized throughout the world.

The Episcopal Complex of the Euphrasian Basilica is situated in the Historic centre of the city of Poreč on the western coast of Istrian peninsula in Istria County, The Republic of Croatia. It was inscribed on the list in 1997 on the basis of UNESCO's criteria (ii), (iii) and (iv) and represents "an outstanding example of an early Christian Episcopal ensemble that is exceptional by virtue of its completeness and its unique Basilican cathedral."<sup>27</sup>

The Episcopal Complex represents the group of completely preserved religious monuments such as the basilica, atrium, baptistery and Episcopal palace. The basilica's architecture combines classical and Byzantine elements of the 5th- and 6th-century religious architecture. The Euphrasian Basilica itself is the most integrally preserved early Christian cathedral complex in the region. All its components such as church, memorial chapel, atrium, baptistery and Episcopal palace are exceptionally preserved. The Episcopal Complex of the Euphrasian Basilica is managed by the Catholic Church, the Parish of the Assumption of the Blessed Virgin Mary in Poreč<sup>28</sup>.

As regards tourism activities sightseeing is possible every day except during religious rituals.<sup>29</sup> Furthermore the Euphrasian Basilica has 56 years old tradition of hosting classical music festival

<sup>27</sup> UNESCO WHL. Episcopal Complex of the Euphrasian Basilica in the Historic Centre of Poreč. Available at: <http://whc.unesco.org/en/list/809>. Accessed 28.3.2015.

<sup>28</sup> Župa Poreč. Eufrazijeva bazilika. Available at: <http://www.zupaporec.com/eufrazijeva-bazilika.html> Accessed 10.5.2017

<sup>29</sup> Istra.hr. Cultural Sights. Available at: [http://www.istra.hr/en/regions-and-towns/porec/arts-and-culture/cultural-sights/2857-ch-0?&l\\_over=1](http://www.istra.hr/en/regions-and-towns/porec/arts-and-culture/cultural-sights/2857-ch-0?&l_over=1) Accessed 10.5.2017.

„Concerts in Euphrasiana” during peak season in the months of July and August. Concerts are organized by Open University of Poreč and Tourist Office of Poreč under the patronage of Ministry of Culture of the Republic of Croatia, Istria County, City of Poreč and Poreč Tourist Board.

#### 4.1. Methodology

An attempt to estimate the value of cultural heritage was made using the maintenance cost method based on available secondary data as well as costs of the promotion. The maintenance cost method served as a guiding tool in identifying the main variable for the valuation of tangible cultural heritage in a tourism destination and its influence on the economic sustainability of a tourism destination.

The independent variable for the valuation of cultural heritage in a tourism destination is the cost of protecting and maintaining tangible cultural heritage under UNESCO protection, while the dependent variable is economic sustainability with sub-variables representing chosen economic sustainability indicators; tourist arrivals and overnight stays.

The group of independent variables:

$x_1$  - cost of protection and maintenance of tangible cultural heritage

$x_2$  - cost of promotion of tangible cultural heritage

The group of dependent variables:

$y_1$  - tourist arrivals in a tourism destination

$y_2$  - overnights in a tourism destination

Linear regression equation:  $Y_1 = \beta X_1$ ;  $Y_2 = \beta X_2$ ;  $Y_2 = \beta X_1$ ;  $Y_2 = \beta X_2$

The sample included 11 observations from year 2005 till 2015. Data collected for the aforementioned period is presented in the Table 2.

Table 2 - Data on The Episcopal Complex of the Euphrasian Basilica and the tourism destination of Poreč

| Year | The Episcopal Complex of the Euphrasian Basilica |                   | The tourism destination of Poreč |                 |
|------|--|-------------------|----------------------------------|-----------------|
|      | Protection & Maintenance Costs                   | Promotional Costs | Tourist Arrivals                 | Overnight Stays |
| 2005 | 367533,44  | 130000,00         | 665186,00                        | 4639739,00      |
| 2006 | 688511,41  | 130000,00         | 687952,00                        | 4734360,00      |
| 2007 | 140000,00  | 130000,00         | 579932,00                        | 3923202,00      |
| 2008 | 140000,00  | 180000,00         | 572818,00                        | 3974151,00      |
| 2009 | 800000,00  | 200000,00         | 562578,00                        | 3815675,00      |
| 2010 | 800000,00  | 280000,00         | 529163,00                        | 3652954,00      |
| 2011 | 800000,00  | 200000,00         | 582709,00                        | 3959786,00      |
| 2012 | 1000000,00                                       | 250000,00         | 606296,00                        | 4168685,00      |

|      |            |           |           |            |
|------|------------|-----------|-----------|------------|
| 2013 | 500000,00  | 260000,00 | 587239,00 | 3935711,00 |
| 2014 | 1100000,00 | 290000,00 | 591320,00 | 3858931,00 |
| 2015 | 935000,00  | 290000,00 | 637224,00 | 4081518,00 |

Source: Croatian Bureau of Statistics; Ministry of Culture; Poreč Tourist Board

Hypotheses tested for the purpose of this case study are as follows:

H1: The cost of investing in the protection and maintenance of The Episcopal Complex of the Euphrasian Basilica affects the increase in tourist arrivals in Poreč.

H2: The cost of investing in the protection and maintenance of The Episcopal Complex of the Euphrasian Basilica affects the increase in overnights in Poreč.

H3: The cost of investing in the promotion of The Episcopal Complex of the Euphrasian Basilica affects the increase in tourist arrivals in a tourism destination.

H4: The cost of investing in the promotion of The Episcopal Complex of the Euphrasian Basilica affects the increase in overnights in Poreč.

The hypotheses assume that the cost of investing in the protection and maintenance as well as in promotion of tangible cultural heritage of The Episcopal Complex of the Euphrasian Basilica has a positive impact on the dependant variables representing economic sustainability. Methods used to test the hypotheses were the descriptive analysis and correlation analysis to determine existence of correlations between variables. The SPSS software was used for data analysis.

#### 4.2. Research results

Hypothesis H1 was rejected based on correlation analyses and Pearson's coefficient of linear regression which is 0,007 (Table 3). It shows no linear relationship between the variables. This result could be confirmed on the basis of a Graph 1.

Hypothesis H2 was also rejected based on correlation analyses and Pearson's coefficient of linear regression which is -0,149 (Table 3) as it shows no linear relationship between the variables. The result could be clearly noticed on the basis of a Graph 1.

Table 3 - Correlation analyses

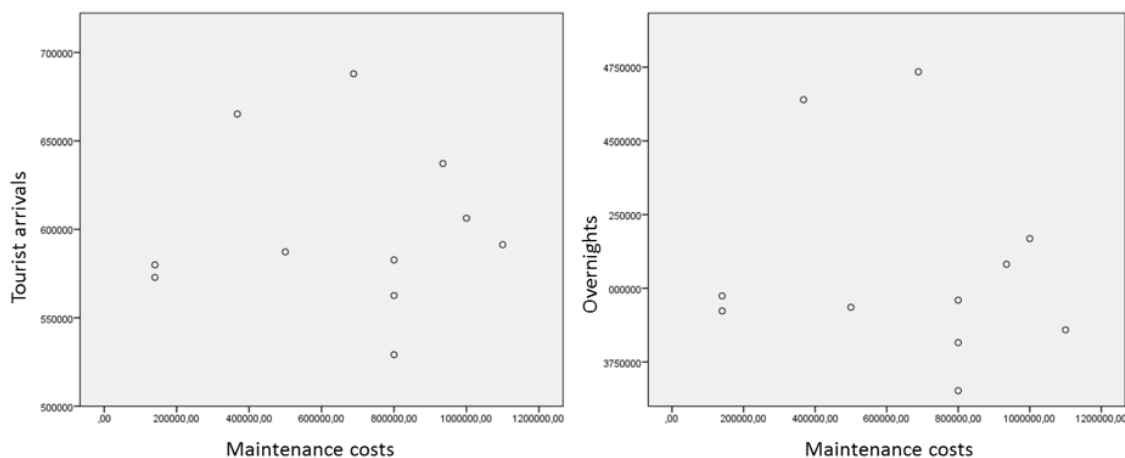
|                   | Maintenance costs | Promotional costs | Tourist arrivals | Overnight stays |
|-------------------|-------------------|-------------------|------------------|-----------------|
| Maintenance costs | 1                 | ,690*             | ,007             | -,149           |
| Promotional costs | ,690*             | 1                 | -,411            | -,592           |
| Tourist arrivals  | ,007              | -,411             | 1                | ,945**          |
| Overnight stays   | -,149             | -,592             | ,945**           | 1               |

\*. Correlation is significant at the 0.05 level (2-tailed).

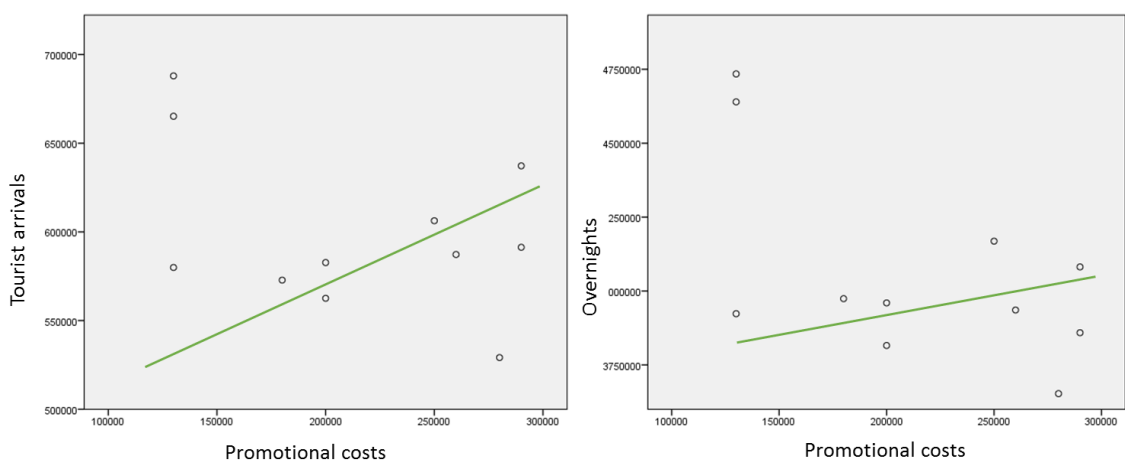
\*\* . Correlation is significant at the 0.01 level (2-tailed).

Source: author's calculations

**Graph 1. Scatterplot of tourist arrivals and overnights vs. maintenance costs**



**Graph 2. Scatterplot of tourist arrivals and overnights vs. promotional costs**



Source: author's calculations

Hypothesis H3 and H4 were also rejected based on correlation analyses and Pearson's coefficient of linear regression which is -0,411 and -0,592 (Table 3) as it shows no linear relationship between the variables. However, a positive trend between variables could be noticed which means if the cost of investing in the promotion of The Episcopal Complex of the Euphrasian Basilica will increase the number of tourist arrivals in a tourism destination will also increase (Graph 2.) Since The Episcopal Complex of the Euphrasian Basilica is a well-known as well as one the most important cultural attractions in the tourism destination of Poreč, efficient promotional activities could boost not only the number of tourist arrivals but the number of overnight stays in Poreč.

The correlation model is simplistic and it is an obvious simplification to identify economic sustainability with number of tourism arrivals and overnight stays. Nevertheless the descriptive analyses showed possible effects of the promotional costs on those variables.

#### 4.3. Research limitations

Research limitation could be related to the sample of the time series model. To be representative, the sample requires a timeline of at least 30 years, preferably 100 and ideally over 100 years of collected data. Moreover, multiple short and medium-long term factors may influence tourism demand, tourist



flows and their economic impact. The tourist arrivals and overnights series should be cross checked with accommodation facility series and marketing effects in the same period. Maintenance cost series should be cross checked with public policies in culture. Moreover, cost of maintaining and protecting cultural sites in the Republic of Croatia are based on government decisions without prior cost benefit analysis in connection with tourism system.

Promotional costs are provided in general amounts for the city of Poreč and could not be obtained solely for the Euphrasian Basilica. On the other hand every brochure that advertises cultural tourism in the city promotes the Euphrasian Basilica.

## 5. Conclusion

Although hypothesis could not be accepted due to research limitations and the measurement issues and the impacts between variables could not be proved, it could be argued that the promotional cost of a cultural heritage could influence the number of tourist arrivals and overnight stays. The results confirmed theoretical notions which claim that cultural heritage complements tourism supply and induces economic impacts in tourism destination indirectly.

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# Promoting sustainability in World Heritage Cities. The case of the historic centre of Havana

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## Abstract

Sustainability is a widespread concept, especially in tourism. However, although its meaning seems to be quite clear, how it can be achieved is a less discussed issue. Our proposal aims to deepen the implementation of sustainability indicators and their systematic measurement in World Heritage Cities, taking the Historic Centre of Havana as a case study. The Old Havana was declared a Cultural World Heritage Site in 1982. It is a multifunctional space with a complex urban dynamic where residential, religious, cultural, political-administrative, commercial, educational, and tourist functions co-exist. The present research is focused on the study of tourism sustainability as an analysis tool to holistically assess the behaviour of city models, specifically the premises that address the spatial planning and tourist planning of the Historic Centre of Havana. A selection of tourism indicators have been done taking into account the following categories: socio-economic, environmental, socio-cultural, tourism use level, tourism management, and the preservation and reuse of buildings. In order to study the changes in the tourism model, an evaluation of these indicators in the period 2010-2014 has been developed. This has allowed us to reach key conclusions about whether the tourism model developed in the Historic Centre of Havana does or does not follow sustainable guidelines. Finally, based on the results, a series of recommendations have been proposed to improve the sustainable tourism model.

## Keywords

Sustainable Tourism; Indicators System; World Heritage Cities; Old Havana.

## 1. Introduction

One of the great challenges today for governments, private institutions, researchers and planners is how to promote the development of tourism while avoiding the impacts of such an activity. That is, developing more sustainable tourism in environmental, socio-cultural and economic terms. The concept of sustainable development within the tourism sector defines a necessary strategy, which aims to insert tourism in a framework of environmental, social, cultural heritage and economical compatibility.

Since the 1990s, urban policies have incorporated sustainability indicators in urban centres, especially in those cities that, by origin, had built heritage of great historical and cultural value and therefore tourism potential (Robert, 2010). Extrapolating the results of a study on sustainability to other destinations is complex, since it depends on the conditions of the space being analyzed. It is therefore advisable to perform periodic studies of the phenomenon in order to make comparisons and have the ability to make decisions if necessary (Echarri, 2006).

In this sense, this research is focused on the study of sustainable tourism as an analytical tool to holistically assess the behaviour of city models, specifically the premises that formulate land and tourism planning in the Havana Historic Centre. This study is part of the project "The capacity and number of visitors in the Havana Historic Centre", associated with the research line "Sustainable



development of tourism destinations", and developed at the Faculty of Tourism of the University of Havana. The proposal is based on the analysis of sustainability indicators ranging from social to the environmental within a framework of local tourism development. Thus, this study opens the spectrum of research and shows a pathway analysis of the dynamics of the current management model.

As part of this research project periodic assessments of the indicators have been carried out. The last was held in 2010; therefore it is necessary to carry out an update of the evaluation of the Old Havana management model. The aim is to facilitate the decision making of managers and to evaluate the performance of the evolutionary dynamics of the tourist destination. That is why the objective of this study is to assess sustainable tourism indicators for the Havana Historic Centre in the period 2010-2014, proposing continuity in the analysis of the Old Havana tourism development model.

## **2. Theoretical Background**

In the majority of historic cities, heritage tourism is located in the city centre ignoring new shopping areas, residential areas, business centres or industrial estates located in the outskirts or in suburban residential districts (Timothy, 2011). In some cases this behaviour results in the overcrowding of main squares and areas surrounding major attractions, causing the deterioration of the place and the experience. To avoid such situations in historic cities, tourism should be following sustainable development models, further than only ensuring the protection of heritage (Mercie, 2010). These considerations have contributed to the adoption of a policy of sustainable development and to the use of the concept of sustainable tourism in order to manage this new reality (Cohen-Hattab, 2013).

Sustainable tourism has been defined as one that meets the needs of the present without compromising the ability of future generations to meet their own needs (UNWTO, 2004). According to the European Association of Historic Towns and Region (2009) sustainability embraces social, environmental and economic matters and for cultural tourism it involves a consideration of each of the components through:

- Visitors – their needs, aspirations and wellbeing
- Industry – the need for tourism businesses to be profitable and have a long-term future
- Community - respecting the values, needs and quality of life of the local community
- Environment - conserving the cultural and physical environments, local identity and sense of place

One of the most widely discussed parameters in recent years in the discourse on the preservation and sustainability of tourism management concerns the issue of the participation of the public and the aspiration to decentralize the decision-making processes (Landorf, 2009; Lombardi *et al.*, 2011; Jones and Evans, 2012; Nyseth and Sognaes, 2013; Lussetyowati, 2015). Policies for sustainable tourism, especially in inhabited historic cities of social and urban sensitivities strive to focus on interdependence between representatives of the tourism industry and representatives of the local community and groups concerned with the environment. The vested interests of the residents of the old city in maintaining and improving their quality of life makes them valuable partners in the tourism planning process (Cohen-Hattab, 2013).

As a consequence of the awareness of the importance of historic centres heritage and their tourist use, numerous initiatives have been promoted for their conservation and rehabilitation. However, they have mainly focused on the protection of the tangible heritage, abandoning other important functions.

As a result, well preserved urban spaces which are devoid of life and economic and tourism activities have arisen, leading to a musealisation of historic centres (Santos and Lois, 2005). Van der Borg and Russo (2005) also cite the preservation of cultural identity as a prerequisite for the sustainability of tourism in the historic city, along with the spatial balance of uses.

When referring to sustainable cultural tourism, terms such as Cultural Heritage Management, Heritage Planning and Heritage Consumption have emerged (Ashworth and Tunbridge, 2000; Mackay, 2001; Manning et al. 2002). Tourism management strategies that face the problem of how to deal with sustainability limits have been described by several authors (McCool and Lime, 2001; Russo and Van der Borg, 2002; Landorf, 2009; Butler, 2010). The idea that sustainable tourism in historic cities is closely related to the carrying capacity (physical, social, economic, environmental and perceptual) has been reinforced by several authors (Troitiño 2003; García, 2003; Massiani and Santoro, 2012). Some of the measures found in the literature are: traffic regulation, signage, limits to free access, limits to specific activities, concentration or dispersion of tourist flows and pressures, land use/spatial planning measures; economic tools such as pricing, taxes and incentive schemes; organizational tools such as booking systems, information management, education, training and market control (Massiani and Santoro, 2012; Barrera, Arista and Azevedo, 2014).

Tourism and Cultural Heritage Management exist within the context of government policy and legislation under which heritage is conserved and tourism is developed. The political or legislative balance between the two, therefore, plays a central role in the nature of the relationship. Pro-tourism governments may not wish to introduce heritage legislation or may seek to dilute existing legislation in order to stimulate tourism. It is therefore necessary that the tourism planners are able to anticipate such tendencies, bringing together development and sustainability, on more than one scale: the spatial, the socio-economic and obviously the environmental (Russo and Van der Borg, 2002).

Management and tourism planning should be based on development policies and criteria that incorporate sustainability principles. In this regard, the establishment of sustainability indicators and their systematic measurement is an important tool for analyzing and monitoring a destination tourism model (Schianetz, and Kavanagh, 2008; Castellani, and Sala, 2010; Bauler, 2012; Blancas, Lozano-Oyola, González and Caballero, 2016). Using this instrument enables the evaluation of the transformations and changes of natural, social and economic systems and the degree of conservation of the values that support a region or area for tourism development (Blancas, Lozano-Oyola, González and Caballero, 2016).

## **2. The historic Centre of Havana**

The Historic Centre of Old Havana stretches to 2.14 sq.km and occupies 50% of the municipal territory. It consists of two clearly differentiated zones from the urban point of view: the old intramural city, and the surrounding band that was urbanized after the demolition of the city walls and built between the mid-nineteenth and the early twentieth century.

As is illustrated in Figure 1, intramural Havana extends from the western margin, including the current sea border, to the axis through which the old land wall flowed. The other zone is integrated by Murallas district that goes from San Salvador de la Punta Castle to the Railway Central Station yard. In addition, the fortification system of Havana bay is also part of the Historic Centre.

Old Havana suffered a serious decline in its heritage due to damage from several factors: urban sprawl, urban decay and the consequent loss of buildings, as well as the devastating effects of tropical

hurricanes. During the twentieth century, it became an area characterized by a high density of low income population. Poor housing conditions and the decline in accessibility and sanitary or educational equipment were critical. Deficiencies in the infrastructure required by the elderly, disabled and other vulnerable groups also emerged. In addition, technological infrastructure and networks were damaged causing overloads in local areas. Another problem was the lack of safe drinking water, partly mitigated by the use of portable tanks (Office of Historian of Havana, 2006).

The urgency of protecting historic buildings and monuments, as part of a promotion of the Cuban culture and nationality, led to the founding of the Office of Historian of Havana in 1938. In 1981 it was designated to manage the Historic Centre rehabilitation. In 1982 UNESCO declared the Havana Historic Centre and its Fortification System a World Cultural Heritage site. This achievement opened new possibilities for the Integrated Rehabilitation Program for Old Havana. Five -year restoration plans were put in place. Based on a strategy of recovering public spaces, the image of the main squares was changing and marking the lines of what would constitute the patrimonial rehabilitation in the old city.

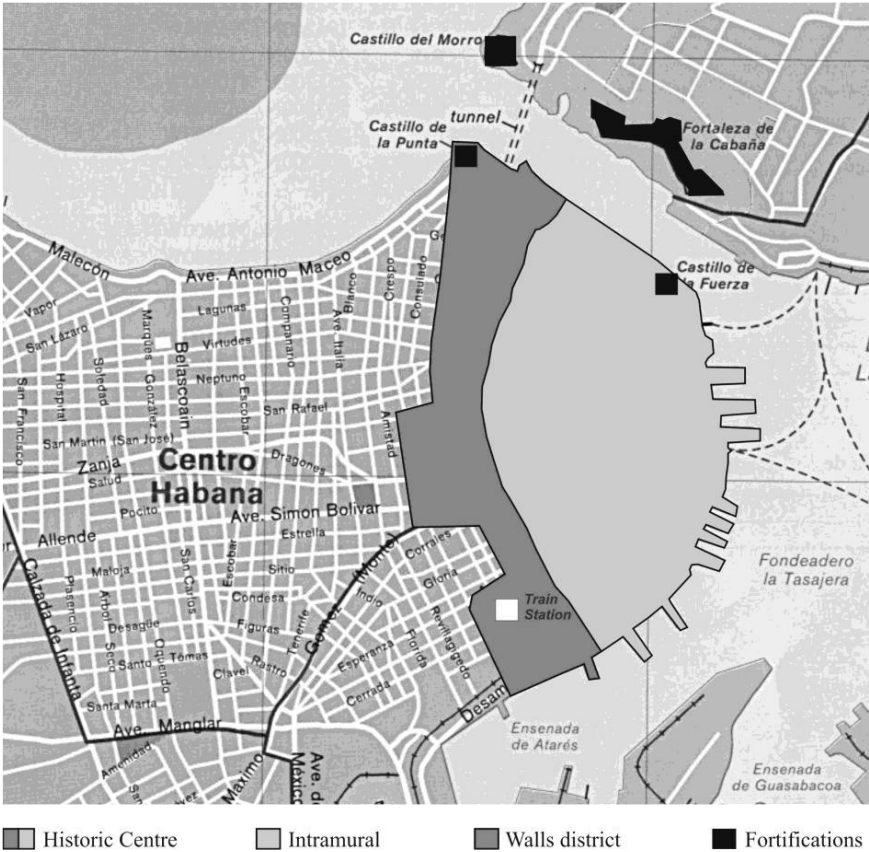


Figure 1. Delimitation of the Havana Historic Centre.

Source: Own elaboration using material from Perry-Catañeda maps collection. University of Texas.

In the Office of the Historian, the Master Plan is the entity that controls the use of land and is responsible for maintaining its comprehensive management. In 1998 the Special Development Plan (PED) was developed, which constituted a practical guide to govern actions in the territory, ensuring the coherence of interventions and physical recovery. Rehabilitation was structured linking integral development criteria, self-sustaining recovery and cultural development mechanisms (Leal, 2007).

Regarding the planning of tourist spaces in the Old part of Havana, different studies have been done. The Historic Centre has been classified by functional sectors differentiated by typological

characteristics such as traditional functions and future roles (Salinas and Echarri, 2005). This territorial division was directed to complete the following objectives: (1) protect and respect the residential vocation of the historic centre; (2) promote tourism and the tertiary sector in terms of permissible uses and in areas suitable for such purposes; and (3) promote those uses and functions that allow a diversified centre, taking into account the layout, customs and physical potential for each area.

Thus, eight functional sectors were identified. Two of them with a tourist and tertiary nature, two tertiary, two residential, one mixed-residential and the other mixed. It was mainly in tertiary areas where tourism planning was developed, constituting the theoretical and practical development of rehabilitation and re-purposing programs of the tertiary and tourism sectors. In this manner, tourist's focus of the first and second categories, the routes connecting them and the areas of influence formed were identified by Salinas and Echarri (2005).

**3. Methodology**

There is extensive literature which proposes different indicator panels to assess the sustainability of tourism, supported by initiatives undertaken by international organisations such as the UNWTO (Choi and Sirakaya, 2006; Echarri, 2006; Blancas, Caballero, González, Lozano, and Pérez, 2010; Miller, 2001; Rio and Nunes, 2012). The information provided by these types of panels (disaggregated or aggregated using composite indicators) is used in practice to determine the current status of the issues that affect the degree of sustainability of tourist destinations. This evaluation is usually presented as rankings defined by the basis of one or more indices, in such a way that each area manages to visualise aspects of what is necessary to act upon in order to improve the destination's position.

In this study, a four-year period (2010-2014) has been analyzed using the methodology proposed by Echarri (2006). In the case of some indicators the information was not available for 2010, thus data from previous years has been used. In other cases it has not even been possible to find information. Six categories have been defined: environmental, social, cultural, tourism management and usage level, contribution of tourism to heritage preservation and the reuse of buildings. These categories, in turn, have been broken down into 26 indicators (Table 1). The behaviour of these indicators was assessed as positive, negative or stagnant depending on their evolution in the period of the study. Therefore, it allowed assessing whether the management model of the Historic Centre of Havana followed sustainable guidelines or not.

The indicators were quantified using secondary sources including books, magazines, brochures, regulations, the Internet, and the historical and statistical records of the Office of the Historian of Havana. Similarly, the Official Gazette of Cuba, doctoral thesis and end-of-degree projects from the Faculty of Tourism were consulted. Complementarily, semi structured and without structure in depth interviews were given to specialists and experts from the Office of Historian related to the work study, such as: directors of the Master Plan, commercial specialists of the San Cristobal travel agency, and from the Habaguanex S.A. tourist company. Respondents provided useful information related to the behaviour of the model sustainability, the benefits of the development of tourism in historic centres, and the negative elements.

Table 1 - Selected categories and indicators of sustainability

| Category      | Indicator             |
|---------------|-----------------------|
| Environmental | Power consumption     |
|               | Environmental control |
| Social        | Absolute population   |

|   |   |
|---|---|
|   | Tourism employment  |
|   | Security  |
|   | Average schooling index                                     |
| <b>Cultural</b>   | Authenticity of the design, environment and architecture    |
|   | Number of annual cultural activities                        |
|   | Existence of national and local performing arts             |
| <b>Tourism management and usage level</b>               | Number of tourists  |
|   | Number of rooms   |
|   | Average length of stay                                      |
|   | Number of tour operators                                    |
|   | Visitor information centres, interpretive materials, guides |
|   | Tourist satisfaction  |
|   | Income  |
|   | Usage   |
| <b>Contribution of tourism to heritage preservation</b> | Entry fees  |
|   | Leased premises   |
|   | Licences awarded  |
|   | Business Taxes  |
| <b>Reuse of buildings</b>                               | Number of reused buildings for residential purposes         |
|   | Number of buildings reused for cultural activities          |
|   | Number of buildings reused for tourism                      |
|   | Number of buildings in deteriorating conditions             |

Source: Echarri (2006)

#### 4. Findings and Discussion

Following the structure of the proposed classification, the results of sustainable tourism indicators for the Historic Centre of Havana are presented and discussed in this section, grouped into the 6 categories mentioned above.

##### 4.1. Environmental category

This category includes energy consumption, shown in electricity costs (Euros per day per tourist). In the period 2010 - 2014 the indicator performed negatively, with an increase of €4.42 (from €4.42 to €8.85). This result does not respond to the energy restructuring implemented in the territory through plans to encourage energy saving. This may be due to the increase of housing capacity in the territory by the company Habanaguanex S.A.

The other indicator analyzed within this category is environmental control. In this regard we must mention that despite all the facilities being certified from a health point of view and participating in the various sanitation campaigns, none meet the legally established programs of environmental monitoring. Therefore, this indicator did not change in the study period. However, it should be noted that some of the facilities are linked to the REVIME Project (Sustainable Waste Management for a better life), which aims to develop the management capacity of municipal solid waste (paper, cardboard and plastic) in the Office of the Historian of Havana.

REVIME project is promoted by the Campania Region (Italy), in collaboration with the Office of the Historian of Havana, the National District City Council of Santo Domingo (Dominican Republic), the City of Port-au-Prince (Haiti), the Consorzio Bacino Salerno 1 (Italy) and co-funded by the European Union - EuropeAid (UNESCO). It also requires the existence of a Sorting and Processing Centre leading this waste to be reused as raw materials. This awareness campaign addresses citizens and tourists, and

explains the importance of recycling waste and its environmental impact, in order to limit the growth of landfills and recover materials that make up the waste.

#### *4.2. Social category*

In 2002 a census held in the historic centre showed a population of 66,752 inhabitants, reflecting a significant decrease from studies conducted in previous years. In turn, the census conducted in 2012 showed that the territory had 55,484 inhabitants, of which more than half lived in shared houses. This gradual decline occurred as a result of the conversion of shared houses into apartments with appropriate indicators of habitability. In this process many residents failed to return to their homes. Although residential buildings were built in some of the vacant lots that existed within the area, not all of them could be committed to housing. A large part of them were destined to meet other deficit uses to guarantee the development of the historic centre. The relocation of part of the population, to other areas of the municipality or to other municipalities in the city improved the quality of life of residents in the historic centre.

In terms of safety, for the period 2010 - 2014 the Special Police Brigade's department of crimes against foreigners claims an improvement in the number of crimes committed against foreigners (the data is not available as it is confidential).

Regarding the rate of schooling, there was a decrease of 14 percentage points in this indicator among midlevel workers, from 24% in 2008 to 10% in 2014. For high school level, there was a growth of 18% (58% -76%). However, for higher education level the decrease shown is worrying, considering that it was 18% in 2008 and 12% in 2014. It is alarming that the education level has been declining over time despite the constant improvement of courses made available to employees by the Habaguanex.

With regard to tourism employment, the total number of workers of Habaguanex increased from 4,888 in 2008 to 5,065 in 2014. The number of local workers for this period was impossible to gather, as the company does not keep this data. However, according to a study of the Master Plan, in 2012 the Historical Centre generated a total of 13,518 direct jobs, of which about 50% were performed by residents.

#### *4.3. Cultural category*

Property reuse and recovery of traditional uses have led to the authenticity of design, settings and architecture becoming an identifier element of tourism in the Historic Centre. 100% of the facilities in both 2010 and in 2014 met this indicator; therefore the temporal performance is positive.

In relation to the number of annual cultural activities, this indicator is not verified within the management model of the Office of the Historian, nor by the Asset Management Directorate due to a lack of interest. This indicator was measured exclusively by the Directorate of the Master Plan of the Office of the Historian in 2012 where they calculated 4,130 annual activities, but this was an isolated case.

As for the existence of national and/or local renowned artistic shows, the only data available is for 2014. Of the 49 facilities belonging to the Cultural Heritage Directorate of the Office of the Historian of Havana, only 12 perform this type of show, representing 24% of the total. These are classical music concerts, such as the Chamber Music Festival; or dance group presentations as part of the International Festival of Dance in Urban Landscapes. Mostly, the events held are workshops, conferences, seminars, literary events and courses. However, it is noted that every year since 2001 the Routes and Walks

project has offered tours of the historical and cultural heritage to Cuban citizens. Similarly, we must mention the participation of certain public spaces of the Historic Centre in the Havana Biennial, which takes place every 2 years. Generally of the 412 facilities, including museums, theatres, cultural facilities, hotels, restaurants, cafes, bars, shops and markets, only 3.6% have shows on offer.

4.4. *Tourism management and usage level category*

As shown in Table 2, the number of tourists increased from 82,532 in 2010 to 90,044 in 2014, experiencing 9% growth and indicating the consolidation of the destination. In relation to the volume of rooms, there is only data from 2010 for the state run sector. At present there are 586 state rooms managed by Habaguanex S.A. Tourism Company in the historic centre of Havana, which also had an increase of 9%. 564 are privately run, only being surpassed by the state managed rooms by 3.9%. This behaviour is a result of government regulations that have allowed rapid growth within the non-state sector. Some experts interviewed believe that private management will experience notable increases in the coming years and may even exceed the state supply.

Table 2 - Indicators of tourism management and level of use by category.

| Indicator                         | 2010   | 2014   |
|-----------------------------------|--------|--------|
| No. of tourists                   | 82,532 | 90,044 |
| No. of state management rooms     | 536    | 586    |
| No. of non-state management rooms | -      | 564    |
| Average length of stay (days)     | 2.41   | 2.40   |

Source: Authors' work from Economic Reports by Habaguanex SA Tourism Company.

Regarding the average stay, as shown in Table 2, it has stayed constant at around 2.4 days. However, these values are common in heritage destinations of this type (Salinas and Echarri, 2005; Pérez Guilarte, 2014). Mostly it is short-stay tourism as it shares activities with other sites and modalities, and has many visitors who only spend a few hours. In turn, it is a type of tourism that involves travelling around the place, visiting sites throughout the territory and generating routes and tours (Salinas and Echarri, 2005).

Meanwhile, the number of tour operators licensed to operate has expanded numerically and geographically, allowing for the incorporation of new incoming markets with significant growth such as the United States and Germany. While in 2008 there were only 21 tour operators, this figure greater than doubled in 2014, with 49 tour operators. This extensive growth, however, is not due as such to the implementation of any customer diversification strategy by the San Cristobal travel agency. Although the company has strengthened its participation in various tourism fairs held in the country, this increase is down to the interest of various tour operators in working in Cuba.

The existence of visitor information centres is an indicator that has shown a very slight increase. According to experts, 90% of visitors to Havana visit the historic centre, where there are only four information centres, one more compared to 2008. However, it is valid to note that in terms of production of other types of information materials and media, the Office of the Historian management has done some meritorious work. Thus, there is the radio station Habana Radio, which broadcasts 24 hours a day. They also have the Opus Habana magazine, which publishes four issues a year; the website [www.habanacultural.ohc.cu](http://www.habanacultural.ohc.cu); cultural bulletins in digital and print format showing the cultural agenda of the month; and a half-hour television program per week (Walking Havana).

In terms of tourist satisfaction, we must mention that Habaguanex SA Tourism Company does not have a system to know the level of satisfaction of tourists. Therefore, it has not been possible to obtain a figure that reflects the performance of this indicator.

With respect to total revenues of Habaguanex SA Tourism Company, a notable increase was seen during the study period. The 12.8% increase experienced in 2010-2014, shows the importance of tourism as a generator of financial resources in the Historic Centre of Havana. These revenues are used as a driver for different social works. The tourist/day revenue has had a varied performance, increasing and decreasing in each of the years, as shown in Table 3. However, the 2010-2014 assessment has shown a slight increase of 5.6%

Table 3 - Performance of total revenue and revenue per tourist per day generated in the Historic Centre of Havana in the period 2010-2014.

| Incom e           | 2010       | 2011       | 2012       | 2013       | 2014       |
|-------------------|------------|------------|------------|------------|------------|
| Total (€)         | 11,108,368 | 12,897,803 | 13,170,065 | 11,646,504 | 12,527,016 |
| Tourist / day (€) | 54.93      | 68.18      | 59.51      | 66.29      | 58.00      |

Source: Authors' work from Economic Reports by Habaguanex SA Tourism Company

Furthermore, profits in the sector have seen a worrying decline (from 30% to 18.8%) in 2008-2014. Specialists of the Habaguanex economic department report that this decrease is associated with increases in energy rates and the cost of workers' wages.

#### 4.5. Contribution of tourism to heritage preservation category

The number of facilities that charge an entry fee has decreased from 22 in 2008 to 15 in 2014, from a total of 49 facilities. This decrease was caused largely due to many of them undergoing restoration processes and limiting the quantity and quality of services provided. Therefore, the services are offered for free, and have remained so even after the renovations.

The Office of the Historian of Havana had 8 properties leased for tourism-related activities in late 2014. However, they constitute a kind of pilot scheme, because so far the Ministry of Finance and Prices has not enabled any mechanism for the rental of premises to freelancers. Nor is it a question addressed in the working policy of the Office.

In relation to the number of tourism-related licenses granted to the self-employed, 954 had been approved by the end of October 2010, according to the Municipal Tax Administration Office of Old Havana. This figure rose to 85% at the end of 2012, when after the opening to the private sector 6,157 licenses were registered. 4,535 of them belonged to residents of the historic centre, 74% of the total (Marrero León, 2014). The most requested licenses were those of workers hired by other self-employed workers (21%), those linked to gastronomic activities (11%), transport (9%) and for renting homes, rooms or spaces (9%). According to registered data at the Ministry of Labour and Social Security of the municipality, in 2014 there were 4,338 registered licenses in the historic centre. There was a decrease of 4.5% over a period of two years, which was mainly due to the opening of private businesses by owners without proper business knowledge, causing a lack of profitability and therefore their closing.



Taxes, fees and contributions that individuals and corporations must pay the state are established by Law No. 113 of 2012 of the Tax System. This model by which the Historical Centre of Havana is governed, applies innovative funding instruments to ensure the territory's comprehensive rehabilitation plan. One of them is the rehabilitation contribution, a concept by which economic entities that are not part of the Historical Centre Business Group but operate in the Historic Centre, contribute one percent of their income to the Office. The Ministry of Finance and Prices set these contributions in Resolution No. 175 of 2004, at 5% of the gross income. In the case of state entities operating in Cuban convertible pesos and 1% for those operating in Cuban pesos .

The Ministry of Finance and Prices is authorized to define the amount of the contribution to be paid by the self-employed. Resolution 394 of 2012 states that self-employed that conduct their business activities in the Historic Centre, must pay the Office of the Historian 10% of the monthly fee charged by the National Office of Tax Administration. For 2010 there is no data available on the number of companies that paid taxes while in 2014 there were 77 entities. There is also a lack of data for the number of registered self-employed workers in 2010; in 2014 they exceeded 3,000. In the specific case of Habaguanex SA Tourism Company, all the income generated by the different facilities goes directly to the Office of the Historian to be reinvested in Old Havana.

Also, the increase experienced by spaces designed to sell handicrafts has contributed to the rescue of cultural traditions and their international projection. So it is considered that these indicators have had a positive performance because of the opening made in the country aimed at developing self-employed activity, although it was impossible to get exact numbers.

The Office of the Historian of the City has currently enabled one location to sell handicrafts, which is leased per square meter. Until December 2014, 420 licenses had been granted to work in this space. Also, it is worth noting that there is a public space in the Plaza de Armas for the sale of books, which recorded 67 book vendors for the year-end 2014.

#### *4.6. Reuse of buildings category*

The number of buildings reused for residential purposes was impossible to determine for 2014, as the Department of Territorial Control of the Master Plan at the Office of the Historian refused to provide this information. However, it is known that during 2008 there were 115 buildings reused for residential purposes. The number of buildings reused for tourism decreased from 162 to 143 in the 2010-2014 period due to the closure of some premises.

All buildings were reused for cultural activities during the period studied. While the number of deteriorating buildings showed a slight increase, going from 30% of the total in 2008 to 32% in 2014. Two buildings of varying magnitude collapse in the territory every three days, which is exacerbated in hurricane season (June to November), turning it into an emergency zone.

### **5. Conclusions**

The management model developed by the Office of the Historian of the City for the historic centre prioritizes tourism as a source of income. Tourism represents an alternative for economic diversification, modification of the urban and the social environment, and the recovery of cultural heritage.

The evaluation of sustainable tourism indicators for the Historic Centre of Havana in the period 2010-2014 showed that 50% of the categories have performed favourably. This result indicates that the

management model developed by the Office of the Historian of Havana is following the right path, but attention should be paid to some issues that, compared to previous studies, show a degree of aggravation. This is the case of environmental categories, and tourism management and usage level, giving a warning sign for the sustainability of the model, as their indicators significantly impact on the performance of other categories. However, there are indicators with very positive trends such as the volume of tourists, and the number of tour operators interested in the destination. The increase in these two elements is relevant to enhance the historical centre as an important cultural destination in Latin America.

During the course of the study there were several factors that limited the assessment of the sustainability model such as the lack of information concerning some indicators that preclude digging into the causes of their performance. In this situation, the following categories can be included: energy consumption, revenue, profit, and the average schooling rate. Furthermore, there is a lack of uniformity in the collection of information, making it impossible to track and analyze performances over time.

From the experience of this study, a greater commitment by the Office of the Historian of Havana in the measurement and monitoring of all proposed indicators in the methodology developed in this work is recommended. Only from this systematization of indicators will it be possible to identify the aspects that create a threat to the sustainability of the system, and consequently develop strategies to eliminate or mitigate their impacts. Similarly, the application of sustainability indicators in the historic centres would allow Cubans to have a common working methodology for identifying sustainable tourism trends and establish parameters for comparison with the performance and viability of local development models.

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# **Acessibilidade a edifícios históricos de interesse turístico por pessoas com mobilidade reduzida: análise da igreja de São Francisco – centro histórico de Salvador – Brasil**

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## **Resumo**

Pessoas com deficiência física e mobilidade reduzida, permanente ou provisória, são praticantes de turismo nos seus diversos segmentos, incluindo o turismo cultural. Visitar cidades históricas e conhecer seu patrimônio é um desejo e um direito desse visitante. A população local também deve ser estimulada a conhecer seu patrimônio e assim valorizá-lo, conscientizando-se da importância da preservação arquitetônica e difundindo a necessidade de sua manutenção. Promover a acessibilidade a sítios e edifícios históricos, eliminando as barreiras arquitetônicas, garante o direito à equiparação de oportunidades e de visitação aos bens culturais. O presente texto apresenta parte da pesquisa realizada no Programa de Pós-graduação em Arquitetura e Urbanismo da Universidade Federal da Bahia, que teve como objetivo principal identificar as barreiras arquitetônicas mais comuns que se apresentam em edifícios históricos de interesse turístico, por meio da análise de exemplos localizados na Rota Acessível do Centro Histórico de Salvador. Nessa pesquisa, foi analisada a acessibilidade física da Igreja de São Francisco, monumento barroco do século XVIII. O método utilizado para essa análise baseou-se na Avaliação Pós-Ocupação. A pesquisa demonstrou que a edificação se encontra parcialmente adaptada, necessitando se adequar à legislação brasileira. Conclui-se que conjuntos e edifícios de valor histórico são usualmente adaptados ao uso turístico e o acesso livre e seguro deve ser garantido às pessoas com deficiência ou mobilidade reduzida, por meio da adequação dessas edificações aos critérios técnicos determinados pelas Normas Brasileiras que tratam de acessibilidade, sem, contudo, contrariar os parâmetros da conservação e restauro do patrimônio.

## **Palavras chave**

Acessibilidade; Patrimônio; Turismo; Igreja de São Francisco

## **1. Introdução**

Acessibilidade, arquitetura inclusiva e direitos das pessoas deficientes são questões cada vez mais discutidas pela sociedade atual. O interesse sobre esses assuntos intensificou-se nos últimos anos com base na consciência de que todos têm os mesmos direitos. Isso provocou a elaboração de leis e normas que beneficiam a parte da população que possui algum tipo de deficiência física. Dentre os direitos assegurados à pessoa com deficiência, o artigo 27 da Declaração Universal dos Direitos Humanos destaca que toda pessoa tem o direito de participar livremente na vida cultural da comunidade, tem o direito de fruir as artes e também de participar do progresso científico e de todos os benefícios que dele resultem (Organização das Nações Unidas [ONU], 1982). A pessoa com deficiência, notadamente aquela que possui dificuldade de locomoção, tem direito ao acesso à cultura e ao patrimônio, livre de barreiras arquitetônicas. Conjuntos e edifícios de valor histórico são usualmente adaptados ao uso turístico e o acesso livre e seguro também deve ser possibilitado a pessoas com mobilidade reduzida, garantindo igualdade a todos, sem, contudo, desrespeitar os parâmetros da conservação e restauro do patrimônio aceitos na atualidade.

O presente artigo apresenta parte da pesquisa realizada para a elaboração da Dissertação de Mestrado defendida no Programa de Pós-graduação em Arquitetura e Urbanismo da Universidade Federal da

Bahia, que teve como objetivo principal identificar as barreiras arquitetônicas mais comuns que se apresentam em edifícios históricos de interesse turístico, por meio da análise de exemplos localizados na Rota Acessível do Centro Histórico de Salvador, Bahia, Brasil. Nessa pesquisa, foi analisada a acessibilidade física da Igreja de São Francisco, monumento barroco do século XVIII, verificando-se as adequações indicadas para permitir a acessibilidade a pessoas com mobilidade reduzida a esse edifício de maneira compatível com a preservação do patrimônio.

Muitos locais de valor histórico apresentam dificuldades de acesso e deslocamento para pessoas com mobilidade reduzida, seja permanente ou temporária, notadamente para aqueles usuários de cadeiras de rodas. Alguns locais apresentam dificuldades de acesso e deslocamento até para aqueles que não estão incluídos nesses grupos, ou seja, aqueles que a arquitetura considera como o indivíduo-padrão.

Um ambiente acessível preserva as atividades de uma pessoa deficiente ou com mobilidade reduzida. Suas funções podem se desenvolver sem barreiras físicas. Qualquer ambiente deve se adequar às necessidades de todo usuário para que seja considerado confortável, caso contrário poderá ser considerado um ambiente agressivo e, muitas vezes, até sem utilidade, o que poderá ocasionar mau uso ou, mesmo, o abandono das suas funções.

Pessoas com deficiência física e mobilidade reduzida permanente ou provisória também são praticantes de turismo nos seus diversos segmentos, incluindo o turismo cultural. Visitar cidades históricas e conhecer seu patrimônio cultural é um desejo e um direito desse visitante. A população local também deve ser estimulada a conhecer seu patrimônio e assim valorizá-lo, conscientizando-se da importância da sua preservação e difundindo a necessidade de manutenção do patrimônio cultural.

No Brasil, o direito à cultura e ao Turismo está instituído na recente Lei nº 13.146 (Brasil, 2015), cujo Capítulo IX determina:

Art. 42. A pessoa com deficiência tem direito à cultura, ao esporte, ao turismo e ao lazer em igualdade de oportunidades com as demais pessoas, sendo-lhe garantido o acesso:

I - a bens culturais em formato acessível;

II - a programas de televisão, cinema, teatro e outras atividades culturais e desportivas em formato acessível; e

III - a monumentos e locais de importância cultural e a espaços que ofereçam serviços ou eventos culturais e esportivos. (Brasil, 2015: s.p.).

Os indicadores demográficos apresentados a seguir demonstram que o número de pessoas com algum tipo de deficiência é significativo, justificando a necessidade de adequação dos ambientes ao uso seguro e confortável. Além disso, o número de pessoas com deficiência está aumentando, devido, principalmente, ao alto índice de acidentes automobilísticos e ao envelhecimento da população. Segundo o Departamento Nacional de Infraestrutura de Transportes (DNIT) o número de acidentes de trânsito nas rodovias federais do Brasil foi de 141.072, no ano de 2008, subindo para 158.893, em 2009, e alcançando o valor de 182.900, em 2010 (DNIT, 2010).

A Organização Mundial de Saúde (OMS) e o Banco Mundial divulgaram, em 2012, o Primeiro Relatório Mundial sobre Deficiência (*World Report on Disability*). Nesse relatório estimam que:

[...] mais de um bilhão de pessoas vivem com algum tipo de deficiência, o que representa cerca de 15% da população mundial (com base nas estimativas de 2010 da população global). Isto representa um número maior que o anteriormente estimado pela

Organização Mundial da Saúde, datado de 1970, e que vislumbrava um número em torno de 10%. (Banco Mundial/OMS, 2012: 269).

No Brasil, o censo 2010 indicou que 45,6 milhões de pessoas, ou seja, 23,9% da população, declararam ter pelo menos uma das deficiências investigadas (visual, auditiva, motora e mental/intelectual). Dessas, 13.265.599 (6,95% da população brasileira) possuem deficiência motora, dentre elas 734.421 possuem alto índice de limitação, 3.698.929 possuem grande dificuldade e 8.832.249 possuem alguma dificuldade (Instituto Brasileiro de Geografia e Estatística [IBGE], 2010).

Em relação aos idosos, observa-se que o envelhecimento da população é um fenômeno mundial. O Relatório sobre a Situação da População Mundial em 2011, produzido pelo Fundo de População das Nações Unidas (UNFPA), organismo da ONU responsável por questões populacionais, afirma que a população mundial é de 7 bilhões de habitantes, sendo que existiam 893 milhões de pessoas acima de 60 anos em todo o mundo. Estima, ainda, que, na metade do século XXI, esse número subirá para 2,4 bilhões (UNFPA, 2011).

Esses dados mostram que os índices de pessoas com deficiência e idosos são altos e estão crescendo a cada ano. Essa população, independentemente do nível de renda e escolaridade, consome ou deseja consumir cultura, pratica ou deseja praticar turismo e precisa ter um bom nível de comodidade, segurança e conforto ao utilizar equipamentos turísticos e visitar os atrativos das localidades, sejam públicos, privados, históricos ou atuais.

Para a elaboração do estudo em questão, definiu-se como estrutura metodológica, quanto aos seus objetivos, a pesquisa exploratória e descritiva. Quanto aos procedimentos de coleta de dados, a pesquisa foi bibliográfica e incluiu também o estudo de campo.

Na pesquisa de campo buscou-se a investigação empírica realizada em local onde se dispusessem os elementos para explicar o fato estudado. Como método, foi definido o estudo de caso. Foram analisados a Igreja e parte do Convento de São Francisco, conjunto histórico localizado na Rota Acessível do Centro Histórico de Salvador, com o objetivo de avaliar a acessibilidade física desse equipamento. A seleção do edifício levou em consideração seu grau de proteção legal, uma vez que os edifícios tombados pela legislação de proteção ao patrimônio cultural são objetos de critérios mais rigorosos de intervenção. Essa avaliação incluiu questionários, formulários de observação e entrevistas com pessoas que tiveram experiências práticas com o problema pesquisado. Foram, ainda, realizadas medições, levantamentos fotográficos e representações gráficas do objeto estudado.

Como instrumento de pesquisa foi utilizada a Avaliação Pós-Ocupação (APO). A APO é um processo interativo e sistematizado de avaliação de desempenho do ambiente construído. Focaliza os ocupantes, usuários e suas necessidades, a partir das quais elabora critérios e decisões de projeto. Como técnicas de avaliação, foram elaborados os roteiros e entrevistas com os gestores das instituições instaladas nos edifícios analisados, questionários com visitantes, além de uma proposta de avaliação da acessibilidade. Essa avaliação foi realizada baseando-se em métodos já testados por pesquisadores do tema acessibilidade, tais como: Duarte e Cohen (2006), Vasconcelos (2011) e Jean-Paul Thibaud (*apud* Cohen, Duarte e Brasileiro, 2009), sociólogo que desenvolveu a consagrada metodologia denominada *méthode des parcours commentés* (método dos percursos comentados), que conta com a participação e envolvimento do usuário. Os dados obtidos na pesquisa de campo foram apresentados confrontando-se a situação atual com a situação recomendada de acordo com as leis, com as normas técnicas brasileiras e com respeito às determinações dos órgãos de proteção ao patrimônio.



### 1.1. *Acessibilidade, patrimônio e turismo: uma possível equação*

Promover a acessibilidade a sítios e edifícios históricos, eliminando as barreiras arquitetônicas, garante o direito à equiparação de oportunidades e de visitação aos bens culturais. O Turismo, visto como ferramenta de divulgação e valorização do patrimônio de uma região, deverá ser planejado de forma a proporcionar o efetivo acesso dos visitantes aos locais e edificações históricas de interesse.

Acessibilidade é definida pelo grau em que um ambiente, serviço ou produto permite o acesso do maior número possível de pessoas, incluindo especialmente pessoas deficientes.

No Brasil, o Decreto nº. 5.296/2004 (Capítulo III, Art. 8º) define acessibilidade como:

Condição para utilização, com segurança e autonomia, total ou assistida, dos espaços, mobiliários e equipamentos urbanos, das edificações, dos serviços de transporte e dos dispositivos, sistemas e meios de comunicação e informação, por pessoa com deficiência ou com mobilidade reduzida. (Brasil, 2004: s.p.).

O mesmo Decreto classifica as pessoas com deficiência nas seguintes categorias: deficiência física, auditiva, visual e mental. Por deficiência física considera como a “[...] alteração completa ou parcial de um ou mais segmentos do corpo humano, acarretando o comprometimento da função física [...]” (Brasil, 2004: s.p.). Por pessoa com mobilidade reduzida define:

[...] aquela que, não se enquadrando no conceito de pessoa portadora de deficiência, tenha, por qualquer motivo, dificuldade de movimentar-se, permanente ou temporariamente, gerando redução efetiva da mobilidade, flexibilidade, coordenação motora e percepção. (Brasil, 2004: s.p.).

Apesar da legislação brasileira sobre acessibilidade ser uma das mais avançadas e contemplar o tema de maneira ampla, apenas na década de 1980 as discussões sobre o tema se iniciaram no Brasil. Em 1985 foi publicada a NBR nº 9050, primeira norma técnica brasileira relativa à acessibilidade, intitulada *Acessibilidade a edificações, mobiliários, espaços e equipamentos urbanos à pessoa portadora de deficiência*. Em 1994, essa norma passou por uma primeira revisão. No ano de 2004 e, posteriormente, em 2015, foi novamente revista. Cambiaghi (2007) salienta que:

Desde o ano 2000, a Lei Federal nº 10.098 estabelece normas gerais e critérios básicos para a promoção da acessibilidade às pessoas com deficiência ou com mobilidade reduzida, mediante a supressão de barreiras arquitetônicas e obstáculos nos espaços. (Cambiaghi, 2007: 64)

A aplicação da acessibilidade universal deve promover a qualidade de vida de todos os cidadãos e é importante para os agentes sociais envolvidos, tais como os próprios usuários, as empresas que adotam seus princípios, os engenheiros, arquitetos, *designers* e as instituições governamentais. As adequações para acessibilidade também poderão ser aplicadas em edifícios de valor histórico, considerados patrimônio cultural.

### 1.2. *Patrimônio e Turismo*

Edifícios de valor histórico e artístico sofreram e vêm sofrendo, ao longo dos anos, transformações provocadas por intervenções que buscam adaptá-los à vida contemporânea e/ou adequá-los a novos usos. A tecnologia evolui com rapidez e o patrimônio edificado que possui uso específico, para acompanhar as exigências da vida atual, sofre adaptações que, na maioria das vezes, alteram suas características originais, causando perdas de valor histórico e artístico. Essas intervenções referem-se

à instalação de novos e avançados sistemas elétricos, hidráulicos, de telecomunicações, equipamentos de circulação vertical, de controle da temperatura ambiental, de combate a incêndio e, mais recentemente, dos equipamentos de acessibilidade a pessoas com deficiência física ou mobilidade reduzida.

Muitos desses edifícios são utilizados como equipamentos turísticos: museus, hotéis, galerias de arte, lojas, centros de arte e artesanato. A introdução de novos equipamentos tecnológicos pode descaracterizar edifícios de valor histórico, porém projetos de restauração do patrimônio planejados de maneira coerente, equilibrando os princípios de acessibilidade universal com os conceitos da conservação e restauro atuais podem prever a implantação desses novos equipamentos sem alterar significativamente o valor desse patrimônio.

O Turismo, fenômeno econômico e social que tem se desenvolvido a cada dia e aumentado sua importância e significado para diversas nações no mundo, se bem planejado e gerido, pode colaborar com a conservação do patrimônio, na medida em que cidades e sítios históricos transformam-se em atrativos turísticos. O interesse por conhecer locais históricos tem aumentado, principalmente devido à disponibilidade de informações e facilidades em consumir viagens. O consumidor de turismo é motivado principalmente pela prática do lazer, por conhecer culturas diversas e vivenciar elementos significativos do patrimônio histórico e cultural. Esse segmento da atividade turística, denominado Turismo Cultural, refere-se à

[...] afluência de turistas a núcleos receptores que oferecem como produto essencial o legado histórico do homem em distintas épocas, representado a partir do patrimônio e do acervo cultural, encontrado nas ruínas, nos monumentos, nos museus e nas obras de arte. (Beni, 2002: 422).

No Brasil, o Ministério do Turismo (MTur), em parceria com o Ministério da Cultura e o Instituto do Patrimônio Histórico e Artístico Nacional (IPHAN), dimensionou o segmento Turismo Cultural na seguinte definição:

Turismo Cultural compreende as atividades turísticas relacionadas à vivência do conjunto de elementos significativos do patrimônio histórico e cultural e dos eventos culturais, valorizando e promovendo os bens materiais e imateriais da cultura. (Brasil, 2008: 10).

As atividades turísticas são aquelas realizadas em função da viagem de Turismo Cultural e envolvem o transporte, agenciamento, hospedagem, alimentação, recepção, eventos, recreação e entretenimento, dentre outras atividades complementares. Explicitando sua definição de Turismo Cultural, o MTur (Brasil, 2008: 10) esclarece que “[...] a definição de Turismo Cultural está relacionada à motivação do turista, especificamente a de vivenciar o patrimônio histórico e cultural e determinados eventos culturais, de modo a experienciá-los e preservar a sua integridade.”

O Turismo encontra-se inserido em um contexto maior, o da hospitalidade, que, por sua vez, está incluso no conceito mais abrangente de Acolhimento Turístico. Na ideia de acolher, existe a hospitalidade. “A palavra acolher significa receber, cuidar, proteger, aceitar, hospedar, abrigar, agasalhar, atender, recepcionar.” (Avena, 2006: 141). Acolher alguém implica em preocupar-se com seu conforto, o que inclui sua salvaguarda (Avena, 2003: 191). O conceito de acolhimento inclui três categorias básicas, também consideradas expectativas fundamentais do visitante: o reconhecimento, a hospitalidade e o cuidado (Avena, 2006).

A expectativa do reconhecimento indica que o visitante deseja ser reconhecido como um ser humano, que deve ser respeitado em seus direitos e recebido como aquele cuja presença é desejada. A hospitalidade é um fenômeno sociocultural e de natureza espacial, uma vez que engloba o espaço físico, a cidade e sua infraestrutura, que deve estar preparada para receber o visitante com segurança e provocar o sentimento de confiança e satisfação. A hospitalidade é um conceito que historicamente acompanha o homem e cujos componentes da hospitalidade antiga são o reconhecimento, a proteção e a aceitação. O visitante espera que o acolhedor faça tudo para protegê-lo (Avena, 2006: 145). O cuidado consiste em orientar aquele que chega para facilitar a sua estada ou visita. Suprir o visitante de todas as informações e oferecer-lhe os serviços necessários.

O Sistema de Turismo (SISTUR), elaborado por Beni, com base na Teoria Geral dos Sistemas, e que possui como um de seus objetivos organizar o plano de estudos da atividade do Turismo (Beni, 2002), se divide em subsistemas. Dentre eles, os subsistemas ecológico, econômico, social e cultural. Esses subsistemas interagem entre si, pois o SISTUR não se caracteriza por estruturas e funções estáticas.

Para o tema abordado nesse texto, cabe fazer considerações sobre o subsistema social e cultural, uma vez que o Turismo é um fenômeno sociológico importante, podendo “[...] ser um magnífico meio de aproximação, de conhecimento e de comunicação social com outros povos.” (Beni, 2002: 85). Graças aos modernos meios de transporte e comunicação, o Turismo é um dos fatores geradores de grande mobilidade. A mobilidade humana pode ampliar os horizontes culturais do indivíduo, põe as pessoas em contato, amplia e enriquece as maneiras de pensar e, dessa forma, expande o acervo cultural de uma sociedade.

O subsistema cultural é composto pelos bens culturais, postos à disposição do consumo turístico e, em termos gerais, segundo Beni (2002), compreende:

[...] a) o acervo dos monumentos históricos e o registro dos legados que expressam os valores da sociedade; b) os museus e as galerias de arte, que reúnem as várias modalidades de expressão artística, um verdadeiro arquivo das etapas do desenvolvimento de culturas; c) as manifestações populares de caráter religioso e profano; d) o folclore, que retrata, numa reconstituição cênica de ambiência histórica, as etnias formadoras de populações; e) a cultura popular, que mais efetivamente evidencia o presente de cada área, tornando-se, por vezes, geradora de fluxos turísticos específicos e caracterizadora de regiões dentro de um único país. (Beni, 2002: 88-89).

Mesmo o Turismo podendo provocar prejuízos, como a perda da autenticidade da cultura local por meio da transformação do legado cultural em bens de consumo, é um eficiente meio para promover a difusão de informações sobre uma região ou localidade e seus valores culturais, além dos sociais e naturais (Beni, 2002: 39). O interesse do viajante é pela cultura atual e pela passada, o que provoca uma procura cada vez maior por locais históricos. Dessa forma, ocorre uma valorização do patrimônio histórico como atrativo turístico.

A utilização turística dos bens culturais pressupõe sua valorização, promoção e a manutenção de sua dinâmica e permanência no tempo como símbolos de memória e de identidade. Valorizar e promover significa difundir o conhecimento sobre esses bens e facilitar seu acesso e usufruto a moradores e turistas. (Brasil, 2008: 11).

Edifícios de valor histórico são assim adaptados a novos usos, incluindo a utilização como equipamento turístico. Os equipamentos turísticos são edifícios e instalações destinadas ao uso pelo turista, a

exemplo dos meios de hospedagem, restaurantes, aeroportos, centros de informações turísticas, centros de convenções, dentre outros equipamentos indispensáveis à atividade turística e ao atendimento às motivações e expectativas do visitante.

Sobre a garantia do direito de desfrutar de atividades de entretenimento por parte das pessoas com deficiência, o Programa de Ação Mundial para Pessoas Portadoras de Deficiência das Nações Unidas (ONU) destaca:

Os Estados Membros devem garantir que pessoas com deficiência tenham as mesmas oportunidades de desfrutar de atividades recreativas que têm os outros cidadãos. Isto envolve a possibilidade de frequentar restaurantes, cinemas, teatros, bibliotecas, etc., assim como locais de lazer, estádios esportivos, hotéis, praias e outros lugares de recreação. Os países membros devem tomar a iniciativa removendo todos os obstáculos neste sentido. As autoridades de turismo, as agências de viagens, organizações voluntárias e outras envolvidas na organização de atividades recreativas ou oportunidades de viagem devem oferecer serviços a todos e não discriminar as pessoas com deficiência. (ONU, 1982: s.p.).

Remover obstáculos significa eliminar as barreiras arquitetônicas, tarefa que não é simples, quando se refere a edifícios de valor histórico, principalmente aqueles que são protegidos pelo tombamento. Características específicas devem ser consideradas e os princípios da conservação e do restauro atuais devem ser respeitados. Isso cria um conflito aparente entre a necessidade de adaptação, com todas as suas implicações, e o respeito ao patrimônio histórico e suas regras de conservação.

### 1.3. *Acessibilidade e patrimônio*

A implantação da acessibilidade universal em espaços de valor histórico, considerados patrimônio cultural, é um obstáculo a superar. Em cidades brasileiras, muitos locais históricos, podendo-se considerar a maior parte desses, apresentam dificuldades de acesso e utilização, não apenas para pessoas com deficiência, mas também para aqueles que possuem mobilidade reduzida temporariamente.

As soluções para essas questões devem ser compatíveis com a preservação dos bens culturais, ou seja, as intervenções para a adequação não podem afetar os elementos que caracterizam o valor histórico da edificação, podendo ser reversíveis em todos os casos (Cambiagui, 2007: 194).

A NBR 9050 (ABNT, 2015), em sua terceira edição, válida a partir de 2015, em relação aos bens tombados, determina:

- 1) Todos os projetos de adaptação para acessibilidade de bens tombados devem obedecer às condições descritas nesta Norma, compatibilizando soluções com os critérios estabelecidos por órgãos legisladores, e sempre garantindo os conceitos de acessibilidade.
- 2) No caso de sítios, áreas ou elementos considerados inacessíveis ou com visitação restrita, deve-se garantir o acesso por meio de informação visual, auditiva ou tátil das áreas ou dos elementos cuja adaptação seja impraticável, com divulgação das condições de acessibilidade do bem patrimonial informadas com antecedência ao visitante e vinculadas a todo material publicitário. (ABNT, 2015: 122).

É importante destacar que a realização de intervenções na estrutura original do bem não deverá ocorrer em nenhuma situação. Nas adições de novos elementos, seu caráter e tecnologia contemporâneos deverão ser evidentes e facilmente reconhecíveis, além de manterem a harmonia visual do conjunto. Cada situação deverá ser avaliada de maneira cuidadosa e peculiar, uma vez que cada caso será único.

Como exemplo de implantação de acessibilidade em locais de valor histórico, pode-se citar o Projeto Piloto de acessibilidade do Centro Histórico de Salvador, sítio histórico brasileiro declarado Patrimônio Mundial.

#### 1.4. *A rota acessível do Centro Histórico de Salvador*

O Centro Histórico de Salvador (CHS) foi tombado em nível nacional em 1959, pelo Serviço do Patrimônio Histórico e Artístico Nacional (SPHAN), atual Instituto do Patrimônio Histórico e Artístico Nacional (IPHAN). Em 1985, confirmando sua relevância como bem cultural de valor internacional, é inscrito na lista da UNESCO como Patrimônio Mundial.

Segundo Tirapeli (2000), o Centro Histórico de Salvador (Figura 1) preserva a trama urbana original do século XVI, com acréscimos que foram sendo organizados durante os séculos seguintes. O conjunto arquitetônico é constituído por edifícios do século XVII, XVIII, XIX e XX, onde se destacam monumentos da arquitetura religiosa, civil e militar, representando o maior conjunto arquitetônico colonial da América Latina.



Figura 1 - Vista aérea do Centro Histórico de Salvador.

Fonte: IPAC, 1995: 3.

No século XX, devido ao seu abandono, passou por um gravíssimo processo de degradação física e econômico-social. A partir de 1967, sofreu algumas intervenções em imóveis isolados e, em 1992, foi iniciado o Programa de Recuperação do Centro Histórico de Salvador, gerenciado pelo Instituto do Patrimônio Artístico e Cultural do Estado da Bahia (IPAC). Nesse programa, as obras foram realizadas

em etapas, sendo que a sétima etapa encontra-se ainda em execução pela Companhia de Desenvolvimento Urbano do Estado da Bahia (CONDER). A partir de 2008, a região do Centro Histórico e entorno foi objeto de estudos, elaboração e execução do Plano de Reabilitação do Centro Antigo de Salvador, promovido pela CONDER em parceria com o IPAC e o IPHAN, através de programas como o Monumenta, do Ministério da Cultura, e o Programa de Aceleração do Crescimento (PAC) Cidades Históricas.

No ano de 2011, o Governo do Estado da Bahia e a Prefeitura Municipal de Salvador celebraram um Termo de Responsabilidade com o objetivo de realizar obras emergenciais para revitalização do Centro Histórico de Salvador. Dentre as ações previstas estava a recuperação de pavimentação e calçada. A Secretaria da Justiça, Cidadania e Direitos Humanos do Estado da Bahia (SJCDDH) elaborou um projeto onde se previa a inclusão da obrigatoriedade da construção de calçadas acessíveis. A criação da rota acessível foi estabelecida entre as responsabilidades assumidas no documento e iniciou-se o processo de elaboração do Projeto Piloto de Acessibilidade (Bahia, 2013).

O Projeto Piloto de Acessibilidade para o Centro Histórico de Salvador teve como objetivo a construção da primeira rota acessível implantada na Bahia, além de servir como modelo a ser replicado por toda a cidade. Constitui-se de um caminho que parte do Cruzeiro de São Francisco, desenvolvendo-se da Rua Gregório de Matos até o Largo do Pelourinho, retornando pela Rua Alfredo de Brito até o Terreiro de Jesus, fechando o círculo acessível. Acima de tudo, rompe com a ideia de que acessibilidade e patrimônio são incompatíveis (Bahia, 2013).

[...] ainda que não seja possível garantir o acesso a todas as edificações existentes na rota, este projeto assegura o acesso àquelas de maior relevância para o interesse coletivo, tais como as instituições públicas, o Museu da Cidade, a Fundação Casa de Jorge Amado e o Solar Ferrão. (Bahia, 2013: 32).

Em outubro de 2011, o IPHAN aprovou o projeto e autorizou a execução da obra por meio do parecer nº 0388/11. Considerou a proposta viável “[...] dado que a interferência no traçado do logradouro é pequena, quando comparado ao benefício trazido pelo projeto.” (IPHAN, 2011). Observou ainda que as soluções adotadas buscam harmonização com o conjunto protegido pelo IPHAN.

No ano de 2012, foi realizada a execução da rota acessível com o alargamento das calçadas em uma das laterais das ruas, aumentando-se as calçadas para 1,50 m de largura. Nos pontos de cruzamento da rota com as ruas transversais (Figuras 2 e 3) foram instaladas travessias, com faixas executadas em concreto ciclópico (concreto com incorporação de pedras de mão, também conhecidas como matacão ou pedra marroada) revestido com pedras conhecidas como cabeças-de-nêgo, mesmo material utilizado no calçamento das ruas. (Bahia, 2013).

A passarela existente no Largo do Cruzeiro de São Francisco (Figura 4), apesar de tratar-se de um piso mais regular, encontrava-se com as juntas bastante desgastadas, necessitando de requalificação. Para dar maior regularidade a esse piso, foi realizado o rejunte das pedras, possibilitando o acesso à Igreja de São Francisco e ao conjunto arquitetônico existente nesse trecho do Centro Histórico.

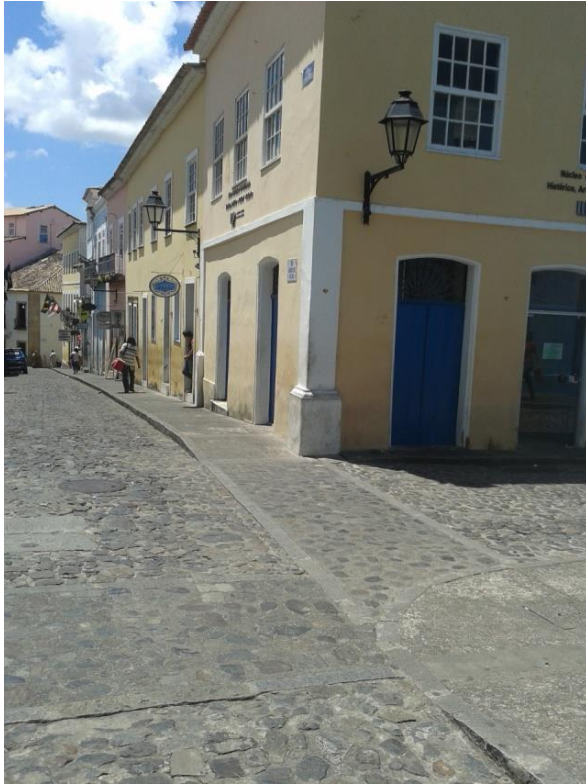


Figura 2 - Rota Acessível do CHS – cruzamento da Rua das Laranjeira com a Rua Gregório de Matos.  
*Fonte: Reis, 2015.*



Figura 3 - Rota Acessível do CHS – cruzamento da Rua das Laranjeiras com a Rua Gregório de Matos.  
*Fonte: Reis, 2015.*



Figura 4 - Rota Acessível do CHS – Largo do Cruzeiro de São Francisco.  
*Fonte: Reis, 2015.*

### 1.5. Acessibilidade em edifícios históricos

Apesar de apresentar-se como um grande desafio, existem recomendações quanto à acessibilidade para edifícios de valor histórico que servem como direcionamento para projetos.

O IPHAN (2014) faz uma série de recomendações sobre a questão acessibilidade versus patrimônio, dentre elas:

- ✓ É necessário promover as adaptações para a Acessibilidade em bens tombados;
- ✓ Para se propor as adaptações deve-se inicialmente verificar o atendimento ou não aos requisitos normativos (Leis, Decretos, ABNT, IN);
- [...]
- ✓ O confronto entre as não-conformidades quanto aos requisitos de acessibilidade, as consequentes necessidades de adaptação e a autenticidade, proporcionará a visualização sobre as possibilidades de intervenção;
- [...]
- ✓ As soluções propostas de adaptação devem ser pautadas pelo contraste, pela reversibilidade, pelo menor impacto, pelo respeito à autonomia, pela segurança, pela equiparação de oportunidades, pela inclusão e pelo desenho universal;
- [...]
- ✓ Garantir a acessibilidade em bens tombados, de uso público ou de grande significância, implica adaptar a edificação dotando-a de características que permitam o acesso, a circulação e o usufruto do bem por qualquer pessoa sem qualquer risco à segurança.
- ✓ [...] Edificações já construídas devem, portanto, passar por avaliação de adequação aos critérios de acessibilidade e sofrer os ajustes necessários. Tal desafio é ainda maior quando a edificação em questão é tombada ou apresenta significância histórica, de modo que as possibilidades de solução para atendimento aos requisitos merecem maior cuidado para não ferir os valores que fazem daquela edificação um ambiente singular.
- ✓ Os estudos devem analisar a edificação/espço à luz dos critérios de acessibilidade estabelecidos pelas normas, avaliar as barreiras físicas e propor soluções técnicas para melhoria das condições e atendimento aos requisitos normativos, garantindo o acesso ao patrimônio arquitetônico, preservando a autenticidade da edificação. (IPHAN, 2014: s.p.).

Percebe-se que o órgão responsável pela preservação do patrimônio brasileiro, possui esta recente preocupação em atender aos requisitos de acessibilidade, reconhecendo a necessidade de atendimento à legislação brasileira, contudo observando-se a autenticidade da edificação e cuidando para que sejam evitados equívocos e desrespeito aos valores do bem.

## **2. Estudo da acessibilidade em edifícios históricos de interesse turístico localizados na rota acessível do Centro Histórico de Salvador: exemplo representativo**

A presente pesquisa utilizou a metodologia de Avaliação Pós-ocupação (APO) para a realização do estudo da edificação objeto de análise. A APO é um processo interativo e sistematizado de avaliação de desempenho de edifícios ou de ambientes construídos, passado algum tempo de sua construção e



ocupação, focalizando os ocupantes (nessa pesquisa, visitantes e usuários) do edifício e suas necessidades (Rheingantz, 2009). Os métodos de análise utilizados para a realização da APO constam das etapas descritas a seguir.

A primeira etapa foi caracterizada pela identificação dos edifícios tombados pelo IPHAN e localizados na Rota Acessível do CHS. Dentre essas edificações foram selecionados a Igreja e o Convento de São Francisco, por formarem um complexo arquitetônico de interesse turístico e possuírem elevado índice de visitação por parte de turistas e população local.

A segunda etapa constou do estudo da edificação, suas características e dados históricos, levantamento de material gráfico, como plantas, fachadas e cortes existentes.

A terceira etapa foi a realização de entrevistas com os gestores da instituição, seguida da avaliação física e levantamento fotográfico do edifício.

Em seguida, foi conduzida a etapa denominada passeio acompanhado ou percurso comentado, quando participantes da pesquisa, que representam usuários e visitantes com características físicas que denotem dificuldade de locomoção, visitam os espaços da edificação e utilizam (ou simulam a utilização) os seus serviços. O pesquisador acompanha, observa e dialoga com o participante, sem influenciar na sua análise. O método do passeio acompanhado combina a observação com a entrevista e diversas técnicas de registros, a exemplo dos fotográficos.

Foram três participantes que colaboraram com a pesquisa na Igreja de São Francisco, realizando o passeio acompanhado: um idoso com deficiência física moderada e permanente, uma jovem com deficiência física moderada e permanente e uma cadeirante.

O reconhecimento do local onde está inserida a edificação, seu entorno, assim como o levantamento fotográfico, a análise dimensional e as observações feitas pelos participantes da pesquisa é denominada avaliação técnico-funcional e “[...] tem como objetivo aferir a compatibilidade do edifício, suas instalações e equipamentos, bem como seu entorno imediato, às condições mínimas necessárias à acessibilidade, previstas na NBR 9050/2004[...]” (Auricchio, 2008: 20).

### *3.1 A Igreja de São Francisco*

A Igreja e Convento de São Francisco localizam-se na Praça Anchieta, mais conhecida como Largo do Cruzeiro de São Francisco, datando de 1686 o início da sua construção. A fachada da igreja possui o corpo retangular dividido em cinco partes, com duas ordens de pilastras superpostas (Figura 5). Seu frontispício, com volutas, é ladeado por torres de terminação piramidal, revestidas de azulejos. O interior da igreja é um exemplo do barroco setecentista, onde se destaca a talha dourada que reveste suas paredes e o forro da nave, em caixotões apainelados. O convento se desenvolve em torno de um claustro quadrado, ocupado em um dos lados pela igreja e sacristia, e nos demais por celas. Destaca-se o conjunto de azulejos de meados do século XVIII que decora as galerias dos dois andares e reproduz, no térreo, as estampas dos Emblemas de Horácio, publicados em 1606, em Antuérpia (IPHAN).

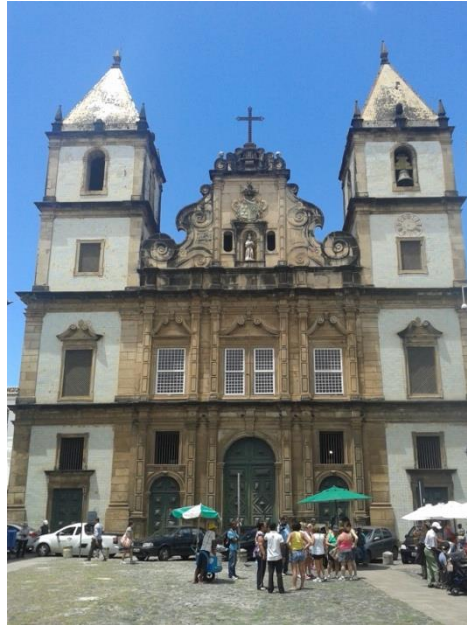


Figura 5 - Igreja de São Francisco

Fonte: Reis, 2015.

Trata-se de um edifício de elevado valor histórico e artístico, formando um dos complexos monumentais mais importantes de Salvador, conforme se descreve:

O corpo da igreja é formado por três naves: as laterais, bem mais baixas que a central e separadas desta por arcadas intercaladas de maciços, lembrando capelas. Sua decoração é um exemplo do barroco da primeira metade do séc. XVIII, e realiza o ideal da igreja de ouro que surgiu em Lisboa e Goa no fim do séc. XVII. [...]. Possui ricos painéis de azulejo: os da capela-mor são de 1737, feitos em Lisboa por Bartolomeu Antunes de Jesus; os do claustro são de Ca 1764/48; os da ante-sala e sacristia são do período 1749/52. Nas torres e parte da fachada, azulejos de Ca 1805/08. (Bahia, 1975: 17).

Pela sua importância histórica e artística, o conjunto composto pela igreja, convento e todo o seu acervo foi tombado pelo IPHAN em 1938, sendo que se encontra inscrito no Livro do Tombo das Belas Artes e também no Livro do Tombo Histórico – nº Processo 0086-T-38; Livro Belas Artes nº inscr.: 011, Vol. 1, f. 003, data: 31/03/1938; Livro Histórico nº inscr.: 001, Vol. 1, f. 002, data: 31/03/1938 (IPHAN).

A igreja de São Francisco é conhecida como a “igreja de ouro”, despertando o interesse dos turistas e moradores da cidade. Segundo informações fornecidas pela administração da Igreja de São Francisco para esta pesquisa, no ano de 2011, recebeu 159.698 visitantes. Em 2012, o complexo foi visitado por 145.680 pessoas e, em 2013, recebeu 152.157. O número de visitantes de 2014 foi de 174.261 pessoas.

### 3.1.1 Avaliação técnico – funcional

A Igreja de São Francisco se situa em local contemplado pela Rota Acessível do Centro Histórico de Salvador (Largo do Cruzeiro de São Francisco). Conforme já observado, nesse trecho da rota acessível o piso é de granito, pois já existia uma passarela implantada pelo escritório da arquiteta Lina Bo Bardi (Bahia, 2013: 47), que, durante a implantação da rota acessível do CHS, teve apenas a requalificação do rejunte das pedras, que se encontravam bastantes desgastadas.

A instituição presta atendimento regular ao turista. Possui algumas instalações que atendem a requisitos de acessibilidade. Para possibilitar o acesso de cadeirantes e pessoas com mobilidade reduzida ao interior da Igreja de São Francisco, foi construída rampa de acesso interligando a rota

acessível do CHS à entrada da portaria do convento, onde se faz o acesso e controle de visitantes. Os acessos entre essa portaria, o claustro e demais portas existentes no percurso que o visitante realiza no térreo do edifício, também possuem rampas de material removível, como madeira e piso emborrachado. Para os visitantes, só é possível acessar o pavimento térreo, onde se localizam a portaria, os sanitários, o claustro, a sacristia, a sala de filatelia, a capela das almas e a igreja. A análise da acessibilidade dos ambientes se apresenta a seguir.

a) Acesso externo – calçadas e circulação

A Rota Acessível do CHS alcança a Igreja de São Francisco, onde foi instalada uma travessia de pedestres e rampas em frente ao acesso à portaria do convento (Figura 6). Esse é o acesso utilizado rotineiramente por visitantes. Apenas nos horários das missas, a porta principal da Igreja e a passagem entre a portaria e a igreja ficam abertos.



Figura 6: Acesso à Igreja de São Francisco integrado à Rota Acessível do CHS. Entrada de visitantes.

Fonte: Reis, 2015.

b) Acesso ao edifício



No acesso ao interior do convento foi instalada uma rampa com o mesmo material do passeio, ou seja, concreto ciclópico (Figura 7). Essa rampa possui inclinação variando de 9 a 11%. Não há faixa de circulação da calçada em frente à rampa, pois esta desemboca diretamente na faixa para travessia de pedestre. A rampa não possui guia lateral e suas bordas não são rampadas, como previsto na NBR 9050/2015. Dessa forma, a própria rampa causa uma barreira ao pedestre que circula pela calçada em frente à Igreja. A porta de acesso à portaria tem largura de 1,52 m e soleira em mármore nivelada com a rampa de acesso externo e o piso do interior da edificação.

Figura 7 - Rampa de acesso à portaria da Igreja de São Francisco.

Fonte: Reis, 2015.

c) Circulação interna, sanitários, escadas e outros

Na portaria ocorre a venda de ingressos para a visita à igreja e demais áreas. O balcão para compra de ingresso é em madeira, acoplado a um vão de porta com altura de 1,67 m (Figura 8). O visitante, com altura próxima ou superior a essa, deverá se inclinar ou se abaixar para realizar a compra do bilhete. A



largura do vão é de 0,77 m e a altura do balcão é de 0,90 m. Não há recuo frontal para aproximação de cadeira de rodas. O espaço para circulação na portaria é amplo, livre e desimpedido. O piso é regular, em mármore, e, nessa área, o visitante já observa as pinturas e azulejos nas paredes laterais e no teto.

Figura 8 - Igreja de São Francisco.  
Guichê para compra de ingresso.

Fonte: Reis, 2015.

A partir da portaria podem-se acessar os sanitários de uso dos visitantes (Figura 9). A porta entre a antessala, que dá acesso aos sanitários e a portaria possui largura de 1,16 m. Há um leve desnível, já resolvido com uma pequena rampa. Existem dois sanitários não adaptados: um feminino e um masculino. A largura livre da porta do sanitário feminino é 0,75 m e a do masculino é 0,76 m. As suas dimensões são 1,65 X 1,88 m, o feminino, e 1,74 X 1,92 m, o masculino. As demais dimensões apresentam-se na Tabela 1:

Tabela 1 - Medidas dos equipamentos dos sanitários de visitantes – Igreja de São Francisco

| Item  | Situação indicada pela NBR 9050/2015     | Situação encontrada |            |
|---|--|---------------------|------------|
|   |  | Feminino            | Masculino  |
| Área para transferência lateral, perpendicular e diagonal ao vaso sanitário | 80 cm de largura x 120 cm de comprimento | 92x113 cm           | 87 x 61 cm |
| Altura da bacia sanitária   | Entre 43 e 45 cm                         | 46 cm               | 46 cm      |
| Comprimento das barras de apoio da bacia sanitária                          | Mínimo de 80 cm                          | Não                 | Não        |
| Altura das barras   | 75 cm (do piso)                          | Não                 | Não        |
| Diâmetro da seção circular das barras                                       | Entre 3 e 4,5 cm                         | Não                 | Não        |
| Avanço da barra lateral em relação à extremidade frontal da bacia sanitária | 50 cm                                    | Não                 | Não        |
| Distância entre o eixo do vaso e a face da barra lateral                    | 40 cm                                    | Não                 | Não        |
| Lavatório   | Sem coluna                               | Sem coluna          | Sem coluna |
| Tipo da maçaneta  | Alavanca                                 | Alavanca            | Alavanca   |
| Altura da maçaneta  | 90 a 110 cm                              | 112 cm              | 112 cm     |
| Altura do lavatório   | 78 a 80 cm                               | 83 cm               | 84 cm      |
| Altura da papelreira  | Entre 100 e 120 cm                       | 44 cm               | Não        |
| Altura do toalheiro   | Entre 80 e 120 cm                        | 130 cm              | 126 cm     |
| Altura da saboneteira   | Entre 80 e 120 cm                        | Não                 | Não        |
| Altura máxima da descarga (botão de acionamento)                            | 100 cm                                   | 130 cm              | 127 cm     |
| Torneira  | Tipo alavanca ou sensor                  | De giro             | De giro    |

Fonte: Reis, 2015.

Em destaque, na cor vermelha, os itens em não conformidade com a NBR 9050/2015.



Figura 9 - Igreja de São Francisco.  
Sanitário feminino – visitantes.

*Fonte: Reis, 2015.*

Para conhecer o claustro, a igreja e demais ambientes abertos à visitação pública, o visitante deve apresentar o bilhete de ingresso ao funcionário responsável pelo controle de entrada. Ao entregar o bilhete, o visitante passa entre a mesa onde fica o funcionário e a balaustrada de jacarandá existente na portaria (Figura 10). O espaço livre é de 91 cm. A porta entre a portaria e o claustro, por ter um desnível de 3 cm na soleira, possui uma rampa de placa OSB (*Oriented Strand Board*) para tapume com inclinação de 6,6% (Figura 11). Toda a área do claustro pode ser acessada sem dificuldades. O piso é nivelado e o acesso à área central descoberta pode ser realizado através de uma rampa com 1,16 m de largura e inclinação de 17,5% (Figura 12).



Figura 10 - Igreja de São Francisco. Portaria – Controle de entrada.

*Fonte: Reis, 2015.*



Figura 11 - Igreja de São Francisco. Soleira (parte inferior da imagem) e rampa em OSB entre a portaria e o claustro.

*Fonte: Reis, 2015.*



Figura 12 - Igreja de São Francisco.  
Rampa de acesso à área central do Claustro.

*Fonte: Reis, 2015.*

Seguindo em direção à igreja, o piso da área adjacente ao claustro, de pedra, possui partes danificadas (Figura 13). Nessa área, a porta de acesso à igreja (entrada pela parte posterior, próximo ao arco-cruzeiro) possui 1,13 m de largura e uma rampa para vencer o desnível de 19 cm. Essa rampa tem largura de 1,49 m e inclinação de 13,8%. É uma rampa com estrutura em madeirite, forrada com emborrachado preto (Figura 14). Importante observar que as rampas do Convento de São Francisco possuem caráter provisório e podem ser retiradas e recolocadas sem causar qualquer dano ao patrimônio.



Figura 13 - Igreja de São Francisco – Piso danificado da área de acesso à sacristia e à Igreja.

*Fonte: Reis, 2015.*



Figura 14 - Igreja de São Francisco – entrada pela parte posterior da Igreja.

*Fonte: Reis, 2015.*

O interior da igreja é amplo, com mobiliário que não cria barreiras, mesmo para o cadeirante. É possível circular por toda a área permitida e o único desnível existente nas naves central e laterais foi resolvido com rampas de madeirite, forradas com emborrachado preto. Essas rampas possuem inclinação de 15,7 % (Figuras 15 e 16). Do lado esquerdo da igreja, também na parte posterior, está a porta de acesso à capela das almas. Essa porta tem 1,12 m de largura e logo a sua frente há uma rampa que vence o desnível de 20 cm e possui 15,5% de inclinação. A área da capela das almas é mais difícil de circular, devido ao piso de mármore com algumas placas (lápides) soltas e quebradas, que provocam desníveis nesse piso.



Figura 15 - Interior da Igreja de São Francisco. Nave central.

Fonte: Reis, 2015.



Figura 16 - Interior da Igreja de São Francisco - rampa

Fonte: Reis, 2015.



Voltando para a área de acesso à sacristia, nota-se que, na soleira da porta, existe uma fissura entre o piso de pedra do salão anterior e o piso de madeira da sacristia. Um carpete vermelho adjacente à soleira possui a borda danificada e descolada do piso, podendo causar acidentes como quedas, principalmente nas pessoas com dificuldade de locomoção (Figura 17). Na sacristia a circulação só é permitida parcialmente, não apresentando qualquer dificuldade de acesso e realização do trajeto.

Os visitantes ainda podem conhecer o salão ao lado da sacristia, onde está a filatelia. Nesse local, a única barreira encontrada foi o desnível de 3 cm entre a soleira e o piso (Figura 18).



Figura 17 - Igreja de São Francisco.  
Soleira e carpete na entrada da Sacrista.

*Fonte: Reis, 2015.*



Figura 18 - Igreja de São Francisco. Acesso à Filatelia.

*Fonte: Reis, 2015.*



Figura 19 - Planta baixa ilustrada – Convento e Igreja de São Francisco – Pavimento térreo  
 Em destaque, com letras vermelhas, os ambientes disponíveis à visitação.

Fonte: adaptado pelos autores a partir de plantas baixas IPAC (1975).

### 3.1.2 Avaliação dos participantes

No Convento de São Francisco foram realizadas três visitas acompanhadas:

- Visita 01 (realizada no dia 09 de julho de 2015): participante O. S. S., 26 anos, gênero feminino. Apresenta dificuldade de locomoção provocada por Paraparesia Espástica (não elastecimento dos tendões inferiores).
- Visita 02 (realizada no dia 01 de agosto de 2015): participante S.A.M. P., 49 anos, gênero feminino. Paraplégica desde os 19 anos de idade em decorrência de acidente.
- Visita 03 (realizada no dia 25 de setembro de 2015): participante P. C. M., 70 anos, gênero masculino. Apresenta leve dificuldade de locomoção provocada pela deficiência na perna esquerda ocasionada por acidente automobilístico.

A atividade definida para todos os participantes da pesquisa era chegar ao Centro Histórico de Salvador, localizar e caminhar pela Rota Acessível em direção à Igreja de São Francisco, simular a aquisição do bilhete de ingresso e visitar todas as áreas permitidas, que incluem portaria, claustro, sacristia, filatelia, capela das almas e igreja, além de simular o uso do sanitário.

Os participantes tiveram facilidade em circular pela Rota Acessível, pois o percurso até a Igreja de São Francisco não apresentou barreiras físicas. Na Igreja de São Francisco circularam por todos os ambientes abertos à visita e destacaram as seguintes questões:

- O guichê para compra do ingresso, apesar de não adequado a pessoas com dificuldade de locomoção, atendeu bem à função. A participante cadeirante considerou a altura do balcão ótima e não teve dificuldades para realizar a atividade, apesar do balcão não permitir a aproximação total da cadeira.
- Os sanitários, apesar de espaçosos, não possuem equipamentos de acessibilidade, dificultando seu uso. A participante cadeirante entrou com facilidade e comentou que consegue realizar as manobras de entrada, permanência e saída do sanitário, pois a área permite o giro da cadeira de rodas, mas que a falta das barras dificulta o uso da bacia sanitária e que há o risco dos usuários se apoiarem em equipamentos indevidos, como a própria caixa de descarga.
- Todos os tipos de piso e seus respectivos materiais (mármore, cerâmica, pedra, madeira e emborrachado das rampas) foram considerados seguros. Apenas o piso danificado da área de acesso à igreja e à sacristia e o carpete da sacristia (já citados anteriormente na avaliação da edificação) chamaram atenção e geraram comentários quanto à possibilidade de provocar quedas. A participante cadeirante observou que o carpete, mesmo danificado nas bordas, não causou nenhum impedimento ao seu acesso.
- Avaliaram que não há dificuldades de circulação por todos os ambientes para a pessoa deficiente física motora ou com dificuldade de locomoção. Opinaram que qualquer indivíduo consegue circular por todos os espaços e participar de todas as atividades realizadas no local. A participante cadeirante destacou que a existência das rampas com piso emborrachado é excelente, mas lhe pareceu visualmente que possuem inclinação maior que a determinada pela NBR 9050/2015 (o que foi comprovado pela medição realizada na avaliação técnico-funcional). S. A. M. realizou todo o percurso de maneira independente, mas solicitou ajuda para subir a rampa de acesso à igreja.
- Como pontos negativos, observaram que, além dos sanitários não adaptados, a sinalização interna é difícil de visualizar. O participante P. C. M. destacou, ainda, que, a depender

do percurso que o visitante realiza para chegar à Igreja de São Francisco, o acesso externo à Igreja é dificultado pelas ladeiras íngremes do entorno.

### 3.1.3 *Entrevista com o gestor*

Em entrevista realizada no mês de agosto de 2015, Sra. K., supervisora da Comunidade Franciscana da Bahia, informou que o público que frequenta a instituição é composto principalmente por turistas nacionais e estrangeiros. Segundo a entrevistada, a última reforma/restauro foi realizada no claustro da edificação no ano de 2009. Todas as intervenções são realizadas pelo IPHAN, que se responsabiliza pelo projeto e pela mão de obra, mediante apreciação dos frades. Possui como elementos de acessibilidade as rampas, que foram implantadas em 2005/2006 pelo próprio carpinteiro da instituição, através de recursos financeiros oriundos da receita de visitas ao convento. De acordo com a supervisora entrevistada, não houve dificuldades na implantação desses equipamentos e não causaram prejuízos ao patrimônio, já que são removíveis. Quanto ao preparo dos funcionários, nunca realizaram treinamento específico para atendimento ao público com dificuldade de locomoção, mas destacou que os funcionários apresentam muita disposição para ajudar e que nunca recebeu nenhuma queixa de visitantes quanto à questão de acessibilidade interna. Quanto à futuras obras de adaptação, não há projetos e nem previsão. Esclareceu que o esforço é manter em bom funcionamento os elementos que já possuem. Questionada quanto à possibilidade de realizar adaptações nos sanitários, ela explicou que o IPHAN não aprovou a construção dos sanitários existentes para visitantes e que esse órgão indica a sua demolição. Devido a isso, acredita que será muito difícil que o IPHAN aprove qualquer obra nesses sanitários.

### 3.1.4 *Recomendações*

A edificação apresenta-se com elementos de acessibilidade que possibilitam ao usuário cadeirante ou com dificuldade de locomoção o fácil acesso e deslocamento por todos os ambientes disponíveis à visita do público externo. Apesar disso, alguns pontos devem ser considerados.

A rampa de acesso externa deverá receber abas laterais com inclinação máxima de 8,33 %. Atualmente não existem as abas, o que cria uma barreira (um desnível) na própria calçada em frente à igreja.

O balcão da compra do ingresso, apesar de avaliado positivamente pela participante cadeirante, apresenta restrições ao uso. Deverá ser deslocado do vão de baixa altura e pouca largura, onde se encontra, para a área em frente, com a instalação de novo balcão com medidas determinadas pela NBR 9050/2015 (Item 9.2).

Os sanitários, que não possuem nenhum item de acessibilidade, deverão ser totalmente adaptados de acordo com a NBR 9050/2015, lembrando que as suas dimensões (1,65 X 1,88 m, o feminino, e 1,74 X 1,92 m, o masculino) permitem a manobra da cadeira de rodas (testado *in loco* pela participante cadeirante) e atendem às dimensões mínimas determinadas pela NBR 9050/2015 para sanitário acessível em caso de reforma (Figura 20).

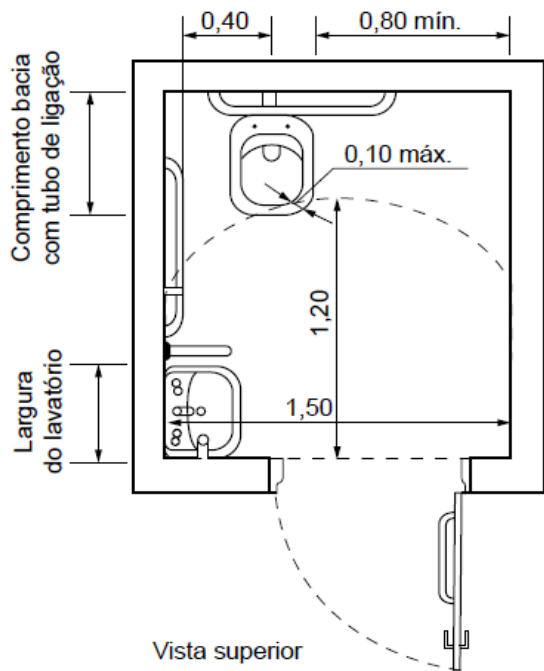


Figura 20: Medidas mínimas de sanitário acessível em caso de reformas

Fonte: ABNT, 2015: 88.

As rampas, que possuem inclinação superior ao determinado pela NBR 9050/2015, mesmo em casos excepcionais, deverão ser substituídas por outras com inclinação máxima de 8,33% e guias laterais com altura mínima de 0,05 m. O material poderá ser o mesmo existente: estrutura em madeira e piso emborrachado. Será necessário, também, a substituição do carpete da sacristia, observando que deverá ter as bordas bem coladas ao piso. As peças em mármore da capela das almas, que se encontram soltas ou quebradas, deverão sofrer manutenção, assim como o piso da área de circulação entre o claustro e demais salas de visitação. O pequeno desnível da entrada da filatelia poderá ser resolvido com pequena rampa na largura da porta e inclinação máxima de 8,33%. Por fim, todos os ambientes abertos à visitação deverão receber sinalização indicativa de acessibilidade.

O imóvel apresenta-se conservado em sua originalidade, apesar da necessidade urgente de manutenção principalmente da sua estrutura e dos seus azulejos. Os elementos que fogem à originalidade são, de fato, os sanitários construídos posteriormente e sem a aprovação do IPHAN. Apesar disso, apresentam-se como equipamentos imprescindíveis para que a legislação seja respeitada. Possuem dimensões suficientes para se adequar a NBR 9050/2015, por isso, sugere-se que a instituição reforce seus argumentos junto ao IPHAN para que os sanitários sejam mantidos no local atual. As demais adequações nas áreas abertas à visitação pública desse imóvel são simples e viáveis. Apenas a correção da inclinação das rampas, adequando-as à NBR 9050/2015, a manutenção dos pisos e a instalação de balcão para recepção de visitantes, além de sinalização adequada, solucionarão as questões de acessibilidade física, sem contrariar a necessidade de preservação do patrimônio tombado.

## Conclusões

O reconhecimento das barreiras arquitetônicas e urbanísticas existentes nas cidades, conjuntos e edificações históricas é de fundamental importância para a elaboração de Planos e Projetos de Acessibilidade. Essas barreiras são resultantes das condições, práticas e legislação existentes nos diversos períodos da evolução histórica e urbana das cidades. O respeito aos processos culturais e o reconhecimento da superposição de períodos históricos é primordial quando se pretende promover a adequação dos espaços urbanos e edificações históricas às necessidades de acessibilidade.

Cidades como Salvador e outras tantas de interesse histórico possuem questões de acessibilidade pouco ou mal resolvidas. A dificuldade é grande, principalmente porque os obstáculos físicos, resultantes da implantação e da evolução dessas cidades, são de complexa adequação para a acessibilidade. Calçadas estreitas, topografia com declives acentuados, becos, ruas estreitas e muitas vezes sinuosas, ruas com revestimento de pedra irregular e desniveladas e escadarias são exemplos desses obstáculos a transpor.

O uso de novos equipamentos e a introdução de novas tecnologias em edifícios históricos é uma exigência constante e premente da vida contemporânea. Apresenta-se como um desafio às questões de manutenção, restauração e adequação de monumentos e edificações. Um olhar mais atento, muita sensibilidade e um estudo crítico poderão ajudar o arquiteto a encontrar soluções que satisfaçam as necessidades de uso, função e manutenção do patrimônio arquitetônico.

Para se manter um edifício com funcionalidade, o seu uso como atrativo turístico é uma prática comum. Ocorre, hoje, um despertar do Turismo Cultural no Brasil e no mundo, provocado pela divulgação de localidades de forte interesse histórico e cultural por meio das mídias eletrônicas. Há um enorme interesse por cidades até pouco tempo desconhecidas do grande público e um aumento do número de visitantes nos tradicionais centros artístico-culturais europeus e também nos sítios históricos de cidades latino-americanas, provocando um comprometimento das capacidades de carga, prejudicando a preservação do patrimônio.

Ações de preservação do patrimônio histórico devem ser constantes. A responsabilidade quanto à manutenção do patrimônio é do poder público e também de entidades privadas e de indivíduos, sejam estes proprietários, usuários ou visitantes.

O bom uso dos espaços históricos é uma forma de preservação e esse bom uso implica em condições de acessibilidade bem implantadas. A legislação brasileira atual estabelece os critérios básicos e os parâmetros técnicos para a promoção da acessibilidade e o IPHAN reconhece que deverá ser seu papel estimular iniciativas adequadas de intervenção nos bens culturais imóveis acautelados em nível federal, que incorporem soluções em acessibilidade, destacando que deverá ser observada em cada caso a compatibilidade com as características do bem e seu entorno.

As limitações inerentes à preservação do bem imóvel devem ser avaliadas, buscando-se possibilidades de adoção de soluções em acessibilidade compatíveis com cada caso específico. O limite será o comprometimento do valor testemunhal e da integridade da edificação. Propostas de adaptação para acessibilidade deverão ser realizadas a partir de levantamentos históricos, físicos, iconográficos e documentais, além do desenvolvimento de estudos baseados

na avaliação de intervenções de adaptação bem-sucedidas (nacionais e internacionais), na legislação, em normas internacionais, em técnicas e em novas tecnologias de acessibilidade, com o objetivo de evitar a descaracterização do bem.

As intervenções para acessibilidade física ao patrimônio histórico imóvel deve priorizar características como o contraste entre o novo e o antigo, a reversibilidade da intervenção, o baixo impacto sobre o bem e o atendimento de grande abrangência.

O monumento religioso objeto deste estudo é representativo da arquitetura colonial brasileira e possui relevante importância para a preservação da história e cultura do país. Por estar localizado no Centro Histórico de Salvador, tem bastante visibilidade e recebe visitantes diariamente. A análise de suas condições de acessibilidade a pessoas com deficiência física ou mobilidade reduzida é essencial para a futura adequação desse patrimônio às atuais necessidades de uso.

Esse estudo mostrou que o monumento analisado não atende totalmente às condições de acessibilidade, estando em desacordo com a legislação brasileira atual. Apesar disso, todas as áreas estudadas apresentaram a possibilidade de promoção da adaptação para torná-las acessíveis aos mais diversos públicos. A adequação dos espaços às necessidades contemporâneas de acessibilidade é um processo necessário e urgente. O não atendimento aos parâmetros de acessibilidade física dificulta, ou até mesmo, impede o desenvolvimento do processo de acolhimento dos visitantes e usuários.

A legislação vigente deverá ser atendida em equilíbrio com as exigências de preservação do patrimônio. Por serem temas complexos, acessibilidade e patrimônio histórico devem ter um tratamento cuidadoso. Cada situação deverá ser estudada em profundidade, com vistas a encontrar soluções com criatividade e eficácia. Isso exige um amplo conhecimento do contexto histórico do local, suas características materiais, estéticas, funcionais, arquitetônicas e urbanísticas. Assim, soluções pertinentes, criativas e com respeito à história e cultura locais poderão proporcionar o acesso ao patrimônio e à riqueza cultural. Dessa maneira, pode-se manter a vida ativa e a valorização de espaços importantes para a memória de um povo e de sua riqueza histórica.

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# Managing tourist information at the cape floral region world heritage site. A South African case study

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## Abstract

The Cape Floral Region (CFR), one of South Africa's World Heritage sites is unique in terms of its geographic range and ecological diversity. For tourists to enjoy a memorable experience the availability of value-added information is imperative and consequently the eight CFR clusters/protected areas have on-site visitor information centres. A Visitor Information Centre (VIC) denotes a facility that aims to provide information to both foreign and local visitors to facilitate their travel needs. The apparent lack of standardized management procedures has resulted in inconsistent information provision practices to tourists and is identified as a challenge to be addressed. Objectives explore whether CFR clusters are managed sustainably; to determine needs and expectations of VIC staff to allow for the delivery of value-added information services to tourists; and to determine whether VIC staff receive sufficient training to provide information of a similar standard and quality to tourists to enjoy experiences at these clusters. A qualitative approach was followed with data collected through interviews with VIC staff of seven of the CFR clusters. The small number of participants is a limitation and Baviaanskloof cluster did not participate. Data were analyzed using content analysis. Findings indicate that participants lack basic management skills with little focus on sustainable management principles; that there is a need for a standardized management training program; that participants had varying needs and expectations of providing a (value-added) information service; and that participants needed information of their own cluster and skills in customer service delivery. All the participants understood the important role of information provision through VICs. The conclusion is that the provision of standardized information services to tourists at the researched clusters was clearly indicatedis clearly needed.

## Keywords

Managing Information provision; standardization of staff services; Cape Floral Region; South Africa.

## 1. Background

The mission of Visitor Information Centres (VICs) is the direct provision of travel information about tourist destinations, which visitors find helpful for making their travel decisions (Wong and McKercher, 2011). VICs also play a key role in determining tourists' first impressions of particular destinations, and ultimately improving the quality of their experiences (Perdue, 1995). Therefore many tourist organizations (including the National Department of Tourism of South Africa) have made efforts to diversify their strategies for successful VIC operations (Dimanche and Taylor, 2006).

In many countries such as the United States and Australia, VICs serve as first points of contact and main platforms through which tourism information is provided to visitors. In so doing, VICs equip visitors with relevant information about available activities and products at the chosen destination. This information can influence visitors to increase their length of stay, spend more money and ultimately re-visit the destination, such as visiting and re-visiting the Cape Floral Region clusters. Lam and McKerchner (2013: 91) state that based on a review of websites, countries such as the UK, Canada, Ireland, Australia and South Africa produce thorough market intelligence reports. South African Tourism's reports can thus be accessed by VICs for relevant

market information, although Lam and McKerchner (2013: 93-94) noted a gap between the provision of publicly available market information provided by public sector tourism websites and the needs of industry. Another gap they noted was a standards gap, where despite efforts by UN World Tourism Organisation, little or no evidence of standardisation of metrics exist. National Tourism Organisations (NTO), such as the South African National Department of Tourism (with South African Tourism as its marketing arm) are data rich and a gap exists between the industry and NTOs – closing the gap will enable tourism businesses, including VICs, to compete effectively in an everchanging information-rich marketplace.

In recent years, however, there has been increased recognition of the role that VICs play in providing visitors with other information and services such as travel advice, interpretation and knowledge of the local region, collection of visitor data; and accommodation and travel booking arrangements (Dey and Sarma, 2010). In addition, the information provided by VICs have the potential to influence a visitor's experience and boost the local economy (Fugere, Oschell and Nickerson, 2011) and the potential that tourists extend their stay as well as increasing their expenditure at destinations, thus enhancing their travel experiences (Mistilis and D'Ambra 2008).

In South Africa, one of the most observed challenges has been the uncoordinated, fragmented and inconsistent practices of providing information to visitors within VICs publicly-funded by the National Department of Tourism. Although standardisation of tourism information provision is identified as one of the key elements for the continued growth of the tourism sector (South Africa, 2011), current information provision practices are inconsistent (South Africa 2011: 44). The National Tourism Sector Strategy (NTSS) framework of the National Department of Tourism shows that "even where there is good, up-to-date, coordinated information provision for a certain destination, there is no overarching, national framework that enables people (locals or foreigners) to find out everything they want to know about travel options in multiple possible destinations in the country, hassle-free" (South Africa 2011: 44).

## **2. Problem statement**

While VICs aim to provide information and knowledge to visitors before and during their visit; their operation has met with a number of challenges. Among these challenges include identifying the needs of different stakeholders, raising operating revenue and conducting business in a user-friendly manner (Connell and Reynolds, 1999). Smith and Holmes (2012) refer to research emerging from Australia that focuses on the dissemination and quality of information, including the role of ICTs. However, most of these research studies from both Australia and the USA focus on the demand side, paying less attention to the supply side to understand for example, the views of those responsible for VIC funding, planning, operation and provision of information and knowledge. For this reason Fallon and Kriwoken (2003: 289) emphasise the importance of considering the needs of staff, local and cultural communities and operators as "it is not enough to only assess a VIC's sustainability by its popularity with visitors". Ballantyne *et al.*, (2009) also explore the importance of enhancing customer service, operational procedures and acquisition of knowledge in VICs. Most of these research studies focus on the demand side of providing information and knowledge to visitors and pay less attention to understanding the views of those in the supply side of information and knowledge provision. This research aims to investigate the supply side, by focusing on the management and training needs of VIC staff to enable them to provide standardized value-added information services to

tourists. The National Tourism Sector Strategy (NTSS) (South Africa 2011) and the VIC Framework (South Africa 2011) developed by the National Department of Tourism reflect efforts by the South African government to use VICs to provide information to visitors in a standardized fashion. It is within this context that the research proposes to address the limited research (gap) in the supply side by investigating how tourism information provision within VICs can be standardized and managed by sufficiently trained staff to allow for tourists to enjoy memorable experiences at the Cape Floral Region clusters.

Based on the challenges that VICs face, the problem statement for this research study is as follows:

What management and information service provision training is needed by staff to deliver a standardized value-added information service to enable visitors to create memorable experiences.

### *2.1 Purpose Statement*

The main purpose of this study is to examine the need for management and information service provision training to staff to enable them to manage standardized tourist information provision within VICs to enhance memorable visitor experiences.

### *2.2 Research objectives*

For tourists to enjoy memorable experiences at World Heritage sites the availability of appropriate standardized value-added information services by trained staff is imperative. The CFR clusters are under the auspices of the National Department of Tourism (SA), but managed by CapeNature (a provincial Parks Board) and have dedicated on-site VICs for local and international tourists. The over-arching aim of the participating VICs is to provide standardized, relevant and accurate information after staff have attended a hands-on pilot course provided to VIC staff commissioned by the National Department of Tourism.

The objectives of the research are:

- to explore whether the VICs at the Floral Kingdom clusters under investigation are managed in a standardized and sustainable way by the staff;
- to determine the needs and expectations of the staff at the VICs (in terms of the pilot course) to enable them to deliver standardized value-added information services to tourists;
- to determine whether staff at the various on-site VICs at the clusters received sufficient training (through the pilot course) to enable them (staff) to provide tourists with information of a similar standard and quality for tourists to enjoy memorable experiences at these clusters.

## **3. Literature review**

### *3.1 Cape Floral Region*

The Cape Floral Region (CFR), one of South Africa's eight World Heritage sites, comprises eight protected areas stretching from the Cape Peninsula to the Eastern Cape, cutting across spectacular mountain and ocean scenery and containing some of the richest plant biodiversity in the world.

The region was the sixth South African site to be inscribed in 2004 on the World Heritage List of the United Nations Educational, Scientific and Cultural Organisation (Unesco). Unesco's World Heritage Committee declared the 553 000hectare Cape Floral Region to be of "outstanding universal significance to humanity", describing it as "one of the richest areas for plants in the world" (UNESCO 2004).

The Cape Floral Region "represents less than 0.5% of the area of Africa, but is home to nearly 20% of 41% the continent's flora," Unesco said. "Its plant species diversity, density and endemism are among the highest worldwide, and it has been identified as one of the world's 18 biodiversity hotspots. The site displays outstanding ecological and biological processes associated with the Fynbos vegetation, which is unique to the Cape Floral Region. Unique plant reproductive strategies, adaptive to fire, patterns of seed dispersal by insects, as well as patterns of endemism and adaptive radiation found in the flora, are of outstanding value to science."

This heritage site comprises eight protected areas considered to be the most important examples of the Cape Floral Region: Table Mountain; De Hoop Nature Reserve; the Boland mountain complex; the Groot Winterhoek wilderness area; the Swartberg mountains; the Boosmansbos wilderness area; the Cederberg wilderness area; and Baviaanskloof, which straddles the Western and Eastern Cape boundary. Kirstenbosch Botanical Garden on the slopes of Table Mountain is included in the site, the first time a botanical garden has been included in one of Unesco's world heritage sites. The region follows the Cape belt of mountains, the Cederberg and Hottentots Holland mountains, then cuts through the Langeberg, Outeniquas, Tsitsikamma, Swartberg and Zuurberg mountains, encompassing key sections of the Cape Floral Region, the smallest and richest of the world's six floral kingdoms – and the only one to be contained within one country. Cape Floral Region in South Africa has the third highest level of biodiversity in the world. The Table Mountain National Park alone has more plant species within its 22 000 hectares than the whole British Isles or New Zealand.

A stretch of land and sea spanning 90 000 square kilometres, or 0.05% of the earth's land area, the Cape Floral Region contains roughly 3% of the world's plant species – at about 456 species per 1 000 square kilometres. Of the 9 600 species of vascular plants found in the Cape Floral Region (CFR), about 70% are endemic, in other words, occur nowhere else on earth. The area's freshwater and marine environments are similarly unique, with plants and animals adapted to highly specialised environments. When it comes to fauna, the kingdom boasts 11 000 marine animal species, 3 500 of which are endemic, and 560 vertebrate species, including 142 reptile species, of which 27 are endemic (McIntosh, 2006).

### *3.2 Information role of VICs*

Visitor Information Centres are known as the most conventional external source of direct tourist information provision, which visitors find helpful for making their travel decisions (Wong and McKercher, 2011). VICs can increase the efficiency of the travel system as they have the potential to act as a one-stop shop for visitors searching for advice and information on destination attractions, events, services and facilities, and play an important information and distribution role between tourists and suppliers within the tourism system (Ballentyne, Hughes and Ritchie, 2009). VICs also play a key role in determining tourists' first impressions of particular destinations, and ultimately improving the quality of their experiences (Perdue, 1995). Therefore many tourist organizations (including the National Department of Tourism, SA) have

made efforts to diversify their strategies for successful VIC operations (Dimanche and Taylor, 2006).

A Visitor Information Centre (VIC) denotes facilities that have as their main function - to provide information to both foreign and local visitors. A VIC as “a clearly labelled, publicly accessible, physical space with personnel providing pre-dominantly free of charge information to facilitate travellers’ experiences” (Pearce 2004: 8). In a competitive market such as tourism, the provision and use of information by the visitors before and during their visit to a destination is critical to assist them to make an informed decision when choosing tourism products and services (Ballantyne *et al.*, 2009). It thus follows that the quality and quantity of the information provided to visitors is an actual strategic success factor (Nabi and Zaman, 2014) that holds great potential to enhance visitor experience and generate benefits for both local business operators and communities.

Tourism authorities, also the SA National Department of Tourism, regard VICs as the most important element in tourism information provision, encouraging tourists to stay for a longer period and spend more money in their areas (Lyu and Hwang 2015: 55).

Research on VICs appeared in tourism journals until the mid-1990s because several US state departments made efforts to launch and improve their facilities during that period, but no comprehensive research is currently available on tourist demand for VIC visits. South Africa lags behind global trends, and in this respect, the National Department of Tourism in South Africa is now making an effort to relaunch VIC facilities and retrain staff countrywide.

With the proliferation of ICTs, Deery, Jago and Daugherty (2007) as well as Carson and Adams (2006) identify alternative means of providing information as one of the challenges facing VIC staffs. Hence the traditional role of VICs to provide information and knowledge to visitors through printed media has been questioned (Connell and Reynolds, 1999; Xiang and Gretzel, 2010; Lyu and Hwang, 2015). In particular, the use of the Internet to search for travel information is perceived to have reshaped tourist information search behaviours (Buhalis and Law, 2008) as tourists can now access real-time information at their convenience, anytime and anywhere (Xiang and Gretzel, 2010). It is these changes that led authors like Connell and Reynolds (1999) and Lyu and Hwang (2015) to observe that VICs are less frequently visited and used. It can therefore be seen that VIC face a number of challenges, including identifying the needs of stakeholders, raising money, customer service, an efficient communications strategy (Ortega, Rodriguez and Kitchen, 2014) and adapting to new ways of providing information and knowledge through ICTs and social media to provide real time travel information (Xiang and Gretzel, 2010). However the importance of a human presence and personal service means that staff have a crucial customer service role to play as well as the potential to influence visitor activities, increase expenditure and encourage repeat visitation (Deery, 2007). Ballantyne and Hughes (2004) and Deery (2007) found face-to-face interactions with friendly and knowledgeable staff to be the crucial feature of VICs to influence visitor experience and quality of service provided. Whereas Wong and Mckerchner (2011) emphasised service attitude and ethics of staff.

In its VIC handbook: a practical guide to VIC operations (2015), the National Department of Tourism, as the custodian of VICs in South Africa, identifies key aspects of VIC operation that must be taken into account as part of the day-to-day VIC operational procedures. However,

these procedures are not mandatory and do not seek to replace any existing legislations or policies but serve as operational guidelines to complement local, district or provincial legislations or policies in order to assist VIC staff on how to run and manage VICs, particularly on issues related to daily operations, service provision and capacity building (South Africa 2015).

With regard to information and knowledge provision in particular, VICs face the challenge of considering the views and needs of those in the supply side. This challenge can be seen in the limited research available to understand the views of other stakeholders such as surrounding communities and local tourism business operators who can provide and exchange information and knowledge with VICs in order to create memorable visitor experiences and generate sustainable socio-economic benefits and opportunities in order to boost a destination's local economy. In this regard Fallon and Kriwoken (2003) state that the involvement of key tourism stakeholders, including local communities and operators should be considered.

#### **4. Methodology**

The National Department of Tourism commissioned the University of Pretoria to develop and present a pilot course to train VIC staff of the CFR clusters in order to standardize basic management skills and information provision to visitors, that aimed to address the mentioned objectives.

A qualitative approach was followed and data were collected through indepth interviews held with the 21 managers and information providers of 7 of the 8 sites of the Cape Floral Region that attended the pilot course from 31 Aug – 4 Sept 2015 at the Vrolijkheid Cape Nature Reserve.

The research instrument was an interview schedule that consisted of questions pertaining to staff needs and expectations of the course; their sustainable management practices at the various clusters; information provision at their respective sites; and knowledge of their particular world heritage site cluster.

Interview notes were transformed containing the details of each interview as well as the participants' perceptions about the interview. Data analysis was done from the entire set of qualitative data through thematic content analysis in order to best describe the needs, experience, skills, insights and capabilities of the participants.

#### **5. Findings and Results**

Most interviews lasted under 15 mintutes and were conducted in English or Afrikaans.

In terms of the question on whether the paricipants felt that their VICs were managed sustainably and in a standardized fashion, the overall findings indicate that most of the participants lacked basic management skills with a focus on sustainable management principles. Of the participants only two were managers and they were trained in basic management principles. All the participants indicated the need for a dedicated and standardized management training program to address this challenge. They all expressed the need for basic information of what 'sustainable tourism management' meant as they regarded it as an abstract term.

The responses of the participants fell into two themes; the need "to better understand VIC management, the VICs role in tourism and its responsibilities"; and the need to market their World Heritage sites nationally and internationally, "to know how to use their world heritage

site status to their advantage when marketing their product” and “to put my cluster on the map as a world class destination”.

In terms of the question on needs and expectations of participants to deliver value-added information services to tourists, the participants expressed the need to “understand how world heritage sites fit into the tourism spectrum”; to “broaden their knowledge on their particular world heritage cluster and to understand the cultural and natural significance of world heritage sites in general”; to “understand the dynamics of customer service” and to have access to resources to assist in value-added information service provision;

In terms of the question on skills and training needs of VIC staff and managers prior to the course, findings indicate that participants wanted to “understand the information needs of the tourist”; know “how to provide accurate information through collecting and storage” in their particular VIC; know “how to deliver information in a professional and excellent way to tourists”; “wanted to improve the quality of their service at their cluster”.

Specifically to customer service, participants indicated that they “wanted to improve their skills to visitor service and to better interact with tourists”; to “understand customer service to foreign tourists and coordinate tasks”; “learn how to say ‘no’ to tourists in a friendly way”.

To career development the participants wanted to “learn about the other floral region clusters and the floral kingdom’s fauna and flora”; “wanted to enhance their current abilities for their job and learn new things”; “wanted the VIC to educate them for a better career to improve their lives”; wanted “personal growth and career development”; “wanted to be able to self-motivate themselves”.

## **6. Limitations**

The small number of respondents is a limitation, although staff from all the seven clusters was included. All respondents are employed by Cape Nature. The Baviaanskloof Protected Area cluster was not included as it is managed by the Eastern Cape Province and did not choose to participate in the course. The aim was not to develop an overarching national framework for the National Department of Tourism, but to indicate the importance of standardized information services at VICs at World Heritage Sites in South Africa.

Another limitation may be that the perceptions of visitors’ perceptions (demand side) regarding information service provision by VIC staff was not investigated, although the focus was on only the supply side as stated above.

## **7. Conclusion: (basis of the recommendations)**

Participants all felt that they now understood the important role of information within the VIC. A small number of the participants however had other job functions, such as finance officer, administrative officer, gate guard and had found the course too difficult, although their job description indicated that they also had to provide tourist information. They indicated that they had nevertheless found the course worthwhile as they had gained insight into the importance of providing the correct information to visitors. The majority of the participants found the course most informative and worthwhile and now better understood the information needs of visitors. All participants found the information on their own World Heritage Site clusters interesting and worthwhile, as they were not aware of it.



As indicated by the participants, it is recommended that the following topics be addressed by a follow-up course: more information on service delivery; information on marketing their clusters (although participants expressed satisfaction in creating a brochure on a new route as a practical exercise) (Andereck, 2005); steps in the application of project management in a VIC; and information on supply chain management.

Overall findings indicated that the interviewed staff employed at the VICs at the seven CFR clusters realised the importance of a World Heritage Site, and were all very proud to be employed at one of the clusters. Although the participants experienced challenges with the pilot course they were unanimous in articulating the importance of providing a standardised service to tourists at all the clusters, although focusing on the information relevant to their particular cluster.

The National Department of Tourism requested that the same pilot course be provided to staff at the VICs of the remaining world heritage sites in South Africa, and another pilot course took place and included staff from iSimangaliso Wetland Park; Cradle of Humankind; Vredefort Dome; and Mapungupwe. To date visitor information centre staff from the remaining three sites – Robben Island, Richtersveld Transfrontier Park and Maloti-Drakensberg Park have not attended the course.

The outcome of the pilot course is the realisation that a standardized VIC course at World Heritage Sites under the auspices of the National Department of Tourism is necessary.

On their own, World Heritage Sites cannot boost tourism. It is when they are incorporated into development programmes that they become magnets for tourists together with the provision of relevant value-added information by visitor information centres. The support of local visitors as well as international tourists is the key to a dynamic sustainable future for World Heritage Sites, for without visitation such sites remain isolated areas. For countries like South Africa where most of the World Heritage Sites are found in rural parts of the country, and where economic yield cannot be solely reliant on tourism, an inclusive approach to sustainable (tourism) development is imperative also addressing the socio-cultural well-being of the local community and the environmental protection of these natural sites.

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# **Património património cultural e investimento público na região centro de Portugal. Estudo de caso dos monumentos património da humanidade**

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## **Resumo**

No âmbito dos períodos de programação comunitários, no contexto da região Centro de Portugal, destacamos as iniciativas apoiadas por fundos comunitários, entre 1994 e 1999, que procuraram responder às preocupações europeias de coesão territorial, em particular de valorização do património cultural e turístico existente na região.

No passado recente, no contexto Quadro Comunitário de Apoio designado de MaisCentro (2007-2013) identificamos, inclusivamente, o apoio a programas de ação vocacionados para a promoção e valorização do património classificados pela UNESCO (United Nations Educational, Scientific and Cultural Organization). Estes programas incluíram projetos, materiais e imateriais, de dinamização da rede de Mosteiros Património da Humanidade de Portugal, onde se inclui o Mosteiro de Santa Maria de Alcoçaba, o Mosteiro de Santa Maria da Vitória da Batalha, o Convento de Cristo de Tomar.

Na atualidade, no âmbito do período de programação comunitária 2014-2020, encontram-se também previstos apoios financeiros para os investimentos em património cultural que visem promover a conservação e valorização do património cultural, enquanto instrumento de sustentabilidade dos territórios e da sua valorização turística. Como prioridades no Programa Operacional Regional do Centro designado de Centro 2020, foram definidas como prioridades estratégicas a valorização turística de Monumentos Nacionais inscritos na lista do Património Mundial (UNESCO) e Monumentos Nacionais e o contributo para a dinamização económica local, através da criação de emprego e de riqueza, e a programação cultural em rede. As entidades beneficiárias aos fundos comunitários neste âmbito são os municípios, as Comunidades Intermunicipais, a Direção-Geral do Património Cultural, a Direção Regional de Cultura do Centro, entre entidades promotoras.

A presente comunicação procura identificar, na região Centro de Portugal, os investimentos já realizados e os projetos a realizar e a sua relação com a atratividade da região, a dinamização económica e turística, a diminuição das assimetrias e o reforço da coesão territorial, bem como a salvaguarda e promoção do património histórico e cultural com elevado interesse turístico (incluindo aquele que já é Património Reconhecido pela UNESCO) e identitário.

## **Palavras chave**

Recursos do Território; Região Centro; Património Cultural; Política Pública.

## **1. Introdução**

A cultura tem vindo a assumir, desde 2000, uma importância crescente na definição e implementação de políticas públicas em Portugal e no restante espaço europeu. O investimento em projetos na cultura e no património cultural e turístico tem sido apontado como solução para o desenvolvimento e a coesão territorial. O investimento está ainda associado a um reforço da identidade local e na valorização das marcas e dos territórios.

O impacto dos projetos da cultura em termos económicos e da sociedade é aceite, mas a sua análise permanece complexa, dada a multiplicidade dos factores envolvidos. Alguns autores (e.g. Sacco, 2011) tem procurado definir modelos sobre a ligação entre a cultura e a economia. Em contexto de retração da economia, o setor da cultura tem registado resiliência e, em algumas atividades, demonstrado mesmo a sua vitalidade.

Paralelamente, alguns setores da cultura destacam-se, como as denominadas indústrias culturais e criativas (ICC), e apresentam algum dinamismo em termos da criação de emprego e de riqueza, mas também se regista o surgimento de uma nova classe de empreendedores, mais qualificada e com a incorporação crescente de inovação em diversos conteúdos e nos produtos turísticos e culturais. O setor cultural e criativo pode desempenhar um papel de grande relevância na internacionalização da economia portuguesa (Augusto Mateus e Associados, 2014). Em simultâneo, o perfil da procura por produtos culturais tem sofrido alteração, associada a uma nova atitude dos consumidores na busca por novas experiências (“bússola de experiências”, Lorentzen *et al.*, 2007) e na avaliação da cultura.

O Património Mundial da UNESCO (United Nations Educational, Scientific and Cultural Organization), tem vivenciado todas estas dinâmicas resultantes da evolução económica e das políticas públicas. O financiamento e a sua gestão é assegurado por um conjunto de entidades públicas (centrais, regionais e locais) mas também privadas.

A análise da evolução da política pública e dos investimentos apoiados na cultura constituem o objetivo principal desta comunicação. A coerência dos investimentos é também abordada, assim como o seu contributo para o desenvolvimento urbano e regional e para a coesão do território. Neste artigo, foi considerado o património mundial UNESCO relativo à configuração da região Centro, com 100 municípios<sup>30</sup>. A análise dos investimentos respeitou esta configuração territorial, ainda que no momento da vigência pudesse estar repartido por outras regiões ou a classificação ainda não tivesse ocorrido.

## **2. Enquadramento: conceptualização, política e caracterização do setor da cultura**

O papel e o potencial da cultura tem sido destacado para acrescentar valor económico e social, embora nem sempre visível no discurso e na política pública.

Pier Luigi Sacco (2011) estabelece um modelo sobre esta ligação entre a cultura e a economia. Sacco, considera três fases nessa ligação: Cultura 1.0, Cultura 2.0 e Cultura 3.0. A Cultura 1.0 está associada ao mecenato e a uma economia pré-industrial, em que não é considerado um setor económico, nem está acessível à maioria das audiências. A Cultura 2.0 surgida com a revolução industrial identifica-se por uma democratização das audiências. É uma nova relação entre a produção cultural e a criação de valor económico, dominado pela expansão das indústrias culturais e criativas. A cultura 3.0 está associada a uma nova vaga de inovações tecnológicas, onde se verifica uma explosão de produtores e em que se torna difícil a separação entre produtores e consumidores. Existe uma participação ativa cultural dos indivíduos, colocando as suas competências para expandir a sua capacidade de expressão, entre outras. Encontra-se num estado preliminar.

Todavia, outros autores (IGOT-UL,2014) consideram que devem ser combinadas as várias produções artísticas, equipamentos e espaços culturais e artísticos entre si e com os elementos identitários, ou seja, ligar a Cultura 1.0-2.0-3.0, de Sacco (2011).

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<sup>30</sup> Em termos administrativos, a Região Centro é composta por 100 municípios. Os municípios encontram-se organizados em oito Comunidades Intermunicipais (CIM), de acordo com a Lei n.º 75/2013, de 12 de setembro, as quais constituem o nível III da Nomenclatura de Unidades Territoriais para Fins Estatísticos (NUTS), aprovada pela Comissão Europeia (Regulamento (UE) n.º 868/2014 da Comissão, de 8 de agosto).

A política pública deve adaptar-se à interdependência entre a cultura e as indústrias criativas e os restantes setores económicos e a sociedade.

Comparando os vários ciclos de programação de fundos comunitários, 2000-2006 e 2007-2013, verificou-se uma alteração de política, tendo o foco passado do turismo para a indústria cultural e criativa, numa perspetiva do desenvolvimento económico. Esta mudança reflete a alteração da perspetiva da Cultura 1.0 para a Cultura 2.0 e está associada importantes alterações em termos tecnológicos, de competências, de empregabilidade e de empreendedorismo (Sacco, 2011). O atual período de programação (2014-2020) constitui um desafio para uma mudança de perspetiva e a sua definição e programação deverá conciliar a emergência da Cultura 3.0 com as transformações descritas. A política cultural deverá ser focada na relação entre atividades culturais e a geração de valor acrescentado económico e social. Sacco (2011) considera, pelo menos, oito áreas em que a participação cultural poderá causar significativos efeitos macroeconómicos: inovação, bem-estar, sustentabilidade, coesão social, novos modelos de empreendedorismo, aprendizagem ao longo da vida, “soft power” e a identidade local.

Para além dos conceitos relacionados com a definição e arquitetura dos quadros comunitários, importa conhecer a distribuição espacial dos equipamentos e dos serviços culturais, das atividades culturais e criativas e dos bens imóveis classificados. Embora Florida e Gates (2001), citados por GANEC (2014), considerem que o crescimento (regional e urbano) está dependente das características da sua população. A concentração de uma classe criativa está associada a uma maior inovação e desenvolvimento tecnológico. O CEDRU (2014), considera que a administração pública nos setores cultural e criativo deve adequar-se às mudanças tecnológicas.

Por outro lado, é considerado que a recuperação de património e as infraestruturas culturais tem impacto no crescimento regional e local. Todos os investimentos têm de alguma forma um impacto na sociedade, podendo ter efeitos diretos e indiretos. Existem vários métodos de quantificação que podem ser aplicados à cultura: “input-output”, efeitos multiplicadores, efeitos de aceleração, despesas gerais, efeitos derivados, efeitos de gravitação, efeitos “não-económicos” (e.g. reforço da identidade nos residentes), efeitos contrários (e.g. efeitos na mobilidade, reforço de investimentos em infraestruturas) (Bowitz e Ibenholt, 2006). Outras metodologias tem sido apresentadas na área da cultura, por exemplo para o cálculo de multiplicadores de eventos culturais (Universidade do Algrave, 2014).

Em Portugal, o setor cultural e criativo, de acordo com a estimativa do Instituto Nacional de Estatística (INE), empregava 85,2 mil pessoas em 2015, representando 1,9% do emprego total. Em termos regionais, cerca de metade do emprego daquele setor (46,7%) estava concentrado na Área Metropolitana de Lisboa, representando ainda 3,3% do total da economia. A região Centro, empregava cerca de 12 mil pessoas, com 1,1% do emprego total. Face ao ano anterior (2014), verificou-se em Portugal um aumento de 8,7% da população empregada, o dobro do verificado no Centro de Portugal. No entanto, a população empregada neste setor é ainda caracterizada por ser mais jovem e escolarizada que nos restantes setores da atividade económica. Todavia, o comportamento da balança comercial do setor cultural e criativo foi deficitário, em cerca de 94 milhões de euros.

De acordo com o Sistema de Contas Integradas das Empresas (SCIE), existiam em Portugal cerca de 50 mil empresas culturais e criativas (Tabela 1), com um volume de negócios de 4,5 mil milhões de euros em 2014, mais de 2,3% do que em 2013. O resultado líquido no período foi de

136 milhões de euros. Em termos regionais, a Área Metropolitana de Lisboa concentrava cerca de metade (45,6%) das empresas e dois terços (66,2%) do volume de negócios. Nas posições seguintes destacavam-se as regiões do Norte e Centro, com 25,6% e 16,1% das empresas culturais e criativas, respetivamente.

Tabela 1 – Principais variáveis nas atividades culturais e criativas, por região (NUTS II).

| Região (NUTS II) | Atividades culturais e criativas <sup>(1)</sup> |                    |                    |                              | Despesas em atividades culturais e criativas dos municípios |                   |
|------------------|---|--------------------|--------------------|------------------------------|---|-------------------|
|                  | Empresas  | Pessoal ao serviço | Volume de negócios | Resultado líquido do período | Total   | <i>Per capita</i> |
|                  | 2014  |                    |                    |                              | 2015  |                   |
|                  | N.º   |                    | 1000 Euros         |                              | Milhões de Euros  | Euros             |
| <b>Portugal</b>  | <b>50.671</b>                                   | <b>83.451</b>      | <b>4.502.000</b>   | <b>136.215</b>               | <b>392</b>  | <b>37,9</b>       |
| Continente       | 48.866  | 80.866             | 4.431.794          | 130.741                      | 375   | 38,1              |
| Norte            | 12.956  | 20.939             | 887.037            | 22.821                       | 114   | 31,5              |
| <b>Centro</b>    | <b>8.146</b>                                    | <b>11.312</b>      | <b>348.545</b>     | <b>23.003</b>                | <b>104</b>  | <b>46,3</b>       |
| AM de Lisboa     | 23.125  | 42.359             | 2.981.586          | 68.005                       | 83  | 29,5              |
| Alentejo         | 2.261   | 3.002              | 104.878            | 8.984                        | 12  | 77,5              |
| Algarve          | 2.378   | 3.254              | 109.748            | 7.929                        | 21  | 48,5              |
| RA dos Açores    | 876   | 1.230              | 27.858             | 1.780                        | 11  | 45,8              |
| RA da Madeira    | 929   | 1.355              | 42.348             | 3.694                        | 6   | 22,0              |

Notas:

1. Inclui as seguintes classes da CAE-Rev.3: 4761, 4762, 4763, 5811, 5813, 5814, 5821, 5911, 5912, 5913, 5914, 5920, 6010, 6020, 6391, 7111, 7311, 7410, 7420, 7430, 7722, 8552, 9001, 9002, 9003, 9004, 9101, 9102 e 9103. SCIE - Sistema de Contas Integradas das Empresas.

Fonte:

INE, Estatísticas da Cultura 2015; INE, Inquérito ao financiamento das atividades culturais, criativas e desportivas pelas câmaras municipais; INE, Estimativas anuais da população residente

Em termos urbanos e locais, as autarquias locais desempenham um papel relevante enquanto promotores e dinamizadores da atividade cultural e criativa. As despesas das câmaras municipais em atividades culturais e criativas foram de 392 milhões de euros em 2015, refletindo um aumento de 11% face a 2014. Em termos regionais, destacaram-se o Alentejo, o Algarve e o Centro, com 77,5 euros, 48,5 euros e 46,3 euros *per capita*, respetivamente. Em termos municipais, destacam-se nove municípios (Figura 1) com um valor superior a 200 euros *per capita*: Mora (519), Viana do Alentejo (443), Elvas (335), Idanha-a-Nova (308), Alfândega da Fé (289), Vila Velha de Ródão (246), Alter do Chão (229), Almodôvar (228) e Castro Marim (212). No sentido oposto, 12 municípios apresentavam menos de 10 euros *per capita* de despesa em atividades culturais e criativas: Oliveira de Azeméis, Santa Maria da Feira, Gondomar, Paredes, Vila Nova de Gaia, Ribeira Brava, Marco de Canaveses, Vizela, Paços de Ferreira, Santa Cruz e Castelo de Paiva. Na análise de séries mais longas, verifica-se uma diminuição das despesas nos dois anos seguintes às eleições autárquicas (ICS, FLUP e CIES, 2014).

A análise das despesas da administração central com a cultura demonstra uma progressiva diminuição, situando-se em 2012 em 0,12% do Produto Interno Bruto (PIB). No sentido contrário, as despesas das famílias em lazer, distração e cultura têm registado um crescimento continuado (ICS, FLUP e CIES, 2014).

O setor cultural e criativo pode ainda ser caracterizado, por exemplo, pelas seguintes variáveis: o património mundial da UNESCO, os bens imóveis classificados, os museus e os seus visitantes (Tabela 2). Atualmente, da lista de Património Mundial da UNESCO fazem parte 15 monumentos e sítios portugueses. Da região Centro figuram: Mosteiro de Santa Maria de Alcobaça, o Mosteiro de Santa Maria da Vitória da Batalha, o Convento de Cristo de Tomar e a Universidade de Coimbra – Alta e Sofia (Figura 2).

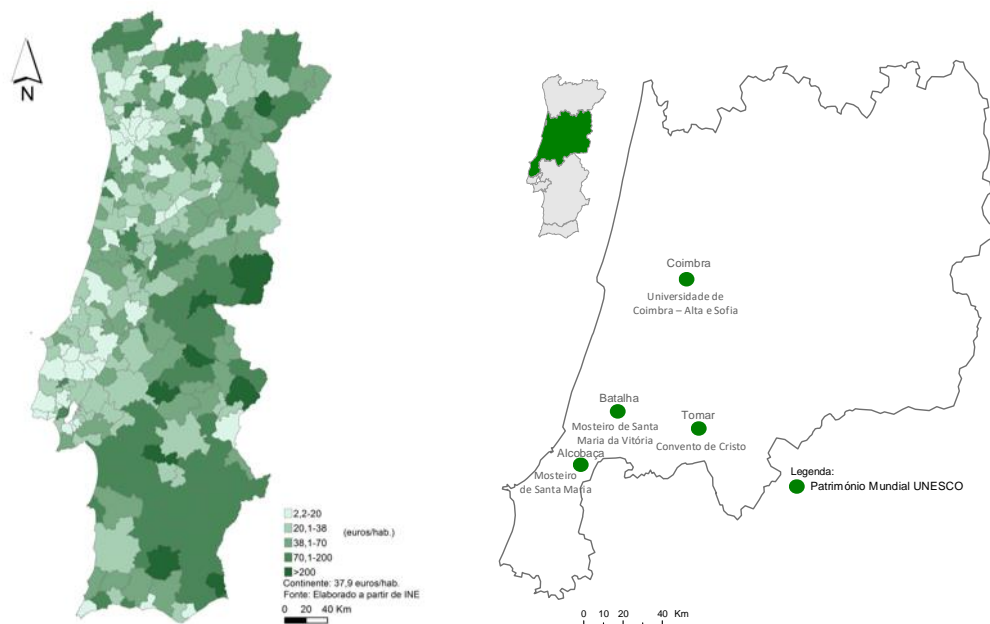


Figura 1 - Despesas *per capita* em atividades culturais e criativas das autarquias, 2015.

Figura 2 – Localização do Património Mundial UNESCO na região Centro de Portugal.

Em termos regionais, a maioria (53%) do património e dos bens imóveis classificados estão concentrados nas regiões Norte e Centro de Portugal. Todavia, no número de visitantes dos museus destaca-se a Área Metropolitana de Lisboa com cerca de metade (48%) do total, dos quais 52% são estrangeiros. Em termos relativos, a região Centro possui a menor representatividade de estrangeiros (19%) no total de visitantes.

Tabela 2 – Património e bens imóveis classificados e museus, por região (NUTS II).

| Região (NUTS II) | Património Mundial UNESCO | Bens imóveis classificados |                      |                              |                                | Museus     |                   |
|------------------|---------------------------|----------------------------|----------------------|------------------------------|--------------------------------|------------|-------------------|
|                  |                           | Total                      | Monumentos Nacionais | Imóveis de Interesse Público | Imóveis de Interesse Municipal | Total      | Visitantes        |
|                  |                           |                            |                      |                              |                                |            |                   |
| 2017             |                           | 2015                       |                      |                              |                                |            |                   |
| <b>Portugal</b>  | <b>15</b>                 | <b>4.451</b>               | <b>819</b>           | <b>2.859</b>                 | <b>773</b>                     | <b>388</b> | <b>13.660.668</b> |
| Continente       | 12                        | 3.986                      | 810                  | 2.660                        | 516                            | 358        | 13.237.551        |
| Norte            | 4                         | 1.352                      | 272                  | 981                          | 99                             | 111        | 4.132.597         |
| <b>Centro</b>    | <b>4</b>                  | <b>1.113</b>               | <b>187</b>           | <b>709</b>                   | <b>217</b>                     | <b>95</b>  | <b>1.589.612</b>  |



|               |   |     |     |     |     |    |           |
|---------------|---|-----|-----|-----|-----|----|-----------|
| AM de Lisboa  | 2 | 642 | 105 | 437 | 100 | 75 | 6.559.141 |
| Alentejo      | 2 | 717 | 220 | 423 | 74  | 64 | 595.164   |
| Algarve       | 0 | 162 | 26  | 110 | 26  | 13 | 361.037   |
| RA dos Açores | 2 | 295 | 2   | 141 | 152 | 14 | 203.283   |
| RA da Madeira | 1 | 170 | 7   | 58  | 105 | 16 | 219.834   |

Fonte: INE, Estatísticas da Cultura 2015 e <http://whc.unesco.org/en/list/>

### 3. A cultura nos vários quadros comunitários de apoio (2000-2020)

A política cultural, o património, os projetos e os investimentos serão de seguida analisados no III Quadro Comunitário de Apoio (QCA III) 2000-2006, no Quadro de Referência Estratégico Nacional (QREN) 2007-2013 e no Portugal 2020 (2014-2020).

Nos últimos quadros comunitários de apoio o setor da cultura tem merecido um destaque variável, indo desde um programa operacional próprio (2000-2006), até a uma dimensão transversal em vários programas operacionais (2007-2013). Os projetos cofinanciados e os investimentos encontram-se inscritos não só no domínio cultura, mas também é reconhecida a sua importância em intervenções de reabilitação e de regeneração urbana (Figura 3). De início, o destaque era colocado no património e nas infraestruturas culturais, mais do que em redes e pólos continuados de animação ou na produção artística.



Figura 3 - Domínio da Cultura nos Programas Comunitários

#### 3.1. O III QCA e o PO CULTURA

No período compreendido entre **2000-2006** vigorava, no nosso país, o **QCA III**. A cultura beneficiava da existência de um Programa de apoio financeiro próprio designado de **Programa Operacional da Cultura (POC)**, em que os projetos e iniciativas eram cofinanciados pelo Fundo Europeu de Desenvolvimento Regional (FEDER). Este programa veio substituir os programas “Caleidoscópio” (1996-1999), Ariana (1997-1999) e o programa Rafael (1997-1999), todos eles desenvolvidos após o Tratado de Maastricht e do reforço da cultura como setor determinante para o desenvolvimento das culturas dos Estados-Membros. Neste Tratado é destacado o património comum de todos os territórios, mas também o que é singular e único de cada um dos países (artigo 128º do Tratado de Maastricht). Este desafio é tanto mais complexo quando, no que diz respeito à construção da cidadania e identidade europeias se ponderava, cada vez

mais, os efeitos da globalização e massificação cultural, obrigando a um esforço acrescido na valorização do património construído e na adaptação aos novos meios de comunicação globais.

Tendo presente que a cultura contribui decisivamente para a qualificação dos recursos humanos, o POC foi definido tendo em conta quatro objetivos principais: 1) promoção do emprego e coesão social; 2) desenvolvimento do perfil produtivo do país; 3) promoção o desenvolvimento sustentado das regiões e promoção da coesão nacional e 4) promoção a proteção do ambiente e a igualdade de oportunidades.

No início do século XX, estávamos segundo o modelo de Sacco (2011) perante um modelo de cultura 1.0, onde a cultura é assumida como um meio de diferenciação social, sendo que a produção e o acesso à cultura estavam limitados. As políticas culturais públicas, em particular o POC, permitiu consolidar a ideia da cultura como um fator económico, de integração social e de cidadania e, neste sentido, um fator que concorre para o reforço e promoção da identidade europeia, nacional e regional.

A importância do setor cultural foi assumida através da definição e execução de um único programa operacional que concentrou medidas e de ações direcionadas e muito específicas neste domínio. Este programa foi estruturado em dois grandes Eixos Prioritários: o primeiro designado de “Valorização do Património Histórico e Cultural” e o segundo de “Favorecer o Acesso e Bens Culturais”. No primeiro Eixo estavam incluídas as Medidas 1.1. Recuperação e Animação de Sítios Históricos e Culturais e 1.2. Modernização e Dinamização dos Museus Nacionais. No segundo Eixo as medidas eram 2.1. Criação de uma Rede Fundamental de Recintos Culturais, 2.2. Utilização de Novas Tecnologias de Informação para Acesso à Cultura e 2.3. Assistência Técnica.

No total foram apoiados 418 projetos, que se traduziu em 396 milhões de euros de investimento elegível e um investimento FEDER no valor de 248 milhões de euros (62,8% de taxa de cofinanciamento comunitário). Com um total de 177 milhões de euros, no Eixo I foram apoiados 304 projetos (177 materiais e 127 imateriais). O Eixo II representou a execução financeira de cerca de 71 milhões de euros e a aprovação de 114 projetos (21 materiais e 93 imateriais).

A distribuição financeira por regiões portuguesas foi muito diferenciada, contrapondo a região Norte que representou 39,9% do investimento executado a nível nacional e as Regiões Autónomas que, em conjunto, não chegaram a atingir 16%.

A região Centro representou 26,8% do total do investimento executado no POC, com destaque para os projetos apoiados no âmbito da medida 1.1. que representaram mais de 45 milhões de euros. Para este volume financeiro muito contribuíram os projetos de recuperação e de valorização no Património da Humanidade Classificado pela UNESCO que, no período de vigência do POC, ainda estava circunscrito na região Centro ao Mosteiro de Santa Maria de Alcobaça e ao Mosteiro de Santa Maria da Vitória da Batalha. A recuperação de parte destes mosteiros ascendeu aos 3 milhões de euros de investimento FEDER. No entanto, considerando a divisão administrativa atual da região Centro de Portugal e a atualização do património da região classificado pela UNESCO, acrescentamos ainda cerca de 1 milhão de euros relativos às duas fases de recuperação do Convento de Cristo em Tomar e ainda cerca de 667 mil euros de obras na Universidade de Coimbra, Alta e Sofia, em particular de recuperação do Mosteiro de

Santa Cruz e de Conservação do Pórtico Central, Grupo Escultórico e Escadaria da Via Latina – Paço Real das Escolas.

Para além destes projetos, foi ainda apoiado, no âmbito da medida 1.2, a remodelação do Laboratório Químico – Criação do Museu da Ciência que, mais tarde viria também a integrar um dos três núcleos que compõem a área património da humanidade de Coimbra.

Com um investimento menos significativo, foram ainda apoiados, na região Centro, um conjunto de projetos imateriais ligados à valorização e animação do património, bem como à formação e captação de novos públicos. Destacamos a realização dos projetos emblemáticos como “Sons do Património”, da responsabilidade do IPPAR e a “Comemoração dos 650 anos da Morte de Inês de Castro” cuja entidade executora foi a Direção Regional da Cultura do Centro (DRCC).

Para além deste conjunto de projetos apoiados, importa ainda assinalar que o POC teve como enfoque o apoio a grandes eventos culturais, com destaque para o financiamento de algumas iniciativas que deram estrutura às Capitais Europeias da Cultura. A cidade de Coimbra teve este rótulo nacional no ano de 2003 e contou com a concertação de um conjunto alargado de entidades, das quais se destaca a Câmara Municipal, a Universidade de Coimbra, a Fundação Bissaya Barreto e a Comissão de Coordenação e Desenvolvimento Regional do Centro. Com um investimento FEDER de 2,9 milhões de euros, a DRCC executou um conjunto alargado de eventos que fizeram parte da Programação de Coimbra Capital Nacional da Cultura.

Também esta tipologia de projetos preconiza a interligação entre a cultura e a política de cidade, considerando os espaços urbanos como alavanca do crescimento e coesão territorial.

Na região Centro o apoio financeiro a projetos no âmbito da cultura não se esgota no domínio do POC, uma vez que, no período de 2000-2006, o Programa Operacional do Centro - PORCENTRO foi um complemento significativo para a valorização do património móvel e imóvel do território regional, para além da contribuição de outros recursos nacionais públicos e privados para o desenvolvimento do setor. Assim, no POR Centro foi ainda contemplada a cultura como prioridade de intervenção na Medida III.9 - Cultura. Do conjunto de projeto apoiados destacamos apenas quatro com incidência territorial em Coimbra, em particular na área abrangida pela UNESCO: “Sé Nova de Coimbra – qualificação e Valorização – 1ª fase e 2ª Fase”, da responsabilidade do IPPAR, “Sé Velha de Coimbra – Qualificação e Valorização” também do IPPAR e “Recuperação da Torre de Almedina”, da responsabilidade do município de Coimbra. Estes projetos totalizam cerca de 1,9 milhões de euros de investimento FEDER.

### *3.2. O QREN – Mais Centro*

Na passagem do QCA III para o Quadro de Referência Estratégico Nacional (QREN), o domínio da cultura deixa de ter um programa único para ser considerado como um domínio transversal a todos os Programas Operacionais Regionais. O Programa Operacional Regional do Centro, também designado de MaisCentro, teve o seu período de vigência entre 2007-2013 e procurou definir uma estratégia regional centrado na dinamização do investimento empresarial, na criação e transferência de conhecimento e na valorização do território.

Tendo como prioridade o desenvolvimento equilibrado da região, os objetivos centrais do Programa MaisCentro foram: 1) qualificação e valorização do território; 2) qualificação dos recursos humanos; 3) Inovação e competitividade das empresas; 4) exploração dos recursos e

do património da região; 5) melhoria da qualidade do ambiente; 6) cooperação entre os setores e a construção de infraestruturas de desencravamento, no respeito da complementaridade entre os fundos comunitários.

Não havendo um programa específico para a cultura, no MaisCentro os projetos associados a este domínio foram, sobretudo, aprovados no âmbito do Eixo II - Valorização do Espaço Regional, onde se destacam duas medidas cujas prioridades foram a valorização do património cultural e a promoção do acesso a bens culturais e no Eixo III - Coesão Local e Urbana, onde se apoiaram alguns equipamentos culturais mas também onde foram desenvolvidas iniciativas de promoção da competitividade urbana e de regeneração urbana, incluindo a recuperação do património das cidades e a qualificação das redes urbanas.

Assim, no Eixo II foram aprovados dois regulamentos específicos e, de forma conseqüente, dois avisos de concurso para a apresentação de projetos no domínio da cultura: 1) Património Cultural e 2) Rede de Equipamentos Culturais.

Do conjunto de projetos aprovados no regulamento Património Cultural destacamos um que foi apresentado pela Direção-Geral do Património Cultural com a designação de “Rota dos Mosteiros Património da Humanidade da Região Centro”. Com uma dotação FEDER de mais de 5,3 milhões de euros, este projeto, iniciado em 2009, foi estruturado através de um combinado de intervenções de carácter estruturante nos 3 monumentos da Região Centro classificados pela UNESCO (Alcobaça, Batalha e Tomar). As componentes realizadas em cada um dos monumentos abrangeram ações de salvaguarda e preservação da integridade física, prevenção de riscos e segurança, bem como ações que permitem conferir aos utentes (visitantes e funcionários) condições adequadas de fruição dos espaços que compõem os circuitos de visita (através da beneficiação da iluminação e das instalações sanitárias, da criação de sistemas de prevenção de incêndios e de canais de evacuação em caso de emergência, entre outros). Todas as componentes realizadas permitiram qualificar os espaços e os circuitos de visita e o apetrechamento de espaços destinados à interpretação destes monumentos, contribuindo para um aumento da procura e para a criação de novos públicos.

No Regulamento específicos Rede de Equipamentos Culturais (REC) os projetos cofinanciados foram sobretudo projetos “físicos” ligados a Arquivos e Bibliotecas Municipais e recuperação de Cineteatros e iniciativas imateriais de “Programação Cultural em Rede” que permitiram uma colaboração estreita (comum) de programação de espaços culturais entre várias instituições da Região (e mesmo com parceiros de outras regiões). Do conjunto destacamos os projetos “Imaginar o(s) Centro(s) – Coimbra”, “ReCENTRAR” ambos da responsabilidade da Fundação Cultural da Universidade de Coimbra e ainda “Culturbe – Braga, Coimbra e Évora” e “Culturbe – componente centro”, ambos da Escola da Noite. Estes projetos totalizam um investimento FEDER no valor de 1 milhão de euros.

Como complemento aos projetos especificamente do domínio cultural, o Programa MaisCentro teve ainda como desígnio o Desenvolvimento das Cidades e dos Sistemas Urbanos, sendo este um dos Eixos Prioritários deste programa. Com os objetivos centrais de reforço da identidade da região e valorização dos recursos e a qualificação integrada dos espaços sub-regionais, este Eixo procurou apoiar intervenções de ações de reabilitação urbana, ações para as redes de

infraestruturas, equipamentos e serviços coletivos e, ainda, projetos relativos à mobilidade urbana.

Assim, em termos de Política de Cidades o MaisCentro teve, inicialmente, dois instrumentos essenciais de intervenção urbana. O primeiro correspondeu às Parcerias para a Regeneração Urbana, também designadas de PRU e, o segundo, correspondeu às Redes urbanas para a competitividade e a inovação, designado de RUCI.

O Regulamento Específico das PRU permitiu alcançar um investimento muito equilibrado em todo o território regional, tendo sido privilegiada a constituição de parcerias (cooperação formal de diferentes entidades: municípios e outros atores urbanos) que elaboraram e implementaram um Programa de Ação comum de regeneração urbana.

Foram elegíveis nas PRU, 24 centros urbanos de nível superior (definidos no PROT – Plano Regional de Ordenamento do Território e PNPOT – Programa Nacional da Política de Ordenamento do Território), onde se incluí as cidades de Coimbra, Alcobaça e Tomar e ainda 34 pequenos centros, onde se incluí a cidade da Batalha, que, apesar de não estarem listados no modelo territorial definido nos Planos Regionais de Ordenamento do Território, possuíam um potencial estruturante do território nacional.

No total foram apoiados 423 projetos que envolveram um montante FEDER superior a 202 milhões de euros. Deste conjunto destacamos quatro projetos que representaram investimentos significativos nas cidades onde se localiza o Património classificados pela UNESCO:

- 1) “Requalificação urbanística intervenção na vila entre Igreja Mariz e Rotunda Cancelas (Cooperativa)”, do município da Batalha, com um investimento comunitário de 379 mil euros;
- 2) “Pedonalização da Zona Envolvente ao Mercado e Valorização dos Jardins Públicos da Zona do Tribunal - Praça do Município”, do município de Alcobaça, com um investimento FEDER de 1,6 milhões de euros;
- 3) “Requalificação urbana do centro histórico Praceta Alves Redol e Envolvente”, do município de Tomar e com um investimento FEDER de 388 mil euros;
- 4) “Requalificação do Pátio da Universidade, das Escadas de Minerva e acessibilidades no Paço das Escolas”, da Universidade de Coimbra, com um investimento de 1 milhão euros (Figura 4).

Estas e outras intervenções foram sobretudo de requalificação urbana tendo, algumas das quais, como mencionámos, ocorrido nas cidades estudo de caso e, portanto, concorrido para a valorização da paisagem urbana e para a valorização da identidade patrimonial destes territórios.



Pátio da Universidade de Coimbra



Escadas Minerva, Universidade de Coimbra



Requalificação do espaço envolvente ao Convento de Cristo



Recuperação da Rua Larga, Universidade de Coimbra

Figura 4 - Exemplos de intervenções apoiadas pelo MaisCentro (2007-2013)

Para além do Regulamento Parcerias para a Regeneração Urbana, a Política de Cidades estava estruturada no MaisCentro pelo Regulamento específico Redes Urbanas para a Competitividade e Inovação. Este regulamento procurou continuar a metodologia de trabalho iniciada em programas operacionais anteriores, onde era exigido, para efeitos de participação comunitária, a constituição de parcerias locais. Estas parcerias corresponderam a um processo estruturado de cooperação entre municípios, entidades públicas e entidades privadas que se propuseram a elaborar e implementar, em comum, um Programa Estratégico de desenvolvimento urbano centrado em fatores territoriais de competitividade e inovação.

No MaisCentro foram apoiadas nove Redes Urbanas, que corresponderam a 69 projetos e cerca de 22,5 milhões de euros FEDER. Estas redes estavam alicerçadas numa base territorial e/ou numa base temática e, pela sua evidente incidência temática destacamos apenas os exemplos das Redes constituídas e apresentadas pelos municípios do Entroncamento, de Tomar e Penela com as RUCI “Património Ferroviário Nacional: O Turismo Científico e Cultural como Produto Estratégico”, “Rede de Mosteiros Património da Humanidade” e “Rede Urbana de Castelos e Muralhas Medievais do Mondego” respetivamente.

A Rede de Mosteiros Património da Humanidade foi constituída com o objetivo de ser beneficiária aos fundos comunitários e teve como área de incidência os três grandes temas-chave associados aos 3 grandes conjuntos monásticos, complementares entre si, – a Ordem de Cister (no Mosteiro de Alcobaça), os Campos de Batalha (no Mosteiro da Batalha) e os Templários (no Convento de Cristo). Para além destes conjuntos, o Mosteiro dos Jerónimos foi também um dos lugares elegíveis que, através do IGESPAR, beneficiou do apoio comunitário, em particular através do financiamento de projetos imateriais de promoção da programação cultural em rede.

A parceria, liderada pelo município de Tomar, foi constituída por um conjunto alargado de entidades públicas dos quais constam os municípios da Batalha e de Alcobaça, o Instituto Politécnico de Leiria, o Instituto Politécnico de Tomar e o Instituto de Gestão do Património Arquitetónico e Arqueológico, IP.

O investimento comunitário deste projeto rondou os 4,2 milhões de euros e foi aplicado em 13 projetos distribuídos pelas seguintes tipologias: 1) Programação cultural anual das cidades em rede, tendo como suporte físico os Mosteiros; 2) Criação de programas de visita e produção de conteúdos de interpretação e 3) Realização de encontros anuais científicos em cada Mosteiro, incidindo sobre a sua especificidade).

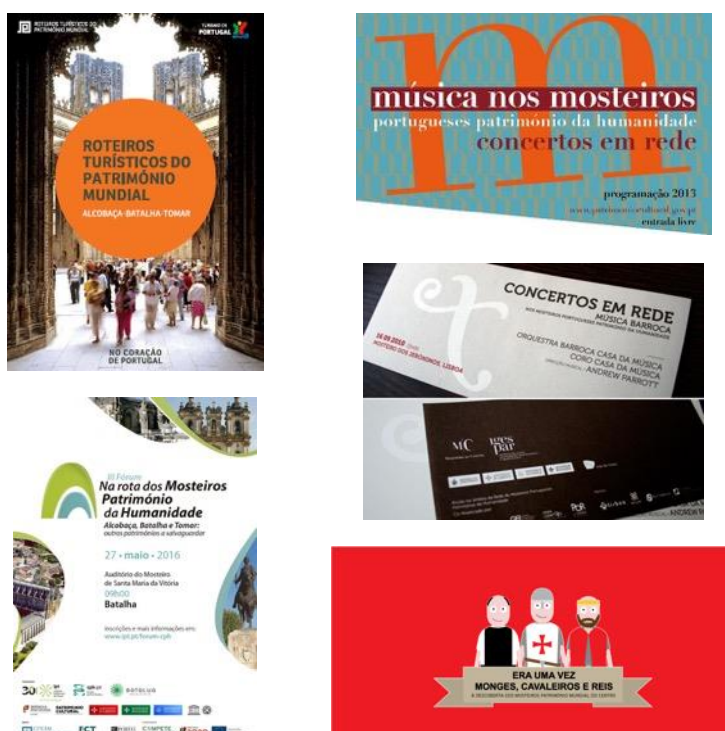


Figura 5 - Exemplos de iniciativas da Programação Cultural nos Mosteiros Património da Humanidade da Região Centro

Dos projetos apoiados destacamos três de natureza imaterial do IGESPAR “Programação Cultural em Rede nos Mosteiros Património Mundial”, “Produção de conteúdos e apetrechamento de espaços e circuitos para a qualificação e diferenciação da visita aos Mosteiros Património Mundial” e Encontros técnico-científicos nos Mosteiros Património Mundial (Figura 5). No total estes projetos representaram um investimento FEDER de cerca de 575 mil euros. Destacamos também dois projetos de natureza material que, pelo seu volume financeiro e pela sua área de incidência, representam as intervenções de fundo que se procuraram fazer nos centros urbanos no âmbito desta Rede de Mosteiros Património da Humanidade. O município da Batalha foi executor do projeto “Requalificação do Largo D. Henrique”, que representou um investimento FEDER de cerca de 941 mil euros, e o município de Tomar foi responsável pelo projeto “Requalificação Urbana da Envolvente à Ala Norte do Convento de Cristo”, com um montante financeiro de 1,3 milhões de euros.

O município de Penela em parceria com os municípios de Miranda do Corvo, Soure, Pombal, Figueira da Foz, Coimbra e outras entidades regionais como o Instituto Pedro Nunes e a própria Agência de Desenvolvimento Castelos e Muralhas Medievais do Mondego, candidataram ao MaisCentro o projeto RUCI “Rede Urbana de Castelos e Muralhas Medievais do Mondego. Desta rede apenas destacamos 3 projetos que tiveram incidência na cidade de Coimbra e, em particular, na área classificada pela UNESCO, a saber: “Reabilitação da Torre de Anto para instalação da Cas Museu da Guitarra e do Fado de Coimbra”, “Reabilitação exterior da muralha entre a Torre de Almedina e a Torre de Anto e respetiva iluminação cénica” e “Reabilitação do troço liberto da muralha da Couraça de Lisboa e respetiva iluminação cénica”. Estes projetos representam um investimento de 400 mil euros no Património da UNESCCO - Universidade de Coimbra, Alta e Sofia.

No total, o Programa MaisCentro foi responsável pela aprovação de 514 projetos que contribuíram para a reabilitação, requalificação e dinamização económica, social e cultural das cidades da região Centro. O investimento elegível aprovado correspondeu a mais de 276 milhões de euros, e o investimento FEDER situou-se nos 232 milhões de euros.

### 3.3. Programa Operacional Regional do Centro – CENTRO 2020 (2014-2020)

No atual período de programação comunitária (2014-2020) o domínio da cultura volta a não ser tratado de forma individualizada, mas sim integrando no conjunto das prioridades de investimento regionais. Isto significa que, para além da questão transversal da requalificação urbanística, o Programa Centro 2020 integra no seu programa estratégico preocupações no âmbito da conservação, proteção, promoção e o desenvolvimento do património natural e cultural.

O Programa regional acolhe, à semelhança do Programa anterior, investimentos de reabilitação e regeneração urbana nos centros urbanos de nível superior e nos centros urbanos de nível inferior. Tendo em conta as experiências do passado e os resultados obtidos com as intervenções já apoiadas, o Centro 2020 procurou apoiar de forma criteriosa investimentos que concorram para a qualificação ambiental e urbanística dos espaços urbanos, com reflexos ao nível da coesão social, da competitividade dos territórios e do nível e qualidade de vida das pessoas.

No Centro 2020 distinguimos duas questões fundamentais. A primeira é a delimitação das áreas de intervenção, ou seja, para aceder aos instrumentos de regeneração urbana foi necessário constituir uma área territorialmente delimitada, incidindo em espaços inframunicipais das Áreas de Reabilitação Urbana (ARU). A segunda é a constituição de um Plano de Ação de Regeneração Urbana, aceite pela Autoridade de Gestão do Centro2020 que, por sua vez deverá ser coerente com a estratégia integrada de desenvolvimento territorial.

Assim, neste contexto, e tendo em conta a tipologia de centros urbanos e a necessidade de serem definidos planos de ação, concorrem ao Eixo 9 do Centro 2020 “Reforçar a rede urbana (CIDADES)” os grandes centros urbanos que, no caso da região Centro foram divididos em 10 centros urbanos regionais<sup>31</sup> e 22 centros urbanos estruturantes<sup>32</sup> e para o Eixo 7 “Afirmar

<sup>31</sup> Na tipologia de centros urbanos regionais estão incluídos os municípios de Aveiro, Coimbra, Figueira da Foz, Leiria, Viseu, Guarda, Covilhã, Castelo Branco, Torres Vedras e Caldas da Rainha.

<sup>32</sup> Na tipologia de centros urbanos estruturantes estão incluídos os municípios de Ovar, Ílhavo, Águeda, Cantanhede, Pombal, Marinha Grande, Mangualde, Tondela, Seia, Gouveia, Oliveira do Hospital, Ourém, Tomar, Torres Novas,



sustentabilidade dos territórios (CONSERVAR)” os pequenos centros urbanos, que no caso da região Centro são os restantes 68 municípios.

No âmbito do Eixo 9 foi, inicialmente, aberto um Aviso de Concurso para os centros urbanos de nível superior apresentarem um Plano Estratégico de Desenvolvimento Urbano (PEDU). Este plano deveria incluir as seguintes Prioridades de Investimento (PI) definidas no Centro 2020:

- PI 4.5. promoção das estratégias de baixo teor de carbono para todos os tipos de territórios, nomeadamente as zonas urbanas, incluindo a promoção da mobilidade urbana multimodal sustentável e medidas de adaptação relevantes para a atenuação;
- PI 6.5 adoção de medidas destinadas a melhorar o ambiente urbano, a revitalizar as cidades, recuperar e descontaminar zonas industriais abandonadas, incluindo zonas de reconversão, reduzir a poluição do ar e a promover medidas de redução do ruído;
- PI 9.8 concessão de apoio à regeneração física, económica e social das comunidades desfavorecidas em zonas urbanas e rurais.

Tendo presente estas Prioridades, os PEDU incluem um Plano de Ação de Mobilidade Urbana Sustentável (PAMUS); um Plano de Ação de Regeneração Urbana (PARU) e, ainda, um Plano de Ação Integrado para as Comunidades Desfavorecidas (PAICD).

Com uma dotação inicial de mais de 211 milhões de euros, foram aprovados até abril de 2017 a os Programas Estratégicos dos 32 municípios a concurso.

No âmbito do Eixo 7, com uma dotação inicial de 78 milhões de euros, foi aberto um concurso para os 68 centros urbanos complementares da região Centro apresentarem os respetivos PARU. Estes Planos deveriam mobilizar apenas a PI 6.5, já referida, e deveriam, igualmente, corresponder a um conjunto de ações de regeneração urbana nos centros históricos, zonas ribeirinhas ou zonas industriais abandonadas, numa área territorial bem delimitada (ARU).

Neste sentido, e no que diz respeito à política de cidades, os municípios de Alcobaça, Batalha, Coimbra e Tomar têm continuado a beneficiar dos fundos comunitários, uma vez que são, mais uma vez, entidades líderes de uma estratégia local e intermunicipal de reabilitação urbana e patrimonial, potenciando, de forma indireta, a coesão económica, social e territorial de toda a região Centro.

Para além das prioridades referidas e que estão centradas na revitalização e conservação das cidades da região Centro de Portugal, o Centro 2020 assumiu como sendo uma das suas prioridades estratégicas a conservação, proteção, promoção e desenvolvimento do património cultural e natural. Aliás, o património cultural torna-se, no atual período de programação financeira, um dos domínios que, de forma clara, contribui para a sustentabilidade dos territórios, para a diminuição das assimetrias e para o reforço da coesão territorial. A cultura passa a ter uma vertente económica e a contribuir, de forma decisiva, para a coesão não só económica, mas também social e territorial, conforme está assinado na Estratégia da Europa 2020.

Trata-se de um compromisso assumido por Portugal ao nível europeu no domínio da cultura, em particular no que diz respeito ao aumento do número de visitantes no nosso país, associado

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Entroncamento, Abrantes, Alcobaça, Nazaré, Óbidos, Peniche, Alenquer e Fundão.

ao aumento do número de turistas e da sua estada média. Neste contexto, o Centro 2020 pretende contribuir para posicionar a região Centro como destino turístico de excelência, contribuindo, de forma direta ou indireta, para a preservação dos valores naturais e culturais, por via da sua promoção e da sua valorização turística, enquanto fatores de competitividade no modelo regional de desenvolvimento económico.

Os objetivos correspondem, na prática, a quatro níveis de investimento:

1. Incrementar o turismo cultural;
2. Criar emprego e riqueza, valorizando os equipamentos associados ao património;
3. Alargar os potenciais beneficiários e a captação de fluxos turísticos, dinamizando os espaços culturais existentes através de uma programação em rede;
4. Aumentar a capacidade de atração de visitantes das áreas classificadas, melhorando o apoio aos visitantes e divulgando os seus valores e recursos.

Tendo presente as prioridades definidas no domínio da cultura, o Centro2020 promoveu, até abril de 2017, a abertura de um Aviso de Concurso específico para o Património da Unesco.

Assim, na vertente imaterial, foi publicitado um Aviso/Convite para a Promoção do Património da UNESCO, com a dotação FEDER de 2 milhões de euros, que resulta do entendimento entre a Autoridade de Gestão do Programa e o Turismo Centro de Portugal, no sentido de ser criado um produto turístico integrado associado aos Lugares Património Mundial do Centro. O objetivo deste convite consiste em conceder apoios financeiros a ações que visem promover e dinamizar o Património Mundial da UNESCO, enquanto instrumento de diferenciação e competitividade dos territórios, designadamente enquanto referências regionais de excelência que alavanquem a animação e a efetiva qualificação da oferta turística que os integra. Para atingir estes objetivos, o Centro2020 considera que é relevante a criação de um produto turístico que considere a produção artística em rede e que envolva os agentes culturais regionais, nacionais e internacionais. Considera ainda relevante a criação de novos públicos, com a participação do sistema empresarial, educacional e científico, e das práticas de aproximação aos fatores identitários, pelo envolvimento das comunidades locais.

As tipologias de ações a concurso devem ser:

- Inventariação, divulgação e animação do património e da rede de equipamentos culturais;
- Promoção do património histórico e cultural com elevado interesse turístico, incluindo em particular aquele que já é Património da Humanidade reconhecido pela UNESCO;
- Apoio à realização de eventos associados ao património; à cultura e a bens culturais, com elevado impacto em termos de projeção da imagem da região, através da promoção em rede a nível intermunicipal e ou regional sempre que adequado;
- Divulgação e integração territorial, através de iniciativas de cooperação territorial e institucional que permitam integrar a programação cultural, as visitas guiadas e a divulgação de equipamentos, bens culturais e serviços prestados.

Para a apresentação de projetos deverá ser o Turismo Centro de Portugal a entidade líder que assumirá a função de coordenador técnico e interlocutor com o Centro 2020 e as outras

entidades regionais como os municípios de Alcobaça, Batalha, Coimbra e Tomar; a Universidade de Coimbra e a Direção-Geral do Património Cultural e a Direção Regional de Cultura do Centro.

### **Remate**

A definição de políticas públicas, no setor cultural, ao longo dos quadros comunitários, tem utilizado várias arquiteturas. Embora o programa específico do setor da cultura apresente vantagens, designadamente como a coerência das intervenções, também são apontadas algumas desvantagens relacionadas com dificuldades de relacionamento entre os setores e as restantes políticas públicas das cidades e do empreendedorismo.

A abrangência das políticas urbanas nos diferentes quadros comunitários de apoio tem vindo a sofrer significativas alterações que, pensamos, irem ao encontro das sucessivas mudanças nos espaços urbanos.

De forma contínua, e depois de terem sido efetuados os grandes investimentos em infraestruturas de base, onde incluímos as de saneamento ou de eletricidade, por exemplo, os programas comunitários têm vindo a atribuir uma importância acrescida às questões da sustentabilidade e da coesão urbana. Para tal, a metodologia de aplicação dos fundos comunitários deixou de estar centrada em projetos isolados, mas sim no apoio a projetos que estejam integrados num plano estratégico de desenvolvimento urbano, circunscritos a uma área geográfica delimitada e que estejam concertados com um conjunto alargado de atores locais. Procura-se, cada vez mais, a definição de planos inclusivos e coerentes que resultem da união entre todos os atores locais.

Desta parte, no âmbito da política de cidades têm sido apoiados projetos estruturantes de reabilitação e de regeneração urbana, em particular nas cidades onde o Património da UNESCO é estruturante e diferenciador como Alcobaça, Batalha, Coimbra e Tomar.

A análise dos investimentos mostrou a importância da cultura e do Património da UNESCO nas políticas públicas, dos últimos vinte anos, na Região Centro. Destacamos o envolvimento progressivo de redes e parceiros na gestão dos projetos apoiados. A diversidade regional, em termos de desenvolvimento, é acompanhada por diferentes fases de maturidade em termos culturais (produção artística, equipamentos, espaços culturais, criatividade e identidade). A integração e interdependência entre a cultura, os restantes setores económicos, a sociedade e a coesão territorial são os grandes desafios na definição e execução das políticas públicas.

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# O carnaval de Olinda e a preservação de seu centro histórico: desafios da legislação municipal para a conservação de seu patrimônio histórico

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## Resumo

O impacto econômico e social proveniente das atividades turísticas durante o carnaval, especialmente em sítios históricos, suscita a discussão acerca do planejamento urbano e da sustentabilidade das ações para fins turísticos, em razão de seu alto potencial de degradação dos bens materiais e imateriais que detém valor cultural e histórico. Tal questão é uma realidade, inclusive para sítios reconhecidos como Patrimônio da Humanidade, como é o caso de Olinda. A importância desse sítio histórico decorre não só de suas belezas naturais, mas também por seu vasto acervo de bens imateriais, arquitetônicos, urbanos, religiosos, etc. Desta forma, a necessidade de se preservar o patrimônio histórico da cidade motivou o poder público a criar mecanismos legais – como, por exemplo, o “Plano Diretor” e a “Legislação Urbanística dos Sítios Históricos de Olinda” – voltados para a organização do espaço urbano. Assim sendo, o presente trabalho analisará de que forma o poder estatal municipal empreende ações para a conservação e proteção do sítio histórico localizado em Olinda, por meio de planejamento urbanístico e da legislação municipal. De modo a compreender de que maneira a prefeitura promove ações para planejar o espaço urbano e as atividades turísticas no intuito de minimizar as externalidades negativas geradas pela influência do turismo no comércio, junto aos residentes e em relação ao desenvolvimento local, durante o período do Carnaval.

## Palavras chave

Patrimônio Cultural; Capacidade de Carga de Cidade; Plano Diretor; Patrimônio da Humanidade; Políticas de Preservação.

## 1. Introdução

Olinda é uma cidade do Nordeste brasileiro que apresenta um rico acervo de arquitetura da época colonial, adornada por uma exuberante vegetação tropical e uma bela vista do litoral, tais características fizeram com que a cidade pernambucana atraísse, ao longo de sua história, vários artistas que dela fizeram sua morada. Além disso, fez com que Olinda colecionasse títulos nacionais e internacionais, inclusive o título de Patrimônio da Humanidade, recebido em 1982, da *United Nations Educational, Scientific and Cultural Organization* (UNESCO).

Todavia, os títulos fizeram de Olinda um polo de atração de turistas, especialmente durante o carnaval. Esse novo contexto trouxe consigo os perigos da degradação urbana e o aumento do risco de deterioração do acervo de bens culturais da cidade. Ademais, provocou mudanças estruturais no carnaval de rua, ao inserir elementos de megaeventos, numa festividade de caráter popular.

Ressalta-se que o poder estatal municipal de Olinda já apresenta leis voltadas à proteção de seu patrimônio histórico, desde os anos de 1973, por meio de seu Plano Diretor, o reconhecimento e a preocupação com a preservação dos bens culturais ainda persistem no Plano Diretor vigente. Outro importante instrumento legal na área é a “Legislação Urbanística dos Sítios Históricos de Olinda”, a qual dispõe sobre as diretrizes e usos do espaço urbano e do patrimônio cultural da cidade.

A proposição de planos remete ao problema da ausência de planejamento efetivo dos países latino-americanos, o que suscita a discussão acerca dos principais elementos que devem estar presentes no processo de diagnóstico, planejamento e execução das atividades do poder público, no sentido de respeitar a capacidade de carga das cidades históricas e promover a sustentabilidade delas, por meio do equilíbrio do tripé: sociedade, economia e meio ambiente.

Dessa forma, o presente artigo se justifica na medida em que há a necessidade de se analisar os planos urbanísticos e seus desmembramentos no mundo real, especialmente em cidades que possuem excepcional valor para a humanidade, pois uma vez constatadas as limitações da letra da lei, faz-se necessário rever preceitos que melhor adequem-se às demandas locais.

Nesse sentido, o objetivo do presente trabalho é analisar a legislação, voltada para a conservação do patrimônio histórico de Olinda, ressaltando as potencialidades e limitações das leis e planos municipais, contrastando-os com o impacto gerado pelo carnaval.

As bases metodológicas deste artigo consistem em pesquisa exploratória, respaldadas por pesquisa bibliográfica e documental. Também foram utilizados dados governamentais, obtidos junto a Prefeitura Municipal de Olinda e ao Instituto Brasileiro de Geografia e Estatística (IBGE). O presente texto foi estruturado em seis partes, sendo elas: “Introdução”, “Olinda do passado ao presente”, este item apresentará a história de cidade de Olinda, seu acervo de bens culturais e sua importância como Patrimônio da Humanidade; “Planejamento territorial e a busca pela sustentabilidade das cidades”, no qual se discutirá a importância do planejamento urbano, no sentido de promover a integração entre os diversos atores públicos e privados, envolvidos e impactados pelas atividades turísticas; “O Carnaval e o processo de transformação do espaço e da cultura local”, aqui será descrita a festa carnavalesca, suas externalidades positivas e negativas; “Instrumentos legais de preservação do Patrimônio Cultural de Olinda”, o qual discorrerá sobre as leis municipais voltadas para o planejamento urbanístico e para a preservação do acervo cultural e histórico de Olinda; e “Conclusões”.

## **2. Olinda do passado ao presente**

Olinda é uma cidade do Nordeste brasileiro que teve sua origem quando o Rei D. João III subdividiu o território, obtido por Portugal através do Tratado de Tordesilhas, em quatorze Capitanias Hereditárias, no intuito de salvaguardar a posse desse território. Dentre as capitanias que lograram prosperidade econômica, temos a de Pernambuco, ou Nova Lusitânia, cujo desenvolvimento se deu em razão de sua Mata Atlântica e grande quantidade de pau-brasil (Bicca, 2006).

Duarte Coelho Pereira, donatário da Capitania de Pernambuco, fundou a Vila de Olinda, em 1537, devido às condições naturais que favoreciam a sobrevivência e proteção contra possíveis ataques, sendo elas, a alta topografia, a proximidade do porto e a água potável em abundância. Olinda fez parte das cidades implantadas nas zonas açucareiras, caracterizadas pela baixa capacidade administrativa e que enfrentou dificuldades para impor normas de edificação. A dinâmica econômica favoreceu os comerciantes – que promoviam a exportação do açúcar – em detrimento dos senhores de engenho, sujeitos aos altos custos dos engenhos e que dependiam do porto de Recife para escoar a produção (Bicca, 2006).

Em 1630, os holandeses invadiram a Capitania de Pernambuco e incendiaram Olinda, transferindo-se para Recife e promovendo o seu desenvolvimento. Em 1654, novamente sob

domínio português, a cidade de Olinda não foi capaz de recuperar sua importância econômica local (Bicca, 2006).

Contudo, Olinda ainda é considerada uma das joias brasileiras, na qual a paisagem litorânea encontra-se com uma bela cidade, constituída por casas de arquitetura antiga e cores vivas; igrejas barrocas; e beleza tropical que cobre sua colina. Tais características fazem com que seja chamada de cidade dos artistas ou da arte, visto que pintura, manifestações teatrais e literatura (popular e clássica) são atividades bastante empreendidas na cidade (Leal, 2008).

A importância de seu patrimônio cultural e natural conferiu à Olinda diversos títulos, sendo eles: o de Monumento Nacional (1980), o de Cidade Ecológica (1982) e o de Primeira Capital Brasileira da Cultura (2005); e motivou ações nacionais e internacionais que assegurassem a proteção de seu acervo, tais como, a elaboração de seu Plano Diretor (1973) e o título de “Patrimônio da Humanidade” (1982), respectivamente.

Nota-se que Olinda possui destaque internacional sendo, inclusive, palco de diversos eventos culturais como, por exemplo, “Arte em Toda a Parte”, a Mostra Internacional de Música de Olinda (Mimo) e o Carnaval. Esses eventos atraem não só a atenção da mídia como também são responsáveis pela atração de uma grande quantidade de pessoas proporcionando, dentre outros efeitos, a movimentação da economia local.

Segundo o Instituto Brasileiro de Geografia e Estatística (IBGE), em 2010, a população de Olinda era de 377.779 habitantes e o Produto Interno Bruto do Município foi de R\$ 3.598.246,00 dos quais 77% advém do setor de serviços (IBGE, 2014), sendo o turismo um vetor da economia local, especialmente no período do Carnaval, o qual é responsável pela atração anual de milhões de turistas.

### **3. Planejamento territorial e a busca pela sustentabilidade das cidades**

A necessidade de planejamento na América Latina é fruto de sua trajetória histórica, que perpassa a descolonização, ou seja, a ausência de competência administrativa deixadas pelas metrópoles, o que acarretou em mudanças nas estruturas socioeconômicas e política dos países latino-americanos, o que resultou em ações altamente dispendiosas e com baixa efetividade (MOLINA e RODRÍGUEZ, 2001).

Segundo Molina e Rodríguez (2001), o planejamento pode promover temporariamente melhoras no contexto socioeconômico. Não obstante, pode perturbar a ordem social através de movimentos como, por exemplo, a modernização, ocasionando, assim, sua rejeição pelos próprios beneficiados. No que diz respeito ao contexto administrativo institucional, os países latino-americanos têm optado por planejamentos setoriais e por instituição, de modo a tratar de questões vinculadas às suas competências, deixando de abordar temas importantes e muitas vezes atuando de forma conflitante – entres Ministérios, instituições, etc. – por falta de harmonia de interesse entres os órgãos de governo.

De modo que, faz-se necessário promover ações subsidiadas por dados concretos, ou seja, por meio de diagnóstico preciso, o qual se pautado pelo detalhamento e análise daquilo que se pretende modificar, sendo este uma das etapas essenciais para o bom planejamento. Feito isso, o passo seguinte é delinear os prognósticos das ações, no sentido de projetar as possíveis variáveis verificadas no diagnóstico. É importante ter em mente a necessidade de se construir instrumentos capazes de viabilizar e ordenar o planejamento, tais como: fontes de



financiamento, pressupostos de saída (gasto público), pressupostos de entrada (receitas públicas) e normas jurídicas (MOLINA e RODRÍGUEZ, 2001).

O planejamento turístico é um processo racional que envolve uma série complexa de atividades, as quais compartilham um objetivo em comum, conforme o trecho que segue

*Planejar*, em seu significado mais amplo, implica a identificação de um conjunto de variáveis, com o objetivo de adotar um curso de ação que, baseado em análises científicas, permita alcançar um Estado ou situação predeterminada. Assim, *planejar* é prever o curso dos acontecimentos futuros. Em outras palavras, o planejamento consiste em estabelecer um curso de ação que conduza à obtenção de uma situação desejada, mediante um esforço constante, coerente, organizado, sistemático e generalizado (MOLINA, 2005:45).

Essas ações atendem a uma dimensão espacial, ou seja, planejamento nacional, planejamento regional, planejamento estadual e planejamento municipal; que correspondem a determinada dimensão temporal, cuja validade pode ser de curto prazo (de 5 a 7 anos), de médio prazo (de 8 a 20 anos) e de longo prazo (período superior a 20 anos).

Segundo Hall (2001), diante do contexto de transformações do meio ambiente e da sociedade, a sustentabilidade é um tema que ganhou importância no debate internacional já no início do século XX, ao compreender a ligação intrínseca entre ambiente, economia e sociedade. Nesse sentido, assim como a sustentabilidade, o desenvolvimento sustentável deve ser inserido na elaboração de políticas públicas e nas decisões de planejamento. De modo que o planejamento turístico não resume-se somente às atividades de divulgação e desenvolvimento do setor, mas sim deve fazer parte de processos mais amplos de planejamento econômico, ambiental e social.

Dito isso, o planejamento deve incorporar a comunidade hospedeira, no sentido de atender suas demandas e respeitar as características peculiares da população local, por meio de um processo dialógico e abrangente, que possibilite acomodações de interesses, no decorrer do tempo. Nesse sentido, é apontado que:

«Embora o planejamento não seja uma panacéia para todos os males, quando totalmente voltado para processos ele pode minimizar impactos potencialmente negativos, maximizar retornos econômicos nos destinos e, dessa forma, estimular uma resposta mais positiva por parte da comunidade hospedeira em relação ao turismo no longo prazo (HALL, 2001:29).

Outro ponto que merece atenção são os problemas relacionados à degradação ambiental e ao congestionamento de pedestres e veículos, os quais são consideradas externalidades do turismo, especialmente em cidades históricas, cujas ruas são mais estreitas; os estacionamento são escassos; o comércio, os residentes e os turistas disputam o mesmo espaço; e que apresentam limitada possibilidade de adaptações às condições de vida moderna, demonstrando, assim, a necessidade de se promover o planejamento turístico a fim de mitigar os impactos negativos do excessivo fluxo turístico (OLIVEIRA, 2003).

Assim sendo, Oliveira (2003:23) utiliza-se do “conceito de capacidade de carga para o planejamento sustentável do turismo”, propondo a integração harmoniosa entre o ser humano e o meio ambiente, de modo a reconhecer que os recursos – naturais e os construídos pelo homem – são finitos e que quando têm seus limites ultrapassados, em decorrência do elevado número de visitantes recebidos, por exemplo, estão sujeitos ao processo de deterioração e descaracterização local.

Segundo Ruschmann (1997), a rentabilidade do setor turístico é um importante componente da discussão de preservação local, posto que os recursos naturais turísticos, geralmente pertencem às pequenas comunidades, as quais são caracterizadas pela baixa capacidade de promover investimentos na área de infraestrutura e/ou sua preservação. Dessa forma, deve-se estimular mecanismos de solidariedade entre o setor privado, residentes e órgãos públicos, no sentido de incentivar a lucratividade aos investidores ao passo em que garantam condições adequadas e propícias para a proteção ao patrimônio cultural local.

A busca pelo ponto de equilíbrio entre a exploração da atividade turística e o respeito pela capacidade de carga da cidade é de suma importância para o planejamento turístico de médio e longo, uma vez que ele será responsável pela proposição de ações que atendam a demanda por equipamentos destinados aos turistas, suavizando os efeitos de degradação urbana, promovida pela ação predatória do mercado.

#### **4. O Carnaval e o processo de transformação do espaço e da cultura local**

O carnaval de rua não é originalmente uma festa formal, na qual reúnem-se atores e espetáculos, que performam em palcos aos moldes de megaeventos, mas sim uma comemoração que representa o cotidiano do povo, por meio das festividades momescas e com a finalidade de assegurar a liberdade de expressão e a diversidade cultural (BOCCIA, 2015).

Segundo Boccia (2015:182), o carnaval no Brasil é uma festa multifacetada, que possui componentes ligados a ritualização e expressão individual, de modo a proporcionar experiências de coletividade diferenciadas, de acordo com os valores simbólicos atribuídos aos espaços. Nesse sentido, o autor utiliza a cidade de Salvador como exemplo para apontar que “(...) a ocupação do centro simbólico exerce grande atração para artistas, empresários, políticos e foliões, todos interessados em produzir e transmitir os próprios valores”.

O Estado de Pernambuco apresenta uma população multiétnica e histórico marcado por manifestações populares diversificadas, as quais fazem parte de sua identidade cultural e tornam o carnaval pernambucano único. Olinda é um exemplo dessa diversidade, na medida em que apresenta elementos locais como, por exemplo, o desfile de bonecos gigantes – que ressaltam o caráter popular da festa, por meio da representação de personalidades locais e/ou nacionais e/ou críticas sociais – pelas ruas e ladeiras da cidade (Lima et al., 2014).

Segundo Barreto (2008), inicialmente o carnaval de Olinda era constituído basicamente por residentes locais – inclusive, artísticas plásticos – que compartilhavam as atividades de organização e decoração da cidade para a festa, de maneira que as pessoas que desfilavam nas agremiações, geralmente eram as mesmas que desfilavam nas procissões, o que estabelecia um vínculo de comunidade entre os participantes da festividade e garantia à cidade a permanência de características idiossincráticas, próprias do povo de Olinda e relacionadas ao sítio histórico.

Todavia, a partir do ano de 1981, após o recebimento do título de “Monumento Nacional”, a festa incorporou novos elementos, assumindo uma postura de busca por potencializar a atividade turística. Essa transformação de paradigmas fez com que o volume de turistas aumentasse consideravelmente no período do carnaval, o que acarretou numa série de problemas apontados pela Sociedade Olindense de Defesa da Cidade Alta (SODECA), tais como: o aumento do trânsito de veículo; o elevado número de barracas e outras formas de comércio de rua; o aumento do fluxo de pessoas; a sobrecarga da rede de esgoto; a poluição visual, proveniente de ações publicitárias; a fuga dos moradores locais durante o feriado; a depredação

de monumentos e imóveis; dentre outros fatores que afetam o centro histórico da cidade de forma negativa (Barreto, 2008).

Atualmente, em meio às casas coloridas, os foliões dividem o espaço com os bonecos gigantes, tomam as ruas e podem aproveitar outras atrações como os blocos de rua, agremiações e apresentações de artísticas, de acordo com a programação de eventos disponibilizada pela prefeitura de Olinda em *website* oficial e específico para o carnaval (<http://www.carnaval.olinda.pe.gov.br>, recuperado em 30, março, 2017), que roteirizou atividades, em sua maioria, concentradas nas ruas do centro histórico, conforme Figura 1, nos dias 25, 26, 27 e 28 de fevereiro para o carnaval de 2017, cujo *slogan* foi “Esse carnaval tem história”.

## Olinda - Carnaval - Polos

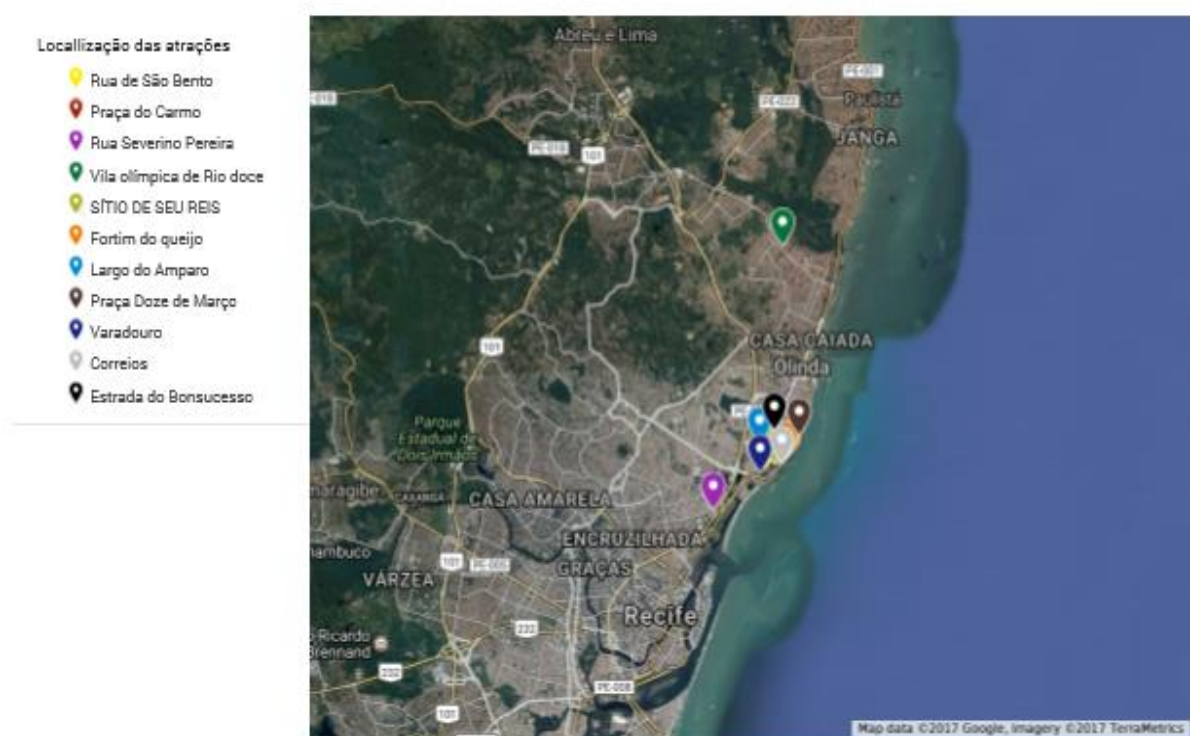


Figura 1 - Mapa do roteiro de atrações do Carnaval 2017

Fonte: Elaborada pelos autores

O carnaval é uma importante festividade para a economia de Olinda, segundo pesquisa da Secretaria de Turismo, Desenvolvimento Econômico e Tecnologia, em 2017, a rede de hotelaria obteve a taxa de 97% de ocupação. Estima-se que a cidade contou com cerca de 2.300.000 de foliões, dos quais 56% são provenientes do Estado de Pernambuco e os outros 44% são foliões estrangeiros e de outros Estados, conforme Figura 2.

Segundo a prefeitura de Olinda, no plano do desenvolvimento econômico, a festa gerou 60 mil empregos – diretos e indiretos – e promoveu a injeção de 120 milhões de reais na economia municipal, estes dados evidenciam a importância econômica que o Carnaval representa para a cidade.

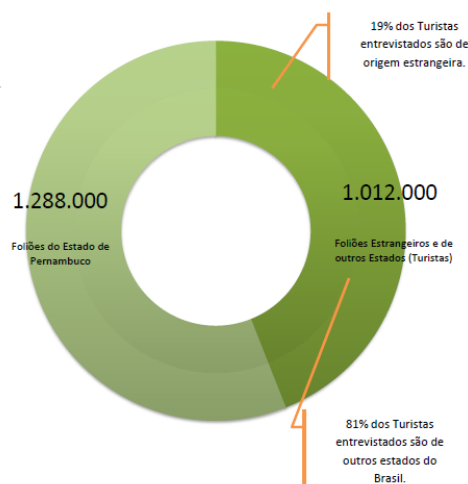


Figura 2 – Representação do número de foliões  
 Fonte: Prefeitura de Olinda

### 5. Instrumentos legais de preservação do Patrimônio Cultural de Olinda

Segundo Villaça (1999), o conceito de Plano Diretor, no Brasil, desenvolveu-se a partir da década de 1950, ainda que São Paulo e Rio de Janeiro tenham experiências anteriores com o zoneamento, suas principais atribuições são pautadas por meio de um diagnóstico prévio acerca das condições socioeconômica, ambientais, administrativas e políticas do município, no intuito de apresentar um conjunto de propostas, de curto, médio e longo prazo, voltadas para a organização do espaço urbano, uso do solo, melhora da rede de infraestrutura, etc. Nesse sentido, o plano diretor consiste num conjunto de normas que orientarão o uso e ocupação do espaço urbano, por meio de diretrizes e princípios alinhados aos objetivos do município para processo de desenvolvimento urbano.

Conforme o Estatuto da Cidade estabelecido pela Lei Federal nº. 10.257/2001, o Plano Diretor deve ser revisto a cada 10 anos, com propósito de verificar a pertinência das diretrizes estabelecidas anteriormente, a criação de novas normas e a definição de novos prazos para implantação do novo plano. Ressalta-se que a legislação prevê a participação da população na elaboração do documento e fiscalização de sua implementação.

Segundo Milet e Zancheti (2007), o tombamento federal do conjunto arquitetônico de Olinda, realizado em 1968, bem como o Plano Diretor Integrado de Olinda, regulamentado pela lei municipal nº lei nº. 3926/1973, constituem instrumentos legais de proteção do sítio histórico da cidade. Magalhães (1997), por sua vez, ressalta que esses instrumentos são de suma importância para a conservação de aspectos singulares da identidade cultural de Olinda e que sem o rigor, imposto pela legislação, o acervo patrimonial de Olinda estaria desprotegido contra as influências do crescimento de Recife e da especulação imobiliária.

Atualmente, o Plano Diretor de Olinda está fundamentado na Lei complementar nº. 024/2004, alterada pela Lei complementar nº. 032/2008, e expressa as diretrizes da política urbana municipal, usos e ocupação do território, a função social da propriedade urbana, dentre outros temas.

O documento assegura em seu art. 2º, inciso I, que a cidade possui função social e, portanto, o poder estatal deve assegurar: “condições adequadas à realização das atividades voltadas para o

desenvolvimento sustentável em suas dimensões econômica, social, ambiental e cultura” e no inciso V, do mesmo artigo, garante “a conservação integrada do patrimônio histórico-cultural, artístico, arqueológico e do Sítio Histórico Patrimônio da Humanidade”.

Outra contribuição relevante para o campo da preservação está localizada em seu art. 30, o qual estabelece a Zona Especial de Proteção do Patrimônio Cultural (ZEPC), cuja finalidade é proteger áreas e bens reconhecidos por seu valor cultural, histórico, ambiental, tangível e intangível. O Plano Diretor elege os seguintes locais: a) ZEPC 01 – Santuário da Mãe Rainha; b) ZEPC 02 – Sítio Histórico Bonsucesso-Monte; c) ZEPC 03 – Sítio Histórico Carmo-Varadouro; e d) ZEPC 04 – Sítio Histórico Santa Tereza.

As ZEPC obedecem à Lei n.º 4.849/92 que versa sobre a legislação urbanísticas dos Sítios Históricos de Olinda, a qual discrimina as ZEPC da seguinte forma: a) ZEPC 01 é constituída pelo núcleo urbano primitivo e área verde de Olinda, ou seja, o Polígono de Preservação Municipal de Olinda; b) ZEPC 02 corresponde às edificações cujo valor histórico e/ou cultural foi reconhecido e que se localizam na Rua de Santa Tereza, Rua Duarte Coelho e Convento de Santa Tereza, na Fábrica Tacaruna, Capela de Santana do Rio Doce e o Casarão do Complexo de Salgadinho (Casarão Rosa); c) ZEPC 03 corresponde às ruínas e edificações do entorno, dotadas de valor histórico-cultural, fazem parte desse conjunto as Ruínas da Fortaleza do Buraco, as Ruínas da Casa da Pólvora, as Ruínas do Convento de Santo Amaro e as Ruínas da Caperila de Santana do Engenho Fragoso; d) ZEPC 04 não é descrita no documento.

No que diz respeito aos logradouros públicos, a legislação urbanística dos Sítios Históricos de Olinda aponta que o governo municipal deve organizar atividades a serem realizadas nesses espaços públicos, de acordo com art. 112, o qual dispõe que: “Qualquer atividade em logradouro público, de eventos religiosos e festas populares, deverá ter disciplinamento estabelecido pela Prefeitura Municipal”.

O art. 113, por sua vez, exige que atividades relacionadas ao comércio e instalação de equipamentos, ainda que provisórios, nas dependências das ZEPC deve, obrigatoriamente, obter aprovação do Conselho de Preservação.

Outro instrumento de normatização é a Lei Municipal nº 5.306/2001, alterada pela Lei Municipal nº 5.927/2015, conhecida como Lei Do Carnaval, a qual institui a Comissão Permanente do Carnaval, que é vinculada às Secretarias que atuam nas áreas de planejamento, saúde, turismo, assuntos jurídicos, segurança urbana, comunicação e finanças. Essa lei também regulamenta as atividades relativas à festividade, no que diz respeito à oferta de serviços públicos de saúde; garantia de infraestrutura para as agremiações; ordenamento do trânsito de veículos; limpeza urbana; dentro outros temas vinculados ao Carnaval. A Lei do Carnaval estabelece, também, que a promoção e funcionamento de shows artísticos, espetáculos musicais, concertos, boates e atividades similares somente poderão ocorrer, mediante a autorização das Secretarias de Patrimônio Cultural e de Planejamento e Controle Urbano.

Percebe-se, assim, que por meio desse conjunto de leis municipais o governo municipal apresenta grande preocupação em proteger seu acervo de bens culturais presentes no Sítio Histórico da cidade, de maneira que as leis estabeleçam a promoção de atividades voltadas para o desenvolvimento, sem que com isso, o centro histórico seja demasiadamente impactado, ou seja, há a tentativa de assegurar medidas de proteção e conservação do patrimônio histórico, sob a tutela do Estado.

## Conclusões

As políticas de preservação do patrimônio histórico, artístico nacional, representam a preocupação estatal em preservar aspectos culturais, que não só fazem parte do cotidiano da vida da população local, mas também remetem à proteção de elementos históricos e culturais, cujo valor é inestimável e dificilmente poderão ser reparados, com ações posteriores ao dano ou perda desses bens.

Dito isso, Olinda na qualidade de Patrimônio da Humanidade possui atributos, nacional e internacionalmente reconhecidos, que denotam a necessidade de preservação de seu sítio histórico e de sua cultura local. Contudo, os mesmos títulos que alçam à fama a cidade de arquitetura colonial, também a destacam como destino turístico ocasionando, assim, o aumento do fluxo de pessoas e veículos; e, conseqüentemente, excedendo a capacidade de carga da cidade.

Os megaeventos, no caso o carnaval de Olinda, favorecem o processo de degradação urbana tendo em mente o salto do número de pessoas que não chega a 400 mil habitantes, para 2,3 milhões durante as festividades carnavalescas. Além disso, as atrações, promovidas pela prefeitura municipal, e foliões concentram-se, em sua maioria, nas ZEPC, como pode ser observado no mapa da Figura 01.

É bem verdade que Olinda dispõe de legislação específica para o campo da preservação urbanística de seus sítios históricos, a qual apoia às diretrizes de seu Plano Diretor. Esses instrumentos legais são de suma importância para a gestão da ocupação do território e usos dos solos, além disso, afirma o compromisso do poder estatal em proteger áreas e bens culturais.

O Plano Diretor incentiva o planejamento de médio prazo, o que já é um avanço do ponto de vista da tradição dos países latino-americanos, no que diz respeito à administração pública. Além disso, esse plano exprime os objetivos urbanísticos da cidade e sua elaboração se dá por meio de um processo democrático que conta com audiências públicas e oficinas de propostas, atividades nas quais participam a equipe técnica municipal, a população em geral e entidades que trabalham temas ligados às questões urbanas.

Percebe-se, desta forma, que Olinda apresenta um conjunto de leis destinadas à proteção de sua identidade cultural, de modo que as bases para o planejamento de suas atividades já estão montadas. Porém, este leque de ferramentas institucionais ainda se mostra incipiente e carece de revisões.

Nesse sentido, a participação social no Plano Diretor é um importante elemento na construção de políticas de preservação, uma vez que representam um dos alicerces da sustentabilidade. Outro ponto que merece atenção é a possibilidade de revisões no plano, premissa que permite alterações pontuais no rumo da política urbana.

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# Beyond sustainable management and tourism at World Heritage Sites: Lessons from Himeji Castle in Japan

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## Abstract

Nowadays, UNESCO (United Nations Educational, Scientific and Cultural Organization) World Heritage Sites face complex challenges; they require multilateral approaches to preserving and promoting them that involve a wide range of stakeholders. Threats and opportunities not only include aspects of physical evidence, but also sociopolitical factors such as changes in recognition among the public or a new demand for tourism. Moreover, with the increased emphasis on utilizing heritage, World Heritage Sites are at a crossroads. They need to strike a balance between conservation and promotion. For this reason, it is of the utmost importance to ensure "sustainable development" through the social cohesion of various stakeholders. In this context, my paper aims to provide applicable lessons in the areas of management of tourist destinations and the sustainability of UNESCO World Heritage Sites by examining the case of *Himeji-jo* (Himeji Castle)<sup>33</sup> in Japan. Three main pillars of sustainable management in the case of Himeji Castle can be summarized as follows; (1) enrichment of tourist experience during the restoration and meticulous maintenance, (2) creation of a "public arena" for research and lifelong learning, and (3) integration among participants by means of community building. In conclusion, my research highlights the necessity for generating consonance among diverse participants in relation to tourism and heritage, including local communities, professionals, private and public agents and visitors.

## Keywords

Sustainable management; restoration; social cohesion; enrichment tourism; community building

Heritage management involves conservation planning, adequate reconstruction, reproduction of the past, and education (Uzzell, 1989 and Nuryanti, 1996). Nowadays, in particular, UNESCO World Heritage Sites face complex challenges; they require multilateral approaches to preserving and promoting them that involve a wide range of stakeholders. Therefore, maintaining sustainability is the key issue in ever-expanding number of inscribed sites (Barthel-Bouchier, 2013) and protection is considered as the most appropriate aspect in sustainable management (Coccossis, 2008).

In this context, my paper aims to provide applicable lessons in the areas of management of tourist destinations and the sustainability of UNESCO World Heritage Sites by examining the case of *Himeji-jo* in Japan. Ultimately, my research highlights the necessity for generating consonance among diverse participants in relation to tourism and heritage, including the local communities, professionals, private and public agents and visitors.

### 1. An overview of Himeji Castle in Japan

The Himeji Castle is located in Himeji City in the western Hyogo Prefecture of Japan as illustrated in Figure 1. From its initial construction by *Akamatsu Sadanori* in 1346 to *Ikeda Terumasa's* additional building in 1613, it was designed and managed as a defensive fortification. Likened as a white heron spreading its wings, thus called *Shirasagi-jo* (White Heron Castle), the Himeji

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<sup>33</sup> *Himeji-jo* is the original Japanese word meaning "the Himeji Castle". Inscribed on the World Heritage List in 1993, it has been evaluated to meet the **Criteria** (i) and (iv). The **property of the Site** is 107 ha, with the **buffer zone** 143 ha. In this paper, I attempt to use terms *Himeji-jo*, the Himeji Castle, and the Castle alternately.



Castle is composed of 83 buildings with highly developed systems of protection devices including multiple baileys, connected by winding paths and gates (Figure 2).

Many castles were constructed in Japan between the 16th and 17th centuries during *sengokujidai* (Warring States period) and the Edo era. Particularly, between 1596 and 1615 alone, almost 100 major castles were built. Most of them were constructed on an unprecedented scale including the castles at Nagoya, Osaka and Fushimi (Coaldrake, 1996:106). Among them, the Himeji Castle is the finest surviving example of Japanese castle architecture (UNESCO World Heritage List).

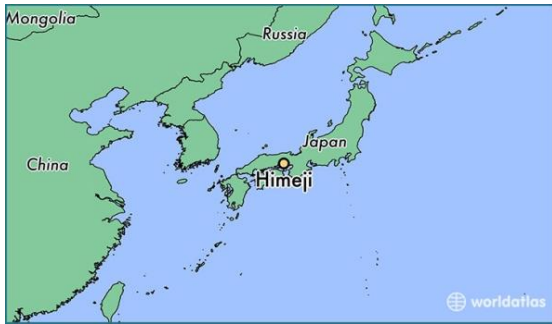


Figure 1- Location of Himeji on a map

Source: Worldatlas website



Figure 2 - The Himeji Castle

Source: Photographed by the author in March, 2017

Throughout the Japanese history, the location of each castle has been one of the most influential components in its strategic significance. Likewise, the Himeji Castle is classified as a type of fortification as *hirayamajiro* (a castle on a hill), since it is set on sloping hills (Coaldrake, 1996:122). Tactical defense devices along with complex keeps fortify the role of the castle. Moreover, three layers of moats which are inner, middle, and outer serve as multiple lines of defense.

The sturdy structure as well as labyrinthine defensive system make *Himeji-jo* the most prominent castle in Japan. It was designated as a Japanese national treasure in 1931, and as the World Cultural Heritage in 1993. As a consequence, the Castle has been continuously upholding its values based on periodic management plans, including daily maintenance, disaster prevention, and site arrangement. In the following section, I will elaborate on such functions mainly by focusing on periodic management plans and maintenance.

## 2. Sustainable Management of the Himeji Castle

### 2.1. Combination of Restoration of Himeji Castle Main Keep and Enrichment tourism

The Himeji Castle has recently undergone a full-scale renovation called “restoration for preservation in *Heisei no Daishuri* (the *Heisei*<sup>34</sup> era). The five-year restoration project has focused on replastering the damaged and exterior walls and replacing the roofing tiles on *dai-tenshu*, or the main keep,. According to the newspaper article of Japan Today (2015), the 2.4-billion-yen worth renovation was partially paid for by donations from 3,000 citizens. The restoration was

<sup>34</sup> *Heisei* period refers to the Japanese imperial reign period that began in 1989 when Akihito became emperor on the death of his father, the Shōwa emperor. Therefore, the Heisei era started on January 8, 1989.

taken place after a lapse of more than 45 years since the restoration of *Showa*<sup>35</sup> Era held from 1950's to 1960's.

The comprehensive renovation is a part of a regular maintenance schedule for repairing the castle every fifty years. While some parts of the castle are managed in regular status, the restoration offered the visitors an exceptional opportunity to get a grasp of how the Himeji castle is being repaired by technicians at the World Heritage Site. During the process, Himeji City allowed the public to see artifacts which had been forbidden to get access and created various events for tourists, such as walking around the castle grounds in traditional dress. In addition, Kajima Corporation, the main construction company which took the initiative to revamp the site, made the restoration progress open to the public, enabling visitors to inspect the process on-site.

During the renovation, the main keep was entirely covered by a roofed scaffold structure called “*suyane*” (Figure 3). *Suyane* not only functioned as a shelter for the main keep to protect from rain or wind after the removal of tiles and plaster walls, but also secured a scaffold for reconstruction work. Also, the special visitor facility for the observation space named *Tenku no Shirasagi* (Egret's Eye View) at the Himeji Castle was set up for the public enabling the access to the restoration process (Figure 4).

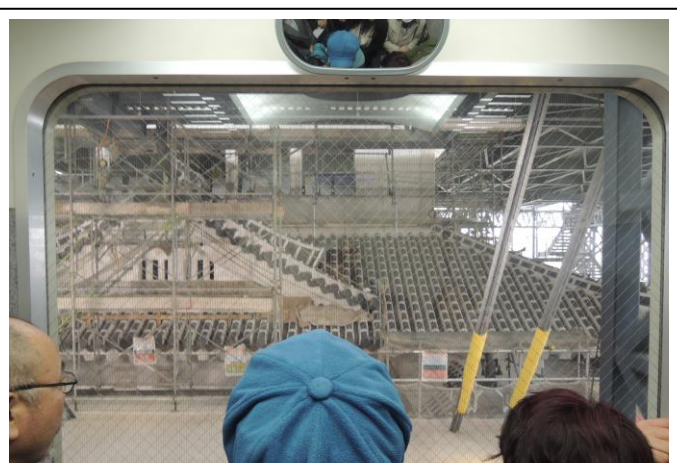
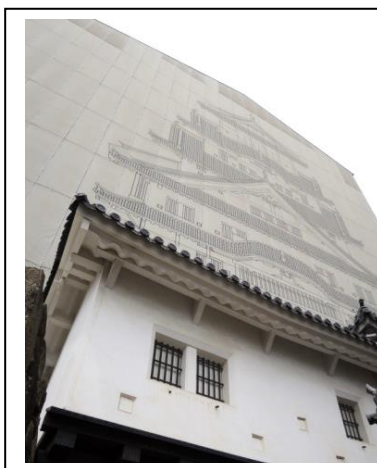


Figure 3 - Roofed scaffold structure “*suyane*”      Figure 4 - Observation space set up for the tourists

Source: Photographed by Matsuda A., professor at the University of Tokyo      Source: Photographed by Matsuda A.

Equipped with inside elevators, *Suyane* and *Tenku no Shirasagi* were established to create an atmosphere for the visitors to get a look at the repair process and to enjoy the panoramic view at the top floor, with a height of 50 meters above the ground. Consequently, tourists who visited the Castle in the midst of renovation period were able to see the process of restoration such as repairing plaster walls and replacing roofing tiles by the skilled craftsmen. Thanks to this strategic plan exclusively deployed for the restoration process, visitors could enjoy more than 70 buildings designated as important cultural properties in Japan.

The noteworthy point is that such strategy of utilizing the restoration period of the heritage can be understood in the context of 'enrichment tourism'. Enrichment travel refers to vacations with

<sup>35</sup> Showa period, from 1926 to 1989, corresponds to the reign of the emperor Hirohito.

authentic, hands-on or interactive learning experiences featuring themes such as adventure, archeology, arts, culture, cuisine, education and so on (Hudson, 2008:59, The Learning & Enrichment Travel Alliance). In the Himeji Castle case, it is presumed that restoration of heritage can open a new possibility to maximize the authentic experience to interact with the assets on-site.

Briefly outlining the overview of the restoration, the roof tiles were entirely removed and reinstalled after examining the type, size, place of use, and installation location of each of the approximately 80,000 tiles. Additionally, joint plasters to hold the roof tiles were applied three times; consequently, the castle looked much whiter after replastering. Regarding the repair of the mud walls, a rope was wrapped around the foundation of a wooden grid structure of the main keep.

Specific process and characteristics of the restoration of the Himeji Castle have been introduced by Kajima Corporation through website. The wooden parts of the castle were either replaced or implanted depending on the degree of damage and stamped with "restoration done." In order to fortify the resistance to earthquakes, the pillars and floors were reinforced without damaging the wood shafts, which led to the enhancement of seismic capacity. Also, a pair of *Shachigawara*, or 'Ridge-end-tile with figure of a whale', was placed on the top of castle as a Japanese ritual enchantment to prevent fire.

In sum, the overall renovation process of the Himeji Castle held once in every 50 years illustrates that main purposes of the restoration are focused on the 'reinforcement' of the materials. Likewise, partial preservation and construction were held based on the 'Middle Preservation Restoration Plan of *Himeji-jo* in the *Heisei* era' by the local government. Regardless of the damage or corrosion, full-scale conservation is being undergone to enhance structural resistance to natural disasters such as earthquakes or fire.

Considering the fact that Japan has been exposed to numerous earthquakes throughout the history, it can be understood that conservation in the Castle naturally has become a part of the half-a-decade custom that lead to the sustainable management. Since fire and earthquakes are the greatest threats to the property, the buildings are equipped with automatic fire alarms, security cameras, fire hydrants, and lightning arresters. All information from these facilities is monitored by the *Himeji-jo* Disaster Control Center (UNESCO World Heritage List).<sup>36</sup>

With a remarkable increase of the visitors after the five-year restoration, the Himeji Castle has been facing new challenges to meet the tourism demand. Table 1 demonstrates the exponential growth in the number of visitors to the Himeji Castle. As such, upon the grand opening after the restoration of Himeji Castle Main Keep in 27 March 2015, the Himeji Castle Management Office reinforced the overall management system of the facilities. Representative post-maintenance includes implementing the online service of Full House Live Reports From Himeji Castle World Cultural Heritage Site

By providing the visitors with practical data such as annual congestion forecast, real-time live image of the castle, current estimated waiting time from the ticket office to the entrance to the Main Keep via SNS services and internet, *Himeji-jo* seeks to streamline the control of the visitors.

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<sup>36</sup> Regarding the earthquakes, Himeji City established an expert committee in 2006 to study, analyze, develop, and implement a necessary seismic strengthening scheme for the main donjon of the Himeji Castle.

Visitors can actually check the current status, and rearrange the itinerary to visit the tour destination in advance thanks to these monitoring plans of the castle (Full House Live Reports from Himeji Castle World Heritage Site). Also, as for the Himeji Castle Management Office and the local community, the relevant actors can expect to enhance the efficiency and the control which leads to the savings of cost, time, and efforts.

Table 1 - Increase of the visitors in the Himeji Castle

| Fiscal year      | The number of entry persons | The domestic and overseas number of people |
|------------------|-----------------------------|--|
| Fiscal year 2015 | 2,687,051 people            | 306,348 people                             |
| Fiscal year 2014 | 918,643 people              | 83,333 people                              |
| Fiscal year 2013 | 880,546 people              | 56,519 people                              |
| Fiscal year 2012 | 710,846 people              | 49,347 people                              |
| Fiscal year 2011 | 610,505 people              | 34,545 people                              |
| Fiscal year 2010 | 457,588 people              | 79,146 people                              |
| Fiscal year 2009 | 1,561,602 people            | 157,027 people                             |
| Fiscal year 2008 | 1,195,004 people            | 165,511 people                             |

Source: Himeji City Government Office website

The service exemplifies the attempt to disperse the visitors and minimize the centralization at the World Heritage Sites. In sum, daily meticulous maintenance is supposed to attribute to the convenience of the both parties related to the Himeji Castle. Eventually, accumulated activities including flexible management plans to allure the tourists, enriched tourism during the restoration and the post-maintenance as well as the renovation itself are regarded as key driving forces of the sustainability at tourist destinations.

## 2.2. Creation of a "public arena" for lifelong learning by Himeji Center for Historical Research into Castle and Fortifications

Followed by the restoration and maintenance by local government and community, creation of a public arena for education and investigation is also a vital factor that supports tourism management on World Heritage Sites. As an exclusive academic institution, the Himeji Center for Historical Research into Castle and Fortifications (or the Center) has been playing a significant part in researching and educating the history and information regarding Himeji Castle since 1990.

The missions of the Himeji Center for Historical Research into Castle and Fortifications can be summarized into research, enlightening activities such as education, and integration of the related actors. All activities contribute to sustainable management of *Himeji-jo* as a lively, multilateral dialogue among diverse stakeholders.

Most of all, the Center has been putting its main efforts to the research of castles and fortifications mainly in Japan. The library contains numerous books and data, providing the users with a useful source of information on castles and related heritage sites. The Himeji Center for Historical Research into Castle and Fortifications has been publishing periodic magazines, news articles called '*Shiro-fumi* (Walking Tour Around the Castle)', and non-periodic books and leaflets on the Himeji Castle. In particular, it is noteworthy that the news articles are thoroughly public-

oriented; the professional curators of the Center collect and reedit the data easily readable to the citizens by means of story-telling , or narratives.

As we are well aware, education for all stakeholders is an essential function of the center; for example, publicly held lectures and various seminars make up an arena for disseminating the value and information with regards to the Himeji Castle. The principal goals of these classes are to provide the citizen with 'lifelong learning' and to enhance public awareness of heritage. Since it is not common to find open stages targeted for heritage such as castles in the country, the Himeji Center for Historical Research into Castle and Fortifications quench the quest for providing with both new knowledge as well as values of the legacies.

Specifically, representative classes include the ones titled <The Collaboration Between Modern and Ancient Technology of Preservation and Restoration in *Himeji-jo*> , <Cultural Asset forum :The people who live in world-class cultural property *Himeji-jo* and a plaster wall> or <Composition and the Stone Wall of the Himeji Castle From the Perspective of the Constructor>. Various classes include not only the lectures from the professionals in the related fields, but also public participation such as walking tours or broadening networks by means of the castle. Figure 5 and 6 are the images of the center, and a regular lecture held by Mr. Ueda Kojou, a professional in the mortar painting field.



Figure 5 - The Himeji Center for Historical Research

Source: Photographed by the author in March, 2017



Figure 6 - The lecture on the preservation into Castle and Fortifications

Source: Photographed by the author in March, 2017

Moreover, the Himeji Center for Historical Research into Castle and Fortifications aims to create an atmosphere for integrating various stakeholders vis-a-vis the Himeji Castle. To exemplify, the center has taken the initiative in promoting the participation of the related actors through the schemes of 'The National Cultural Property Wall Technological Preservation Meeting (or 'The

Preservation Meeting'). Established in 1993, 'The Preservation Meeting' has been promoting the preservation and restoration of the national important cultural assets in Japan.<sup>37</sup>

In collaboration with the nationwide network of the castle and fortifications, the Center has been contributing to technician training by holding various workshops. Also, a joint event "Himeji-jo plastering experience meeting" is being held periodically in collaboration with 'The Preservation Meeting', led by the center every autumn. The activity welcomes the tourists of all generations, providing opportunities to actually sense and interact with Himeji-jo, such as painting the wall with traditional mortar painting techniques, or roof joint plaster under the guidance of the 'The Preservation Meeting' and the Center. Figure 7 and 8 show the experience-based restoration which took place on September 25th, 2016.



Figure 7 - Sign of the on-site activity of Himeji-jo

source: *The National Cultural Property Wall Technological Preservation Meeting website*



Figure 8 - Experience-based restoration for the public

source: *The National Cultural Property Wall Technological Preservation Meeting website*

Along with the trend of making the restoration site public as stated in the Restoration of Himeji Castle Main Keep, programs such as on-site tour enabling tourists to experience restoration and

<sup>37</sup> The Preservation Meeting was established in April 1993 as "Cultural asset wall preservation workshop". The name of the meeting was changed to "the whole country cultural asset wall technological preservation meeting" on April 17, 1998. Himeji city exchanged a memorandum about succession of cultural asset wall technology with a preservation meeting in 2002. It contributes to activities such as planning for preservation of traditional wall technology, succession, various studies on the wall, and exchange of information and accumulation including successor's upbringing.

preservation reflect new tendency of keeping a balance between conservation and promotion at World Heritage Sites in Japan. Since it has been uncommon for travelers and local citizens to experience both traditional and contemporary techniques of national treasures, strategies to induce public participation might be potential solutions, to a certain extent, to tackle the challenges in tourist destinations. In relation to the aforementioned enrichment tourism, such initiatives feature authentic experiences that appeal to visitors to connect with local people, culture, events and history of the tourist destinations.

Thus, the case of Himeji Center for Historical Research into Castle and Fortifications illustrates that a public arena organized by academic institutions plays a vital part in the integration and participation of diverse participants, both locally and globally. The research activities related to the Himeji Castle demonstrate that not only the maintenance of the tangible assets but also 'intellectual engagement' based on continuous research constitute the sustainable management at World Heritage Sites.

In this context, as for the sustainability among cultural heritage professionals, it is important to note that quality and mission of their work influence all the stakeholders: the basis of maintenance, rehabilitation, and reconstruction. Although the preconditions for the inscription of the UNESCO World Heritage such as "Outstanding Universal Value" "Authenticity" ,"Integrity" and Criteria (i) and (vi) have been already testified in case of the Himeji Castle, it is evident that the intrinsic values of the World Heritage Sites shall be recognized and rediscovered at all times by its local community. To this point, management in view of academic sectors such as dissemination of the values of the monuments and legacies to the community is a prerequisite for sustainability in heritage sites.

### 2.3. Conservation and consensus building in the local community

As Haywood (1989) pointed out, tourism has been increasingly integrated into local community management. With regard to the Himeji case, it is worth emphasizing that the socio-cultural milieu of conserving the Castle is strongly linked to the historical background of the city. As specified in the Kajima Corporation website, the Himeji Castle lost its function as a fortification and was abandoned under *Haijo-rei* (Ordinance for Disposal of Castles) in 1873 by affairs of a feudal clan. At the early stage of Meiji period when other castles in Japan had been ruined<sup>38</sup>, Colonel *Shigeto Nakamura* made dedicated efforts for the preservation of the Castle. Consequently, *Himeji-jo* was destined to survive.

However, it is known that the new Meiji government faced with financial difficulty for the reinforcement of the basement of the castle tower. Furthermore, the Castle was partially destroyed by the fire of 1882. Accordingly, deteriorating situation provoked a movement of restoration by the local citizen named *Hakuro-jo Hozon Kisei Doumei* (White Heron Castle Preservation Association). Thanks to the residents' initiative of making a petition to the Diet, public funding of amount up to 93,000 yen<sup>39</sup> was allocated in 1910. As a result, it led to the extensive renovation known as "Meiji Restoration of *Himeji-Jo*" which was completed in 1911.

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<sup>38</sup> Additional castle towers in Japan were lost due to various circumstances such as wars that broke out between the end of the Edo shogunate and the beginning of the Meiji era, the removal of castles in accordance to the ordinance by the Meiji Government to abolish castles, or war damages that occurred during the Second World War.

<sup>39</sup> It is presumed to be around 1,126 million yen by the corporate goods price.

Stemmed from the dedication of local citizens more than a century ago, community of the Himeji city has been incorporating contemporary projects to vitalize the region by means of the Himeji Castle. In order to secure the sustainability of their heritage, numerous volunteering activities such as cleaning services and maintenance have been taken place by various actors. Local enterprises, non-governmental organizations (NGO), and schools have been engaging in the conservation of *Himeji-jo* ; for instance, Himeji UNESCO Association, Himeji *Rojou* Lions Club, and Himeji City Senior Human Resource Center, to name a few. These participation groups constitute the stakeholders supporting their World Heritage Sites.

For instance, *Himeji-jo wo mamoru kai* (Preservation Group of the Himeji Castle) is a representative voluntary group managed by the local community. Since its establishment in 1968 for the purpose to safeguard the castle and the environment, the group has been making efforts toward sustainable development in the city. It consists of approximately 560 members, and volunteer activities include issuing of the annual bulletin "*Shirasagi-jo*", presiding over castle workshops and periodic meetings, performing inspection training on other castles and historical site tour to *Himeji-jo*.

The other example is the non-profit organization (NPO) called 'Ambitious Corporation'. Performances initiated by this NPO includes 'Comitia built with Himeji City Environment'. Despite a relatively short history of five years, 'Ambitious Corporation' has focused on community building and consonance among all generations of local residents. The main projects can be outlined as follows: (1) environment conservation near the Himeji Castle (Figure9), and (2) promotion of community building by means of communication (Figure 10).

With regards to the activities, the NPO takes the initiative in boosting public awareness by participating in 'Himeji City Environment Festival' annually. In connection with other NPOs, public groups, local companies and government, 'Ambitious Corporation' regularly carries out 'Outer moat river cleaning', near the Himeji castle. After the activity, the organizer holds customary events like barbecue luncheon party for the sake of getting-together.



Figure 9 - Environment conservation activity of NPO  
source NPO 'Ambitious Corporation' webpage

A noteworthy fact is that much emphasis of the actions of this 'Ambitious Corporation' is placed on "cultural exchange" and "social cohesion" that harmoniously mingles participants from various backgrounds. Customized activities to promote integration of stakeholders can be found



at other performances throughout the year. The NPO encourages the members to use the social community spaces such as the exclusive restaurant, bar, and conference room owned by the NPO for broadening networks. These open atmosphere welcomes diverse contributors and functions as a forum, for the close communication among the parties concerned to advance agendas of the community.



Figure 10 - Community building by networking

source NPO 'Ambitious Corporation' webpage

In addition, every year in early January, 'Ambitious Corporation' holds *shinnen-igyoushu nettowaku kouryukai* (Network and Exchange Among Different Types of Business) to celebrate the New Year. The organizers invite various participants of all fields in business, and enjoy events to enhance reconciliation among different parties. It helps dissemination of information of the local community as well as their heritage, and contribute to consensus building and integration of different actors. The following statement in the NPO 'Ambitious Corporation' webpage manifests the core concept of the program.

"More than 60 people from various fields participated in the event, and I could broaden a network as well as building up close ties with them and discussing promising cooperation for the future. We enjoyed entertainment programs like traditional Japanese drum performance, prize drawings, a magic show and a popular live music played by the guitar (...) It was such an active exchange so that additional two hours were even extended. Everybody had a very meaningful get-together under a close cooperation. I believe the relationship and bond between each and every participant will be invaluable assets from now on (NPO "Ambitious Corporation' webpage). "

As stated by a participant of the NPO, the main aim of 'Ambitious Corporation' is to form consensus building of the community. The underlying assumption of their performances is that 'shaping' the vision toward sustainability is not enough; on top of that, 'sharing' of the common objectives and specific actions must be mobilized.

Thus, although it might seem trivial, these accumulated efforts can contribute to the reciprocity of actors pertaining to the World Heritage Sites in the long run. It is likely that community lack of consensus and harmony might collide. In this regard, mutual trust and social cohesion of various stakeholders based on the activities such as those of 'Ambitious Corporation' are expected to be the cornerstone toward genuine sustainable development.

### 3. Lessons from the Case of the Himeji Castle

Management at heritage sites is a challenging task that requires careful planning, since its role is to bridge the past, present, and future into a tangible asset (Timothy and Boyd, 2003). Examining the case of the Himeji Castle, I will present the lessons from the sustainable management employed in the local community. As a consequence, I introduce the 8 main components to be focused as follows: (1) resilience ; (2) reinforcement ; (3) research ; (4) rediscover; (5) reconciliation ; (6) reciprocity ; (7) responsibility and (8) resonance.

First, I would like to emphasize resilience as a precondition and ultimate goal of the 8 concepts. The term resilience is not limited to the concept of a tangible heritage ; it also refers to the fundamental value to be achieved by various stakeholders. It goes without saying that resilience is the foundation to secure the sustainability. After being inscribed on the UNESCO World Heritage Lists, each and every piece of heritage cannot be managed properly without continuous care and caution of the related actors.

The case of *Himeji-jo* illustrates the importance of the community in conserving the city's tangible assets. "Himeji Castle stands today thanks to the passion of the people living nearby," argued Aoyagi in the newspaper article (Japan Times, 2015), the former Commissioner for Cultural Affairs, whose statement demonstrated that local commitment undoubtedly leads to a resilience of the community. Therefore, resilience can be construed as a social capital of the tourist destinations and World Heritage Sites.

Second, reinforcement bolsters the sustainable management of heritage. The term reinforcement should be differentiated with remedy; while the latter one refers to a rather temporary, on-the-spot treatment, the former implies more intrinsic, fundamental measure to be taken. Thus, it covers a broader range from renovation of the materials to the environmental, tangible and intangible aspects related to heritage.

Third, research is also a crucial element for expanding horizons of the values of World Heritage Sites. The case of the Himeji Center for Historical Research into Castle and Fortifications exemplifies its significant role as a 'academic hub' to disseminate the information, techniques, and history of the heritage to the public. Moreover, just as research and investigation on the heritage are the prerequisites for the further development, much emphasis shall be put on the lifelong learning. The tasks can be initiated by professionals ; therefore, it shall be understood as a mission for the researchers in the academic field of heritage to arouse public awareness.

In this sense, I suggest that this UNESCO UNITWIN (University Twinning and Networking Program) Conference take the initiative to implement programs such as 'Lifelong Education on World Heritage Sites' to the universities and the related academic institutions. By doing so, it is anticipated to form an effective public arena to disseminate the values of the heritage, promoting the brand of UNESCO to the region. Alternatively, UNITWIN Conference can promote the public recognition in collaboration with 'The UNESCO Institute for Lifelong Learning (UIL)' as well.

Fourth, all parties shall attempt to rediscover the local identity as well as values necessary for the inscription on the UNESCO World Heritage List. Although these values have been previously testified, it is imperative that all stakeholders, especially local residents recognize and rediscover their identity by means of heritage, from their own perspectives. Conservation activities led by

the community such as 'Preservation Group of the Himeji Castle or NPO 'Ambitious Corporation' demonstrate that sustainable management starts from the recognition of local identity. Understandably enough, it is the 'local patriotism' that encourages the citizens of the Himeji City to safeguard their World Heritage Sites.

Fifth, it is of the utmost importance to achieve reconciliation among various stakeholders in the process of the management of tourist destinations. Since sustainability is considered to be rather complex due to the diversity, uniqueness and rareness of the heritage, actors related to the heritage in a particular may have a variety of perspectives, opinions and goals. In some occasions, diversity may trigger value collision and conflicts among different parties. However, it is difficult to deny that reconciliation helps keeping a balance of power among multiple actors and streamlining the process of reaching the common goal of the community. Activities of the preservation group and the NPO in the Himeji Case attest to such efforts in heritage conservation and the community building.

In this context, I propose that UNITWIN establish a practical 'Action Manual Toward Reconciliation of Stakeholders' in view of social cohesion. As a result, it will be both beneficial and efficient to the multiple participants at the risks of conflict and collision. Based on the discussions made at this 5th UNESCO UNITWIN Conference, UNITWIN is able to streamline the process toward reconciliation by integrating the 5 phases of specific components as demonstrated in Figure 11.

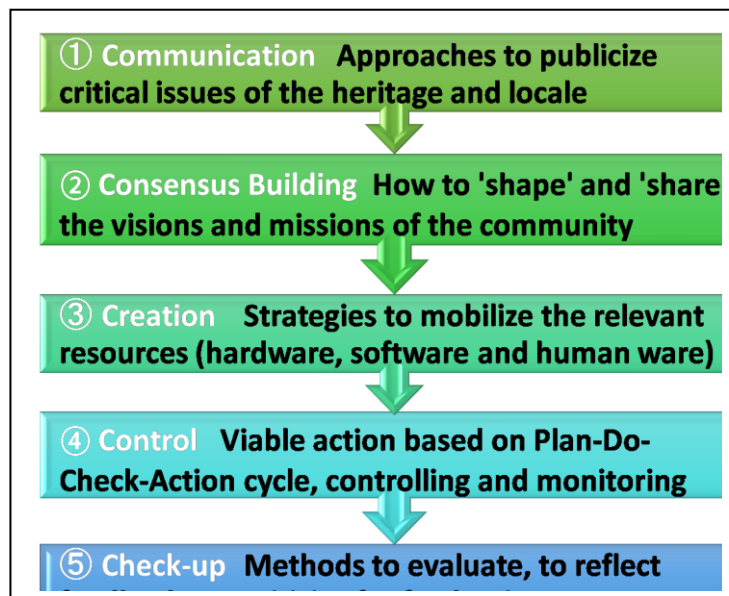


Figure 11 - 'Action Manual Toward Reconciliation of Stakeholders'

Source: Proposed by the author

Since reconciliation attributes to planning and management of tourism activities in the World Heritage Sites, the whole procedure shall be construed as a lively dialogue among all stakeholders to reach an agreeable goal toward sustainable management.

Sixth, I argue that reciprocity is a represented byproduct between heritage and the community, as well as the exchange of various parties. It has been discussed that it is reciprocity between the heritage and a developing sense of community that provides the local identity. Moreover, as demonstrated in the Himeji Case, community's sense fosters heritage, in a process within professionals of the Himeji Center for Historical Research into Castle and Fortifications are

involved. While it can be understood that the former concept of reconciliation is a process of practical action among a variety of stakeholders, reciprocity refers to the outcome of such activities.

Seventh, responsibility shall be borne on all participants of the heritage. The strategic objectives of World Heritage conservation were originally represented by '4C's (Credibility, Conservation, Capacity-building, Communication) becoming '5C's as 'Community' was added to the list in 2007 (Kim, 2015). Consequently, the importance of the roles of local communities overcoming the challenges was reaffirmed at the celebration of the 40th Anniversary of the World Heritage Convention in Kyoto in 2012 (Paris: UNESCO, 2013). I suggest that this year, 2017, be another milestone to reconfirm the responsibility, adding to the roles of the community. Also, I recommend this 5th UNESCO UNITWIN Conference be a momentous opportunity to trace back the accumulated efforts of the communities in the '5C's, and advance the objective, commemorating the 10<sup>th</sup> anniversary since the addition in 2007.

Last, resonance is an ultimate message to be shared among all stakeholders; consequently, it is a message from the heritage to be delivered to the visitors at the tourist destinations, and our next generation as well. Although it might sound rather abstract, resonance can be understood as an echo that reverberates through the generations, to put it more simply. In the case of Himeji Castle, resonance has been represented as a long-standing commitment of the community.

#### **4. Conclusion**

In conclusion, my paper attempts to highlight the need to generate social cohesion by empowering the local community, professionals, private and public agents related to tourism and heritage. In this regard, the ultimate goal shall be to ensure the sustainability of heritage at the tourist destinations. As seen in the Himeji case, it is a duty for relevant actors to strengthen management strategies to meet the expectations of contemporary society.

Even though Himeji Castle might not be the best practice, it certainly sheds light on exemplary efforts of adapting to diverse challenges beyond the boundaries of sustainable management and tourism in World Heritage Sites. In this framework, more experiences, trial and errors, and initiatives need to be examined in tourist destinations for further development.

Aforementioned three main pillars of activities being held in the Himeji Castle suggest a feasibility to enhance the local identity in view of the community and enrich the tourist experience. Moreover, it is important to recognize the missions and capabilities of each stakeholder, and empower the resources to the participants pertaining to the heritage.

As I derived the lessons and summarized into 8 components, resilience of the heritage and community can only be achieved by continuous reinforcement by the local government, research by professionals and the rediscovery of the identity by the public. In order to do so, reconciliation based on integration among diverse stakeholders will lead to reciprocity. Ultimately, dedications and responsibilities of the community will lay a solid foundation for genuine sustainability in the World Heritage Sites, resonating commonly shared values of the heritage.

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## Cultural sustainability in the Unesco site of Matera: risks and challenges

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Matera has been declared a human heritage site in 1993. The inscription was the turning point of a long process through which the town, so far a symbol of underdevelopment, had turned into a guardian of universal values to pass on.

On the occasion of this inscription, for the first time UNESCO used, in the criteria and motivations, the concept of **Cultural Landscape**, which had to become one of the most important criteria to motivate the inscriptions of other sites all over the world.

Matera is thus at **n. 670**: the 'Sassi' of Matera: World Human Heritage. As it is specified on the website of the Ministry of Cultural Heritage and Activities **italia.it**:

*“The peculiarity of the inclusion of Matera in UNESCO is that it does not refer to a single monument or a built up area, but to a thousand-year old way of life and model of development. The Sassi fully comply with the UNESCO criterion of an excellent example of a traditional human settlement or land occupation representing a culture (or more than one), especially when it is endangered by irreversible changes.*

This recognition has been achieved step by step. In the novel *Cristo si è fermato a Eboli* by Carlo Levi, published in 1945, soon after the second World War, the report of the writer's experience, a political exile in Basilicata during the fascist period, suddenly confronted people's view with a marginal, neglected, underdeveloped reality, in which the author proved to be perfectly aware of the urgency to provide for the needs of an abandoned population as well as the human, social values of that society.

The special law on the 'Sassi' (law no. 619, *“Risanamento del rione Sassi nell'ambito del Comune di Matera”*) was passed in the Italian parliament in 1952 and their evacuation started soon after, moving people in specially built, new districts. At the same time, filmmakers showed interest in this archaic environment, discovering its values. In 1953 Alberto Lattuada shot *La Lupa*, with the background of the Sassi and the people who still lived in those houses (Aprà, 2009).

But it was especially *Vangelo secondo Matteo* by Pierpaolo Pasolini, shot in 1964, to reveal the deeper meaning of an urban environment that reminded old Jerusalem, the guardian of a Mediterranean civilisation still alive and tangible. On the other hand it couldn't be forgotten the state of neglect and underdevelopment that the town still represented as it is shown in a short scene of the film *Made in Italy* by Nanni Loy (Floris and Ugo, 1996:....).

From then on, it started a long-lasting success of Matera scenery, which became more and more a background or an extraordinary cinematographic set, at the same time that some churches-caves hosted exhibitions. But the historical town, deprived of its inhabitants, looked ghostly and soon the buildings fell prey to degradation.



Matera cultural rediscovery brings about Unesco recognition, with exemplary motivations.

The architecture of the **Sassi of Matera** portrays the ability of man to adapt perfectly to the natural environment and context, skillfully using simple characteristics such as the constant temperature of the digged rooms, the calcarenite of the bedrock for the construction of the above-ground homes and the use of slopes for the control of water and weather phenomena.

In particular, the site complies with the following Unesco criteria:

Criterion III: The Sassi and the Park of Rupestrian churches in Matera are an extraordinary evidence of a disappeared civilisation. The first inhabitants of the region lived in underground dwellings and celebrated the religious rites in rupestrian churches, that would become an example for future generations for their use of the qualities of natural environment, exploiting the resources of sun, rock and water.

Criterion IV: The Sassi and the Park of Rupestrian churches are an outstanding example of an architectural natural settlement that witnesses significant stages in human history. These range from the prehistoric underground homes digged in the stone of the ravine to the sophisticated urban structures built with excavation materials, and from well-preserved natural landscapes with important biological and geological characteristics to complex urban settlements.

Criterion V: The Sassi and the Park of Rupestrian churches are an outstanding traditional human settlement representative of a culture that has kept, since its origins, a balanced relation with its natural environment, and is now subject to potential risks. The balance between human intervention and the ecosystem lasted for more than nine millennia, during which parts of the settlement digged into the rock were gradually adapted to the growing needs of the inhabitants.»

How has the town responded to the statement of these values?

As soon as the site was identified as outstanding, it was soon necessary to avoid any risk: the specific recommendations expressed by ICOMOS at the time of the inscription were:

- 2 to be careful in the achievement of the restoration works and the reuse of Rione Sassi, paying attention to the use of typical materials, of traditional building technologies, of external coloring and the compatibility of the intended use with the characteristics of the buildings.
- 3 Paying Close attention to the management of the buffer zone between the Sassi and the new town, in order to avoid the drafting of programmes not in harmony with the old districts
- 4 Paying specific attention to the management of flows of tourism, to prevent excessive human flows from deteriorate the specific characteristics of Sassi

These premises are all considered in the Management Plan 2014-2019 developed by Basilicata Regional Administration before the role that will be entrusted to the town in 2019 as European Capital of Culture

([http://www.regione.basilicata.it/giunta/files/docs/DOCUMENT\\_FILE\\_2992924.pdf](http://www.regione.basilicata.it/giunta/files/docs/DOCUMENT_FILE_2992924.pdf)). We will go back to this topic later.

In order to grasp the exceptional nature of the site, visitors as well as Matera inhabitants need to perceive, beyond the picturesque appearance of the Sassi, the environmental value of this “urban ecosystem” and the cultural values that life in the Sassi represented.

In my opinion it is not sufficiently portrayed yet to the visitor's eyes the water macro system of the Sassi, a system that, until XVI century, when the process of overpopulation and decay started, made Matera a garden town (Rota, 2011).

The architectural structure is formed by two systems: the one immediately visible, made up of the subsequent layers of homes, courtyards, open balconies, palaces, churches, roads, gardens, and the inner one, not visible at first sight, made up of tanks, ice-houses, caves, tunnels and systems for water control, fundamental systems for the life and wealth of the community (Laureano, 2012).

Today's tourist consumption is excessively focused on the shocking effect that the report of the unstable life conditions that had made Sassi the 'shame of Italy', arouses in the visitor, or, in alternative or integration to this report, the appreciation of the characteristic appearance of the settlement of homes, that more and more tend to look coquettish, in spite of the compliance with the restoration criteria imposed for a long time.

The dramatic approach has been chosen as key factor of the site "Casa Noha", managed by Fondo Ambiente Italiano (<http://www.visitfai.it/casanoha/>). A house whose empty rooms are scenario for film projections showing the final stage of Sassi age-old story, before the evacuation. The situation of marginality and decay of the Sassi is well portrayed, but the positive values that the urban, human fabric of Matera had represented for centuries, are not taken into account.

On the other hand, some tourist facilities recently opened, not only promote the picturesque, enjoyable side of the Sassi, but also exaggerate in adapting that particular setting to the standard of international luxury resorts.

Hopefully, a balance should be reached between the adaptation of the present needs of housing, tourists' presence and heritage enjoyment, without which the whole historical town is bound to be neglected, and the respect, or rather the re-discovery, of the environmental, historical values of the site.

The above-mentioned Management Plan is integrated by the Action Plan, developed in the same context, that accurately identifies two critical points:

1. The key issue is the work on Cultural Identity and the sense of 'belonging' of Matera community. Although the Sassi have been re-enabled as most of the town, the process of desertion trauma is still being developed. The deep understanding of the Outstanding Universal Value can be for Matera community a tool of reconnection with the past and the incentive to plan its sustainable future in line with the thousand-year old history of this site, bringing back to life the values it has passed on.
2. Another significant perspective is the improvement of accessibility, enjoyment and use of the World Heritage site, emphasising the historical traces that show the origin of this Cultural Landscape and its capacity to express the harmonious balance between man and nature.

An essential point, that in my opinion should be more emphasised, is the water collection system, the incredible engineering network of channels and tanks each house of the Sassi is provided with. In the tourist itinerary this is normally shown, but I think that more can be done.

The issue of water waste is today more relevant than ever and surprisingly there is no concern to keep the old system of rain water collection operating, at least in part. The need to provide the Sassi with running water and a sewage system has not been accompanied by the revitalization of tanks, at least in some cases. Generally, the issue of rain water collection should concern the whole South of Italy, where this old custom, useful to water gardens but also for domestic use, has been lost. We should learn from Matera, which was once a town full of gardens, in order to enhance a model of use of water supply that still has a lot to teach.

The Regional Plan mentioned before deals with the issue: (quote)

*“32. Matera, which is an outstanding example of creation of a sparing, creative system of rare resources, of sobriety and sharing, can today show again its capacity becoming a model of sustainability, of harmonious relation with nature, of innovation in the production of green energy.”*

*“33. The expression of life is the variety and complexity of relations: bringing back to life an urban ecosystem involves the presence and the combination of many elements, functions, places, people. Today we must go beyond the idea of zoning of modern town, we must switch from a town consuming energy to one producing energy, we must diversify the types of dwelling, from being settled to temporariness. As referred to Matera, all this must be considered in function of the peculiarity of this place, for its physical characteristics, for being World Heritage site, for witnessing the history of mankind and its creative effort to collaborate with the earth.”*

*“34. Today one of the reasons of crisis of the model of modernity is energy shortage. On this regard the site of Matera can become a work area of sustainability, in line with its thousand-year old past.”*

The rapid spread of accommodation facilities in the Sassi, with coffee-bars, restaurants, resorts, often equipped with thermal baths may create a misunderstanding in the perception of the historical and moral heritage of the site. Here the institutions must be careful. The visit to Matera must be memorable because it is different, not standardized as other tourist sites. It would be more than welcome the widespread hotel (albergo diffuso), virtuous example of use of the ancient urban fabric.

The social aspect is also to be considered in the visit to the Sassi. The model of social life made up of the neighbourhoods (*vicinati - convicinii*) is a value to be taken into account.

The neighbourhoods, formed by a number of houses overlooking on the same open space, often with a well in the centre, were the model of social life, solidarity and collaboration of the Sassi. The common well where the laundry was washed, the oven where the bread was made, were the fundamental cell of the community organisation. In the houses, the light comes from above as in a North African casbah and the temperature stays a constant 15 degrees, with the thermal mass of tuff stone working as an air conditioner. In summer, the sun rays, perpendicular and hot, stay outside; in winter, when they are oblique, they slide at the bottom of the cave. The sloping and superposition of little houses, is only apparently chaotic as it is in fact accurately built. However, going down in the Sassi is an endless surprise. Among paths and steps one can

reach extraordinary monastic complexes dugged into the rock, Benedictine cenobies and Byzantine lauras, where the monks' cells surround an underground church (Laureano, 2012).

### **Conclusions**

The challenges that Matera will face in 2019 are supported by an intellectual awareness emerging from the strategic plans arranged. Also the accomodation facilities are partly adequate and sufficiently motivated in promoting the local identity.

A greater communicative effort must be made to convey the positive meaning that the historical experience of Matera can have even today.

The original shape that the Sassi have acquired over time, a shape made possible by a close interaction between man and environment, is part of this message. This shape is today aesthetically remarkable, even if it is not the result of any planning. Urban planning, since Hippodamus of Miletus onwards, has preferred geometrical shapes coming from the application of abstract reasoning, considered intellectually better than the 'spontaneous' ones.

Some recent urban theories suggest instead a planning closer to organic shapes. An exhibition recently held still at the Museum of Design in Toronto, Canada, invites to think over planning inspired to natural shapes. Its title was *Evolution*, in which the curator Sanam Samanian has examined "how biomimicry – the design of products, services, and systems that imitate nature's models – has given new rise to design thinking. More and more, designers are looking to nature for responsible design solutions, which has been fuelled by innovation in technology.

How are designers evolving in response to rapid technological advancements? What role does nature play? And, finally, can human intelligence design better than nature?"

I think that Matera can provide old answers even to these modern questions.

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# Database management of world heritage. Application of new technologies on wine iconography from the Theban necropolis in Egypt.

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## Abstract

Egypt like other North African countries has been through many changes since the 2011 “Arab Spring” revolution, and its heritage protection and management has been questioned by many. Egypt has seven United Nations Educational, Scientific and Cultural Organization (UNESCO) world heritage sites (six cultural and one natural) and is rich in both archaeological and cultural heritage. Since the Aswan rescue campaign during the 1960s, many international scientific cooperation projects are based in Egypt, with International and Egyptian archaeological teams working on the field excavating, studying and protecting this heritage. A strong law (117/1983) protects and prevents heritage spoliation and destruction, but how is it enacted during problematic times? What can be done to protect threatened heritage? Can Tourism be an active part on conservation and protection? A starting point is current knowledge: you cannot protect what you actually don’t know, and to answer this simple principle we have created a methodological model of heritage studies and management by implementing a database and SIG maps to approach our research subject, the private tombs with viticulture and winemaking scenes from the Theban necropolis. A web application with all the information concerning Ancient Egypt wine culture and the Theban necropolis private tombs with wine iconography, was created and may be used as a guide for researchers and hopefully also by tourists visiting the Theban necropolis.

## Keywords

Ancient Egypt; Wine; Database; Heritage Management; Tourism.

## 1. Ancient Egyptian Wine

The first archaeological evidence of wine making is from Haji Firuz Tepe, at the Zagro Mountains, in Iran, dated from ca. 5400 BC and the first winery was identified in Armenia, at Areni Cave-1 site, dated ca. 4000 BC (Guasch-Jané, 2015: 548). In Europe, the oldest evidence of wine making is from Greece, at the site of Dikili Tash, dated from ca. 4200 BC (Garnier and Valamoti, 2016). In Ancient Egypt wine jars were placed in the royal tombs of Abydos (Dreyer, 1992), since pre-dynastic times (c. 3200-3000 BC)<sup>40</sup>, surely as an offering for the deceased king. Wine was a selected drink, consumed by the royal family and the upper classes. Wine was used by the priests, during temple rituals, and also as medicine (Murray, 2000; Poo, 1995) and had a strong religious significance being related with God Osiris blood, the God of agriculture and the first God to be mummified and reborn (Poo, 1995; Assmann, 2000). Osiris was known as the ruler of the dead, and in the late Old Kingdom was referred to in pyramid texts as the “Lord of wine” (Allen, 2005; Guasch-Jané, 2011). In Ancient Egypt, the grapes were cultivated near the Nile in the Delta region or in the Western Oasis and the harvest was done during the Nile flooding, beginning in July and lasting until September (Shaw and Nicholson, 1995). The harvest occurred at the same moment that the river had a reddish colour due to the ferruginous alluvium coming from the Ethiopian mountains and the coincidence led Ancient Egyptians to associate Osiris

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<sup>40</sup> The chronology used for Ancient Egypt, in this article, follows Shaw, 2000.

blood and the wine's colour (red). Grapes were thus a symbol of resurrection (Guasch-Jané, 2011: 5).

The majority of the wine was stored in wine jars, *amphorae*, with two vertical handles, and hieratic inscriptions detailing the harvest, including the year (regnal year), type of product (*irep*, wine, or *shedeh*, a special kind of wine), quality (*nfr*, good, *nfr nfr*, very good or *ndm*, sweet), geographical origin, ownership and the name and producer's title. Ancient Egyptians had a well established labelling rules that we can compare with those used today in wine bottles according to European Union's legislation (Guasch-Jané, 2010: 68).

Scenes related to viticulture and oenology appear for the first time in the Old Kingdom, during the 4th Dynasty (2613-2494 BC) and prevail throughout the history of ancient Egypt, especially in Thebes during the New Kingdom (1550-1069 BC). These images allow us to understand the winemaking techniques used by ancient Egyptians, and they are uncannily similar to the ones traditionally present in the Mediterranean region (Portugal, Spain, Greece and Italy) (Guasch-Jané *et al.*, 2013): Egyptians are depicted picking grapes by hand, putting grapes into a wicker basket, transporting grapes to a press, pressing grapes with bare feet, pressing the remains in a sack press, filling the wine jars, fermenting wine, tasting the wine, sealing the wine jars, labelling, counting, and transporting wine jars to a cellar, refrigerating the wine during fermentation, and finally storing the wine jars in a cellar.

## **2. Tourism, heritage management and new technologies:**

The United Nations World Tourism Organization (UNWTO), has declared 2017 the year of Sustainable Tourism and Culture Values, being diversity and heritage one of the five key areas (World Tourism Organization, 2016). Tourism plays a fundamental role on heritage management and protection as the World Charter for Sustainable Tourism (WCST) states: "Heritage is one of the main drivers of tourism, and sustainable tourism must be understood as the driving force for heritage site development. Conserving, protecting and appreciating the worth of natural and cultural heritage, intelligently and responsibly, therefore offers an exceptional context for cooperation and innovation" (World Charter for Sustainable Tourism, 2015: 20).

Egypt, with its rich heritage, was for many years one of the main destinations of archaeological and cultural tourism, with around 14,7 millions of tourists in 2010, according to statistics from the Egyptian Central Agency for Public Mobilization and Statistics (CAPMAS, 2017). Those numbers fell to 9.8 millions in 2011, after the "Arab Spring" and in 2015 there were 9,3 millions visitors (Figure 1). Fortunately, the numbers are growing and according to the World Travel and Tourism Council (WTTTC), 2017 may see an increase of tourism. The direct contribution of Travel and Tourism to Gross Domestic Product (GDP) in 2016 was 3.2% of total GDP and is forecast to rise by 2.5% in 2017, and by 5.6% annually, from 2017 to 2027 (World Travel and Tourism Council, 2017: 1).

It is clear the role of both heritage and tourism in Egyptian economy and development. In an interview to the online platform Marcopolis, in 2014, Hisham Zazou, Egyptian Ministry of Tourism, said "If you picture Egyptian Tourism as a body, it stands on two feet. One foot is the cultural product, Cairo, Luxor, Aswan and Abu Simbel. That is our history, our heritage. The other product is the Sun and Sea vacations (...)."

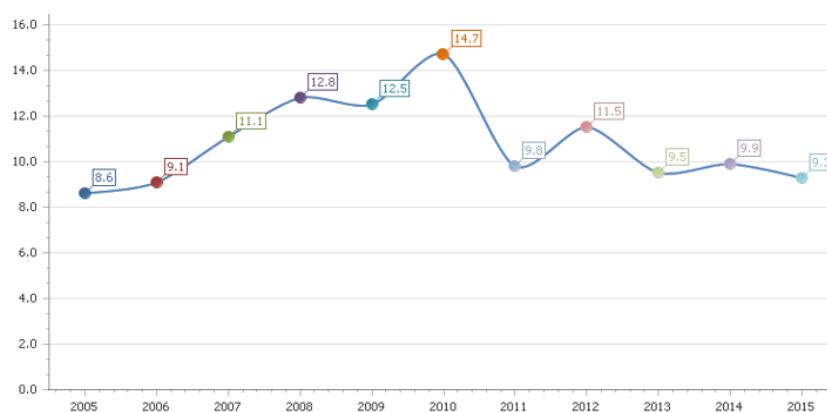


Figure 1- The number of tourists visiting the Arab Republic of Egypt annually, from 2005 to 2015.

Source: Central Agency for Public Mobilization and Statistics (CAPMAS), Egypt.

### 2.1. The Theban necropolis

The Theban necropolis is one of the most important archaeological sites in the world, and is an United Nations Educational, Scientific and Cultural Organization (UNESCO) heritage site since 1979. Located behind cultivated land, on the western side of the Nile, opposite the modern city of Luxor, it was the burial place of Pharaohs and high officials from the Middle Kingdom (2055-1650 BC) through the entire Egyptian History, with special relevance during the New Kingdom (1550-1069 BC) (Shaw and Nicholson, 1995). The private necropolises extension is of approximately three kilometres and consists of eight different parts known nowadays by their Arabic names (Kampp-Seyfried, 2003): el-Tarif, Dra Abu el-Naga (north and south), Assasif, el Khokha, Sheikh Abd el-Qurna (upper and lower), the Southern Assasif, Qurnet Murai and Deir el-Medina. There are more than 900 rock-cut private tombs (Kampp-Seyfried, 2003) of which 460 have an individual record number (Porter and Moss, 1994). Most of the numbered tombs are decorated with daily life paintings or reliefs and among the representations are the 47 viticulture and winemaking scenes studied in our research.

One of our objectives is to contribute to the development of a cultural sustainable tourism in Egypt, by improving the knowledge on Ancient Egypt wine cultural heritage and legacy, and by presenting this knowledge to the cultural tourist in an approachable way, such as a web application that can be used as a tourist guide. We also aim at disseminating and highlight our research by providing access to Egyptologists and heritage managers, and other researchers and specialists, and also providing widespread access to the general public, such as tourists and oenologists. For that reason we chose Fusion Tables database, a free web service from Google, with easy integration with Google maps, allowing visualisation of data on a map (Figure 2).

The information compiled in the database is detailed elsewhere (Fonseca, 2012; Guasch-Jané *et al.*, 2012, Guasch-Jané *et al.*, 2013). It includes the record number; a scene description, and different aspects related with the scene, such as annotations, scene type and condition; text (inscriptions and translation); and image/photo. We also collected the chronological information (period, dynasties and kings); place of origin (governorate, archaeological site, tomb name and number, and location inside the tomb); and present location (the same as provenance, or a museum with its inventory number). Finally, we collected information related with the tomb, such as tomb type; tomb's owner (names and titles) and all the bibliographical references related



to the scene. Related to the viticulture and winemaking we have information on the vinery, on the details of taking care of the vine, grape harvest and counting the baskets, transporting grapes to a press, pressing grapes, heating and filtering, pressing the remains in a sack press, filling wine jars, fermentation, offerings to goddess Renenutet, wine tasting, sealing the wine jars, labelling wine jars, counting wine jars, transporting wine jars to a cellar, refrigeration during fermentation, and storing wine jars in a cellar (Figure 3).

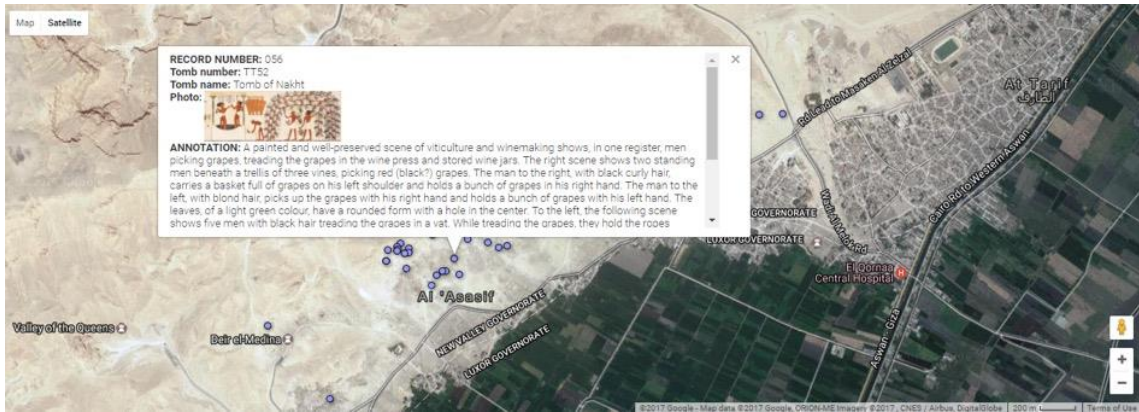


Figure 2 – Fusion Tables layout with the Theban necropolis map showing the 47 tombs with wine iconography, identified by dots. Tables is a free web service database management from Google with several capabilities, including analytics. *Source: Sofia Fonseca*

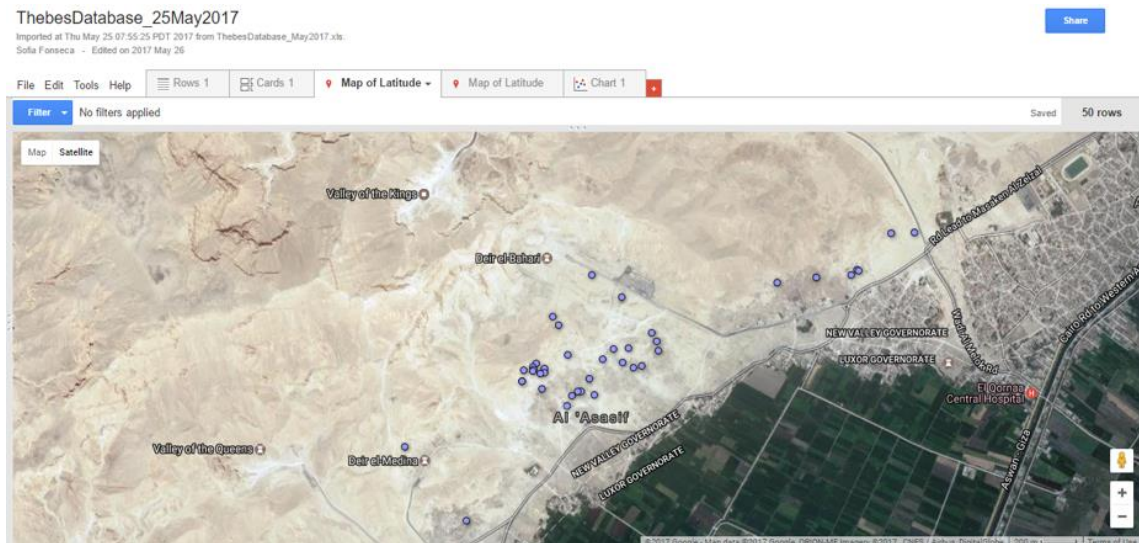


Figure 3 – Example of one of the cards from the database in Fusion Tables, with information related to one of the scenes from the Theban necropolis. In this case Nakht tomb (Theban Tomb [TT]52), from the 18<sup>th</sup> Dynasty. *Source: Sofia Fonseca*

## 2.2. Geographical Information System (GIS) and heritage management

GIS is essentially an organized collection of computer hardware, software, and geographic data designed to efficiently capture, store, update, manipulate, analyse, and display all forms of geographically referenced information (ESRI, 1990). Archaeology with its heavy relationship with spatial aspects is well suited for GIS applications and since the beginning of GIS technology, in

the 1960s by Roger Tomlinson<sup>41</sup>, was one of the first sciences to implement its usage (Gonçalves, 2014).

We are implementing a GIS map in ArcGIS Online (Figure 4 and Figure 5) and an application (app) using ArcGIS Story maps (Figure 6). The ArcGIS Online is a cloud-based mapping system that organizes and manages geospatial content, such as data, maps, images, and other geographic information (ESRI, 2012a). It configures an array of ready-to-use applications that can be embedded and run in browsers and on mobile devices. The ability to include maps and interactive scenes to explore and understand geographic data (e.g., identify new patterns, quickly and summarize data), in parallel with the ability to create applications and publish / sharing them on the web makes ArcGIS Online a powerful tool.

By using these tools we expect Egyptologists, students, researchers, wine historians, oenologists, general public and tourists to explore the information produced by our research. We expect this knowledge to be used as an archaeological/ oenology tourist guide, once its available on tablets and smartphones.

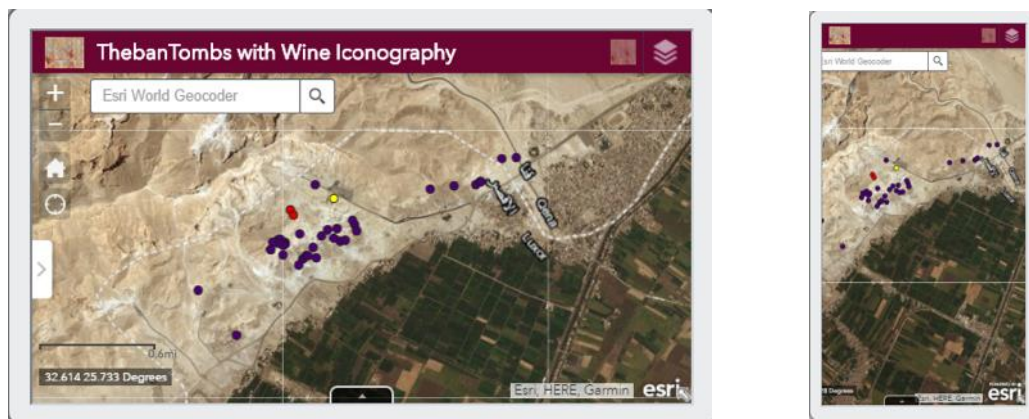


Figure 4 – GIS map created with ArcGIS Online, will disseminate our research in a user-friendly and approachable way, on computers, tablets and smartphones. In the image the Theban necropolis with the location of the tombs with wine iconography.

Source: Sofia Fonseca

The use of ArcGIS Online is very simple and as soon as the application is accessed the location of the tombs appears in a map and by selecting one of the dots, information concerning the image is showed in a detailed card. The layout is user-friendly and you can add images and even videos to the content on display.

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<sup>41</sup> Roger Tomlinson created the Canada Geographic Information Systems (CGIS), in 1963, considered the first GIS system and for that reason he is also known as the “father of GIS”.

Another interesting GIS application to present heritage content in a comprehensible way is ArcGIS Story Maps (Figure 6), that differentiates from ArcGIS Online, because you a strong visual effect and storytelling capabilities, by adding general information related to the subject, in this case, wine in Ancient Egypt. The ArcGIS Story Maps are interactive maps (web maps or map services) combined with text and other content (e.g., photos and videos) that tell a story and bring the power of geography and spatial analysis to large audiences (ESRI, 2012b).

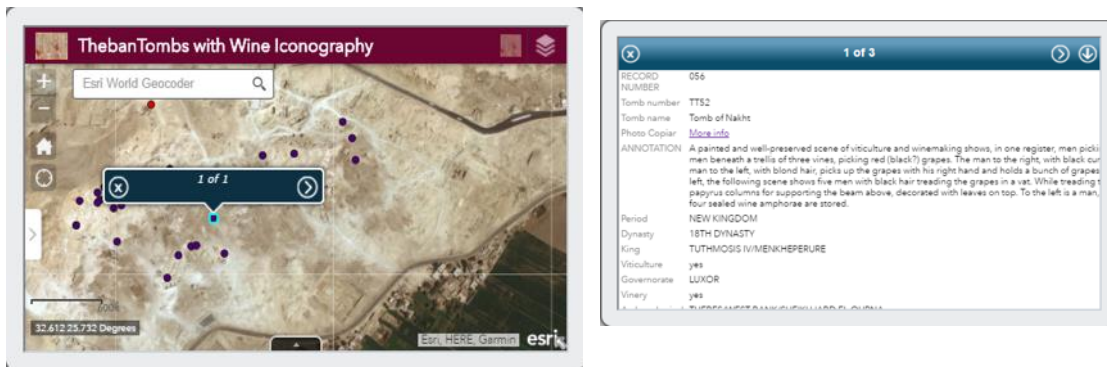


Figure 5 – With ArcGIS Online, information concerning the tombs is displayed in a very clear and organized way.

Source: Sofia Fonseca

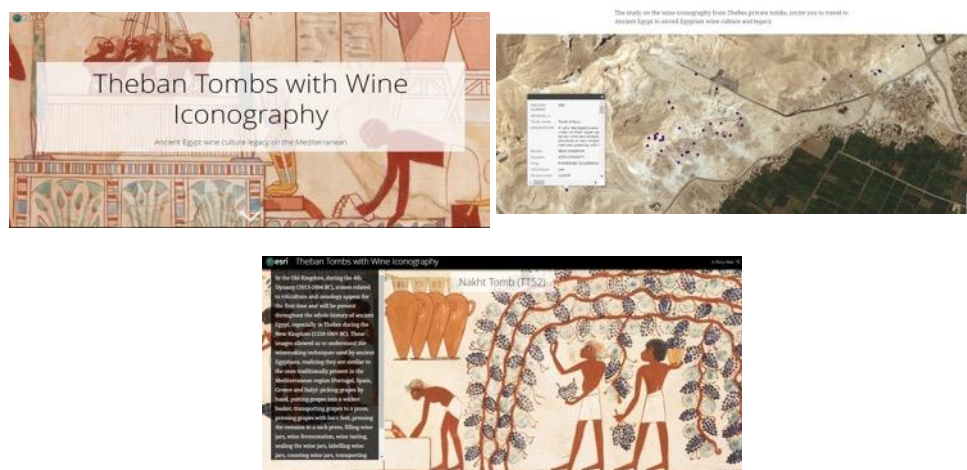


Figure 6 – App developed with ArcGIS Story Maps, another application that can be used as a tourist cultural guide to supply information to tourists visiting Egypt, especially interested in archaeology, wine iconography or wine history.

Source: Sofia Fonseca

Fusion Tables, ArcGIS Online and ArcGIS Story Maps, can be applied to other archaeological themes, or even regions. A compelling use would be to create several routes on the Theban necropolis by identifying other iconographic themes such as bread making, beer making, oils making, fishing on the marshes, hunting ducks, farming and so much more. These themes are well known to the Egyptologists, but probably unknown to the general public. The variety and richness of the Theban iconography is outstanding and can really be part of a heritage/ tourist initiative to bring tourism back to Egypt, by enlightening one of the most important archaeological sites in the world in a very approachable and innovative way.

Management and conservation strategies can also be implemented based on the information compiled in the database and apps. For instance, information on scene condition (complete,

damaged, destroyed and unknown) have been collected and its analysis present a clear picture on the tombs needing an urgent intervention; on the tombs that may be visited by a limited number of tourist; and which tombs could withstand a larger number of tourists (Figure 7).

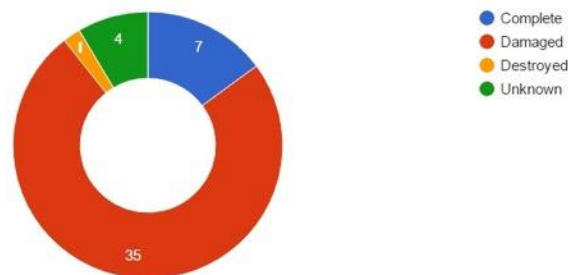


Figure 7 – Preservation conditions of the viticulture and winemaking scenes from the Theban necropolis. Chart made with Fusion Tables.

Source: Sofia Fonseca

From a “creative tourism” perspective, we can envision this application being used as “oenological routes”, with wine-aficionados learning about wine-making in Ancient Egypt, while visiting the region and the tombs opened for visit. A tour of the only winery open to the public in Egypt - Gianaclis Vineyards, near Alexandria- could also be associated to the route. The vineyards are open since 2011 (Cairo 360, 2011) and last year had around 1000 visitors<sup>42</sup>. The tools we present here would have to be developed with the local tourism and public policy stakeholders, such as the Egyptian Supreme Council of Antiquities, and the Egyptian Tourism Authority, and also private entities like the aforementioned Gianaclis winery, and hotels that could offer wine tasting to visitors. And even if Egypt is not traditionally considered a wine production country, due to the climate, culture and religion, the reality is that during the past few years, Egyptian wines have won some international recognition (Japan Times, 2015). Nowadays, there are only two companies producing wine in Egypt, Gianaclis Vineyards and Kouroum of the Nile winery, in El Gouna, near the Red Sea. Both companies have been struggling since 2000 to improve and enhance wine industry in Egypt. In a country where wine consumption relies 70% on tourism (Middle East Eye, 2016), the industry will inevitably suffer with less tourism. Even so, the Kouroum of the Nile winery has won several international awards with their *Jardim du Nil* and *Beausoleil* wines, and as Mr. Jean-Baptiste Ancelot<sup>43</sup> describes the Egyptian wines as “The whites are the most successful. You can find wines that are both fresh and very fruity, of the exotic fruit type (...)” (Middle East Eyes, 2016). We can't avoid remembering Athenaeus of Naukratis words, in the 3<sup>rd</sup> century BC “excellent, white and enjoyable, aromatic” (Athenaeus, 1961), while describing Egyptian wines.

## Conclusions

Sustainable Tourism is an essential partner on heritage management and protection, and our research shows how archaeological results can be applied to create an heritage and tourism resource to be used by a conscientious/ cultural tourist. By bringing together investigation and new technologies, we embrace the principle of knowledge equals protection. We believe that it is essential to present and disseminate knowledge, to specialist and the general public, about

<sup>42</sup> Information obtain by telephone communication in March 26, 2017.

<sup>43</sup> Mr. Ancelot is the founder of Wine Explorers, the world's first inventory of wine-producing countries.

Egypt unique heritage. By applying the knowledge acquired while implementing our database of viticulture and winemaking scenes from the Theban necropolis, to mobile applications, we create a cultural guide that tourists may use during their visit to Egypt. Thus, while enjoying world heritage sites in an innovative way, tourists may increase the revenues for the local population.

The methodology of “archives digging” and database heritage management can also be applied in conservation and restoration strategies and even in tourism flow, creating different levels of access to tombs depending on their condition and carrying capacity. But it can also be applied to other iconographic subjects represented inside the tombs, such as hunting, fishing, beer making, and others., by implementing similar ArcGIS tools and creating routes around those particular iconographic themes.

World archaeological sites and heritage goods, must be protected even when archaeological excavation or research is not possible. Our methodology can help protect heritage around the world, even from a distance, by assembling a great amount of data, sometimes scattered in different archives and countries, organized in a suitable way to produce fundamental tools to prevent heritage destruction from natural or anthropic agents. Knowing cultural heritage and its conditions is fundamental to control and establish priorities in research, restoration, conservation and to efficiently manage tourism. Embracing new technologies will allow to bring together disciplines as archaeology, world heritage management and tourism. Making cultural information available and user-friendly by using smartphones and tablets, will encourage the new generations' interest on heritage and culture.

Egypt has been for centuries one of the favourite tourist archaeological destination and our proposal brings together research and sustainable tourism by creating a resource for a cultural tourist, that will protect and love Egyptian heritage.

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# Redevelopment of two historical heritage sites. Finding a balance between preserving the past and embracing the future

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## Abstract

In the last few decades, a lot of historical heritage sites all over the world lost their initial function. As a result, dealing with vacant heritage buildings became a much-discussed challenge. In academic research, the concept of 'adaptive reuse' is brought forward as a possible approach. This implies, not only 'reusing' a vacant building for its historical value, but also 'adapting' this building to create value for the future. As such, it is about finding a balance between (1) preserving the past, for its intrinsic value, and (2) embracing the future, in view of changing needs, issues and values of the modern world. To find out if and how this balance can be obtained, we carried out a research project on the redevelopment of two historical heritage sites, being the two former Agriculture Pauper Colonies of the two Flemish municipalities 'Wortel' and 'Merksplas' (i.e. in the Province of Antwerp, Belgium), into an 'Inclusive Economic Participation (IEP) Site'. We noticed a balance can be obtained not only by the concept of an 'IEP Site' itself but also during the strategic and spatial elaboration of this concept on both Colonies. During our research project, we noticed that we could (1) preserve the past, by showing respect for the past, while we could (2) embrace the future, by being innovative, as well as by responding to the current needs.

## Keywords

Historical Heritage Sites; Redevelopment; Adaptive Reuse; Social Economy; Tourism.

## 1. Introduction

This paper is based on the results of a research project on the redevelopment of two historical heritage sites, being the two former Agriculture Pauper Colonies of the two Flemish municipalities 'Wortel' and 'Merksplas' (i.e. in the Province of Antwerp, Belgium). Because of their rather unique landscape, urban development and architecture design, that is original and still largely preserved from their creation to this very day, both Colonies are considered worth saving and called 'historical heritage sites' (Cassel and Pashkevich, 2013). Since 1999, both Colonies are already protected as 'cultural heritage landscapes' (De Borger, 1999; De Sadeleer and Plomteux, 2002). In addition, both Colonies are also trying to gain a 'United Nations Educational, Scientific and Cultural Organization's (UNESCO's) World Heritage status' by 2018, not only because of their historical value, but also because of their innovative goal of supporting poor citizens (e.g. beggars, vagrants, orphans, elderly, disabled, diseased, etc.) (UNESCO, 2013). After all, the combination of housing, education, healthcare, labor and punishment (i.e. in case of bad behavior) in a self-sufficient entity helped poor citizens escape from poverty, in a more structural way. This remarkable social experiment was a testing ground for a state model (i.e. the welfare state), that later took shape in large parts of the world (UNESCO, 2013).

In view of the redevelopment of these historical heritage sites, a discussion among administrative and political policy makers was brought up, on what this redevelopment should entail. For some policy makers, the past should be preserved as much as possible. According to this group, a destination with a socio-economic focus should be provided, in order to stay foot



to the initial function of both Colonies to support poor citizens, because of a still existing problem of poverty in our society (i.e. the provincial government's ambition) (Termote, 2006; Coene *et al.*, 2011; Termote and Galand, 2012; Oosterlynck *et al.*, 2016). However, for others, the future should be embraced as much as possible. According to this group, a destination with a tourism focus should be provided (i.e. the local government's ambition). Instead of making a black-and-white choice during this redevelopment (i.e. choosing for the one or the other), both ambitions can be combined. This brings us to the central problem statement of this paper: In which way the provincial government's ambition and the local government's ambition can be combined? Or in other words, in which way(s) a balance can be obtained between (1) preserving the past and (2) embracing the future, during the redevelopment of these historical heritage sites?

The importance of finding a balance between (1) preserving the past and (2) embracing the future is not new, however goes back to the seventies or the period, in which a lot of historical heritage sites all over the world lost their initial function. In view of a new destination, it is considered important, not only to respect and retain the historical value, but also to add a contemporary layer that provides value for the future. This process of finding a balance is called 'adaptive reuse' (Bon and Hutchinson, 2000; Latham, 2000; Wilkinson *et al.*, 2009; Bullen and Love, 2010, 2011 a, b; Plevoets and Van Cleempoel, 2011). This means, during the redevelopment, we should not only make 'reuse' of an old and vacant building, to preserve the heritage significance, but also make 'adaptations' to this building, to meet a new destination, in view of changing needs, issues and values of the modern world (Wilkinson *et al.*, 2009). After all, people are interested in visiting historical heritage sites because of for instance their conserved relicts of the past, however they also ache for modern support facilities (Nasser, 2003).

As far as the structure of this paper is concerned, this preliminary introduction is followed by three paragraphs. In the first paragraph, we clarify the original destination and identity of both Colonies and give their evolution, in order to trace what has made them become 'historical heritage sites'. In the second paragraph, we clarify the two rather opposite suggestions of administrative and political policy makers, for the redevelopment of both Colonies. In the third paragraph, we introduce the totally new concept of an 'Inclusive Economic Participation (IEP) Site', as a possible destination for both Colonies (De Nys-Ketels, Vallet and Bylemans, 2015; Vallet, De Nys-Ketels and Bylemans, 2015; Vallet, Bylemans and De Nys-Ketels, 2016 a, b). On the one hand, we explain in which way we succeeded in combining the provincial government's ambition and the local government's ambition, by means of the concept itself. On the other hand, we explain how we succeeded in finding a balance between (1) preserving the past and (2) embracing the future, by means of the strategic and spatial elaboration of this concept on both Colonies. Finally, we end this paper by giving conclusions.

## **2. Original destination and identity**

In respectively 1822 and 1825, the Colonies of '*Wortel*' and '*Merksplas*' were developed, in comparison with five Colonies in the Netherlands, that were created in the same period. The Dutchman Johannes van den Bosh provided their construction as an innovative solution for the extreme poverty at that time in the Low Countries (i.e. in Belgium, the Netherlands and Luxemburg), after many centuries of prosperity. For their construction, large areas with a

surface of respectively 552 ha and 480 ha were purchased in the two Flemish municipalities 'Wortel' and 'Merksplas'. In figure 1 (see the next page), aerial photographs of both areas are shown on the same scale (see the Colony of 'Wortel' on the left and the Colony of 'Merksplas' on the right), to give an idea of their size. After the acquisition of both areas, a plan with a clear and clean landscape, urban development and architecture design was drawn up. This plan consisted of a grid based pattern of compartmental landscapes with tree alleys, ditch structures and rectangular plots of meadows, woodland and farmland (i.e. the landscape and urban development design), as well as distinctive buildings, such as houses, schools, workplaces, farms, pharmacies, chapels, cemeteries, etc. (i.e. the architecture design). As such, a self-sufficient entity was created, in which a combination of housing, education, healthcare, labor and punishment (i.e. in case of bad behavior) was provided for poor citizens, to help them escape from poverty in a more structural way (De Borger, 1999; De Sadeleer and Plomteux, 2002; UNESCO, 2016).



Figure 1 - Aerial photographs of both Colonies on the same scale: one of the Colony of 'Wortel', with a surface of 552 ha (see on the left), and one of the Colony of *Merksplas*, with a surface of 480 ha (see on the right).

Over the centuries, the landscapes were further developed, while the buildings were renovated and expanded, but unfortunately also demolished. The first renovations of existing buildings started in 1870, but also in the next years, renovations were carried out. The period between 1880 and 1890 was one of many new buildings, which form the majority of the buildings that are still present today. Because of the evolution of some buildings towards a penitentiary around 1950, once again new buildings had to be developed. Of course, these new built 20<sup>th</sup> century buildings, with a prison function, have a less valuable historical quality than the previously built 19<sup>th</sup> century buildings. Because of a devastating fire or a function loss, in combination with a

limited valuable historical quality, some buildings were however unfortunately also demolished (De Borger, 1999; De Sadeleer and Plomteux, 2002; UNESCO, 2016).

After the abolition of the 'Law on vagrancy' in 1993, the Colonies of 'Wortel' and 'Merksplas' (and five Colonies in the Netherlands) lost their initial function of supporting poor citizens and a large number of their buildings became vacant (De Borger, 1999; De Sadeleer and Plomteux, 2002). As a result, the future of both Colonies became uncertain and a discussion among administrative and political policy makers was brought up, on what the future of both Colonies should entail. For some policy makers, both Colonies should get a new destination with a tourism focus (i.e. the local government's ambition), while others prefer a socio-economic focus in order to stay foot to the initial function of both Colonies to support poor citizens, because of a still existing problem of poverty in our society (i.e. the provincial government's ambition) (Termote, 2006; Coene *et al.*, 2011; Termote and Galand, 2012; Oosterlynck *et al.*, 2016).

### **3. Future destination**

Because of two rather opposite suggestions of administrative and political policy makers, as two different future destinations for both Colonies, there is still no clarity about what kind of activities should be provided. Let us clarify these two opposite suggestions in relation to their activities. As such, we discuss the provincial government's ambitions in contrast to the local government's ambition.

On the one hand, the provincial government's ambition implies that the Colonies of 'Wortel' and 'Merksplas' should get a socio-economic focus during their redevelopment, in order to stay foot to the initial function of both Colonies to support poor citizens, because of a still existing problem of poverty in our society (Termote, 2006; Coene *et al.*, 2011; Termote and Galand, 2012; Oosterlynck *et al.*, 2016). For instance, in 2015, 14,9 % of the Belgian population lived with an increased risk of poverty. This means, 14,9% of the Belgian population needed to survive with less than € 1.083 per month (EU-SILC, 2015). As a result, these poor people do not have enough money for a good housing, a good education, a good healthcare, etc. and are confronted with a weak and insecure economic participation. To help these poor people escape from their vicious circle of poverty, socio-economic activities should be provided on both Colonies. This means, not only activities that poor citizens can make use of (i.e. as a consumer of goods and/or services), but also activities that poor citizens can be employed in (i.e. as a producer of labor), in order to help them escape from poverty in a more structural way. Let us take two examples, to illustrate what socio-economic activities could be and what they could generate. As first example, social housing can be provided, to give poor citizens the opportunity to have an affordable and decent housing (i.e. the consumer side). As second example, a social restaurant can be provided, to give poor citizens the opportunity to have an affordable and healthy meal (i.e. the consumer side), but also to give them the opportunity to make money by working in this social restaurant (i.e. the producer side). By means of its socio-economic focus, the provincial government's ambition holds on to the past for the intrinsic value of both Colonies. As such, this ambition emphasizes (1) preserving the past.

On the other hand, the local government's ambition implies that the Colonies of 'Wortel' and 'Merksplas' should get a new destination with a tourism focus. Just like these particular historical heritage sites, a lot of historical heritage sites all over the world, with or without a 'UNESCO's World Heritage status', are often considered potential tourism destinations (Graham *et al.*,

2000; Ashworth, 2003; Cassel and Pashkevich, 2013). Different tourism activities should be provided, in order to attract as many and diverse tourists as possible, especially in view of a possible and desired 'UNESCO's World Heritage Status'. A large number of tourists has however not only advantages, but also disadvantages. First of all, as greatest advantage, tourism provides revenues, that can be used for the preservation, maintenance and renovation of historical heritage buildings. Second, as greatest disadvantage, tourism provides some major transformations in for instance the use of public space, the morphology of the place, the physical structures and the functional patterns. In every project, a strategy for minimizing the disadvantages and maximizing the advantages of tourism has to be found, just as during the redevelopment of both Colonies (Nasser, 2003). By means of its tourism focus, the local government's ambition looks ahead or forward to the future, in view of changing needs, issues and values of the modern world. As such, this ambition emphasizes (2) embracing the future.

#### **4. Finding a balance**

The challenge for our research was to combine the two abovementioned ambitions and to find a balance between (1) preserving the past, for its intrinsic value, and (2) embracing the future, in view of changing needs, issues and values of the modern world. Our multidisciplinary research team at the Faculty of Design Sciences (i.e. at the University of Antwerp, Belgium) came up with the totally new concept of an 'Inclusive Economic Participation (IEP) Site', as a possible destination for both Colonies (De Nys-Ketels, Vallet and Bylemans, 2015; Vallet, De Nys-Ketels and Bylemans, 2015; Vallet, Bylemans and De Nys-Ketels, 2016 a, b). Our research team is 'multidisciplinary', since researchers from disciplines within both social sciences (i.e. (social) economy and management), and design sciences (i.e. (interior- and landscape) architecture, urbanism and spatial planning), are brought together. First of all, we clarify the concept of an 'IEP Site', by means of a preliminary definition, to explain in which way we succeeded in combining the provincial government's ambition and the local government's ambition. Second, we give the strategic and spatial elaboration of this concept on both Colonies, by means of four 'activity clusters', to demonstrate in which way(s) we succeeded in finding a balance between (1) preserving the past, for its intrinsic value, and (2) embracing the future, in view of changing needs, issues and values of the modern world.

##### **4.1. The concept of an 'Inclusive Economic Participation (IEP) Site'**

First of all, by redeveloping both Colonies into an 'IEP Site', we succeeded in combining the provincial government's ambition and the local government's ambition. After all, these two ambitions can be noticed in the preliminary definition of an 'IEP Site'. We defined an 'IEP Site' as a 'spatial connection (i.e. 'Site'), in which different kind of public, (social) profit and/or private organizations are brought together, not only to support the economic participation of 'socially deprived or vulnerable citizens' (i.e. 'Economic Participation'), but also to attract other citizens (like for instance tourists) (i.e. 'Inclusive') (De Nys-Ketels, Vallet and Bylemans, 2015; Vallet, De Nys-Ketels and Bylemans, 2015; Vallet, Bylemans and De Nys-Ketels, 2016 a, b).

On the one hand, this definition meets the provincial government's ambition. After all, the goal of an 'IEP Site' to support the 'economic participation' of 'socially deprived or vulnerable citizens' meets the provincial government's wish to get a socio-economic focus for both Colonies, in order to stay foot the initial function of supporting 'poor citizens', because of a still existing problem of poverty in our society. However, the initial target group of 'poor citizens' is

extended to 'socially deprived or vulnerable citizens'. After all, not only poverty, but also other vulnerabilities (e.g. disability, disease, age, race, divorce, bankruptcy, etc.) make that more and more citizens are confronted with a weak and insecure economic participation, both as a consumer of goods and/or services, and as a producer of labor (Termote, 2006; Coene *et al.*, 2011; Termote and Galand, 2012; Oosterlynck *et al.*, 2016).

On the other hand, this definition meets the local government's ambition. After all, the purpose of an 'IEP Site' to be 'inclusive' or to be accessible for not only 'poor citizens' or 'socially deprived or vulnerable citizens', however also other citizens (like for instance tourists) meets the local government's wish to get a tourism focus for both Colonies.

#### 4.2. The strategic and spatial elaboration of an 'Inclusive Economic Participation (IEP) Site'

Second, while redeveloping both Colonies into an 'IEP Site', we succeeded in finding a balance between (1) preserving the past, for its intrinsic value, and (2) embracing the future, in view of changing needs, issues and values of the modern world. To demonstrate how we managed to find this balance, we clarify the strategic and spatial elaboration of this concept on both Colonies, by means of four 'activity clusters'. Because of the quite large amount of socio-economic and tourism activities, that we want to provide at both Colonies, we divided these activities over four 'activity clusters'. We distinguish: 'exploring the Colonies', 'experiencing the Colonies', 'making use of the Colonies' and 'staying (over) at the Colonies'. For each of these 'activity clusters', we give their activities, as well as some examples. On the one hand, we give an example to demonstrate in which way we succeeded in finding a balance between (1) preserving the past and (2) embracing the future, while taking strategic decisions (i.e. that are made by administrative and political policy makers). While on the other hand, we give an example to demonstrate in which way we succeeded in finding a balance between (1) preserving the past and (2) embracing the future, while developing spatial designs (i.e. that are made by (interior- and landscape) architects, urbanists and spatial planners).

##### 4.2.1. Exploring the Colonies

The first cluster is one of 'exploring the Colonies'. Today, visitors can already get information in the existing visitors center at the Colony of 'Wortel'. However, in the future, they can also get information in the upcoming visitors center at the Colony of 'Merksplas'. In contrast with these two visitors centers, that give information about the history of both Colonies, we want to provide a shelter for birds and wild animals, where visitors can also get information about the animals that appear in this environment. In addition, we want to provide museum boxes, that are connected to each other, by means of hiking and cycling routes.

On the one hand, we searched for a balance between (1) preserving the past and (2) embracing the future, when taking 'strategic decisions' during the 'strategic elaboration' of the first cluster. Let us take the suggestion of museum boxes as an example. In this case, the things that are exhibited inside these boxes refer to the past, like for instance old relicts that were found at the Colonies or old stories from people who lived at the Colonies (i.e. preserving the past), while the idea of these boxes is a modern interpretation of a museum (i.e. embracing the future). After all, the existing museum wants to move to another, better and larger location. However, none of the still vacant buildings meets the requested surface for this new museum, so another solution had to be found. As a result, we launched and elaborated the idea of museum boxes, that are placed outside and distributed in open space, in order to win more space.



Figure 2 - A museum box, that is 'photoshopped' into a picture.

On the other hand, we searched for a balance between (1) preserving the past and (2) embracing the future, when developing 'spatial designs' during the 'spatial elaboration' of the first cluster. Let us take, once again, the suggestion of museum boxes as an example. In figure 2, one of several museum boxes is 'photoshopped' into a picture, in order to show a realistic setting. This box consists of a steel frame, that can be filled in with transparent or dense materials and extended in function of a bicycle rack (see on the left), as well as a bench (see on the right). In addition, one side of this box (i.e. the front) displays a text, that gives more information about the content of this box. In order to preserve the past, we want to place these boxes in a way, that the old sight axes can be retained. In contrast and in order to embrace the future, we suggest modern materials for assembling these boxes, that are not only weatherproof, but also sustainable.

#### 4.2.2. Experiencing the Colonies

The second cluster is one of 'experiencing the Colonies'. By means of all the various activities, that are included in this cluster, visitors can experience the Colonies in different ways. First, we want to provide a number of sports and play activities on both Colonies. In addition to the existing sports fields, we suggest a play barn, games barn, climbing trail and bicycle trail. Second, in particular for less active visitors, we want to provide creative activities on both Colonies, like for instance workshops. Third, we want to organize cultural activities on both Colonies, like for instance movie, theater, vocal and dance performances, as well as exhibitions. Fourth, we want to provide leisure activities on both Colonies, like for instance a wellness.

On the one hand, we searched for a balance between (1) preserving the past and (2) embracing the future, when taking 'strategic decisions' during the 'strategic elaboration' of the second cluster. Let us take the activity of workshops as an example. In this case, we suggest not only a workshop in pottery, in reference to the old clay pits on both Colonies (i.e. preserving the past),

but also a workshop in some healthy cooking, in relation to the increasing awareness of the modern society for a healthy diet (i.e. embracing the future).



Figure 3 - Different scenarios of a wellness: one without additional openings (see on the left) and one with additional openings (see on the right).

On the other hand, we searched for a balance between (1) preserving the past and (2) embracing the future, when developing 'spatial designs' during the 'spatial elaboration' of the second cluster. Let us take the activity of a wellness as an example. For this activity, we suggest the former 'Potato Barn' at the Colony of 'Merksplas' as an appropriate building. This particular building stands out for its sloping floor on both ground level and second level, as well as dark interiors, due to a sunken floor in combination with small windows. In this case, we dealt with two historical heritage rules, that we managed in a different way. In order to preserve the past, we respected the following rule: 'as much historical heritage components as possible must be preserved'. According to this rule, the sloping floor must be preserved in the spatial design. This can be done, by placing the water basins on top of this sloping floor, so visitors can get inside these basins in shallow water and swim to the other side of these basins into deeper water. In contrast and in order to embrace the future, we bended the following rule: 'no architectural interventions may be applied to historical heritage buildings'. According to this rule, no additional openings may be applied in the spatial design. However, by lowering the windows and by removing a part of the floor in combination with a part of the roof, several benefits can be obtained. As first and most important benefit, more daylight is brought into the building. As additional benefits, hidden beams are exposed and the interiors are experienced bigger. In figure 3, different scenarios are given, one without additional openings (see on the left) and one with additional openings (see on the right). We used the contrast between these scenarios as an eye-opener, to prove that rather small architectural interventions can have several large benefits, that are necessary to embrace a new function, in this case a wellness.

#### 4.2.3. Making use of the Colonies

The third cluster is one of 'making use of the Colonies'. In that respect, we want to work with the short food supply chain. In other words, we want to provide all steps within this short food supply chain: the production, the processing and the marketing. As a result, a direct relationship can be obtained between the producer and the consumer. The first step or the production, we want to provide by means of growing fruits and vegetables in allotment gardens and a greenery. The second step or the processing can be obtained in two different ways. On the one hand, fruits

and vegetables can be processed into soups, juices and jams, while on the other hand, they can be used for assembling food packages and picnic baskets. And the last step or the marketing, we want to provide by means of offering fruits and vegetables, as well as their processed products, in the small shop that we suggest on the Colony of 'Wortel' and the market (hall) that we suggest on the Colony of 'Merksplas'.

On the one hand, we searched for a balance between (1) preserving the past and (2) embracing the future, when taking 'strategic decisions' during the 'strategic elaboration' of the third cluster. The idea of the short food supply chain relates to the Colonies being a self-sufficient entity in the past (i.e. preserving the past), however in the future it will be in particular tourists who will take advantage (i.e. embracing the future).

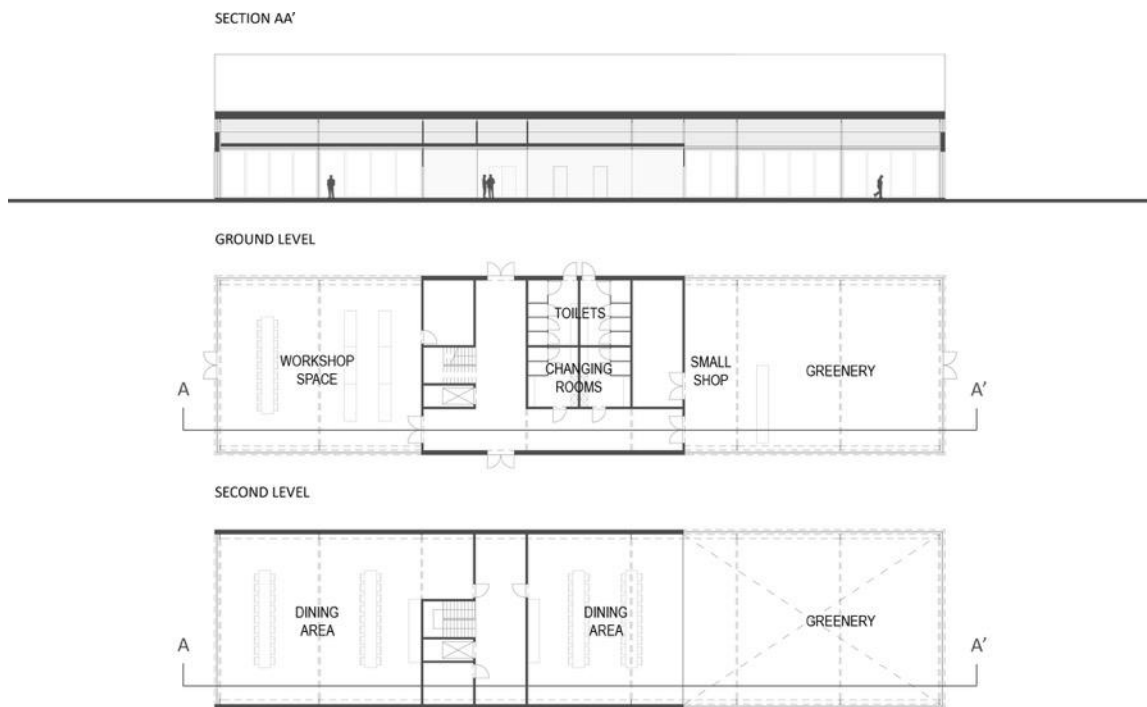


Figure 4 - A new building at the Colony of 'Wortel', as it was designed to include all steps within the short food supply chain (i.e. the production, the processing and the marketing).

On the other hand, we searched for a balance between (1) preserving the past and (2) embracing the future, when developing 'spatial designs' during the 'spatial elaboration' of the third cluster. In view of this short food supply chain, we suggest, among other things, a new building at the Colony of 'Wortel'. In figure 4, this building is shown, as it was designed to include all steps within the short food supply chain. After all, this building consists of a greenery, to meet the first step or the production, a workshop space, to meet the second step or the processing, and a small shop, to meet the third step or the marketing. In addition, we provide toilets, changing rooms and dining areas, not only for people who work in the allotment gardens, but also for adults or children who participate in educational (school) trips. In order to preserve the past, we designed this building, in harmony with the neighbouring buildings. After all, we used a similar frame bearing structure. In contrast and in order to embrace the future, we chose for steel instead of wood, to realize greater span lengths.



#### 4.2.4. Staying (over) at the Colonies

The fourth and last cluster is one of 'staying (over) at the Colonies'. In this case, a distinction can be made between a short-term stay (i.e. one day) and a long-term stay (i.e. more than one day and possibly permanent). First of all, we want to provide a daycare for elderly and for children, both examples of a short-term stay. Second, we want to provide houses as a permanent long-term stay, as well as bivouac places, sleeping attics, a group accommodation and a Bed and Breakfast as a temporary long-term stay, in function of a holiday.

On the one hand, we searched for a balance between (1) preserving the past and (2) embracing the future, when taking 'strategic decisions' during the 'strategic elaboration' of the last cluster. Let us take the temporary long-term stay as an example. In this case, the suggested sleeping attics relate to the former large dorms that were present at both Colonies (i.e. preserving the past), while the suggested Bed and Breakfast lodges tourists in smaller groups, like for instance couples and families (i.e. embracing the future).

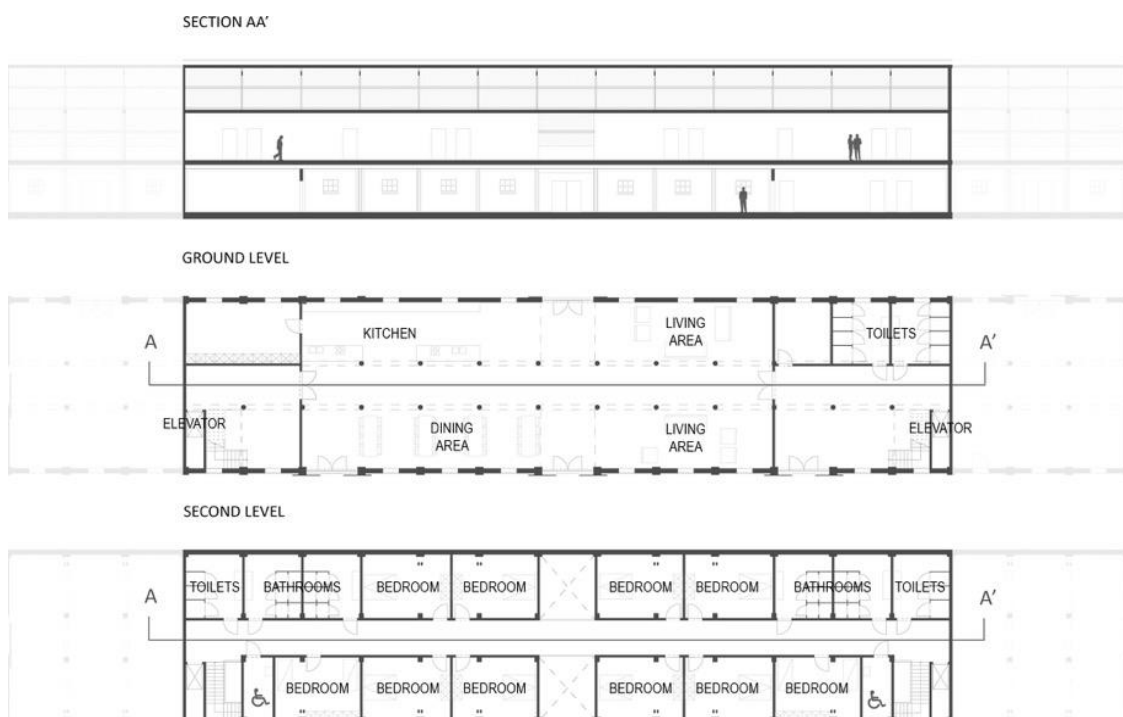


Figure 5 - The middle part of the former north wing farm at the Colony of 'Wortel', as it was designed in view of a group accommodation.

On the other hand, we searched for a balance between (1) preserving the past and (2) embracing the future, when developing 'spatial designs' during the 'spatial elaboration' of the last cluster. Let us take the temporary long-term stay of a group accommodation as an example. For this type of residence, we suggest the former north wing farm at the Colony of 'Wortel' as an appropriate building. In figure 5, the middle part of this building is shown, as it was designed in view of a group accommodation. This means, in addition to some private rooms, like the second level bedrooms, we provide some rooms that are used commonly, like the ground level kitchen, dining area and living area, the ground and second level toilets, as well as the second level bathrooms. In order to preserve the past, we not only saved some existing historical heritage components (like for instance openings in the floor, that are covered with wooden hatches), but also restored some former historical heritage components (like for instance openings in the facade, that were bricked up), to bring this building to its original state. In contrast and in order

to embrace the future, we provide elevators, so this type of residence can be used by people with a physical disability, to give them the opportunity to go on a holiday.

## Conclusions

In our research project on the redevelopment of the Colonies of 'Wortel' and 'Merksplas', we not only tried to, but also succeeded in, combining the provincial government's ambition and the local government's ambition, as well as finding a balance between (1) preserving the past, for its intrinsic value and (2) embracing the future, in view of changing needs, issues and values of the modern world. On the one hand, combining both ambitions was obtained, by means of our suggestion for redeveloping both Colonies into an 'IEP Site' or a concept that attaches importance to both ambitions. On the other hand, finding a balance was obtained, during the strategic and spatial elaboration of this concept on both Colonies.

On the one hand, we noticed during our research project, that we could (1) preserve the past, by means of showing respect for the past. While taking strategic decisions, this means for instance referring to the past, like the suggested sleeping attics at the Colony of 'Merksplas' that refer to the former large dorms or the suggested pottery workshop at the Colony of 'Wortel' that refers to the former clay pits. While developing spatial designs, this means for instance retaining historical heritage components, like the sloping floor within the 'Potato Barn' at the Colony of 'Merksplas', restoring historical heritage components, like the closed openings of the north wing farm at the Colony of 'Wortel', as well as harmonizing new buildings to existing buildings, like the one that was designed in function of the short food supply chain at the Colony of 'Wortel'. This building is designed in a similar style, typology and structure as its neighboring buildings.

On the other hand, we noticed during our research project, that we could (2) embrace the future, in two different ways. First of all, (2) embracing the future can be obtained by being innovative, which leads to a large amount of benefits. While taking strategic decisions, this means for instance using innovative concepts, like the suggested museum boxes at both Colonies, to create much more space. While developing spatial designs, this means for instance using innovative materials, like the suggested steel structure for the new building that we suggest at the Colony of 'Wortel', to create much greater span lengths. Second, (2) embracing the future can be obtained by responding to the current needs. While taking strategic decisions, this means for instance improving our way of living, which is why we suggest a healthy cooking workshop at the Colony of 'Wortel'. While developing spatial designs, this means for instance improving the 'perception' of space, which is why we suggest additional openings in the 'Potato Barn' at the Colony of 'Merksplas' (i.e. in the floor, the roof and the facade), as well as improving the accessibility of space, which is why we suggest two elevators in the north wing farm at the Colony of 'Wortel'. By means of these elevators, this building (and its new function) is made accessible for people with a physical disability.

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# **THEME D**

**TOURISM RECREATION AND  
CULTURAL EVENTS**

**TEMA D**

**ANIMAÇÃO TURÍSTICA E EVENTOS  
CULTURAIS**

#### **THEME D**

Tourism recreation focused on the resources of a given area, planned and implemented in order to encourage and facilitate greater and more active participation of tourists, are a key component of the differentiation of the offer of a tourist destination.

Cultural events are part of the new positioning strategies of territories in the competitive tourism market and also play an important role in promoting their singularities, which are at the root of different classification processes/asset protection.

The increase in demand and tourist experience on the one hand, and the growth and diversity of World Heritage Sites on the other, justify the renewed interest in these issues, in the range of entertainment and events programmes, and in its actual effects on tourist destinations of renowned heritage relevance.

#### **TEMA D**

A animação turística, enquanto conjunto de atividades centradas nos recursos de um determinado território que são planeadas e implementadas com vista a estimular e facilitar uma maior e mais intensa participação dos turistas, é uma componente fundamental da diferenciação da oferta de um destino turístico.

Os eventos culturais fazem parte das novas estratégias de posicionamento dos territórios no mercado competitivo do turismo e desempenham também um papel relevante na promoção das suas singularidades, as quais estão na génese de diferentes processos de classificação/proteção patrimonial.

O aumento da exigência e da experiência dos turistas, por um lado e o crescimento e a diversidade dos Sítios Património Mundial, por outro, justificam o interesse renovado destas temáticas na amplitude dos programas de animação e dos eventos com efeitos concretos nos destinos turísticos de reconhecida relevância patrimonial.

# Histórias de cultura. O poder do *Storytelling* em destinos de turismo cultural

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## Resumo

O turismo cultural no qual faz parte a vertente *Storytelling* assume cada vez maior relevância nos dias de hoje. Não só por ser um produto único, mas também porque faz a ponte entre os residentes e os turistas, aproxima-os uns dos outros de uma maneira que a vertente tradicional do turismo jamais faria. Contudo a informação existente sobre este tema ainda é escassa, especialmente na sua vertente turística. Este trabalho tem como objetivo apresentar dados sobre o subproduto do turismo cultural, o *Storytelling*, assim como mostrar a sua relevância para a atividade turística. Posteriormente será proposto um modelo conceitual onde serão propostas escalas de análise para a medição das variáveis de consumo consideradas fundamentais para a avaliação do *Storytelling* e o seu impacto no consumo turístico.

## Palavras-chave

*Storytelling*; Novos produtos em turismo; Economia das experiências, Comportamento do Consumidor em Turismo.

## 1. Introdução

Vivemos hoje num mundo onde o fornecimento de produtos turísticos, serviços e destinos estão em constante crescimento e onde todos asseguram ter produtos únicos e diferenciadores. No entanto, uma das verdadeiras ofertas turísticas que se pode realmente chamar única, são as histórias.

O turismo cultural, no qual está representado o *Storytelling* representa cerca de 40% de todas as viagens turísticas a nível mundial (OECD, 2009). É, sem dúvida, uma das formas de turismo mais importantes hoje em dia quer pelo seu peso económico, quer pela sua complementaridade em relação às outras formas de fazer turismo.

O objetivo deste trabalho é elaborar um estudo sobre o *Storytelling* e proceder ao levantamento das variáveis do comportamento do consumidor, relacionadas com este produto turístico. Através deste estudo de comportamento do consumidor irá ser possível analisar as escolhas e as motivações dos turistas que optam por este tipo de produtos, mas também obter um melhor entendimento da sua tomada de decisões.

## 2. Contextualização teórica

A Organização Mundial do Turismo (OMT) determinou em 1985 duas definições para o Turismo Cultural – a primeira em sentido lato que inclui “todo o movimento de pessoas que satisfaça a



necessidade de diversidade contribuindo para a valorização pessoal e intelectual e de vivência de novas experiências e encontros”, e a segunda mais específica que diz respeito ao “fluxos de pessoas com motivações de visita, viagem, e estudo do património e da natureza, ou de culto” (OMT, 1985).

O turismo cultural aparece interligado com outras tipologias de turismo onde os turistas realizam de uma forma complementar uma despesa cultural, como por exemplo, durante um City-Break o objetivo principal do turista acaba por ser a maior parte das vezes conhecer o património do destino escolhido e a cultura que este transmite. Se pensarmos na cultural no seu sentido amplo, ou seja, o interesse por artesanato e formas de vida de outros povos, a maioria dos turistas consomem ou irão consumir em algum momento produtos culturais, tal como todos os destinos turísticos oferecem de uma forma ou outra alguma oferta cultural (Dominguez, 2012). A atual dimensão do turismo cultural é difícil de estimar, mas no entanto a OCDE e a OMT estimavam que em 2007 representava cerca de 40% de todo o turismo internacional, acima dos 37% de 1995. Perante esses dados é possível fazer uma estimativa do número total de turistas com motivação cultural que viaja pelo mundo. De acordo com a percentagem de turistas culturais podemos verificar que em menos de 20 anos o seu número passou dos 195 Milhões para 453 Milhões (Tabela 1) o que demonstra o peso que este tipo de turismo tem a nível mundial.

Tabela 1 - Volume total do turismo cultural internacional

| Ano  | Total de Chegadas Internacionais | (%) de viagens culturais | Total de viagens culturais |
|------|----------------------------------|--------------------------|----------------------------|
| 1995 | 527 Milhões                      | 37%                      | 195 Milhões                |
| 2000 | 674 Milhões                      | 37%                      | 249 Milhões                |
| 2005 | 809 Milhões                      | 37%                      | 299 Milhões                |
| 2010 | 898 Milhões                      | 40%                      | 359 Milhões                |
| 2013 | 1,087 Milhões                    | 40%                      | 434 Milhões                |
| 2014 | 1,133 Milhões                    | 40%                      | 453 Milhões                |

Fonte: Elaboração própria, segundo Estimativas de UNWTO (1995 – 2014)

Na Europa, o turismo cultural foi reconhecido como um importante agente de mudança social e económica (Richards, 1996). O crescimento do turismo cultural, em diferentes contextos e escalas espaciais, constitui uma resposta às características e mudanças da sociedade pós-moderna e, também, representa um sinal de esperança, para os destinos que têm importância patrimonial (Carvalho, 2010). O desenvolvimento do turismo cultural e a crescente procura por este tipo de turismo deve-se, essencialmente, ao aumento da educação, do rendimento disponível, das tecnologias de informação e comunicação, o crescente papel da mulher na economia e a uma maior consciência do processo de globalização (Richards, 1996; Silberberg, 1995).

Qualquer viagem cuja motivação seja férias, negócios ou lazer, envolve elementos culturais e, portanto, pela sua própria natureza, a arte de viajar retira os turistas da sua cultura e coloca-os temporariamente num meio cultural completamente diferente do seu. Mas o turismo cultural oferece algo mais ou diferente tanto ao turista como à comunidade que o acolhe (Mckercher & Cros, 2002). Assim sendo, a prática do turismo cultural inclui todos os aspetos da cultura específica de um país, de uma região ou de uma comunidade (Raj, 2004) e, ainda, as atividades

associadas à cultura do dia-a-dia do local que é visitado (Smith, 2003). Por outro lado, as pessoas ao conhecerem a História e as estórias do seu destino cultural, aumentam o desejo de deslocar-se para o local, seja por mera curiosidade ou para aprender algo mais na sua visita.

Falar de turismo cultural é recuar no tempo para conhecer o passado de um povo, pois a cultura dá-nos a conhecer a memória e a história de um povo segundo uma perspectiva do seu passado. O turismo cultural faz uma ponte com o passado, pois, na cultura estão envolvidas as perspectivas do passado, da memória e da história dos povos. Pode-se mesmo dizer que, o simbolismo do passado se resume aos valores facultados, aos objetos materiais assim como aos valores imateriais.

O turismo deve ser uma experiência que permita aos visitantes ter uma “experiência viva”, ou seja, ter atividades que os permitam colher, construir, permanecer e acima de tudo aprender (Phipps, 2007). O valor associado a este conceito de turismo “experiência viva” tem como base a convicção de que existem muitos significados atribuídos ao destino, os quais, muitas vezes passam despercebidos, pois as viagens dos turistas estão constrangidas pelo tempo bem como pela escassez de narrativas e histórias que lhes permitam desfrutar as “experiências” (Rodriguez, 2011).

*Storytelling* é a ponte que proporciona aos habitantes locais partilharem e verbalizarem eventos, lugares, pessoas, objetos, atividades, assim como momentos no tempo (Eduards, 2003). O uso de histórias pode também satisfazer sentimentos de nostalgia que os habitantes locais possam ter sobre atividades que se perderam em resultado da urbanização. É de destacar que para além de servir de ponte entre os visitados e os visitantes, o uso de narrativas providencia também um elemento que é original e único e que muitos destinos turísticos necessitam para assegurar a sustentabilidade da sua atividade turística (Steward & Stratern, 2003). Em todas as histórias relativas ao *Storytelling* podem-se identificar os protagonistas e com eles criar laços afetivos de camaradagem (Herskovitz & Crystal, 2010). Os destinos podem ser vistos como “*storyscapes*” ou domínios onde as narrativas podem ser transformadas e ordenadas através da interação entre o destino, residentes e turistas (Chronis, 2005).

Os turistas têm uma relação complexa e interessante com os mitos e as lendas. Por um lado eles são atraídos pelos mitos, por outro lado ficam frustrados com eles. Ou seja, os mitos são o fator “pull” que estimula a procura, no entanto um fator “push” pode ocorrer no destino caso os turistas sintam que o seu guia desmistifica os locais que eles visitam. Este fator “push” provoca um estado de alienação, um distanciamento, que ocorre se o processo de interpretação é pequeno ou interrompido demasiado bruscamente. De qualquer das formas o fator “pull” (Mcgrath, 2003).

A distância cultural pode ser, igualmente um fator motivador importante na procura turística, especialmente no turismo cultural, na medida em que a diferença traz em si um fator de curiosidade de saber mais sobre o outro que é diferente. Esta aspeto motivacional tem igualmente influência no valor atribuído à viagem. A distância cultural pode ser avaliada através de três dimensões: Interesse em outras culturas, Etnocentrismo no consumidor e Abertura de Espírito (Kim & Littrell, 2001).

Assim propõe-se que:

H1: A motivação pull e a distância cultural têm um efeito positivo no valor atribuído a viagens para destinos de turismo cultural.

*Storytelling* oferece às pessoas um meio de fuga, especialmente quando estas compreendem o que está escondido no seu interior, assim sendo, pode-se dizer que as experiências turísticas, têm o poder de conceder um estatuto simbólico aos turistas, pois através das suas ações, atitudes e valores conseguem fazer com que os seus mundos se tornem parte do quadro mais vasto e global (McCabe & Foster, 2006). As narrativas não apelam exclusivamente às emoções, elas também têm o poder de dar um toque pessoal aos destinos turísticos que são demasiado estandardizados. Neste âmbito, a empatia é um fator fundamental na ligação emocional dos turistas aos destinos que visitam.

Empatia é a capacidade de entendermos o que as outras pessoas sentem e pensam. É também uma ferramenta que facilita o entendimento social e o sucesso no mundo das relações pessoais (Waal, 2009). A empatia é um alicerce fundamental no comportamento pró-social, assim como nas ações que as pessoas tomam e que beneficiam outros e a Sociedade (Eisenberg & Mussen, 1989).

Segundo Mussen e Eisenberg (2001) a empatia pode ser entendida como uma reação emocional idêntica ou muito semelhante a de outra pessoa, originada pela compreensão apropriada do estado interno dessa outra pessoa; por outras palavras, é a capacidade de 'ler' as emoções e perspetivas de outra pessoa e compreendê-las sem julgar. Por sua vez, a simpatia é uma resposta emocional ao estado de outra pessoa, na qual não é sentida a mesma emoção que a outra pessoa. A simpatia opõe-se à empatia porque se trata basicamente de um atributo emocional que envolve sentir intensamente a dor e o sofrimento do outro (Hojat, Vergare, Maxwell, Brainard, Herrine & Isenberg, 2009), isto é, em geral são sentimentos de tristeza e de lamento (Ceconello & Koller, 2000).

Estudos garantem que a empatia é um elemento essencial quando falamos do *Storytelling*, pois este faz com que as pessoas consigam compreender sentimentos e emoções transmitidas pelos autores, assim como as consequências que certos atos e comportamentos podem ter. Assim, o *Storytelling* pode ser usado como uma poderosa ferramenta de marketing, não apenas para atrair e fidelizar clientes, mas também como forma de motivar e alterar comportamentos ou intenções (Akgun, Keskin, Ayar & Erdogan, 2015).

*Storytelling* acrescenta valor, pois é através dele que as heranças histórico-culturais podem ser divulgadas. Os factos históricos referentes a estas heranças podem ser consumidos, como reproduções de ambientes do nosso passado. Nós sentimo-nos mais próximos das pessoas que frequentemente ouvem as nossas histórias (Lee, 2005). O valor atribuído aos produtos e consequentemente às viagens pode ser avaliado de forma multidimensional: i) valor funcional, ii) valor monetário, iii) valor emocional, iv) valor social, v) valor como novidade, vi) satisfação, (Babakus & Boller, 1992; Bello & Etzel, 1985; Oliver, 1993; Patterson & Spreng, 1997; Sweeney & Soutar, 2001; Weber, 2001).

Com base no exposto propõe-se que:

H2: A Empatia e simpatia do *Storyteller* influenciam positivamente o valor atribuído a viagens para destinos de turismo cultural.

H3: A Empatia e simpatia do *Storyteller* influenciam positivamente as intenções de comportamento dos turistas relativamente a destinos de turismo cultural.

O valor do *Storytelling* especialmente no que diz respeito à experiência turística pode ser confirmado quando se tenta apurar qual o elemento que mais influencia os comportamentos dos indivíduos (March, 1995). As emoções dominam o comportamento humano, mais especificamente no domínio do consumo. Deste modo verifica-se que as pessoas compram emocionalmente e depois justificam as suas decisões com a lógica, isto é, com argumentos racionais (Cardoso, 2009).

Assim, devido à sua componente emocional, propõe-se que o *Storytelling* tem um efeito importante nas intenções futuras de comportamento dos turistas no que diz respeito aos destinos visitados e experiências vividas. O comportamento futuro dos turistas pode ser avaliado de forma multidimensional através da i) Resposta Externa, ii) Resposta Interna, iii) Disposição para pagar mais, iv) Lealdade, Recomendação e Recompra (Babakus & Boller, 1992; Patterson & Spreng, 1997; Parasuraman Zeithaml & Berry, 1988).

Assim, propõe-se o seguinte:

H4: O valor atribuído a viagens para destinos de turismo cultural influencia positivamente as intenções futuras de comportamento dos turistas.

De seguida apresenta-se o modelo concetual proposto (Figura 1):

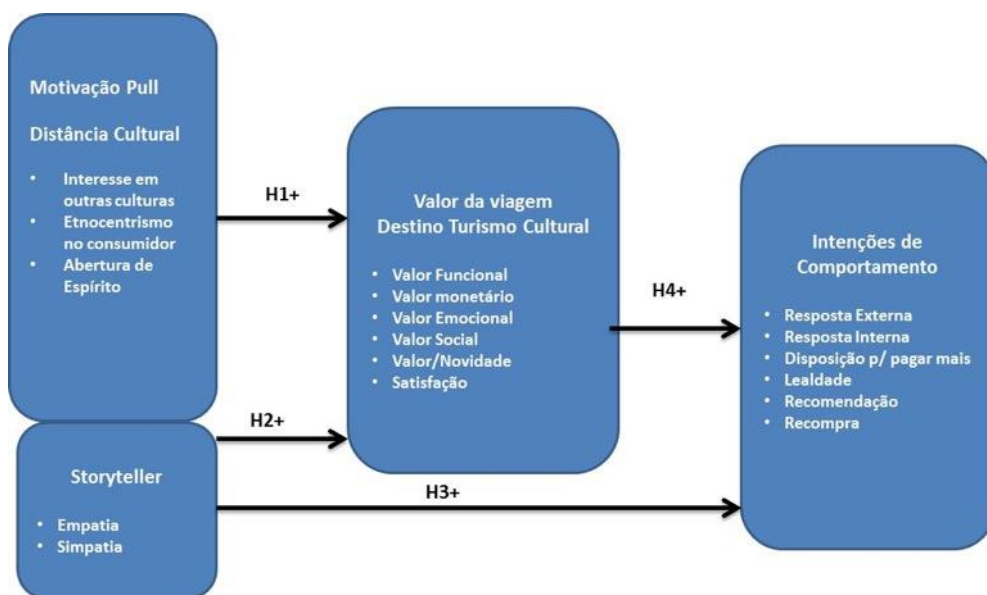


Figura 1 - Modelo concetual: *Storytelling*

Fonte: *Elaboração própria*

### 3. Metodologia

Este é um estudo concetual, contudo com intenção futura de aplicação empírica. Propõe-se um estudo empírico com recolha de dados através de questionário em destinos culturais. A medição dos constructos apresentados será feita com escalas adaptadas de outras previamente estabelecidas e testadas:

- (i) Motivação Pull (Mcgrath, 2003)
- (ii) Distância Cultural: Interesse em outras culturas, Etnocentrismo no consumidor e Abertura de Espírito (Kim & Littrell, 2001).

- (iii) Valor da Viagem: i) valor funcional, ii) valor monetário, iii) valor emocional, iv) valor social, v) valor como novidade, vi) satisfação, (Babakus & Boller, 1992; Bello & Etzel, 1985; Oliver, 1993; Patterson & Spreng, 1997; Sweeney & Soutar, 2001; Weber, 2001).
- (iv) Intenções de Comportamento: i) Resposta Externa, ii) Resposta Interna, iii) Disposição para pagar mais, iv) Lealdade, Recomendação e Recompra (Babakus & Boller, 1992; Patterson & Spreng, 1997; Parasuraman Zeithaml & Berry, 1988).

Pelo facto de se utilizar uma base de literatura científica sólida, plenamente testada empiricamente, far-se-á a avaliação da robustez de cada fator determinando os alfas de *Cronbach*. Posteriormente, realizar-se-á uma análise fatorial confirmatória para contrastar as relações pré-estabelecidas a partir da teoria. Finalmente, desenvolver-se-á a análise causal, modelo de equações estruturais, para contrastar empiricamente o modelo conceptual proposto.

#### **4. Resultados**

O papel do *Storytelling* no turismo pode ser visto de diferentes maneiras, sendo que uma delas é que uma história “transforma o que seria um espaço indiferente e sem importância num atrativo destino turístico” (Chronis, 2012, p. 445). Num mundo onde o fornecimento de produtos turísticos, serviços e destinos estão em constante crescimento, onde todos asseguram serem únicos, mas que na maioria dos casos não são nada mais do que cópias uns dos outros, uma das poucas ofertas que se pode considerar verdadeiramente única são as histórias que os locais têm à sua disposição (Bryon, 2012).

Pretende-se com este estudo compreender melhor o fenómeno do *Storytelling* e a sua importância para a atividade turística, especialmente o turismo cultural.

#### **5. Conclusões**

Estudos sobre o *Storytelling* defendem que este é um elemento diferenciador nos produtos, principalmente quando se fala em mercados altamente competitivos. As histórias fortalecem a identidade, acrescentam valor, influenciam o preço e a imagem do produto (Mora, 2012; Pierre & Florine, 2013). Argumenta-se também que o *Storytelling* ajuda as pessoas a familiarizar-se com os produtos (Lee & Shin, 2014).

*Storytelling* é uma poderosa ferramenta do imaginário. As histórias possibilitam as pessoas de ver o mundo através da perspectiva de personagens muito diferentes delas. Elas libertam as pessoas dos constrangimentos das suas experiências e ajudam a vislumbrar as suas vidas. Ao fazer isso, as histórias tecem relações alternativas, oferecendo-nos janelas vívidas do nosso futuro (Irene, 2014).

O trabalho apresentado propõe um modelo concetual para avaliar a influência do *Storytelling* no valor atribuído e intenções futuras de comportamento dos turistas relativamente a destinos de turismo cultural. Espera-se, desta forma contribuir para a análise de um aspeto cada vez mais fundamental do turismo cultural. Está provado que o *Storytelling* tem um efeito catalisador para os destinos de turismo cultural visto que o relacionamento entre o visitante e o *storyteller* potencia o envolvimento dos visitantes com o destino, potenciando a fidelização dos turistas ao destino através de uma experiência turística e memorável (Lee, 2005). Compreender este fenómeno é pois fundamental para os gestores.

A principal limitação presente neste trabalho é o facto de ser ainda apenas teórico, contudo, pretende-se no futuro testá-lo empiricamente. Sugere-se também que em pesquisas futuras se explore mais exaustivamente as relações entre lugar, residentes e visitantes. Algo que só será possível com a realização de inquéritos à população local.

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# **Cultural and creative industries and the city: the case of the old town of Corfu in Greece. Creativity strategies in the development of a cultural economy**

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## **Abstract**

Cultural and creative industries are in a strategic position to promote smart, sustainable and inclusive growth in all EU regions and cities, and thus contribute fully to the Europe 2020 Strategy, which is the EU's growth strategy for the coming decade. This paper explores the existing situation of cultural and creative industries in the Old Town of Corfu, in Greece, a World Heritage Site inscribed on UNESCO's List. It examines the cultural landscape of the Monument, the development of cultural and creative industries over the years, their relation to cultural tourism and finally it proposes initiatives that could be adopted for their further development towards a sustainable cultural economy. The overall objective is to present how a series of activities, some of them random and some of them strategically designed, have fostered creativity and knowledge, strengthened regional identity, increased attractiveness and supported economic growth in the area. More specifically the paper explores: 1) The monumental character of the city and the importance of dealing with it as a source of knowledge emphasizing on cultural and urban identity as well 2) Upgraded, specially modified and enhanced cultural areas, able to host visitors and cultural initiatives 3) Joint cultural initiatives, such as performance and visual arts, that are a highlight and raise the cultural profile of the area 3) Strategic documents that have dealt with cultural and creative industries 4) A number of proposals towards a cooperation strategy to act as an umbrella of cultural and creative industries development and prosperity.

## **Keywords**

Old Town of Corfu; Creative Industries; cultural industries; Cultural Incubator; Sustainability.

## **1. Introduction**

Cultural and creative industries are today a main motor for Europe 2020 Strategy and fully in position to promote sustainability and inclusive growth throughout Europe (European Agenda for Culture 2011-2014, 2012). Cultural and Creative industry as a term is used to describe entrepreneurial activity in which economic value is linked to cultural content. It brings together the traditional strengths of classical culture with the 'added value' of entrepreneurial skills and the new knowledge-based electronic and communications talents. Creative industries are based on individuals with creative skills, in alliance with managers and technologists, making marketable products whose economic value lie in their cultural (or 'intellectual') properties (Parrish, 2007). This paper deals with the development of cultural and creative in industries in a world heritage site, the Old Town of Corfu, which is located on the island of Corfu, Greece.

Corfu island is the second largest island of the Ionian sea and lies just 60 nautical miles east of the heel of Italy and a few kilometers west of Igoumenitsa, the closet major communication point to mainland Greece. It is a magnificent area in a strategic geopolitical position since antiquity. It has been occupied over the centuries by numerous conquerors including the Normans, the Angevins, the Venetians, the British, the French and the Russians. The features

they brought with them or left behind were assimilated creatively and were developed fruitfully by the Corfiots. They enriched their cultural profile with ancient Greek, Roman, Byzantine, Medieval and Renaissance elements, molding their contemporary culture that successfully combines features of both the European West and the European East. Corfu coming into contact with numerous civilizations and cultures has led to an exchange of elements at all levels that have eventually affected social and political life. The influence of the Byzantine and, more importantly, the Venetian culture resulted in the blossoming of music, theatre and architecture and the development of customs and traditions thanks to which Corfu has become a unique cultural touristic destination. A series of museums and other cultural areas host the remnants of cultures that were developed on the island. Important literary and cultural centers nurture and promote knowledge, history and education with the aim of preserving the cultural identity of the Corfiots and the Ionian islands in general. Furthermore, the old town of Corfu has been inscribed since 2007 at United Nations Social and Cultural Organization's List of World Heritage Sites according to criteria iv "an architectural example of exceptional universal value that preserves its authenticity and integrity".

Culture is feted as Corfu's great strength, but despite the international recognition of Corfu's cultural multi-dimensional beauty, this rarely translates into economic approaches of culture as a sector for investment. Although Corfu is one of the world's most famous destinations, the emphasis of the city's funding policy and its self-promotion had for many years undervalued contemporary experimentation related to cultural economy steps and new challenges. After years of politics and cultural stimulation, some steps have been taken towards a cultural and creative industry approach that led to interesting primary results and to the reevaluation of the role and impact of culture in the development of economic strengths including tourism and the promotion of the area's multidimensional cultural attributes. Culture has been in the stage center of a series of initiatives contributing towards the creation of a valid and ambitious local economy and a more engaged forward-looking and innovative society, subject to further analysis and conceptualization.

## **2. Aims and objectives**

This paper aims to understand the development of cultural and creative industries in the Old Town of Corfu in Greece and to identify their development in connection with cultural tourism and the overall promotion of the area. It raises three basic questions:

- 1) What are the existing cultural and creative industries in Corfu? What are their characteristics?
- 2) Is there a strategy on their operation and development? What are the relevant initiatives and policies, provisions and characteristics?
- 3) What kind of actions could be implemented by various Corfiot factors (public, governmental, cultural, touristic, other) towards further cultural development and sustainability?

Overall, this paper attempts to identify advantages and weaknesses of the existing situation, as well as to suggest possible alternatives towards a sustainable cultural and creative economy in the Old Town of Corfu.

## **3. Methodology**

After a literature review on cultural and creative industries, and a brief presentation of the Old Town of Corfu, we produced a list on existing cultural and creative industries in Corfu and their

characteristics in 2017. For relevant strategies, initiatives, policies, and for approaching the roles and interactions of the various Corfiot factors, we have studied a number of management plans produced by local authorities and cultural institutions. Towards the same end, we have also collected and analyzed relevant statistical data and information from local authorities, cultural institutions and private tourism-related organizations. Our discussion and results are also based on the authors' personal experience from participating in relevant processes in the last decade.

#### **4. The Cultural Landscape of the Old Town of Corfu**

##### *4.1. The city today: features of cultural, environmental development*

The Old Town of Corfu, a recognized historical monument by the Greek Law since 1980 (Presidential decree, 1980) and a UNESCO (United Nations Educational, Scientific and Cultural Organization) World Heritage site (decision 31 COM 8b.40) since 2007 (UNESCO, 2007) can be considered as an open air museum in between two fortresses (the *Old Fortress* and the *New Fortress*). It consists of numerous cultural and natural features uniquely united (Mitropia and Stanellos, 2005), creating a dynamic landscape of cultural, environmental and human characteristics and conceptualizations of the past and present (Jacques, 1995; Knapp and Ashmore, 1999), demonstrated in various contexts of traditions, actions, decisions, developments and prospects. Features of many periods of time are blended together in a mosaic of fortresses, monuments, archaeological sites, historical places, small squares and parks, a road system of characteristic pathways (*kantounia*), mansions of numerous styles (neoclassical, venetian, modern, other), churches and other religious places, historic buildings, residences, shops and museums. We mention a few, which we show on the map of figure 1 below: the Archaeological Museum, the Corfu Museum of Asian Art, the Antivouniotissa Museum (Byzantine Art), the Solomos Museum the Casa Parlante - Corfu Living History Museum, the Serbian Museum and the Municipal Gallery of Corfu.

The historic centre of Corfu has also open areas -small squares and parks- and the most distinctive example is *Spianada Square* which is the largest and most impressive square in Greece. *Spianada Square* constitutes the result of military fortifications of the Venetians for the protection of the city during the 17th and 18th centuries. The cultural mosaic of the centre is blended by the existence of thirty – six temples. Three of the most important are the Saint Spyridon's Church, the Jewish Synagogue temple and the Roman Catholic Cathedral Church of Duomo of Saints James and Christopher.

Historic buildings underline the coexistence of Greek and Western architecture. Examples include the *Ionian Parliament* constructed in 1855 by the famous Corfiot architect John Chronis, the neoclassical building of the *Ionian Bank* also by John Chronis, the *Mansion of Ioannis Kapodistrias* – the first governor of Greece, the *Palace of St. Michael and St. George*, which was designed in the Regency style by the British Engineer Colonel George Whitmore, today housing the Corfu Museum of Asian Art. Other historic buildings are the *Theatre of San Giacomo* (today housing the Town Hall), the *Maitland's Peristyle*, which was constructed on 1816 also by Colonel George Whitmore, the historic building of the *Ionian Academy* founded in 1824, which was the first Greek university/ academy.



Figure 1 – Location of several cultural institutions, landmarks etc. in the Old Town of Corfu.  
*source: Background of the map was provided by grafic designer Fileni Lorandou (personal communication, March 5, 2017)*

It is worth mentioning, in terms of the cultural and creative development of Old Town of Corfu, the role of the peripheral suburbs of *Mantouki* on the east and *Garitsa* on the south. These peripheral suburbs expand the economic geography of the inner city (Collis *et al.*, 2010; Flew, 2010) and are expected to play a significant role in the cultural, touristic and economic growth of the city, acting as developing creative places affecting locals and visitors.

#### 4.2. Creativity through multiple cultural initiatives, public and private organizations

Creativity in the Old Town of Corfu is also expressed by the operation of other cultural organizations. The existence of Philharmonics Societies constitutes a tradition since 1840. These non-profit cultural organizations are known worldwide for their cultural events and celebrations in and beyond the island. It is worth noting that these organizations record, preserve and contribute to musical cultural heritage over generations, having established the good reputation of the island as a world centre of musical education and culture. In the Old Town there are three

Philharmonics Societies (namely the *Philharmonic Society "Mantzaros"*, the *Philharmonic Society of Corfu* –also known as "*Old Philharmonic*", and the *Philharmonic Society "Kapodistriasis"*), but there are eighteen Philharmonic cultural units on the island (Municipality of Corfu-Philharmonics, n.d).

Local music tradition, part of Corfiot intangible heritage, is also served by the operation of many choral groups. These groups are artistically active and they play an important role in cultural events on the island and abroad. It is worth mentioning the festival that recently took place in Corfu in October 12-16, 2016. It was the *1<sup>st</sup> International Festival and Choir Competition*, organized by *Interkultur*, a non-profit organization, in cooperation with the Municipality of Corfu, the Region of Ionian Islands, the Ionian University, the Ministry of Culture and Sports and the Choral Association of Corfu. The result was a unique and sustainable cultural and artistic event (Interkultur, 2016).

Additionally, folk dance is also presented in Corfu's cultural life by the operation of numerous dance organizations. One of the most popular is the *Laodamas – Cultural, Artistic and Sport Club of Corfu*. *Laodamas* club has eight dance groups (4 children groups, 2 teenager groups and 2 adult groups) and participate in cultural events since 1985.

The theatrical expansion in Corfu is supported by the Municipal Theatre since 1997 as well as theatrical groups, while many artistic events happen throughout the year and new artists from all over the world have the opportunity to communicate their work to general public. These events are hosted in public and private organizations, and in public spaces, such as open public spaces, museums outdoor areas, etc.

Finally, the Ionian University, established in 1984 in Corfu, has strengthened cultural and educational bonds between public and private entities. It has three Faculties consisting of two departments each: the Faculty of History & Translation-Interpreting (Department of History, Department of Foreign Languages, Translation and Interpreting), the Faculty of Information Science & Informatics (Department of Archives, Library Science and Museology, Department of Informatics), and the Faculty of Music & Audiovisual Arts (Department of Audio and Visual Arts, Department of Music Studies). The Ionian University play an important role in research, conducting and participating in European research programs, international conferences, workshops, summer schools. By implementing new technologies and new research tools, it helps towards bridging academic research and educational and cultural development.

## **5. Cultural and creative industries (CCIs) and tourism in the Old Town of Corfu**

### **5.1. Milestones of cultural and creative industries (CCIs) in Corfu and their development**

In the last 30 years there have been some historic points that boosted creativity and led to the first steps of establishing cultural and creative industries in the Old Town of Corfu. The Old Town is the main attraction of the island. It is a complex site internationally renowned as a unique cultural entity of high aesthetic values and at the same time a living city hosting the vast majority of cultural institutions and activities of the local cultural economy (Mariani *et al.*, 2014). Cultural initiatives in Corfu in terms of the development of strategy and tourism promotion can be summarized in three major milestones. The first milestone was during 1994, when Corfu hosted the European Council's meeting, during which central government and local authorities highly invested in revitalizing important cultural monuments in the Old Town to host the meetings. The

second milestone was the inclusion of the Old Town of Corfu in the Unesco's List of World Heritage Sites. Before the inclusion in the List, the Municipality of Corfu established a specialized office, the "Old Town of Corfu Office", staffed by experts in cultural management, archaeologists, architects and other professionals whose duty was to prepare the application pack for Corfu and a Management Plan in case of success. The third milestone was the expansion of the Ionian University's scientific orientation in order to follow the technological development of the 21st century. In 2004, the Department of Audiovisual Arts was established in order to combine studies of art and technologies, providing unique interdisciplinary study programs. Professors, researchers and students, in cooperation with other departments of the University and along with private and public actors, have organized several activities in the fields of traditional cultural industry such as visual and performing arts, music, design and communication. This cultural stimulation created a strong cultural identity for both inhabitants and jobholders of the Old Town of Corfu that saw their city changing looks and becoming more organized and welcoming. Authorities and people came closer to the cultural assets of the Old Town of Corfu and their potential for development and further investment.

The aforementioned milestones in the Old Town of Corfu creativity and cultural expression concentrated on the restoration of cultural spaces and thus the creation of new traditions and the extroversion in cultural institutions' activities. Here are the most significant examples. The two Fortresses were evolved from visiting monuments to the most famous hosting areas for cultural events. The basement of the Saint Michael and George Palace and its gardens transformed into a cultural coffee shop offering its premises for recreational activities. Historic relict neighborhoods such as the *Lemonia* Square and the Jewish quarter were revitalized, creating new artistic districts in the Old Town. Degraded suburban areas such as *Mandouki* and *Garitsa* were given back to life with urban renewal projects offering added value to the buffer zone of the Old Town. At the same time, cultural Institutions such as the Music Bands - Philharmonic Societies- gradually abandoned traditional performance stages such as Corfu's Municipal Theatre (Jones *et al.*, 2014) and valorized for their activities the new transformed town they had been offered. Theatre groups organized open air performances in secluded neighborhoods of the Old Town and new cultural institutions were established. Furthermore, a significant number of Museums such as the Museum of Asian Arts and the Archaeological Museum were restored with partial renovations while new Museums were established such as the "Nikolaos Mantzaros" Museum of Music and the Living History Museum "Casa Parlante".

These initiatives revitalized the Old Town and had a direct influence to the promotion and production of culture leading to indulging cooperation between public and private actors. Moreover, they let to the creation of the first informal cultural clusters based on the co-participation of artists and the local community. A notable example is the "*Ionian Concerts*", a series of music performances and workshops every summer since 2000 co-organized by local authorities, the Ionian University and international artists. Also, the "*Be there! Corfu Animation Festival*" is an international animation festival that has Corfu as its touchstone, constituting a meeting point for animation artists from all over the world since 2011. The "*Walk Around Art*" project is an initiative of local artists presenting their work in shops in the Old Town, creating artistic routes in the city. Nonprofit organizations for the community involvement in art integration were also established, such as "O.S.C.S" (Organization for Stimulating the Civil

Society) whose priorities are to involve, inform and activate people so that they realize the benefits of belonging to a society that respects cultural alliance and expression.

The tendency towards a creative economy is also clear through the latest participation of local authorities and other institutions to European Co-funding projects, with the subject either of creating cultural clusters or revitalizing public spaces and monuments for the use by cultural initiatives. Such programs are the Project I.C.E.: Innovation, the Culture and Creativity for a New Economy, the Greece-Italy 2007-2013, the INCH: Innovative Creative Heritage, the Greece-Italy 2014-2020, the Place: Public Spaces Revitalization and Evaluation, the Greece-Albania 2014-2020, etc. (Moulaert and Sekia, 2003). This kind of strategic partnerships made cultural institutions acting as the main motor of structural change and regeneration of the local economy through the creation of new motors for growth based on added-value activities of the cultural and creative industries.

## 5.2. Cultural and creative industries (CCIs) in the Old Town of Corfu today and their characteristics

After years of experimentation and evolution, the Old Town of Corfu has today a quite vibrant character in terms of cultural and creative industries in almost every creative sector. Museums, art creation and exhibitions, theatre, folk culture and dances, literature publications, cultural events and cultural products based on new technologies constitute sectors of good examples. Within its rather small boundaries, there are eight (8) established museums; Archaeological Museum (public), Byzantine Museum (public), Museum of Asian Arts (public), Banknotes Museum (private), “Nikolaos Mantzaros” Museum of Music (private), Solomos Museum (private), Serbian Museum (private) and the Living History Museum “Casa Parlante” (private). Most of these museums offer to visitors their permanent collections and a series of temporary exhibitions by local and international artists. In terms of exhibiting and promoting art, the Old Town of Corfu has the Municipal Art Gallery (public) and the Corfu Art Gallery (private), both hosting a vast collection of the works of Ionian Islands artists of the last three centuries. It is worth noting that first School of Fine Arts in the modern Greek world was established in Corfu in 1811 to serve the creativity of numerous Corfiots in the fields of painting, engraving and sculpture. Nowadays a great number of visual artists live and work in Corfu. Meanwhile, the Department of Audio and Visual Arts of the Ionian University is cooperating with young artists in order to promote new aspects of art (video art, 3D Mapping, digital art, virtual art, animation, etc) (Corfu’s Bidbook for European Capital of Culture 2021, 2016). With regard to music, The Old Town of Corfu hosts a significant number of music institutions, including the Municipal Symphony Orchestra, three Philharmonic Orchestras (bands), mandolin orchestras and several choirs. The Philharmonic Orchestras are a chief characteristic of Corfu’s intangible heritage engaging almost every single Corfiot family, since at least one member of every Corfiot family is part of a Philharmonic Orchestra on the island (Dionyssiou, 2011). The expansion of the Municipal Theatre of Corfu with the participation of citizens and amateurs of all ages to its performances and workshops, led to the development of many other private theatrical groups that produce and present in yearly basis their work. Folk culture and dance is also present with the functioning of several dance associations who teach traditional local dances to young people and organize folk performances exploring the possibilities of creative expression within modern and traditional dance, with the dancers wearing the impressive costumes of Corfiot and Greek tradition. Literature is also an integral part Corfu’s cultural identity as it has inspired important



poets and novelists. The literary blossom produced the edition of the magazine “Prospero” and the journal “Porfyra”, both with nationwide distribution. In terms of cultural events, it is noted that every single day of the year at least one cultural event is taking place in the Old Town of Corfu, while during summer and other high peak periods the events are many. Regarding new technologies, creativity has intruded the market by creating collaborations between entrepreneurs and artists, leading to the development of new innovative culture-related products such as digital tour guides and augmented reality presentations. There has also been a significant growth of startup companies in this field and an enhancement of the publishing and film sectors, with the area of the Old Town of Corfu being attested as ideal scenery for new productions. This major cultural activation was sequentially followed by an expansion of creative industries creating active businesses in the CCIS, ranging from self-employed artists to small enterprises.

By the UNESCO’s definition of cultural and creative industries, we attest that CCI’s in the Old Town of Corfu share certain universal characteristics. These are the dual nature of the activities (economic and cultural), the creativity in the center of every action and product, the exploitation of intellectual property, the self-financing of all of the activities and the use a combination of creative and non-creative skills in their production and promotion (Rozentale and Lavanga, 2014). All these activities seem to be part of a bigger plan for urban regeneration of the Old Town of Corfu and for a cultural policy in the city development strategy. Within this concept, the Old Town of Corfu participated in the bidding process for the designation of European Capital of Culture 2021. This participation initiated a process of collaboration between all cultural entities of the Old Town in the framework of a targeted strategy along with public policies and support.

Despite the blossomed creativity and the existence of multiple of cultural institutions, it is clear that CCI’s in the Old Town of Corfu function in a rather competitive way than a cooperative one. Until very recently there has been no specific organizational/institutional framework for CCI’s cooperation in order to make most of their potential. Most cultural and creative factors function individually and without and overall management and control. Only very recently some initiatives have been started by local authorities, in order to foster cooperation, leverage the potential of the cultural and creative industries as well as promote new employment opportunities and inclusive growth.

The unavoidable link between CCI’s and the tourism sector, which is the Old Town’s of Corfu main source of income, has raised some awareness from both public and private actors for the promotion of cultural heritage and the increase of its value and attractiveness in more cooperative schemes.

### 5.3. Current tourism in Corfu in brief

In order to understand cultural and creative industries (CCIs) in Corfu's tourism context, we need to briefly address tourism in Corfu.

Corfu welcomes several streams of inbound and outbound visitors which could be grouped using multiple parameters such as (1) their typical temporal distribution and behavior over the years, (2) the sub-systems of tourism including inbound tourism-cruise flows, incoming tourism-air transport flows, incoming tourism-visitor flows, internal tourism in organized groups, internal tourism with family/individual character, and (3) the purpose and length of the visit (holidays,

business, events, semi-permanent accommodation, combinations of above). The volume of tourism flows is shaped by the interaction of the above parameters. The existing flows are accumulated by the daily urban mobility of Corfu (European Commission- Scenarios for Integrated Territorial Investments, 2015), considering that in the last 5 years around 4.0 - 4.2 millions of overnight stays have been realized all over the island. It has been accounted that a number of 1,100,000 guests arrive each year at Corfu airport 7.1% of the respective country's arrivals (Sete Intelligence, 2015). The number of arrivals through marine and cruise tourism is equally important. The groups arriving in Corfu circumnavigation via cruise ships exceed on an annual basis the 650,000 visitors, while the arrivals of coasters exceed 400,000 people (Corfu Port Organization, 2017). Corfu Town and its historic centre (the Old Town of Corfu) is considered to be an attractive pole for cruise visit due to the multiple alternatives offered for tours as well as the net time spent on the island, which is significantly longer compared to other cruise destinations (Greek Cruise, n.d).

Apart from the number of arrivals in the area, it is also important to investigate the berth capacity in terms of tourist accommodation. The island of Corfu has a significant capacity of hotels, villas and rental rooms. From a number of 402 hotels and 44.576 beds, Corfu Town has only 8 hotels with a capacity of around 2.000 beds. A number of 15 hotels located in suburban areas of Corfu Town can be added to the sum. Corfu Town does not offer rental rooms and only lately a small number of apartments have been available to tourists through Airbnb platform (Hellenic Chamber of Hotels, 2017). The majority of tourists visiting Corfu Town stays outside the Old Town of Corfu and has to make special arrangements to visit the area.

The very popular in Corfu island "sun & sea" tourism model implies that few visitors stay for more than a night in the city center to gain a deeper knowledge and explore the cultural profile of the city. This fact requires further examination in relation to the number of visits attested in cultural institutions and the numbers of tourists' participation in cultural events. Despite the big number and the plurality of cultural institutions in the Old Town of Corfu described in the previous chapter, organized and individual visits to museums and other cultural organizations and entities present a rather disappointing figure. For example, the Old Fortress accepts during August (a "peak month") around 50,000 visitors (24% of total annual visits), while all the other museums of the city accept roughly 11,000 guests (19% of the respective annual). According to statistics by the Municipality of Corfu at Tourist Information Centers, the number of visits to museums and archaeological sites in the city is very low and estimated around the 12% of the total annual arrivals. Furthermore, the cultural events that take place in the Old Town of Corfu very rarely and randomly attract tourists. These statistics also show that these events mostly take place during afternoon and evening hours, when most tourists return to their hotels or cruise ships. This limited and random tourists' participation in cultural events is further justified by the fact that most tourists, as they declare, are not informed about these events by tour operators and/or their travel agents and hotels.

#### 5.4. Existing / documented strategies and policies on cultural and creative industries (CCIs) in Corfu

The establishment of cultural and creative industries (CCIs) in the Old Town of Corfu relates to the existence of relevant policies by local authorities and stakeholders. In order to identify the level of policy support in operation, we present strategic documents associated with the Old

Town of Corfu's cultural management. These include the Municipality of Corfu Operational Strategic Programmes for 2009-2013 and for 2014-2019, the Operational Strategic Programme of the Region of Ionian Islands for the same periods, the Smart Specialization Strategy for the Region of Ionian Islands, the UNESCO Management Plan for the period 2007-2013, the Municipality of Corfu Strategic Papers for Tourism Development for the years 2014-2017 and the Integrated Territorial Investments 2014-2020 Working Paper, which is currently under public consultation. Also, the cultural institutions' working papers presenting their overall strategy for 2016-2017 as well as their synergies and priorities on events and initiatives. Moreover, the documents of the latest calls for the Sectoral, Regional and Territorial Operational Programmes of the Partnership Agreement for the Development Framework 2014-2020, the main strategic plan for growth in Greece, which has included as a priority sector for economic growth "Tourism, culture and creative industries".

These documents describe and propose activities related to cultural and creative industries, directly linking those activities with cultural tourism. They show that cultural and creative industries are definite actors for the Old Town of Corfu's cultural economy. This has only been acknowledged in the last very few years during the preparation of the Programming Period of 2014-2020 by public administration. Before that, strategies and policies designed by public authorities encouraged creativity and the promotion of culture but did not see to their interaction with local economy and entrepreneurship. Policies related to funding and supporting economic actors used to focus on "sun & sea" tourism and the customer services market, and not to cultural tourism. Prior to its induction to UNESCO's World Heritage List, the Old Town of Corfu had a weak spatial management institutional framework and a weak and vague overall local tourism management scheme. Only the UNESCO Management Plan for the period 2007-2013, which is a complete and comprehensive document with explicit preservation and development rules, had dedicated a whole chapter to tourism and visitors' management. Cultural and creative industries have been mainly supported by random initiatives, such as (1) the restoration of buildings and open spaces as a motor for the establishment of creative neighborhoods and spaces, (2) the development of the urban environment to become more attractive and inspirational for indulging creativity, and (3) the arrangement of festivals and other activities in order to promote local culture and identity by enlivening the city's creative and cultural atmosphere.

## **6. Towards CCIs' development and sustainability in Corfu: ideas and proposals**

Corfu has not yet developed a promotion strategy for its tangible and intangible heritage, a promotion strategy that would help the enhancement of a competitive tourism marketplace with local distinctiveness in the face of globalization (OECD, 2009). Public actors and local authorities have put emphasis on the restoration of monuments and public spaces, giving priority to infrastructure instead of sustainability. Cultural Institutions, despite the fact that they have realized several outreach programs and have ameliorated their interaction with local community, they very rarely follow cooperative schemes and continue to organize activities on their own, without overall management, coordination and a cooperative spirit. Even the UNESCO Management Plan 2006-2012, which included specific managerial partnerships and schemes, has been left in papers. This lack of the cooperation amongst different partners leads towards an undervalued local identity by locals and carries the risk of a delisting of the Old Town of Corfu as a World Heritage Site. This lack of cooperation between public and private sectors

of economy could successfully be dealt with the establishment of a Cultural Incubator, boosting start-ups creative enterprises and assisting with advocacy, logistical and advisory support, funding campaigns and integrated promotion.

To elaborate this point further, and taking into account that cultural and artistic activity promotes development, the strategic planning of Corfu's authorities and private actors can focus on Small / Medium Enterprises (SMEs) involved in the art and cultural sector, via reinforcing their competitiveness and capacity to create economic and social value. Such a target can be supported by the creation of an integrated network of cultural enterprises (Cultural Incubator) exchanging knowhow, experiences and skilled support in an innovative management system that would put lifelong education and training at the very core of its development strategy (Nagaoka, 2011). The creation of such as a Cultural Incubator would assist in enhancing artistic production, entrepreneurship, and relevant public policy (Essig, 2015). Cultural institutions, along with other agents such as local tourism agencies, could form dynamic partnerships and cultural clusters (Mommaas, 2004) and link cultural attractions, travel motivators and the cultural market profile of the city.

For the sustainability and further development of the Old Town of Corfu and its cultural preservation and promotion, it is essential for a series of cooperative initiatives to be implemented by public actors, institutions and stakeholders. Such initiatives would boost cultural and creative industries in a productive way and further support the local economy. The cooperation amongst various Corfiot factors (local authorities, culture and tourism related stakeholders, and entrepreneurs) is the cornerstone for the area's sustainable development. This cooperation should be in line with tourism promotion policies, as tourism in Corfu is the main growth motor for income with highly increasing tendencies due to cruise tourism. Towards this end, we propose four further initiatives: the establishment of a Destination Management Organisation, the creation of a Cultural Management Organization, the revitalization of the handicraft industry of Corfu and the development of new technologies in tourism management.

The establishment of a Destination Management Organization would implement a coordinated destination management plan for the area that would focus tourism flows towards cultural initiatives, manage creative tourist experiences and promote the co-creation of tourist experiences with a lasting memory value, developing strategies that would encourage and facilitate new and innovative forms of cultural tourism.

Apart from the Destination Management Organization, a Cultural Management Organization should also be created, that would unite the development and promotion strategies of all cultural entities in the Old Town of Corfu. Also, due to the fact that public policies have invested a lot in buildings and public spaces restoration, it would be a challenge to design, develop and experiment a coordinated framework and an integrated public-private system for generating sustainable, innovative and qualified services for promoting and developing cultural heritage. This would aim at simplifying policies, procedures and models for heritage development, generating a stable inter-institutional cooperation, promoting public-private management models and supporting participatory initiatives involving enterprises, organizations and local communities. In this way, procedures and technical aspects to improve the number of events, performances, exhibitions, meetings, etc would be minimized, and a common definition of standards and ideas of innovative services for cultural heritage would be generated by public

authorities and local enterprises. The latter cannot be excluded, since sustainable development of local economy can be promoted only if initiatives succeed to include business sectors and entrepreneurial creative skills.

The revitalization of the handicraft industry of Corfu would be important and helpful, as in the Old Town of Corfu there are several traditional handicraft workshops promoting locally made handicrafts, such as olive tree products. This revitalization would in turn create entrepreneurial opportunities as well as opportunities for enhancing people's skills.

An aspect directly linked to cultural and creative industries that should also be addressed drastically in the tourism services in Corfu is the further development of new technologies in tourism management. This involves targeted interventions designed by private actors and tourist agents to offer a self-experiential approach of the visitor (Sotiriadis and Gursoy, 2016) as a means of cross-promotion and marketing. Promotional channels such as social media constantly produce new and self-powered electronic content (e-WOM: electronic Word of Mouth), combined with specialized web-marketing campaigns (González-Rodríguez *et al.*, 2016). Supposing that tourist destinations are increasingly affected by travel-related information shared through the Web, the stories and the importance of destinations as experienced by visitors themselves in the form of "story-telling" (personal narrative) has been given extreme credibility (Tham *et al.*, 2013). The idea behind this proposal is the development of the concept of tourist not as a one-time visitor but as a temporary citizen. The aim is to rebalance tourism culture to welcome "sun and sea" tourists into cultural life and to attract more visitors for cultural activity-based tourism.

Based on the above, a new, modern and innovative strategy for attracting, planning, managing and monitoring tourist flows in Corfu should be designed, related to cultural industries and responding to the needs for multiple services information for the guidance of flows of visitors in the Old Town of Corfu. Creative industries and tourism, the so called "industries of experience", should be closely linked into this Strategy. Through this process, Corfu can become a centre of attraction for cultural creation, an internationally recognized dominant cultural tourism location and a destination of cultural tourism, leading to upgraded economic results. The cultural identity of the island will be redefined, upgrading its international profile and attracting artists and visitors from all over the globe. Another intention is to promote cultural sustainability guidelines that could be applied to other heritage sites with similar characteristics. This could lead to further discussion about cultural management in UNESCO sites and their relation to non-UNESCO ones, for example the participation to the UNESCO Creative Cities Network.

## **7. Conclusions**

This paper dealt with CCIs in the Old Town of Corfu, Greece, which is a UNESCO World Heritage Site since 2007. The Old Town of Corfu consists of a number of cultural organizations that can rightfully be characterized as CCIs. These include museums, art galleries, bands, theatre, folklore and local dance, festivals and cultural events. Despite initiatives related to status of UNESCO World Heritage Site and certain documents produced by local authorities, all these organizations followed their own micro-policies until very recently. In recent years, the need to cooperate and work together emerged, in order to achieve sustainability and development. An overall cultural strategy is still the next step. Towards this end, this paper addresses the existing situation and proposes a number of ideas towards a cooperation strategy to act as an umbrella of CCIs

development and prosperity. These include the creation of an integrated network of cultural enterprises (Cultural Incubator), the establishment of a Destination Management Organisation, the creation of a Cultural Management Organization, the revitalization of the handicraft industry of Corfu and the development of new technologies in tourism management.

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# **The management of tourism animation in world heritage destinations. Cultural events: St. John's festival in Porto and the harvest festival in Douro valley**

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## **Abstract**

The main objective of this study is to investigate whether the management of tourism animation, as part of the management of World Heritage sites, may be associated with the notoriety of destinations and their intention of recommendation. Due to the singular and unique characteristics of Porto and Douro and to the recognized importance of its two anchor events: St. John and the Harvest Festival, it is believed that networking and cooperation among stakeholders is relevant in a sustainable tourism management framework. Concerning the increase of tourism flows and the development of tourism events, it is essential to organize and promote the destination both from the point of view of supply and demand. As a key component in the differentiation of a tourism destination and satisfaction of a behavior marked by the consumption of unique and memorable experiences, tourism animation has the ability to highlight the rich and diverse content of places, recreating the historical and patrimonial content of the site and of cultural events, in programmes and events of tourism animation.

Regarding the methodology, it was based on the review and discussion of the existing theoretical literature on the subject (an exploratory empirical research), crucial for the framing and familiarization of the study and an exploratory analysis of the mentioned case studies.

## **Keywords**

Tourism animation; World Heritage; cultural events.

## **1. Introduction**

Although natural and cultural resources are the main attractions of a territory and the basis of its competitive advantages, it is essential to take into account the way these resources are incorporated into qualified tourism products, in order to satisfy the needs and expectations of tourist demand, especially in terms of cultural activities and experiences in World Heritage destinations.

Nowadays, the concepts of leisure, recreation and tourism are much more difficult to divide and manage individually because tourists want more and more to live the experiences as locals. Bearing in mind the new motivations of the tourism demand, the development of tourism experiences such as tourism animation programmes within different contexts are becoming one of the major assets in terms of marketing but also tourism destination management.

In this framework, the design of tourism animation programmes on a cultural landscape, such the World Heritage sites, will contribute to the community's reaffirmation of its territorial, social and cultural identity, as well as offer the opportunity to enhance the tourism system with new and qualified offer. An asset that is based on the cultural enjoyment of the event promoted by



the reading and interpretation of its material and immaterial heritage has also the ability to gather the host community in this recognition and promotion.

In this sense, the purpose of this study is to bring to the discussion two case studies that are believed to materialize this framework.

The city of Porto reveals a particular interest for the development of tourism, given its position has the second major city of Portugal. Due also to its recognition has the natural leader of the northern region, Porto holds two internationally recognized brands – as the Port Wine city and as Cultural Heritage by UNESCO (United Nations Educational, Scientific and Cultural Organization). The St. John's Festival, due to the plurality of material and immaterial heritage that integrates, is Porto's most important cultural event. Since it's internationalization in 2011 is seen as a very interesting tourism resource and also very relevant as a hallmark event that gives the opportunity to develop a large range of tourism animation programmes for different segments of tourism demand.

The emblematic area of the Alto Douro Vinhateiro, a World Heritage Site since December 2001, is a work, done over centuries, by man and nature. One the most important national wine regions, associated with wine and landscape, has also been evidenced by its tourism affirmation. In recent years, tourism has been identified as a promising and effective way of socio-economic development in the region. The wine culture continues to mark the rhythm of the life of wine regions, and harvests, considered the high point of all tourist activity in the region, are the opportunity for many to return to their origins. The major event, the Harvest Festival, is a manifestation of cultural, ethnographic and artistic character that begins in late summer (usually September) and lasts until the middle of October. Promoted by the different economic agents, has the particularity of involving the tourists that visit the region, giving them the possibility to carry out the course of the harvest, from the grape-picking to foot treading, always associated with a component of cultural animation.

## **2. Events as a form of tourism animation**

The popularity and uniqueness of events are directly related to their ability to achieve multiple goals (Getz, 2001: 425). Many events, although their origin in collective celebrations, by their characteristics, have already aroused interest on the part of another public (Hall, 1989). Events as temporal phenomena are distinguished from other tourist attractions by the "time" factor, which gives them a special advantage (Getz, 2007: 459).

Events are of major importance to tourism. They have the potential to provide special tourism experiences regarding tourism animation due to: (1) the use of unique stories and themes; (2) the focus on authentic forms of culture and history; (3) the integration of elements such as participation and learning (Hall, 1989). They have multiple themes and dimensions and have, in their common denominator, the differentiating and unique character in relation to the permanent tourism offer, which elevates them above the common / daily life (Getz, 1991).

Events can also be seen as strategies for the cultural, social and economic development of the destinations, contributing to improve their tourism image. As tools of territorial dynamism, they fight the seasonality and help the growth of the tourism flows, a benefit for the visitors and for local economies. They assume themselves as generators of development opportunities for the destination and as drivers of the positioning of a strong and positive image.

It is widely recognized the potential of events to attract tourists (Getz *et al.*, 1999), as well as their importance regarding the attractiveness and generated impacts. Events strengthen the traditions, values and social cohesion of the communities, praising the residents' pride, which predisposes them to their involvement.

Events act in a global and dynamic environment, with more or less complexity, depending on their size. Regardless their typology, external and internal factors that influence their planning process and the positive or negative impact they generate in the community or in the territory (Table 1).

Table 1 - Tourism events and its impacts

| Aspects                           | Positive impacts   | Negative impacts  |
|-----------------------------------|--|---|
| <b>Social and cultural</b>        | <ul style="list-style-type: none"> <li>• Shared experience</li> <li>• Revival of traditions</li> <li>• Community pride consolidation</li> <li>• Legitimation of community groups</li> <li>• Increased community participation</li> <li>• Presenting new and challenging ideas</li> <li>• Expansion of cultural perspectives</li> </ul> | <ul style="list-style-type: none"> <li>• Alienation of the community</li> <li>• Community manipulation</li> <li>• Negative community image</li> <li>• Destructive behavior</li> <li>• Drug and alcohol abuse</li> <li>• Social displacement</li> <li>• Loss of comfort</li> <li>• Negative changes in values and customs</li> <li>• Insecurity</li> </ul> |
| <b>Physical and environmental</b> | <ul style="list-style-type: none"> <li>• Environment exposure</li> <li>• Examples of best habits</li> <li>• Increased environmental awareness</li> <li>• Legacy of infrastructures</li> <li>• Improving transport and communications</li> <li>• Transformation and urban renewal</li> </ul>  | <ul style="list-style-type: none"> <li>• Environment damage</li> <li>• Pollution</li> <li>• Heritage destruction</li> <li>• Acoustic disturbance</li> <li>• Traffic jams</li> </ul>   |
| <b>Political</b>                  | <ul style="list-style-type: none"> <li>• National and international prestige</li> <li>• Image promotion</li> <li>• Promotion of investments</li> <li>• Social cohesion</li> <li>• Development of administrative capacities</li> </ul>  | <ul style="list-style-type: none"> <li>• Risk of Event Failure</li> <li>• Diversion of funds</li> <li>• Lack of responsibility</li> <li>• Misleading advertisement</li> <li>• Loss of Community control</li> <li>• Legitimation of ideology</li> </ul>  |
| <b>Tourism and economy</b>        | <ul style="list-style-type: none"> <li>• Promotion of destination and increase of tourism</li> <li>• Increased length of stay</li> <li>• Profit increase</li> <li>• Business opportunity</li> <li>• Business activity</li> <li>• Job creation</li> </ul>   | <ul style="list-style-type: none"> <li>• Community resistance to tourism</li> <li>• Loss of authenticity</li> <li>• Exploration</li> <li>• Inflationary prices</li> <li>• Financial mismanagement</li> <li>• Opportunity costs</li> </ul>   |

Source: adapted from Allen *et al.* (2008) and Marujo (2012)

All events have a direct sociocultural impact on their participants and, in most cases, on the local community. This, which is often marginalized, must be involved in the project and be part of the planning and management of the event and of the destination (Hall, 1989).

Although it is a way of disseminating the unique characteristics of a territory, including its intrinsic qualities, must take care of environmental and preservation issues before, during and after the event.

From the economic point of view, several beneficial impacts are indicated for the local community as the increase of the quality of life and the creation of employment, among others, but also the consumption of local products. At the image level, events are considered, for Getz (1997), as "image builders" of destinations, helping to combat negative images. The author reinforces that these positive effects are amplified if the events work in a network.

On one hand, events, when well planned and organized, generate strong images that attract visitors, positioning or repositioning a destination (Marujo, 2012); on the other hand, the representation of limited, poorly planned or ambiguous realities, can contribute to a valorization of the values, in addition to real estate speculation, with negative impacts on the territory.

Of the different types of events we highlight the festivals. Considered by Getz (1997) as a cultural celebration, public, thematic, a festival should have the following characteristics: be open to the public, present a specific theme, happen annually or less, take place only during a predefined period, without permanent infrastructure and have all the activities within a specific area or region (Getz, 1991). This type of events are increasingly popular in destinations, creating opportunities to attract tourists throughout the year, although in a more incisive way during the event. During the period of the event, ethnographic and cultural traditions are spread, with a wide range of experiences enhancing social interaction, in a dimension of observation or interaction with the local community (Marujo, 2012).

Events are also a way of lasting positive memories, essential to the "experience economy" (Pine and Gilmore, 1999), in sharing experiences, both individual and collective. The authenticity of the time, often distinctive for different tourists, or the staged authenticity of the event are "the result of how tourists or visitors view the activities or the schedule of events according to their perspectives and interpretations. The experience of authenticity in events is relative to each type of tourist that can have its own definition, experience and interpretation of authenticity "(Marujo, 2012: 171).

### **3. Tourism demand trends for unique selling points**

The tourist's movement is moderated by factors related to: (1) the frictional effect of distance on demand; (2) the number of intervention opportunities available; (3) the total amount of time available; (4) the way tourists choose to spend time; (5) the different variables of the trip; (6) the socio-cultural formation of tourists (McKercher and Lew, 2007: 68); (7) and what destinations offer (Oliveira, 2000: 27).

Nowadays tourists are provided with new travel requirements and more demanding diversity (Henriques, 2003: 39). Globalization, demographic changes, technological advances and a shift in value systems, in relation to the need for self-development, and natural life, shaped tourism demand for a post-materialistic product. As a result, the concept of tourism based on experience emerges as a way of gradually covering this need. This form of tourism based on experience presupposes a sustainable and competitive journey by providing highly personalized and memorable experiences (Tzortzaki *et al.*, 2006).

So, over the last few years, the tourism experience has ceased to be based on the passivity of the tourist and has given rise to a greater participation interacting, to a greater or lesser degree, with the surrounding environment. Tourists are increasingly demanding to look for different and unique experiences, so it is urgent to reinvent, diversify the offer available.

The diversity of the existing supply, associated with changes in consumer behavior, results that tourists no longer face a proposal in the same way, always seeking an attractive multi-level investment. The tourism animation is due to the profile of this new tourist, more demanding and active, which promotes the creation of tourism promotion proposals that contribute to increase the length of stay and loyalty to the territory.

Urry (2002) states that tourist places and services are consumed because they provide pleasant and different experiences from day to day. The postmodern tourist consumes the environments of the place he / she is visiting, given their limited stay in these places and their disengagement with local history and culture. The time that the tourist passes in the destination is thus converted into time of exception, or interval of life, which causes that it tries to obtain the maximum possible emotional satisfaction (Fortuna, 1999: 69).

In this perspective, and believing that Festivals that occurs in World Heritage sites are unique experiences, tourists have the propensity to "consume" it intensely, making the tourism experience very rich. In this context the city of Porto and the Douro Valley not only answer to the motivations of the tourism demand for cultural events, because they hold the World Heritage seal, but also because they hold two major hallmark events, the St. John's Festival in Porto and the Harvest Festival in Douro. It is certain that these combinations adds a decisive value to the international recognition of these territories as tourism destinations. So, the unique selling point theory presented by Law (2000: 153) that allows to highlight the point or attribute of the place that is unique, we can say that this two cultural events taking place on two World Heritage sites may be considerer the unique selling points mentioned by this author.

From a tourism demand point of view, people enjoy attending events for different reasons: (1) satisfaction of leisure needs, relaxation, entertainment, relax, socialization and evasion to everyday life; (2) self-development and self-learning through participation in different learning experiences; (3) participation in events in unique places; (4) observation and participation in the way of life of others; (5) contemplate how the communities of the visited places celebrate their culture; (6) interact with the host community; (7) witness different cultures, traditions, forms of crafts, environments and ways of living; (8) to experience the unique atmosphere of the collective celebration (Dimmock and Tiyce, 2001); (9) satisfy a wide range of experiences; (10) belong to a group; (11) to find family members; (12) meet friends; (12) extend social contacts; (14) being with people who have fun (Mohr *et al.*, 1993); (15) learning and participating in unique activities and unique environments (Hall, 1989); (16) interest in authentic cultural experiences (Getz, 2007: 467).

Dimmock and Tiyce (2001: 363) further state that people can participate in events for any reason mentioned in the list presented, or even for all reasons. And in the cases and places where these events are socially, culturally or environmentally unique, the tourist attraction is even greater for this segment.

#### **4. Networking and cooperation as a sustainable tourism management framework**

##### **4.1. The role of events in destination management**

The relation of events with tourism is based on their very nature, considered events that occur at a given time and for a specific period. A snapshot of the community's longest-standing lifestyle, which also now behaves differently from the rest of the year. They provide a value of

evasion, liberation, a moment in time, where normal restrictions, in the face of social rules and community norms, are suspended, or at least behavior is modified to satisfy the act of celebration (Azara, McCabe and Crouch, 2004). Similarly, tourism has been used as an alternative to the development of events, making them financially viable, either by increasing the number of spectators or by attracting financial aid from official entities and sponsors. Interest in this subject has been growing, largely due to the growing number of public celebrations that have taken place, as a result of the perception of the social and economic contributions that events can give to society (Schofield and Thompson, 2007).

For Getz (2007: 459-463) there is no doubt that people change their travel programs because of the events held in the destination. They can travel to a certain destination, for pleasure or business reasons, but decide to schedule the visit associated with the possibility of attending or participating in an event, since this brings added value to the trip.

In the opinion of Nicholson and Pearce (2000: 237) and Getz (2007: 459), the events produce strong images that allow to position a destination in the market providing a competitive advantage, and being able to configure itself the main marketing attribute of the destination, through brochures and tourist information.

These advantages, in turn, encourage the increase of the number of visitors, the increase of the spending and the increase of the time of the stay, and are excellent means for the resolution of the seasonality and distribution of the demand for new areas. Schofield and Thompson (2007) add that events enhance value to the image of the destination, attract and enhance recreation opportunities, contribute to local and regional economies, attain local pride and culture, and provide opportunities for improving the relationship between visitors and the host community, which in some way contributes to sustainable development.

Getz (1991) attest that the external revenue generated will be substantial and will result in increased visitor spending, increased tax rates, and increased local employment. The verification of these characteristics may result in a successful event, capable of pleasing the local community and tourists of special interest. (McDonnell *et al.*, 1999 quoted by Dimmock and Tiyce, 2001: 360-370). There are thus clear and concrete advantages in investing in events (Getz, Anderson and Sheehan, 1998 quoted by Getz, 2007: 468): (1) promotion of the place in general, (2) economic development, in particular.

In the context of destination management, events may play a number of important roles (Getz, 1991, Andre *et al.*, 2003 and Garcia Hernández *et al.*, 2003 quoted by Ribeiro *et al.*, 2005: 65) among which:

- 1) Attracting tourists and visitors, national and foreign, with the purpose of enhancing benefits caused by tourists and visitors and local and regional audiences;
- 2) Attracting attention, animation of attractions and animation of fixed equipment, with the purpose of stimulating the repetition of visits; maximization and rationalization of the use of spaces, with the consequent financial benefits; preservation and dissemination of artistic and cultural heritage;
- 3) Attracting investments, with the purpose of creating a complementary tourist industry adequate to the characteristics of the product offered; generation of activity and economic diversification; incorporation of new spaces to be shared by companies and citizens of that destination.

For Dimmock and Tiyce (2001: 361) events contribute in this way to the tourist development of the destinations, in that they are: (1) generators of economic impacts; (2) tourism attractions; (3) image creators; (4) mitigating the effect of seasonality; (5) development of local communities and their businesses; (6) support to key industrial sectors; (7) development and exchange of cultures between hosts and visitors, stimulating the exchange of experiences and information.

The celebration of events is also an effective strategy to diversify the tourism offer of the destination, with the potential to capture new market segments and / or renew the interest of the usual visitors, thus justifying the necessary public and private investments, both in the tourism and cultural perspective (Ribeiro *et al.*, 2005). For Raj (2003) events play an important role in the city and the local community, as they are attractive to the community because they help the development of local pride and identity, they provide important contributions in the planning of the destination and in the connection of tourism to trade.

This growing trend in the number of people with cultural motivations naturally led to risks to destinations. Taking as example the 12th General Assembly in Mexico, which addresses issues related to tourism management in World Heritage sites, tourism is looked from three perspectives (Atlante, 2005: 187-188): (1) as a sensitizer, catalyst and sustainer of preservation policies, and, if well managed, be an excellent development engine; (2) as a complex phenomenon (e.g. respect to the management of the resident-resident relationship); (3) as a motivation for the preservation of cultural and natural heritage. So, it's important that event planning and management can include monitoring and evaluation of positive and negative impacts on the destination. This is critical for the event to be sustainable and provide benefits for the whole community (Dimmock and Tiyce, 2001: 370). Also presented in the document are the notion of inheritance and the importance of its protection, and the concept of sustainable development, showing how tourism and conservation can have a healthy relationship with each other. This perspective can actually compensate for the negative aspects of the tourism and that has been driving and revitalizing local celebrations and traditions, producing benefits that surpass the fruition of the local community (Raposo, 2002: 5).

These issues are also very well described in the World Tourism Ethics Code, adopted in 1999 by UNWTO (World Tourism Organization), namely placing tourism as user of the world cultural heritage and as contributor to its enrichment and giving the responsibility to local communities and to all stakeholders in the preservation and enhancement of heritage. It also says that the benefits of such exploitation should be in favor of conservation and that cultural productions cannot be standardized. To do so networking and collaboration between stakeholders must be accomplished in order to achieve a sustainable tourism management framework. Following this purpose, it's relevant to reinforce the necessary reflection and action assembled for 2017 as International Year of Sustainable Tourism for Development.

Sustainable management of cultural heritage requires conciliation between conservation and the new economic and social triggered by the tourism function. The practice of responsible tourism is essential and a good use of heritage is the best guarantee of conservation (Troitiño, 2002). Events, particularly cultural events, have also emerged as a factor in the renewal and revitalization of places and regions, both at the economic level and at the landscape level, both as means of preserving the cultural and historical heritage and as a form to positively influence the internal and external image of a territory (Ribeiro *et al.*, 2005: 63). Particularly cultural

events facilitate the preservation of aspects of community heritage such as old crafts, talents, buildings or traditions (Dimmock and Tiyce, 2001: 361).

Tourism destinations that are capable of enhancing this use will benefit both in terms of the revenue generated and in terms of length of stay. Regarding this Enright and Newton (2005: 341) focused their attention on the role that events, and particular festivals, play in tourism destinations competitiveness, regarding their contribution as attractive tourism resources combined with landscape and climate, culture and history.

Events require planning, financial solidity, marketing and strategic vision (Rodrigues, 2007: 17). In this reading, there are already many communities and organizations involved in marketing, involved in systematic planning aimed at structuring and promotion of events, such as tourist attractions, or as instruments of animation of other attractions, presenting this as really the concept of tourism events.

In addition, culture has its origin in authenticity that has become one of the biggest assets of the tourism system, resulting in products based on historical heritage (Raposo, 2002: 7), and allowing the enjoyment of the cultural dimension of destinations. In this way these dimensions feeds and awakens the tourist's interest to what is being observed, or consumed, stimulating it to new approaches. The aim will be to enhance the influence on local well-being and a good tourism experience (Runa and Rodrigues, 1998: 71-77).

#### 4.2. Networking and cooperation

A tourism destination has inherent a territory where are located the resources that will provide the experiences that the tourists look for and that motivated them to move to this space. So, it's common to see tourism organizations being encouraged to collaborate with other organizations, in a more or less explicit way, in order to create experiences that enhance the image of the tourism destination. It is not presupposed to have administrative "borders" in a tourism destination (the tourist perceives the place as a whole), but rather common objectives.

The critical success factors for the development of the territories are not only the existence of cooperation capacity and regional leadership with a vision for the future, but also the creation of networks or the encouragement of entrepreneurship and the involvement of local communities. This involvement should create in the future an emotional relationship with the brand, in order to make the tourist loyal. Networking is therefore essential.

Although network theory appears in the 1930s, it was only during the 1980s that it received a major boost. In the case of tourism, however, this theory was introduced gradually, and only after the decade of 2000 (Kastenholz *et al.*, 2014). Due to its complexity, networks can be analyzed and classified in different ways, being consensual the fact that they are constituted by two basic elements (Kastenholz *et al.*, 2014): (1) the nodes, formed by the actors or entities in the network; (2) the links, represented by the interaction between these actors. In fact, there are various forms of organizing the networks, which of them being adapted and adjusted to the sector and the size of the stakeholders that are part of it. Porter (1998) quoted by the authors refers that alliances and networks are unions between autonomous companies, with the same common goal, shared with elements of its value chain. The new organizational models are based on alliances, partnerships, mergers and networking. The need for organizations to exchange resources is one of the important foundations for inter-organizational development. This exchange occurs in the form of networks, where information and knowledge are also shared.

The multiplier effect of tourism on destinations will be enhanced by the interconnection of all stakeholders. However, the competitive advantages are more beneficial in the management and planning of these destinations, depending on a good relationship among the public-private, companies and community.

Networks correspond to a way of achieving local/regional development, because "... the combination of efforts between public and private stakeholders and a better use of joint marketing strategies and actions can reduce the isolation of rural tourism businesses and become more effective, which can be the solution to the success of rural tourism "(Kastenholz *et al.*, 2014: 63). The local economy, urban or rural, will only benefit from this multiplier effect if it is able to retain the benefits generated. Effectively, networking allows structuring tourism supply according to parameters of management and use of resources, adjusting the demand to the development objectives of the destination. As shown in Figure 1, stakeholder cohesion will have a positive impact on the effects of the target, allowing actions and marketing strategies to be directed towards superior effectiveness, which is reflected in tourism revenues (Kastenholz *et al.*, 2014).

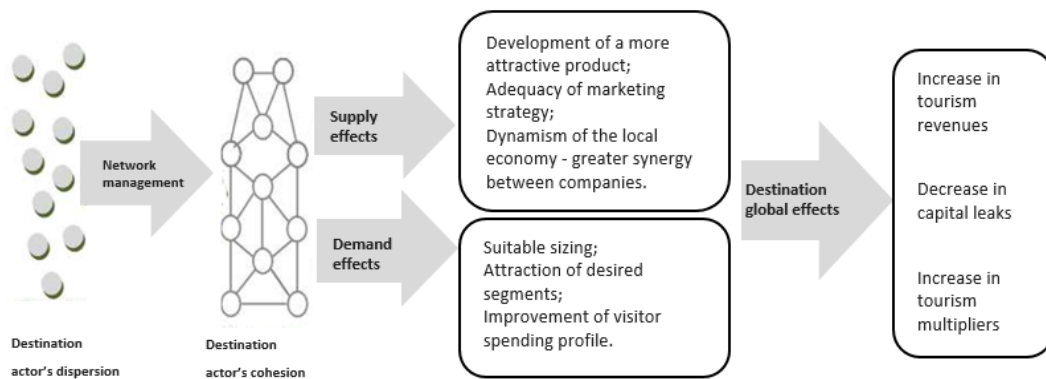


Figure 1 - Effects of networks on tourism destinations

Source: Adapted from Veloso (2009)

Networking is even more important in the case of rural destinations, as for instance in Douro Valley, concerning that questions relating to the planning and management of natural and cultural resources are taken into account. It is important, in fact, to develop the coordination of different stakeholders, as well as equip tourist areas with quality equipment and infrastructure, creating synergies between different tourism products, while ensuring the correct management of visitors based on the balance of three important pillars of development of tourism destinations: the local community, the area-destination and the tourist.

According to Buhalis (2000), the contribution and interconnection of stakeholders is crucial for networking, and the author identified six key actors in his "Dynamic Wheel of Stakeholders": visitors, locals, tourism companies and SMEs, tour operators, Public and Government. The development and implementation of strategies and objectives will greatly depend on the existing relationship and cooperation between all these actors, each of which should maximize its benefits, which is why they may conflict with some contrary interests advocated by other actors (Figure 2).

It is therefore important that everyone work together to build integrated and successful strategies that control and optimize tourism impacts in the region (Buhalis, 2000, Wang and



Xiang, 2007). Residents (host population) integrate this "Dynamic Wheel of Tourism Stakeholders", since they also benefit from visitor flows (Buhalis, 2000). In addition, residents play two separate roles that complement each other: they are an integral part of the visiting experience, but also, an interested party, as they reap tourism benefits. In this sense, we believe that a population with high levels of commitment, a sense of community and belonging, can play a more impacting role in the visitor experience.

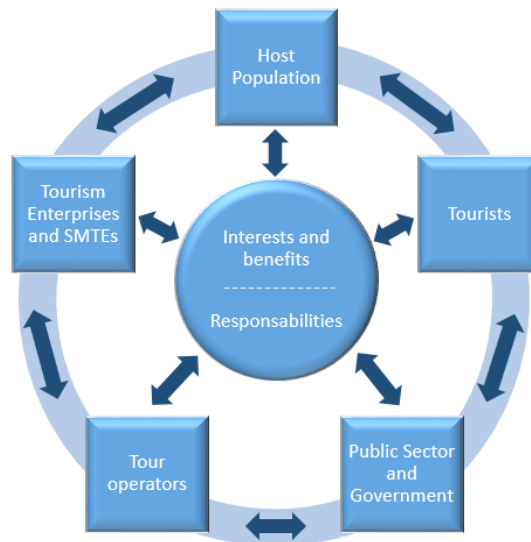


Figure 2 - The dynamic wheel of tourism stakeholders  
Source: Buhalis, 2000

Concerning the companies, Guzmán and Cañizares (2008) defend that is essential to establish alliances between the different companies in charge of providing the services. This is particularly important in a wine destination since the tourist (consumer) only buys a product (which corresponds to satisfying a need through of travel), when it is sold by several agents (the hotel, the restaurant and the cellar), for example.

Promoting an integrated communication image, a valid, credible, simple, appealing and differentiated image, with a distinctive position in the market, which is representative of the reality of the territory, are the premises for the management of a tourism destination, such as Porto and Douro. However, the number of stakeholders and sectors involved in the territorial marketing of the destination increases the unpredictability and complexity in defining and pursuing these goals. However, the obstacles must be minimized, since the attractiveness, trust and credibility of all the actors involved is strengthened through the territorial brand. Moreover, the greater the union between the actors of the destination, the greater the capacity for implementation and the benefits generated not only for the community, but also for the companies operating in that territory, as well as regional competitiveness.

On the other hand, the growth of a greater mobility and competitiveness between the destinations fomented the creativity of programmes, imperative in the creation of new tourist products in order to maintain or to improve the positioning before the competitors. Thus, the territorial brand promotes attractiveness, the attainment of trust and credibility, positioning the place, and contributing to a dynamic of development in the face of new paradigms of competitiveness.

## 5. Methodology

The research methodology selected was the analysis of case studies, opting for the direct observation and/or participant, depending on the case. Surveys were applied in five languages, either at the time of the S. João in 2008 (June), either during the Harvest Festival in 2012 (September and October).

In the case of S. João, in Porto, the criteria used to define the universe of study were the visitors and tourists who were in the city during the event, particularly in the area of Ribeira, the city's largest tourist inflow. Participant observation was performed in Bolhão, rua Santa Catarina, avenida Aliados, Fontainhas, Miragaia, Ribeira, Massarelos, Lordelo, Foz.

In the case of the Harvest Festival the focus were the economic agents that, in general, have wine tourism dynamics related do Wine Tourism. Were covered the territories of greater tourist flow that correspond mainly to the area of Vila Real, Peso da Régua and Lamego. During the event, the participant observation was undertaken in acceding to the project entities involved, before, during or after the tourist experience.

## 6. Results

### 6.1. The city of Porto and the St. John's Festival

From the primary data collection to 111 valid surveys to visitors/ tourists during St. John's Festival, it was possible to verify that 56,8% of the respondents were female and 46,8% graduated and 22,5% having a master's degree. They were in the city for the first time (72,5%), coming to Porto by plane (66,7%) from Spain (24,0%), United Kingdom (15,0%), France (12,0%) and Portugal (11,0%). They were between 20 and 29 years old (38,5%), stayed in hotels (49,1%), in an average length of stay of 3,55 days, bigger than the 1,8 days of the average length of stay of Porto (INE, 2008). The majority intent to spend up to € 500 (52,9%), however 40,2% indicated between € 500 and € 1.000, and they traveled with friends (43%), and in couple (40%).

The three main reasons for traveling to the city were not connected to any specific tourist attraction of Porto. For 59,3% of respondents the motive was to know other places, for 33,3% was for having fun and for 27,9% the main reason was to relax. However, it was very interesting to notice that for 14,4% of respondents one of the three main reasons to visit Porto was exactly to participate in the event. Another interesting result was that the majority of respondents that came to Porto for this event were international visitors, particularly from Spain and United Kingdom.

57% of the respondents that were in Porto during the St. John's Festival had already some knowledge about the event, particularly through family/ friends (34,4%) and the Internet (34,4%), and although most had not previously participated in the event (83%), 69% presented the intention to participate and / or had already participated in some part of this event during their current stay in the event (the St. John's Festival takes place in Porto throughout the month of June). Preferably, it is the St. John's Night (June 23) that more interest arouses in the respondents (75,3%). What most pleased the majority of the respondents was the atmosphere of the event (60,7%). Their biggest interest in St. John's Festival is having fun (46,5%) and their intention to recommend the visit to Porto for this event is very high ( $Mdn=8$ ).

The St. John's Festival in Porto seems apt to become itself a very strong tourism resource, which nevertheless requires a development strategy. The results showed that tourism offer related to this event, is still unattractive and insufficient considering the potentiality and the opportunities raised with this research.

## 6.2. The Douro Valley and the Harvest Festival

In the analysis of the results, and of the 410 valid surveys, it was possible to verify that 54,3% of the respondents are female and 45,7% are male. The predominant group is the married group, standing in the range of 30-39 years, with children, standing out the individuals with higher education qualifications and self-employed. Most of the sample is made up of tourists of Portuguese nationality (67,3%), while 32,7% have other nationality, mainly corresponding traditional markets, such as France and Spain. There were also other important markets such as American, English, German and Brazilian.

The duration of the stay foreseen in the Douro with greater expressiveness among the tourists surveyed was two days, representing 28,0%. In turn, 23,2% of tourists reported that they expected a stay between three to five days. It was found that a fifth of the tourists surveyed predicted that the visit to the Douro would occupy only a part of a day. By contrast, 15,6% reported that the visit to the region was expected to last one day. It was also verified that 9,3% of the tourists intended to stay a week, while values lower than this were registered for the option more than one week. Indeed, those that have a greater wine culture or a greater interest in discovering the Douro, remained more nights in the region.

The average stay in Portugal in 2013 was 2,9 nights (INE, 2014) and that of Rural Tourism and Housing Tourism (Turismo de Habitação) 2,3 nights (INE, 2014). Analyzing tourist demand, we verified that the average nights in the region were 1,6 nights in 2014, so the current indicators are positive. But, in an event such as the Harvest Festival, that lasts about four weeks, the activities and cultural attractions that the event offers to tourists, promote the curiosity or motivation to participate in a more active way, as is the case of picking the grape, foot treading, participation in dances, or even wine tastings.

The animation activities offered in the Douro destination are very focused on the programs of individual service providers, sticking to its specific area of activity: a vineyard, a hotel or a cruise company. Therefore, it is necessary to work the local imagination, the creativity of the communities, creating new proposals, new tourism products preserving the cultural heritage and increasing the length of stay in the region.

The stakeholders involved in the region must be up to date and involved in real coordination, with a view to economic, social and environmental sustainability. The development strategies of a territory cannot be limited to the sum of multiple disjointed and punctual and much less competitive actions, but must be complementary and comprehensive of the various scales, including that of the place, involving the environmental, economic, social and cultural areas. This is the key to successful activities having necessary coordination between the viticulture and the tourism sectors.

Although a significant majority of the respondents recommend the Harvest Festival and intends to return to the Douro, the actual tendencies point out an increase in the demand for customized products with a high degree of flexibility. It determines a greater dynamic, the need for integration of the various tourism co-producers and the tuning of the various links in the value

chain. The particularities of the wine tourism destinations, the distinguishing factors of the events and how they are made available to tourists, depending on their experiences, has significant influence in its motivations and the time they spend in the region. Today, the challenge will be to find ways to articulate the different interests of the segments (business, local, regional and national public authorities) and the communities involved, which participate in the production and availability of the tourism product, as well as their compatibility with other productive activities of the Wine Tourism destination.

## **7. Conclusions**

The two case studies resulted in the confirmation of the potential announced by the tourism use of popular festivals either in rural and urban areas. There was also a solid foundation of the St. John's Festival and the Harvest Festival as tourism resource, and the potential of integration into different tourism products, particular those with fulfill the cultural interests from tourism demand.

However, it also resulted the importance and the challenge of managing events as a tourism animation for, particularly in World Heritage destinations. While tourism can contribute to protection and restoration of World Heritage sites, the right balance between competitiveness and undesirable impacts can be difficult to achieve. Tourism attractions must be periodically renewed to remain competitive. In the case of World Heritage sites, such as Porto and Alto Douro Vinhateiro, they are also aware that they are under an international and very strict obligation to maintain or restore the site's original values.

This responsibility poses difficult questions regarding the type of activities that should be permitted to accommodate tourism growth. Another issue is to involve the community and ensuring that a portion of tourism revenue remains in that community.

Experience has shown that a positive atmosphere for introducing management actions can be achieved by involving stakeholder's and partners in planning animation activities as well as implementing the whole process. Tourism animation programmes should create realistic and interesting experiences, as well as the responsibly to inform potential visitors of the specific heritage characteristics of a place or host community.

It would not make sense a tourism destination without tourists, but to keep the destination attractive and competitive, it is necessary to promote new ways of attracting tourists, visiting or revisiting, recommending to friends and family, making the destination World Heritage Site viable, balanced and sustainable.

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# Eventfulness as a new strategy for heritage sites involvement in tourism: the experience of Russia

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## Abstract

Events are increasingly used worldwide as instruments for economic and social growth and cultural heritage involvement in tourism activities. Event activities can have strong emotional impact on visitors, create a sense of festivity and, as a result, are more consciously used for tourism destinations marketing. The importance of events for modern tourism development in Russia is vital. In recent years many destinations, first of all, big cities started to generate special events and event-series in order to move successively to event-tourism products. Nowadays tourists are particularly attracted by the combination of their unique cultural heritage with ongoing events. The demand for events in Russia is growing but there are also imperative issues of heritage conservation and sustainability to be answered. There are also complex issues on how new events match existing cultural traditions and authenticity. In addition, events are sometimes organized 'per se' but they should be seen as important tools for tourism management. It is essential to establish special mechanisms and platforms based on partnership relations among a wide range of event stakeholders for their effective interaction and further tourism development. Partnerships should be developed not only between cultural institutions and tourism business community but, in this context, to cover the entire «state-business-society» system turning it into a social partnership in its broadest sense.

## Keywords

Tourism; culture; heritage; events.

## Introduction

More than 25 years have passed since the first three Russian sites — the Historical Centre of St. Petersburg and related groups of monuments, the Kizhi Pogost, the Moscow Kremlin and Red Square — were included in the United Nations Educational, Scientific and Cultural Organization (UNESCO) World Heritage List. Now there are 26 UNESCO World Heritage sites in the country and more than 20 sites are already on the Tentative Lists (<http://whc.unesco.org>). However, their involvement in tourism development in Russia is not sufficient. Despite numerous visitors, many researches confirm lack of modern tourist products in these destinations and their inappropriate promotion. The spatial distribution of World Heritage sites around the country is very uneven as all the 16 cultural heritage sites are concentrated in the European part of Russia. Coupled with a relatively short tourist season, these reasons cause considerable problems for heritage sites development and require new measures and approaches to be taken for their effective use in tourism.

Some heritage sites or their most easily accessible parts are by now subjected to high tourist pressure and exist almost at their capacity limit (during peak seasons specially). For example, the Historical Centre of Saint Petersburg taken together with Peterhof State Museum-Reserve (4.7 million visitors per year), Tsarskoye Selo State Museum-Preserve (2.7 million visitors per year), Pavlovsk State Museum (0.7 million) and over three dozens of other attractions in the vicinity of the city form the most visited cultural heritage site in Russia. Moscow Kremlin and



Red Square UNESCO World Heritage Site is visited by 2 million annually (this statistics applies only to Kremlin museums as the admission to the Red Square is free).

White-stone Monuments of Vladimir and Suzdal receive more than a million visitors per year, Historical Monuments of Veliky Novgorod and its Environs — about 750 thousand visitors, Historical and Architectural Complex of Kazan Kremlin — about 400 thousand, Ferapontov monastery with Dionysius' frescoes — about 250 thousand. Even Kizhi, a remote museum with the World Heritage status, is visited by 150-200 thousand tourists annually thanks to the cruise passengers. Thousands of tourists, including hundreds of pilgrims, visit Bolgar Historical and Archaeological Complex (Buyukli *et al.*, 2015).

However, not all heritage sites and attractions are now actively visited by tourists. In some cases, the number of visitors is very small. There are also serious limitations for heritage sites involvement in tourism activities. The peculiarities of socio-cultural environment, principles of sustainable tourism development, introduction of educational programmes and activities aimed at heritage promotion and intercultural discourse development, active involvement of local communities in cultural heritage management as well as strengthening interaction with governmental and non-governmental structures at all levels should be taken into account.

With all the shortcomings and difficulties, there are positive trends in cultural, educational and event-based tourism development in the country. Modern features of cultural and historical heritage involvement in tourism activities in Russia include increasing the attractiveness of destinations through cultural resources by means of iconic and flagship attractions as well as new principles, instruments and forms of culture-tourism interaction at different levels (Aleksandrova and Aigina, 2017). Special attention is now paid to various events based on cultural and historical heritage sites. New projects that combine cultural heritage and event management appear in some places. State policy in tourism management encourages event tourism growth and is aimed at effective partnership of all stakeholders and is intended for conservation and sustainable development of the heritage sites used for tourism activities.

The study focuses on the events held in the most famous World Heritage cultural sites of Russia — in Moscow Kremlin and Red Square and Church of the Ascension in Kolomenskoye. Moscow, the capital of the country, its historical, spiritual and cultural centre and at the same time one of the largest world cultural centres, has the greatest opportunities for tourism development. Unique cultural and historical heritage, important economic, sport and cultural venues are concentrated in the city. About a half of cultural heritage objects of the Russian Federation are located here. All these places are of outstanding cultural and historic value and serve as symbols of the country. Nowadays tourists are particularly attracted by the combination of cultural heritage sites with ongoing events, such as light festivals, *Maslenitsa* (Shrovetide) celebrations, various music, food, sport festivals, etc. Special attention is paid to the «Times and Epochs» historical reconstruction festival organized annually since 2011 in Kolomenskoye museum-reserve (in the buffer zone of the UNESCO World Heritage site). Key problems and opportunities for event tourism and cultural heritage interaction are discussed in the paper.

The methods used to collect the necessary information comprise the analysis of quantitative data from all accessible sources with regard to events and event tourism development within the boundaries of the heritage sites in two capital cities and towns of the Central Russia as well

as the analysis of qualitative data on the same subject matter received through a number of interviews with 4 groups of stakeholders engaged in event activities:

- tourism authorities and governing bodies;
- tourism business representatives;
- administration of heritage sites and cultural attractions;
- events' participants and spectators.

The overview of the conceptual framework, main surveys and relevant publications covering event tourism and cultural heritage interaction was added by several field trips and inclusive observations made by the authors in 2011-2016 during events held in these parts of the country.

### **1. Cultural heritage and event activities**

Culture, as a set of traditions, norms, values, meanings, ideas, symbolic systems, characteristic of a particular society, perform social functions ensuring the consolidation of human communities around certain ideas and values as well as individual self-determination. The unlikeness of different social groups and individuals creates urban culture that grows due to transformations and updates while rural culture exists due to tradition, experience and conservation.

The development of flexible and volatile post-industrial economy and the consumer society has changed dramatically social and cultural landscape of modern cities. These transformations are in general typical for the cities of the developed economies. Many European and North American cities turn their culture into main resource of urban development subjecting it to commercialization and commodification in order to increase their own competitiveness. Thus, a new type of economy, a symbolic economy, is being formed with active development of tourism and creative industries.

Moscow, Saint-Petersburg and other big cities in Russia, which for a long time were subordinated to the socialist planning logic, are now simultaneously experiencing the decline of the industrial development model and rapid service economy growth. In these conditions, cities should seek new opportunities to remain centres of economic, political and cultural growths (Khohlova, 2011). They start using technologies that have been proven to be effective in other cases. Urban cultural heritage utilisation by means of eventfulness for tourism development purposes is among them. The growing importance of events is one of the characteristic features of the post-industrial city.

The role of events in tourism development of modern cities is discussed by Getz (2007), Richards and Palmer (2010), Richards and Rotariu (2015), Getz and Page (2016) and many other authors. They point out that festivals and events help to distinguish tourism destinations and form additional reasons for tourists and local residents to visit them. They are both effective instruments in attracting first time visitors as well as repeat visitors due to the differential advantage they can offer (European Travel Commission, 2005).

Event activities can have strong emotional impact on visitors, create a sense of celebration and, as a result, provide more intimate communication between tourists and destinations compared to conventional advertising campaigns. That is why they are more consciously used as a tool for

tourism destinations marketing. Many cities start to promote themselves as 'eventful' or 'festival' by adopting special strategies for event or festival development. It is possible to define an eventful city as places that 'purposefully uses a programme of events to strategically and sustainably support long-term policy agendas that enhance the quality of life for all' (Richards and Rotariu, 2015, p.92). The programme should include generation, growth, production, management and marketing of events aimed at increasing competitive advantages of eventful city.

In this paper several types of relations between cities and events suggested by Richards and Palmer (2010) applied to Moscow event experience and transformation are discussed (Table 1).

Table 1 - Types of cities in relation to event development

| Stages | Types of cities          | Key event characteristics   |
|--------|--------------------------|---|
| 1.     | The managed city         | Cultural events are the extension of cultural facilities                                    |
| 2.     | The postmodern city      | Multifaceted events act as creators and develop competitive advantages of the city          |
| 3.     | The entrepreneurial city | Major events are managed by public-private partnerships with the help of special strategies |
| 4.     | The creative city        | Cities develop cultural and creative resources to attract 'creative economy'                |
| 5.     | The intercultural city   | Cultural landscapes are transformed by the growing mobility of people                       |

Source: Richards and Palmer, 2010

The stages of relations between cities and events presented here can be found in event tourism development in the Soviet Union and modern Russia but they had always had a very specific character. For example, events in the managed city usually comprise of national and local celebrations, historical anniversaries and jubilees, accompanied by cultural amenities. The events of this kind like Victory Day or October Revolution military parades and fireworks were very typical for the Soviet Russia period. They always had strong political and ideological agenda and were organized by central authorities all over the country according to similar schemes. Despite their mass character, these events were not for attracting tourists, they were not moneymaking or creative.

Perestroika and radical transformation of the society together with the speedy life-style changes in post-Soviet Russia gave the postmodern character and created new values and ideas for event development. The construction of modern cultural environment has led to the emergence of event-series of very different nature. For example, in 2013 Moscow city authorities launched «Moscow Seasons» — cycles of city street events, constantly replacing each other like seasons of the year. They include festivals, exhibitions, holidays and other cultural, sports and gastronomic events dedicated to national, religious (Christmas and Easter), traditional (Shrovetide) holidays or brand new occasions held all year round. Starting with the experience of Christmas fairs in Europe (in 2013) and Christmas traditions all over the world (in 2014), these events quickly expanded their idea and made it all-inclusive in terms of subject matter, seasons, cultural identity, venue, etc. For example, in 2015, winter activities were held under all-embracing slogan «Dreams Come True».

Moscow event activities have contributed to the tourist interest growth and high tourist ratings. The city started to gain revenues both in terms of rankings and economy almost immediately. Now «Moscow Seasons» street festivals are included in the State Moscow City Programme «Development of Recreation and Tourism Industry in 2012-2018». According to the Moscow tourism authorities, these activities help to emphasize and to diversify the cultural image of the city. Together with the representatives of Moscow tourism industry they believe that such events contribute to the increase of tourist arrivals. In 2015 Moscow reported about 12.7 million domestic tourist arrivals and 4.45 million inbound tourist arrivals (State Moscow City Programme).

This type of urban event development has a distinct entrepreneurial character. The events are now managed by public-private partnerships or private companies and are aimed at mass consumption and high revenues. As a result, the events of this type are often organized 'per se' with no particular regard to cultural heritage, traditions and symbols Moscow is famous for. They are unlikely to become really significant in terms of tourism attractiveness, or «hallmark», according to Getz (2008), and can hardly provide the city with distinct competitive advantages. Event development should not only become part of urban revitalization and service economy development but should also preserve cultural heritage and create new values and traditions.

## **2. The use of UNESCO's cultural heritage for increasing the attractiveness of Moscow through events**

There are different forms of using UNESCO heritage sites for tourism purposes. Traditional forms include visiting various exhibitions, permanent and temporary museum expositions, standard excursions and tours. For example, Moscow Kremlin Museums are recognized as the best tourist attraction of the city. The usual forms of tourist activities there comprise guided sightseeing tours around the architectural complex of the Cathedral Square including admission to one or two museums-cathedrals, tours to the Armoury Chamber museum and special visits to ongoing exhibitions.

### *2.1. Moscow Kremlin and Red Square*

New forms of heritage sites involvement in tourism represent a combination of different activities including unconventional forms that help visitors to get the most vivid impressions which is particularly important in the era of consumer economics. As for Moscow Kremlin Museums example, a new route «Kremlin Square: Historical Memoirs» appeared at the New Kremlin Square where grand-scale archaeological research had been made recently. Two-meter open pits allow visitors see the remains of the Chudov Monastery (Monastery of the Miracle) and the Small Nicholas' Palace demolished in 1920s and to imagine how these buildings could look like ([www.kreml.ru](http://www.kreml.ru)).

Starting from 2005 the ceremonial mounting parade of Horse Guard and Foot Guard of the Presidential Regiment held at the Cathedral Square on Saturdays from April to October has become the most attractive part of tourist activities in Kremlin. At present, it is considered to be a symbol of Moscow like the changing of the guards in front of Lenin's Mausoleum was in Soviet times (Aleksandrova, 2012). This year unique concerts of medieval music are held in the Assumption Cathedral. The first concert is dedicated to the culture of France. Also the music of European and Byzantine Easter traditions is presented. Thus, traditional tourist attractions and activities are supported by adorning memorable events.

Kremlin Museums are visited annually by more than two million guests from all over the world ([www.kreml.ru](http://www.kreml.ru)). This statistics applies only to visitors of the Moscow Kremlin Museums which work at maximum capacity during the peak season in summer. It should also be remembered that Kremlin is the official residence of the President therefore in some cases tourists' access is restricted due to official state ceremonies and special occasions. But taking into account the Red Square with free access, which is also part of this UNESCO site, the number of visitors and attractions here can be increased manifold.

The Red Square has always been the centre of city events and celebrations. Military parades, mass demonstrations as well as football matches, book fairs, classical and rock concerts, Guinness records and other events were held here. Starting from 2009, the Red Square hosts «Spasskaya Tower» Kremlin military tattoo (<http://kremlin-military-tattoo.ru>). It is a spectacular show performed on the background of the Kremlin walls by military bands from different countries every evening in a week. The combination of different types of music, military band parades and dance shows, light and pyrotechnical effects make the festival one of the most impressive events of the year and attracts both tourists and local residents.

This event has become one of the brightest and most attractive parts of Moscow event calendar. More than 140 groups from 41 countries have already taken part in this show. The festival is held annually in the beginning of autumn and the number of participants as well as the audience is growing year after year. «Spasskaya Tower» Kremlin military tattoo can be described both as a postmodern event as it is very diverse and based on not only Russian cultural traditions and as an entrepreneurial event because of the results it brings in ticket sales and destination marketing. But it helps to increase the competitiveness of Moscow as a tourist destination and contributes to its general place marketing through active presentation in the media.

## *2.2. Kolomenskoye Museum-Reserve*

Another Moscow UNESCO World Heritage site — Kolomenskoye museum-reserve — is now particularly known for the «Times and Epochs» Re-enactment Festival which started in 2011. It is the only festival of this type held in a large urban agglomeration and at the same time in the border zone of the protected heritage site. The festival is held near Dyakov's fortress in Kolomenskoye which is considered to be the oldest settlement in Moscow region. There are 13 protected areas and natural monuments in Kolomenskoye and it was difficult to find a compromise solution about the festival venue. Kolomenskoye is also famous for the Church of the Ascension (1532) — the first tent-roof stone church in Russia built supposedly by an Italian architect and included in 1994 in UNESCO World Heritage List. The festival organisers supported by Moscow tourism authorities did their best to minimize the impact of festival activities on natural and cultural environment of the museum-reserve and heritage site and therefore this event was approved by the museum administration. At the same time they are perfectly aware of the advantages of the festival held against the background of the World Heritage site and try to maintain them.

«Times and Epochs» Re-enactment Festival started as a historical festival aimed at extending and enlivening the city cultural attractions but in five years has changed greatly. Every year the theme of the festival was different:

- 2011 — «Times and Epochs. Ancient Russia with Your Own Eyes»;
- 2012 — «Times and Epochs. The Moscow Kingdom»;

- 2013 — «Times and Epochs. Middle Ages»;
- 2014 — «Times and Epochs. 1914/2014»;
- 2015 — «Times and Epochs. Rome»;
- 2016 — «Times and Epochs. The Thousand Swords Battle» ([www.historyfest.ru](http://www.historyfest.ru)).

The idea of changing the themes was very attractive since it was possible to attend the event several times. The re-enactment festivals and tournaments became very popular in Russia in general and in Moscow in particular and attracted thousands of visitors every year (Figure 1). More than 10 thousand re-enactors from different countries took part in the festival events. 2016 was not very successful because of bad weather which has a crucial impact on outdoor activities.

In 2017 a decision to bring the project to a new level in scale, duration and diversity was taken (Ovcharenko, 2016). The new festival «Times and Epochs. The Gathering» is held not only in Kolomenskoye but also in 30 other venues around Moscow to show that it has become one of the most popular and visited events in the city. Now this is an unprecedented convention of re-enactors representing all the epochs of the world history with 6000 participants including 1000 participants from abroad. The organisers of the festival — «Ratobortsy» historical projects agency — admit that the idea to change the historical era appeared in course of the festival concept discussion. It's easier, more commercial and faster to use different historical periods to generate events contributing to a new, not boring tourist image of Moscow. This statement shows the entrepreneurial character of the festival and the shift to commercialization of event projects in the city. The festival organizers have also confirmed that tourists, both domestic and inbound, started to purchase special tours for «Times and Epochs» festival activities offered by Moscow tour operators (Ovcharenko, 2016).

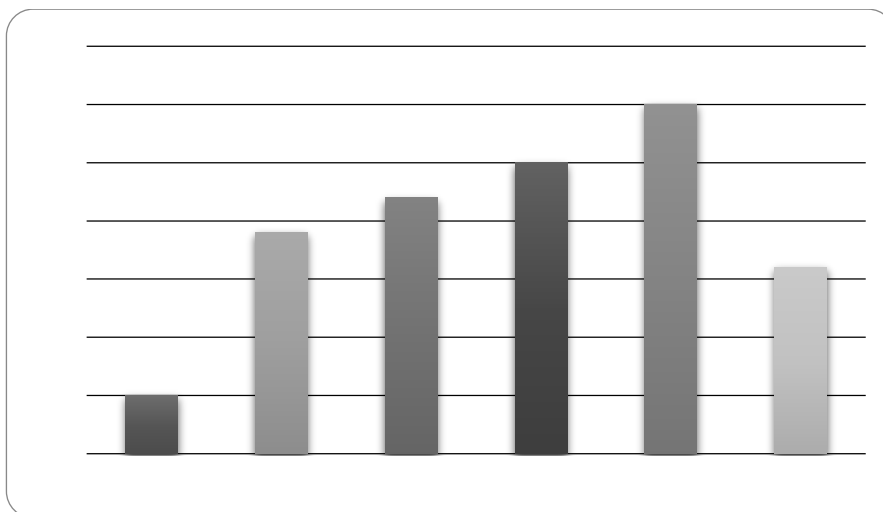


Figure 1 - «Times and Epochs» Re-enactment Festival participants, 2011-2016  
 Source: «Ratobortsy» historical projects agency

In 2016 the authors of the project received the Moscow Mayor's Prize for the popularization of historical and cultural heritage of Moscow and for organization of «Times and Epochs» festival series. Now the festival is officially supported by Moscow city authorities. It proves that public-private partnership becomes the main management model which helps events to be more successful and attractive for consumers (Richards and Palmer, 2010).

There are many other events and festivals organized in Moscow now. It is worth noting the «Circle of Light» Moscow international festival — an annual event when lighting designers and specialists in audiovisual art reinvent the architectural landscape of Moscow using video mapping. Massive or most famous buildings that symbolize Moscow and Russia in general, such as the Bolshoi Theatre, the Moscow State University and others are transformed into canvases for large colourful video projections (<http://lightfest.ru>). Like many other events, the «Circle of Light» festival started in 2011 and now is awarded as the best cultural event of the year, city festival of the year, eventful project of the year, etc. Although this event draws immense interest of residents and visitors of the city, it has no direct relation to Moscow cultural and historical heritage. It is an attractive demonstration of modern technologies similar to events held in other cities. Events of this kind can be classified as creative, and through diffusion of innovations they spread from the most advanced destinations to other regions. After Moscow, light festival based on a similar technology was later organized in Saint Petersburg.

### **Conclusions**

Eventfulness has become an effective strategy for tourism development in Moscow, starting from around 2011. Events are characterized by thematic diversity and different scale and are aimed at expanding competitive advantages of Moscow tourism industry.

Moscow follows global trends in event tourism and is spreading innovations in event tourism development to other regions of Russia.

The combination of managed, postmodern and entrepreneurial events helps to develop Moscow cultural resources and the city creative economy. First and foremost, event series are based on Moscow cultural heritage sites and attractions to increase the awareness and heritage involvement in tourism and to provide its protection and conservation. Some events start to use the broader understanding of culture. It is important to realize the general significance of culture; not only does it enhance the attractiveness of tourist destinations but it goes much further in that to create a comfortable environment for living, working and investing.

Event tourism development on the basis of UNESCO heritage sites is a strategic way for modern tourism development in Russia in most cases. Large number of tourists is attracted by projects that combine cultural heritage and event activities. Food festivals and sports competitions, military and historical reconstructions, music and folk festivals demonstrating the unique characteristics of their region, as well as events dedicated to all kinds of art — literature, painting, cinema, music or architecture — become so attractive that tourists not only from all over Russia but also from countries abroad are eager to visit them.

The establishment of partnership between cultural enterprises on the one hand and tourism industry on the other is difficult as they are driven by different and sometimes conflicting interests. But public-private partnership model which is now used in most of the events help to find appropriate solutions. Now all the most successful events in the city are supported by Moscow tourism authorities and included in Moscow tourism development programme.

Since 2013, the project «National Calendar of Events» is being implemented in Russia. The project started with the Russia's Ministry of Culture support and is aimed at attracting the attention of regional and municipal tourism authorities, tourist information offices to events as mechanisms for domestic and inbound tourism promotion as well as the platform for introducing regional tourism opportunities to travellers. The number of events in Russia is growing every

year. In 2016, the national catalogue comprised 2000 events in different regions of the Russian Federation.

In 2012, the national award for event tourism «Russian Event Award» was established in Russia. Nominations in 14 areas of event tourism as well as special diplomas and other prizes become effective tools for identifying the most successful event tourism projects and their promotion. It helps to form a conscious interest of government authorities and public community to these projects and events.

For large cities and metropolises the concept of the creative city, linking the traditional cultural products, services and heritage with the creative industries such as media and entertainment, design, architecture and fashion, can offer great advantages in attracting visitors (European Travel Commission, 2005, p.12). Nowadays it is possible to say that creative elements connected with modern art or traditional crafts can be found in Moscow event activities. Eventfulness in Moscow goes rapidly, and changes in event nature and contents take place almost simultaneously. Moscow is a global city, and events with intercultural character as results of migrations may probably appear here fairly soon.

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# Tourism development in small destinations through creativity and innovation in events – The cases of Óbidos (Portugal) and Paraty (Brazil).

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## Abstract

Tourism has been and will increasingly be a development opportunity for small territories. Cultural events – as one of the tourism segments – have been an important opportunity for tourism development in small destinations and between large metropolitan areas and main tourist destinations. Through creative and innovative actions from the local governance management in these destinations, a cultural multi approach destination branding was created in the last decade's and resulted in the association of quality in the tourism activity with the destinations. Óbidos is a small destination between the metropolitan areas of Lisbon and Oporto in Portugal. Paraty is located between São Paulo and Rio de Janeiro metropolitan areas and biggest cities of Brazil. Despite of a theoretical and initial disadvantage on competitiveness of these small destinations in using tourism as a development tool, the local governance agents created different cultural events which increased tourism to a level where this activity reached an important position for local economy, though not threatening authenticity. In this context, our paper aims to make a comparison between Óbidos and Paraty through the description of the local governance management in each destination and to identify the cultural events which are responsible for attracting tourists through the last years. Finally, it is crucial to understand which creative and innovative actions and tourist products are being created and implemented to keep these territories competitive among other tourism destinations.

## Keywords

Cultural Heritage; Destinations; Creativity; Events; Tourist Products.

### 1. Cultural heritage, governance and creativity on events planning

#### 1.1. Cultural heritage and its importance for the development of tourist destinations

What is Cultural Heritage? A definition of Cultural Heritage is given by Francioni (2008: 6), considering it as being constituted by “the totality of cultural objects, traditions, knowledge and skills that a given nation or community has inherited by way of learning processes from previous generations and which provides its sense of identity to be transmitted to subsequent generations”. Deepening the definition of the concept, it is necessary to bear in mind that it has, in its etymological origin, as referred by Selicato (2016: 7) the latin word *patrimonium*, which is “the union of two terms: *pater* (father) and *munus* (duty)”. The author adds that this term has the literal meaning “the duty of the father” or, in a broader translation, “things belonging to his father”. That is, the goods that belonged to the father and that carry or evoke value and meaning.

According to the Portuguese Basis Law of Protection and Valuation of Cultural Heritage, Law 107/2001 of September 8th, the cultural heritage is constituted by all the assets that, being testimonies of civilization or culture value, bearing relevant cultural interest, should be the subject of special protection and appreciation. We are faced with a comprehensive definition of

Heritage, which included in it all the goods of all time. As Nabais (2010) points out, we are facing a vision that involves understanding the cultural heritage as open, dynamic and living terms, surpassing a conservationist and preservationist vision, and definitively placing emphasis on valorisation and enrichment.

The testimony of the way in which the concept of Cultural Heritage has been extended and incorporated other elements is a reflection of the evolution and needs of the contemporary societies. The semantic opening of the concept is the result of a triple extension (Vecco, 2010). We are facing a typological-thematic extension, since objects that were not part of the traditional concept are now included, in so far as a chronological and geographical extent since the heritage status has been given to other attitude or to extremely recent assets. The vision of the concept has also changed in relation to the context. Heritage cannot be seen as an isolated element, but in relation to the context, which implies the adoption of an integral approach in its issues.

Heritage thus acquired a new centrality in contemporary societies and in the affirmation of the territories. A notion of cultural heritage as a dual viewable concept is presented by Graham et al., (2000), who considered it to be both a resource of economic capital and a resource of cultural capital. The Cultural Heritage is progressively seen as a lever for the progress of the communities that give rise to it and enliven it. As Getz (2007) points out, the concept of cultural heritage is open to interpretation, and this concept is a politically charged term, meaning more than history, where judgments of value prevail over what is important.

At the same time, we see a general strategy, as Zukin (2000) states, to mythicise the city to sell it as a 'site', adding that "developers and elected officials seek investment funds by marketing the cultural values of place". Or an urban development based on an attempt "to 'theme' cities in such a way as to make them into a series of urban experiences which are commodifiable" (Amin and Thrift, 2002: 124), and which in turn generate economic revenues.

The reality of places as commodities and products to be consumed (Lipovetsky, 2010; Hall, 1997), is easily understood in the light of the societal context of globalization and symbolic competition that we live in, however, as Richards and Wilson (2006: 1221) states it "seem to be leading to increasing the serial reproduction of cultural attractions and 'commodification' of the cultural tourism product".

The postmodern context has also transformed urban space insofar as it is directed towards leisure activities. As Ferreira and Fernandes (2012) point out, the historical identities of cities that rediscover their past are highlighted and prepare thematic spaces, designed to respond to the search for a supposed authenticity, with a growing desire to escape the routine by individuals greedy of environments and forged exoticism, many times in folkloric traits of a spectacle reality. It is unbridled by the dollars coming from the tourists and financial investments reinforcing "the city's image as a center of cultural innovation" (Zukin, 2000: 3), resulting from the phenomena of privatization of the pleasures, the individualization and the commercialization of leisure time.

Urban space is thus marked by a set of architectural themes, which play an increasingly important role in urban redevelopment strategies based on historical preservation and local cultural heritage (Zukin, 2000). Nonetheless, places that do not have what Richards and Wilson (2007: 4) call "hard cultural resources" to compete effectively in this cultural arena, are

increasingly considering creativity as one of the few alternatives to cultural development. It is therefore understandable that we are witnessing a transition of the bet, although not as a universal phenomenon, as Evans (2009: 1013) points out, in the arts, cultural heritage and cultural industries, for the cultural and creative industries, which in the opinion of the author goes further and we will watch in the future the bet on the city of knowledge.

The reality is that places have been progressively commodified, considered as commodities to be consumed, and as Philo and Kearns (1993) argued, places which are understood as commodities do not preclude the need to be made attractive, to be publicized, as it happens with all consumer products in the capitalist market.

## 1.2. Governance and its relevance to the management of tourist destinations

In common sense, the term governance and government can be misinterpreted and used as synonyms (Ruhanen et al., 2010), but the meanings are different. There is also no agreement as to the definition of the term governance, in addition they all pervade ideas related to changes in the standards regarding the way of governing. This change implies the re-sizing of command and control of the state, as well as the existence of new structures, mechanisms and decision-making procedures that involve the democratic participation of actors (Hall, 2011; Beritelli et al., 2007; Kooiman, 1993), which presupposes the existence of a favourable context for democracy, decentralization of decision-making processes, citizen participation and a high level of trust among social actors.

For this research, we use two concepts of governance. The first is tourism governance, which "would be a new way of leading innovation processes, strengthening and changing tourist dynamics in a specific space, incorporating public and private actors to make collective decisions" (Velasco, 2013: 508). From the increase and consolidation of cooperation, collaboration and coordination, the interactions between social actors create possibilities to face challenges such as improving the competitiveness of tourist destinations. The second brings the approach of cultural governance that retains the look to the public space and the interaction of cultural subsystems and their intersectionality. In this set, it is necessary to identify the actors and clarify their capacities and responsibilities, to ensure that they are not only consulted about the use and representation, but actively participate in the public space (Meyer-Bisch, 2002), enabling the cultural empowerment it provides Integration of communities at risk or in decline.

With cultural empowerment, the exercise of civil rights, including cultural rights and respect for the identities, tends to avoid conflicts, while at the same time opens up possibilities for innovation processes and creative diversity (Meyer-Bisch, 2002). When the democratic governance system interacts with cultural empowerment it is possible to establish public spaces whose functions and objectives become the place of creation (knowledge connections), production and socio-cultural exchange in which there is simultaneous destruction and creation that influence the configuration of competitive territories.

In this context, cultural policy governance fosters the interaction that results in the production of society and its networks of actors. Governance with a democratic basis and the creation of a network is based on the definition of resources - of the actors, of the capital functions, of the responsibilities - that each actor will assume by defining the responsibilities (functioning) from the objectives contemplated by normative instruments that will be adopted in view of human

rights and normative principles of the rule of law, in addition to those that comprise social, cultural and economic wealth (Figure 1).

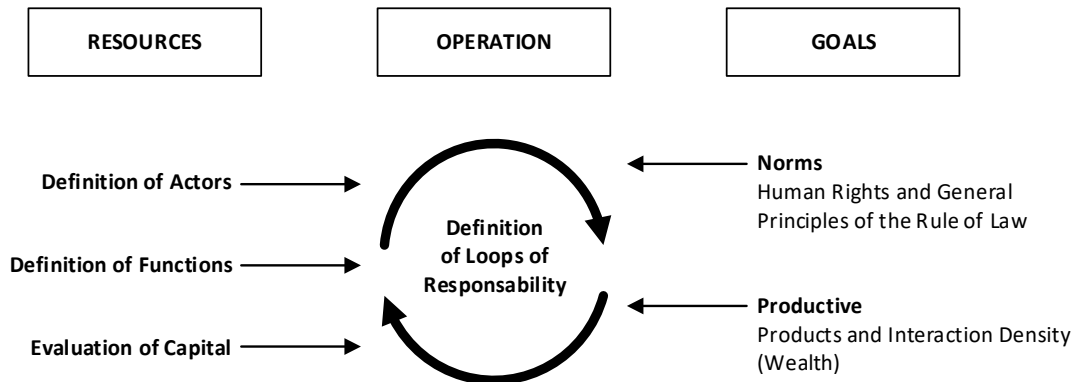


Figure 1 – Criteria for assessing democratic governance  
 Source: adapted from Meyer-Bisch, 2002.

Governance is the political principle that will contemplate the different forms of knowledge that correspond to the social capital present in a certain tourist destination. Integrating cultural governance and tourism governance is a challenge that, once overcome, will provide the collective construction of creative tourist destinations embracing different identities and various forms of knowledge, such as: sciences, values, ways of life, production, and beliefs among others.

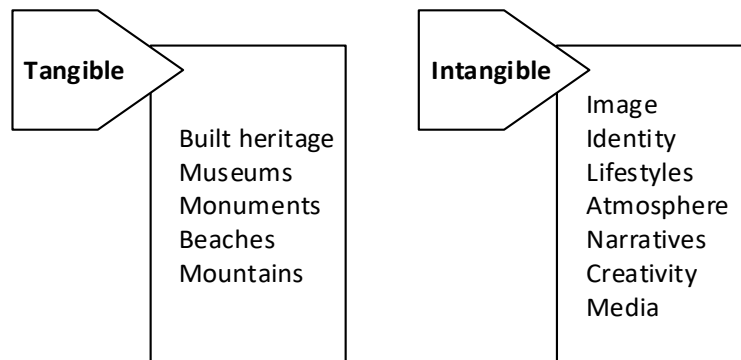


Figure 2 - The shift from tangible to intangible tourism resources  
 Source: adapted from Richards and Wilson (2007: 18)

The integration of cultural and tourism governance will also enable the integration of cultural and tourist interests, tangible and intangible, and their use in the field of creativity, promoting changes that tend to influence local social groups and tourism. In this case, the use of tangible and intangible material heritage would influence a transition from cultural tourism to creative tourism (Figure 2).

The conception of tourism governance, adding innovation with cultural governance linked to creativity, is a genuine native resource with the capacity to produce distinctiveness between territories and emphasize them in the context of cultural tourism, shows and creative spaces as well as creative tourism.

### 1.3. Creativity and innovation in the paradigm of tourism offer and differentiation

Creativity and innovation have been affirmed as elements capable of producing distinctiveness between territories. As we have pointed out, the competition of the territories for the sake of their affirmation in the global world is a recurring practice. The phenomena of *samefication* (Mateus, 2010), of McDonaldization (Ritzer, 2001), or yet the phenomena of thematization, the construction of iconic structures, or the heritage mining (Richards and Wilson, 2006: 1212), are phenomena that evidence this struggle, and demonstrate the despair of the territories, in this search for elements of differentiation.

Places have opted instead for a logic of importing exogenous strategies rather than for outlining cultural and heritage promotion policies based on endogenous resources. The brand of authenticity and originality of the activities and tourist products offered goes away and the demand, of the exotic, of the different in force is put in question. It should be kept in mind that this demand, as Gonçalves (2008: 4) refers to, wants to experience the smells, tastes, sounds, and the touch of a culture. The same opinion is shared by Cravidão and Fernandes (2003) when they affirm that the practices of massification of Fordism coexist in the present with the valorization of diversity, creativity and innovation. In turn, Evans (2009: 1005) considers that the phenomenon “creative city and space” is a global phenomenon adopted by cities and states, in the eagerness to claim for themselves some of the generated economic knowledge, or to obtain a good position in the cultural ranking of cities.

On the other hand, Pratt (2009: 10) points out that policy makers face huge challenges in selecting best practices and their implementation, but that the most recurrent solution of policy makers has been “what I term ‘Xerox’ policy making that is, direct replication”. However, it should be remembered, as Amin and Roberts (2008) state, that a creative community tends to thrive by developing an informal generic project that allows the production and promotion of the work of its members, of reactions, comments and stimuli, revolution-inspiring triggers for this community.

The central idea in this scientific field is that there is only possible to affirm the places in the present context, through innovation and creativity, and as Gonçalves (2008: 7) points out, in the identification of their differentiating factors in relation to other places that are successful, and in the promotion and encouragement of the local context, essentially through what is not imitable.

The best of urban spaces has been to promote the inimitable, which, as Evans points out (2009: 1005), has seen a shift from the promotion of the arts, cultural heritage and cultural industries to the creative industries.

The truth is that in the contexts under analysis the relationship between creativity and tourism, as referred to by Gonçalves (2008) is still at an early stage, however, presents a great potential for development considering the new leisure needs, the need the reinvention of economies, the new consumption and, finally, the new trends in urban regeneration.

Concerning urban cultural strategies, it is necessary to bear in mind, as stated by Bianchini and Parkinson (1993, cited by Taylor, 2009: 155), that there are three types of risk's, in the first instance, the risk of gentrification and exclusivity, when conceptualized in a centre-periphery basis. On the other hand, the conflict between requests for investments in cultural

production and cultural infrastructure, and finally the tension that may occur between short-term events, carried out to increase the profile of a certain place and attract visitors, and the planning of long-term events solutions based on sustainable solutions to attract visitors. It is therefore necessary to combat the identified risks by planning long-term events with a capacity for sustained attraction, but also to fight against gentrification and the notion of exclusivity that increasingly marks events, or the gap between support to produce events and support for cultural infrastructures.

Peripheral regions tend to be more active in terms of events and culture, and as Williams (1997: 140) points out that it is even questioned that this activity will not be dependent on the fact that policies in these regions are considered as preponderant. Williams (1997, 140) adds that while peripheral regions may be more effective in marketing their cultural resources, the larger urban centres were still the ones that were more profitable to achieve it. The truth is that even if this is a reality, it is in peripheral regions that these benefits are essential. What is undeniable is the fact, as Florida (2008) mentions, that cities around the world increasingly focus on Culture and Creativity to increase and / or improve their reputation, but also to achieve economic growth. But of course, and even though locals who have never had a chance, are now at the centre of the action, as Florida (2008) points out, not everyone has the ability to participate and benefit in the same way.

These inequalities derive from the inability to use innovation and creativity as a genuine indigenous resource for the affirmation of the territory. As Pratt points out (2008: 35), "a creative city cannot be founded like a cathedral in the desert: it needs to be linked to and part of an existing cultural environment". However, the complex network of interdependence between creativity, local cultural environment and territorial affirmation objectives is not taken into account, and one is often used as a way of exploring the other (Pratt, 2008). That is, it is not possible to affirm the territory through creativity if it is not based on a dynamic cultural environment. We dare to say that a dynamic cultural environment is not possible unless it is not based on innovation and creativity.

It is also necessary to point out that the centrality that creativity occupies today in local planning and development results from the awareness of its capacity to generate revenue and development, but also, as Florida (2012) points out, by the growing recognition that creativity is a source of new technologies, new industries. It will be pertinent to further emphasize that the way creativity is seen in its strands creativity, technology, or inventions, economic creativity, or entrepreneurship, cultural and artistic creativity has ceased to be in isolation. Today we are aware that all strands are extremely interconnected in the current context. (Florida, 2012).

The conviction is that creativity is in fact a motor of development, we must also bear in mind that competition among cities makes creative cities create and induce drastic movements of the community among themselves (Amin and Roberts, 2008). Creativity, though dependent on hatching conditions, or as Amin & Roberts (2008) points out, form the creative city soil, which provides places and events for the fertile interweaving between creative communities, being characterized by immateriality, is not so as anchored to the territory, as the heritage resources or cultural products. Richards e Wilson (2006: 1215) consider that "creativity can become extremely mobile-arts performances and artworks can today be produced virtually anywhere, without the need for much infrastructure".

#### 1.4. The importance of events for the development of the territories

The main premise governing this study is to “Events act as a concentrator in terms of time and space, forming important nodes in creative networks and providing a direct link between creativity and tourism” (Richards, 2011: 1240). The importance of events for local development results in the first instance, as Taylor (2009) points out, from the pressures of globalization. According to the author this is more felt at the local and regional level, where the phenomena of deindustrialization and delocalisation have had considerable social and personal effects.

The needs of territorial assertion, and consequent revenue needs, have created a phenomenon in which local and regional policies are refocused on culture and creativity. As Kong and O'Connor (2009) have pointed out, cultural and creative industries have become central to political agendas, with different administrations identifying not only the domestic consumption potential generated by them but also the potential of external consumption that comes from its realization.

The notion that signs, symbols and desires support consumption and that cultural industries, such as the arts, media, tourism, recreation and leisure, increasingly, as Amin and Thrift (2007) point out, or, Bowdin et al. (2006), exploit them as a way to feed the economy, has become widespread. Consequently, we are not in the paradigm where territories and local authorities can ignore this phenomenon. Contrary to Williams (1997), there is recognition of the importance of cultural industries in economic development, and this importance is also recognized by the authorities. The paradigm shift lies in the fact that cultural industries *per se* are not the core of local development policies, but rather that in their place the notion that they are uncreative is failing.

The importance of culture and creativity as a lever for economic progress and job creation is also evident in the European Structural Funds programs, which evidence awareness of the potential that exists (Taylor, 2009). And that has been explored by the territories through the accomplishment of events, being that as Hall refers (1989: 263) “they have assumed the key role in international, national and regional tourism marketing strategies. Their primary function is to provide the host community with an opportunity to secure high prominence in the tourism market place”.

The cities with the superior results in the capacity of attraction of tourists, investment and recipes, are those, as they refer Bell and Jayne (2004, cited by Meethan and Beer, 2007: 218) that are characterized by the greater cultural diversity and the spaces. Thus, we understand that private companies, but also public administrations, are increasingly interested in harnessing the creative energies of groups that exist in communities, but usually disconnected, through tasks, capacity building actions and common projects (Amin and Roberts, 2008).

These actions allow us to counteract what Williams (1997) had already pointed out as a fragility of cultural production, namely that consumption and production are extremely proprietary and controlled, and the development of strategies and consequent policies that allow the promotion of ownership by the local community of cultural production and cultural consumption infrastructures. Adding that local demand satisfaction must also be a concern of developed policies, since if this has not been considered, there is a risk of alienation from the local community. Hall (1989) argues that in addition to the importance of events in attracting tourists, they also play a role in the development or maintenance of the identity of the community or



region. In Hall's view (1989) short-term staged events, such as carnivals and festivals in small towns and villages have not only economic importance but also social importance.

Events are a different type of achievement than the cultural and patrimonial offerings available to tourists, as they are not a continuous or a seasonal phenomenon (Hall, 1989). It is important to design them as Pedro et al. (2012) to bear in mind the premise that they should have an impact, using creativity not only during their realization, but above all, through appropriate promotion and dissemination.

Developing, events, as Getz (2012) refers to are living entities created to achieve specific outcomes, including those related to economics, but also to business, culture, society, and the environment. They are designed, as Goldblatt adds (2011), "to produce outcomes, and a special event is a unique moment in time celebrated with ceremony and ritual to satisfy specific needs".

And why is there a worldwide demand for events? If, on the one hand, there is a push on the part of the territories and places, underlying the need to create or diversify the tourism offer that they have, as we have been able to point out, there is another, in contemporary society, derived, as Goldblatt (2011: 9) points out, from the strong need to escape from an increasingly stressful work environment, and that can be attenuated in seeking experiences or through activities. Bowdin et al. (2006: 3) share the same opinion when they state that the "events are central to our culture as perhaps never before", adding that this centrality comes from increased leisure time and discretionary spending. Tribe (2011) notes, however, that the degree of importance given to recreation and tourism is not uniform, and that this depends on the stage of economic development of a country, and that as a Country, leisure, and the activities and events that underlie it, are of growing economic importance.

The way we see the world conditions the realization of events, and the identified tendency is that they meet the differences, to serve the specific needs of a tourist demand. As Florida (2008: 10) states, being "the most mobile people in human history, we are fortunate to have an incredibly diverse menu of places - in our country and around the world - from which to choose". This perspective of event menu is important because it underlies the need for targeting and segmentation of the supply, not forgetting that each one tries to meet different needs and necessarily have different preferences (Florida, 2008).

Thus, the supply of events nowadays results from the awareness of its importance for the development of places, the potential for revenue creation, and is, or at least should be, underlying the segmented demand. The events are thus the solution in the creation of a reputation of the places, that associated with the tourist bonanza, attend to the different needs of the market (Bowdin et al., 2006).

However, the reality is that the copy, called 'Xerox' (Amin and Roberts, 2008: 245), where replication of successful formulas is constant, whereas Orbasli (2000) refers to events, dances, the religious ceremonies and the festivals are organized having exclusively the tourist interests by base, having in many occasions lost its original meaning or even the logic and sequence of accomplishment in the calendar.

This is compounded by the generalized importation of concepts, per se, bad in view of the lack of links with the local social and creative context, but which, when analyzed in detail, totally fail in a thematic and conceptual coherence with the territory where are being developed at either

the aforementioned levels or at the cultural and heritage level. The risks of this type of action are well identified, and destinations that produce events for tourist consumption, without considering local communities, tend to refer as Bowdin et al. (2006), to produce inauthentic and superficial events, and this type of event, exploited or poorly managed and conceived, can generate the counterproductive effect of damaging the reputation of a place.

It is essential to carry out a detailed analysis of the different contexts underlying the reality where the event will be organized. This will be the capital for decision making, making the objectives underlying the organization of the event, such as increasing notoriety, increasing the attractiveness and / or simultaneously raising economic revenue, paraphrasing Ritchie (1984), are matched with the needs to be met by potential tourist demand, but also with the objectives and agendas as reported by Bowdin et al. (2006), the main stakeholders in the event, such as tourism agencies, destination community, government agencies associated with the area and the main event organizers.

One example, among the many that have been studied, namely the case of Montreal in Canada, is given to us by Amin and Roberts (2008). The authors believe that creativity allowed the city to play an active role as the city culturally, socially and economically innovative. However, this role has only been achieved because the place and its stakeholders have developed a culture of large projects, based on a shared vision and as such with popular involvement.

Lastly, it should be noted that the existence of abandoned or neglected sites in cities has been recurrently exploited by events, but also by the cultural and creative industries, stimulating urban regeneration and the development of these fringes of the territory that had been abandoned. As Amin and Roberts (2008) point out when "recycled" with a new vocation, these sites become open platforms for projects and events. The result of this recycling will be a new life of the places, contributing to the development of the community, being important, however, to bear in mind, as mentioned, that these projects and events must be the result of a genuine will of the communities that originated them.

## **2. The tourist destinations of Óbidos and Paraty**

Óbidos is a Portuguese municipality located 85 km from Lisbon (capital) and 239 km from Porto (second largest population centre in the country). It is located just 63 km from Leiria (capital of the sub region) and 88 km by land routes from Fatima (world-class religious destination). In 2011, the population of the municipality was 11,772 inhabitants, corresponding to the central population nucleus, the fortified village (within the walls and surroundings), to a population of about 3,779 inhabitants (Figure 3). Óbidos is evidenced by its castle and by its ancient wall, and fortified village in its interior with the built heritage representative of the passage of several architectural styles. Óbidos, through its main urban centre, arises mainly as a destination associated with history and the corresponding atmosphere.

Paraty is a Brazilian municipality located 249 km from Rio de Janeiro, capital of the state of the same name, and 268 km from the city of São Paulo, therefore between the two Brazilian metropolises and the two most important emitting nuclei of the country. In 2010, the total population was 37,533 inhabitants (IBGE, 2013). In terms of tourism Paraty is in the region of the Costa do Sol, also composed by the municipalities of Angra dos Reis, Mangaratiba and Rio Claro (Figure 3).



Figure 3. Fortified village of Óbidos and Paraty  
 Source: *comercioenoticias.pt* and *vipsseguros.com.br*

Although the village of Óbidos is not located by the sea, the municipality extends into the Atlantic Ocean, offering sun and beach tourism from May to September and a diverse set of other activities with a tourist character from the presence of the lagoon with the name of the municipality and that makes this territory geographically diverse.

Paraty offers various possibilities to enjoy the territory from the activities it develops, having as main tourist segments the sun and beach, nature, ecotourism, adventure and cultural, including cultural events. The tourist resources of Paraty are based on natural resources, whose occurrences are beaches, islands, vegetation of the Atlantic forest, fauna, peaks, that make up a unique landscape both on the continent and in the marine and insular environment. The cultural patrimony is represented by the architectural set that integrates the material heritage, and by immaterial goods such as the Festa do Divino, both dating back to the colonial period and protected by the National Historical and Artistic Heritage (IPHAN). The authenticity (preservation of the elements of the past) of the material and immaterial heritage in Paraty, as well as in the local cultural / economic activities of this territory, is justified by the partial isolation of this territory up to the 1970s in relation to the great metropolises, from there being served by quality roads and enabling mobility on a larger scale.

The tourist infrastructure in the two municipalities is composed of several types of lodging such as hotels, hostels, hostels and Airbnb. The gastronomy includes from well-known and sophisticated restaurants to simpler options, with several and local and national typical dishes.

Paraty has a characteristic regarding its territory reflecting on governance. In general, the municipalities have political and administrative autonomy as specified in the Brazilian Constitution of 1988. Meanwhile, Paraty has 100% of its territory protected by IPHAN and approximately 80% in federal, state and municipal conservation units. That is, the local government, to manage the territory on which it has autonomy, must dialogue and negotiate with the supra-municipal bodies that also, have both responsibilities and their specificities. This fact directly implies tourism, whether for the preservation of natural and cultural patrimony or the release of permits for interventions in land use and material goods. In this case, multilevel governance among public entities would be the most appropriate to manage the territory and obtain better results regarding the management and coordination of government actions and investments. Local governance is constituted by public power, private initiative and community (Figure 4).

In the case of Óbidos, included in the Portuguese context, the national tourism institution (Turismo de Portugal) stipulates the general guidelines and direction for the development of tourism activity in the country, organizing the tourism activity in more specific traits from each

one of the seven national tourist regions. In the case of Óbidos, included in the region of action of Turismo Centro de Portugal. It is at the local level, through the municipal company Óbidos Criativa, created in 2012 by Óbidos City Council that creativity is fostered and stimulated, among other activities, in the main events organized in this territory. One of the presuppositions must be conceptual development and experimentation in creative education.

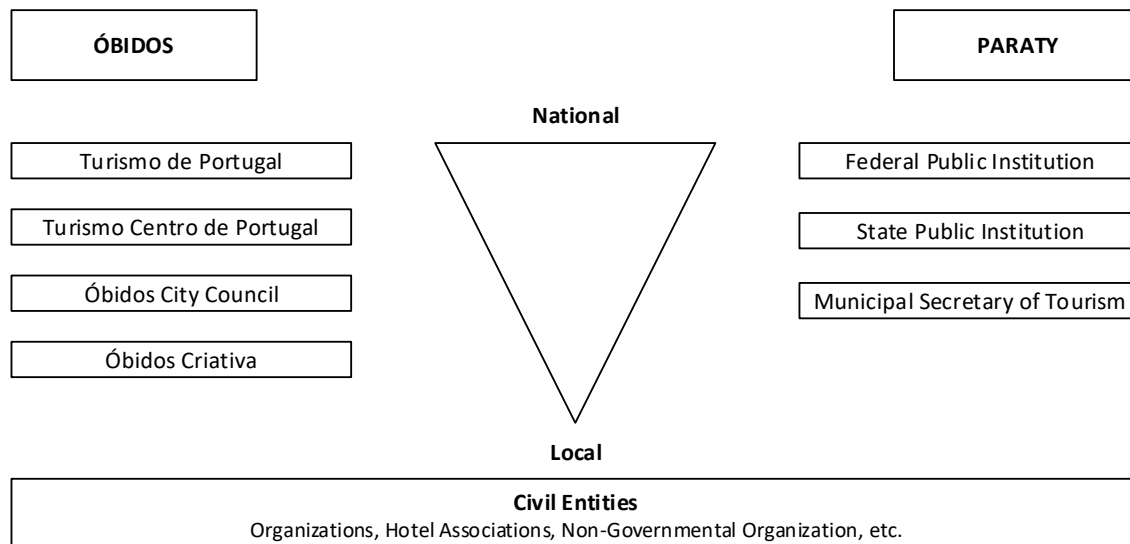


Figure 4. Tourism governance from the public institutional point of view (actors)

The municipality's commitment to creativity has become widespread. In 2009, in Óbidos, the first meeting of canvassers from several countries took place in the Creative Clusters - creative clusters in low density urban areas network. One of the recitals of the network is creativity and innovation as necessary conditions for the economic, political, social and cultural development of cities and regions, and is at the heart of the challenges facing Europe today: globalization, demographic change, climate change and building of the knowledge society. It is also mentioned that despite the commitment to creativity and innovation, each region, city or urban area must base its development strategy on factors that differentiate the territory, promoting its local identity, namely traditional products, native species, and the tangible and intangible heritage (Creative Clusters in Low Density Urban Areas, 2009).

With a project started in 2011 by the city council, in 2015 Óbidos joined the UNESCO network of creative cities, aiming to promote social, economic and cultural development, and based on the creative industries. Óbidos was distinguished in the literary village category. The project resulted in the creation of more than a dozen bookstores in non-standard places, such as a former wine cellar or an old primary school. In the case of Paraty, at this moment there is an intention on the part of the governmental institutions for the submission of an application to UNESCO for a creative city in the category of Gastronomy.

### 3. The main events and its creativity elements

The year 2016 had about 24 events in Óbidos with tourist attraction capacity and distributed among four of the six categories promoted by the model of the planned events of Getz (2012), namely (1) Cultural Celebrations, (2) Business and Trade, (3) Arts & Entertainment, (4) Sport and Recreation. In addition to these four typologies arise (5) Political & State and (6) Private functions (both non-existent or residuals in the municipality).

Within the totality of the events held in 2016 and with an annual periodicity, there are five planned events with highlight and as tourist main attractions in the county (Table 1). Of these five events, there are three (Holy Week of Óbidos, International Chocolate Festival of Óbidos and Óbidos Vila Natal) which are included in the Cultural Celebrations (festivals, heritage commemorations, Carnivals, Mardi Gras, religious rites, pilgrimage and parades) typology. The event Mercado Medieval de Óbidos is included on the typology of Business and Trade (meetings, conventions, fairs exhibitions, markets, corporate events) and Semana Internacional de Piano de Óbidos is included in Arts & Entertainment. Three of these events are promoted and organized by Óbidos Criativa being the chocolate international festival the event that will be analyzed in this paper.

Table 1. Main events, promoters and calendar in Óbidos (2016)

| Event   | Promoter                                      | Calendar                    |
|---|---|-----------------------------|
| <i>Semana Santa de Óbidos</i> (Holy Week of Óbidos)   | Óbidos catholic parish                        | March 20th – 27th           |
| <i>Festival Internacional de Chocolate de Óbidos</i> (Chocolate International Festival of Óbidos) | Óbidos Criativa E.M.                          | March 31st – April 25th     |
| <i>Mercado Medieval de Óbidos</i> (Medieval Market of Óbidos)                                     | Óbidos Criativa E.M.                          | July 14th – August 7th      |
| <i>Semana Internacional de Piano de Óbidos - SIPO</i> (International Piano Week of Óbidos - SIPO) | Associação de Cursos Internacionais de Música | July 17th – 29th            |
| <i>Óbidos Vila Natal</i> (Óbidos Christmas Village)   | Óbidos Criativa E.M.                          | November 30th – January 1st |

Source: adapted by authors from *bol.pt*, *obidos.pt* and *pianobidos.org*

As far as Paraty is concerned, in 2016, 33 events were held with the tourist attraction capacity. Among the five main and selected events (Table 2), namely, Festa do Divino, Bourbon Festival Paraty, the Festival da Cachaça, Cultura e Sabores de Paraty, the Festa da Nossa Senhora dos Remédios (these as Cultural Celebrations typology), and Feira Literária Internacional de Paraty - FLIP (Arts & Entertainment), two events stand out, considered local products according to an interview with a local tourism decision maker:

[...] we have as our product the Festival of Cachaça, the Carnival and the Feast of the Divine, are those that are genuine products, so to speak, that we have as our product. We realize that we cannot give the same treatment for these events, except this year, that we got with the Cachaça Festival, but there is a concern of mine to take better care of the Carnival and Divine Feast, to see if there is more quality, in order to be able to highlight its details, so that it can be better marketed (interview with a Local tourism decision maker in 2015).

Table 2. Main events, promoters and calendar in Paraty (2016)

| Event  | Promoter                               | Calendar             |
|--|--|----------------------|
| Festa do Divino (Holy Spirit Party)  | Festa do Divino and Sectors Organizers | May 6th – 15th       |
| Bourbon Festival Paraty  | Bourbon Street                         | May 20th – 22th      |
| Feira Literária Internacional de Paraty (International Literary Fair of Paraty)                              | Casa Azul Association                  | June 29th – July 3rd |
| Festival da Cachaça, Cultura e Sabores de Paraty (Sugarcane liquor, Culture and Flavours Festival of Paraty) | APACAP and Sectors                     | August 11th – 14th   |

|  |                            |                             |
|--|----------------------------|-----------------------------|
| Festa da Nossa Senhora dos Remédios (Our Lady of Remédios Party) | Catholic church and Sector | August 30th – September 8th |
|--|----------------------------|-----------------------------|

Source: adapted by authors from *paraty.com.br*

Other two events, the Bourbon Festival Paraty and FLIP (external promoted events), which are organized by a show house located in São Paulo (Bourbon Street music club) and the second by a local Civil Society Organization of Public Interest (OSCIPI). The Bourbon elected Paraty to hold a jazz festival for the characteristics of the destination and its relation with the manifestation of culture in its different forms linked to the image of Paraty as a reference destination in Cultural Tourism that is located geographically between the two main Brazilian metropolis, Rio de Janeiro and São Paulo.

### 3.1. The chocolate international Festival of Óbidos and the International Literary Fair of Paraty

Started in 2002 under the name of the European Chocolate Festival, the International Chocolate Festival is, according to the local municipality, an event that has been demarcating this territory among the others and is organized annually through the municipal company Óbidos Criativa. It was the first event of its kind in Portugal and has seen an overall increase in the number of visitors (exception for 2009-2012 due to the economic crisis), and with about 65,000 visitors in 2016 (Figure 5). The premise of the event was initiated by the town hall and at the suggestion of an American resident in Óbidos and who participated in the campaign of Ronald Reagan for the presidency of the USA. This premise was to cross the magical world of chocolate with the medieval atmosphere of the local castle (*expresso.sapo.pt*, 2017).



Figure 5. Chocolate International Festival of Óbidos

Source: *nit.pt*

About the duration of the event, the number of days has been extended: 2002 to 2004 - from Thursday / Friday to Sunday; 2005 to 2012 - 11 days in a row; 2013-2016 - Four weekends (From Thursday / Friday to Sunday 12/16 days). The festival has a different theme every year and from which are based and inspired various activities contained in the program. These activities consist of "activities, exhibitions, games, courses, workshops, shows, points of sale, show cooking, demonstrations, etc., which are different from edition to edition, diversified enough to keep visitors for a few hours in the event, always with reasons of interest "(interview with a person in charge of the festival). The activities also include the creation of chocolate sculptures, and specific activities for children, allowing the promotion of creativity through the creation of

chocolate products (cook it and eat it / do it yourself). In 2016, there were about 58 the number of events within the festival (Table 3).

Table 3. Activities in the events Chocolate International Festival of Óbidos and in FLIP of Paraty

| Chocolate International Festival of Óbidos          | International Literary Fair of Paraty |
|---|---------------------------------------|
| Books releases                                      | Children's literature                 |
| Chocolate atelier (hands on chocolate and smear it) | Cinema sessions                       |
| Exposition  | Conferences with book authors         |
| Fashion show  | Debates                               |
| Food bloggers – Chocolate in network                | Expositions                           |
| Healthy chocolate shows                             | Music shows                           |
| Kids cooking  | Party                                 |
| Magazine release                                    | Performance and visual arts           |
| Making chocolate sculptures live                    | Reading mediation                     |
| Products (chocolate based) releases                 | Reading sessions                      |
| Show cooking with chefs                             | Street dance                          |
| Spectacles with music and other arts                |                                       |
| Tasting   |                                       |
| Theater performances                                |                                       |

Source: retrieved and adapted by authors from [obidos.pt](http://obidos.pt) and [flip.org](http://flip.org)

The International Literary Festival of Paraty (FLIP) has emerged from the interest of local people through the Casa Azul Association and which annually organizes FLIP, since 2003, through the premise of creative diversity. It is the only event in the country with this typology and interaction with the population of various age groups. The FLIP is subdivided into: Flipinha (directed to children) (Figure 6), FlipZona (for young audiences) and FlipMais (theater, music, cinema and literature). This group offers activities such as children's literature, performance, debates, performing and visual arts. Each year a Brazilian author is honored as "a way to preserve, perpetuate, disseminate and value the Portuguese language and the literature of Brazil" (FLIP, 2015).



Figure 6. International Literary Fair of Paraty) – Flipinha zone Source: [feriasbrasil.com.br](http://feriasbrasil.com.br)

At FLIP, the program includes parallel and simultaneous events, bringing together intellectualized audiences as national and international authors and artists, as well as the public in general. In 2016, FLIP counted about 195 events in its program, with 37,036 participants in the program activities, and of 25,000 the number of people who participated as public (Relatório FLIP Report, 2016).

FLIP has been playing an inspiring and leverage role in the development of creativity in the remaining events in Paraty, "It has implemented a very high standard of quality in the events,

others have been following it" (interview with a representative of the Casa Azul association in 2015). The FLIP has also had the capacity to bring external visibility (extra municipal, national and international) of the territory:

[...] the balance is very positive, today Paraty is known also by the Literary Festival (FLIP), nationally and internationally. The Blue House brings as spontaneous media to FLIP project more than 140 million clips (Media clips). About this resource, if we were to pay we would never get it, it is more than the Ministry of Tourism invests in Brazil for the media, and Paraty gets this media from a Literary Festival (Representative of the Casa Azul Association).

### 3.2. Creativity elements in the events of Óbidos and Paraty

Considering the diversity of elements associated with creativity as a promoter of the development of tourist destinations, Richards & Wilson (2007) present a framework where they present the context of creativity in the development of tourism (Table 4); "There are clearly different models for creative development, different concepts of creativity, different creative experiences, different levels of visibility of creative spaces and spectacles, and creativity may be integrated with or separated from other policy areas" (Richards & Wilson, 2007b: 255). They also point out that many tourist destinations seek creative solutions to common challenges in their tourism development. In this sense, they indicate that "it may be possible to identify broad and narrow types of creativity. In the broadest sense, everything that exposes one's identity to some kind of challenge or learning can be creative" (Cloke 2007, cited by Richards & Wilson, 2007b: 256).

Table 4. Contexts of creativity in tourism

|  | <b>Cultural tourism</b>       | <b>Creative spectacles</b>        | <b>Creative spaces</b>                    | <b>Creative tourism</b>      |
|--|-------------------------------|-----------------------------------|---|------------------------------|
| <i>Development context</i>               | Hardware                      | Orgware/<br>Software              |   |                              |
| <i>Spatial context</i>                   | Backdrop                      | Activity                          |   |                              |
| <i>Geographical scale</i>                | Global or local               | Glocal                            |   |                              |
| <i>Timescale</i>                         | Past and present              | Present                           | Present and future                        | Past, present, future        |
| <i>Cultural context</i>                  | High culture, popular culture | Arts, performance, festivity      | Arts, architecture, design                | Creative process             |
| <i>Mode of consumption</i>               | Product focus                 | Performance focus                 | Atmosphere                                | Experience, co-makership     |
| <i>Learning orientation</i>              | Passive                       | Passive                           | Interactive                               | Active skill development     |
| <i>Reproducibility</i>                   | Serial                        | Custom, bespoke, co-production    |   |                              |
| <i>Intervention</i>                      | Economic development          | Economic and cultural development | Cultural, social and economic development | Realizing creative potential |
| <i>Identity</i>                          | Reinforcing                   | Pluralizing                       |   |                              |
| <i>Artistic focus</i>                    | Aesthetic                     | IP                                |   |                              |
| <i>Competitive environment</i>           | Competition                   | Collaboration, co-opertition      |   |                              |
| <i>Engagement in consumption process</i> | Abstract                      | Visual                            | Multisensory                              | Flow                         |
| <i>Heritage</i>                          | Historic or contemporary      | Transcendent                      |   |                              |

Source: Richards & Wilson (2007:258)



From the point of view of the characterization of cultural tourism (from which creative tourism develops) to the characterization of creative tourism itself, there are several elements of creativity that can be found in creative spectacles and Creative spaces. It is assumed that the development and fulfillment of these creative elements in creative spectacles and Creative spaces will allow to identify an evolution and passage from cultural tourism to creative tourism in a certain destination. According to these authors, Creative spectacles are “Creative and innovative activities which then form the basis of more passive tourist experiences as spectacles (i.e. production of creative experiences for passive consumption by tourists)” and Creative spaces as “Creative enclaves populated by cultural creatives to attract visitors (often informally at first) due to the vibrant atmosphere that such areas often exude” (2017a: 20).

Considering Table 5, it can be inferred that Óbidos and Paraty have characteristics related to cultural tourism, cultural spectacles, creative space and experiential tourism that make them destinations in which creativity and tourism are now tangled are now intertwined. Therefore, in the case of Paraty, the Ministry of Tourism awarded the destination a prize in the local economy category in 2015, due to the business leveraged by events such as FLIP, Bourbon Festival Paraty and other local events. In the case of Óbidos, local, national and international commitment through the integration of the municipality in creative networks and with policies in accordance with the objective of stimulating creativity.

Table 5. Creative characteristics in Chocolate International Festival of Óbidos and in FLIP of Paraty

|                                | Óbidos                                      | Paraty                         | Óbidos                                    | Paraty                                    |
|--------------------------------|---|--------------------------------|---|---|
|                                | <i>Creative spectacles</i>                  |                                | <i>Creative spaces</i>                    |   |
| <i>Development context</i>     | Orgware <sup>1</sup> /software <sup>2</sup> | Software                       | -   | -   |
| <i>Spatial context</i>         | Activity                                    | Activity                       | -   | -   |
| <i>Geographical scale</i>      | Glocal – global and local                   | Glocal – global and local      | -   | -   |
| <i>Timescale</i>               | Present                                     | Present                        | -   | -   |
| <i>Cultural context</i>        | Arts, performance, festivity                | Arts, performance, festivity   | -   | -   |
| <i>Mode of consumption</i>     | Performance focus                           | Performance focus              | Atmosphere                                | Atmosphere                                |
| <i>Learning orientation</i>    | Passive                                     | Passive                        | Interactive                               | Interactive                               |
| <i>Reproducibility</i>         | Custom, bespoke, co-production              | Custom, bespoke, co-production | Custom, bespoke, co-production            | Custom, bespoke, co-production            |
| <i>Intervention</i>            | -   | -                              | Cultural, social and economic development | Cultural, social and economic development |
| <i>Identity</i>                | Pluralizing                                 | Pluralizing                    |   |   |
| <i>Artistic focus</i>          | -   | -                              | -   | -   |
| <i>Competitive environment</i> | Collaboration, co-opetition                 | Collaboration, co-opetition    | Collaboration, co-opetition               | Collaboration, co-opetition               |

<sup>1</sup> Sectors, industries, clusters, policies, governance

<sup>2</sup> atmosphere/ambience, fashion, quality of life, perceived diversity

|  |              |              |              |              |
|--|--------------|--------------|--------------|--------------|
| <i>Engagement in consumption process</i> | Visual       | Visual       | Multisensory | Multisensory |
| <i>Heritage</i>                          | Transcendent | Transcendent | -            | -            |

Both the Chocolate International Festival of Óbidos (CIFO from now on) and the International Literary Fair of Paraty (FLIP), the main international event in Paraty, fit as creative spectacles, although they also have the characteristics of creative spaces by having a learning orientation which is also interactive and the intervention impacts cultural, social and economic developments.

Concerning the development context both events have ambiance and perceived diversity in their creative spectacles (Software). In the case of Óbidos, Local policies and governance (Orgware) is added for creativity in its events, being stimulated by the municipal public company. The spatial context is filled by the activity of the event in the two destinations, being carried out in a geographical scale designated by Glocal, where the main themes (chocolate in the CIFO and literature in the FLIP) cross and interact with the characteristics of the territories where they take place.

The events are held annually in a timescale with a character associated with the present and with a sub-theme. In the case of CIFO, in 2016, the theme was water (associated with Óbidos lagoon) and FLIP, associated with an author and a country invited. The Cultural context unfolds through the demonstration of arts, performances and festivity.

The mode of consumption in the spectacles is stimulated by performance focus, both destinations being Creative spaces, as places with atmosphere that, year after year, are establishing an image and a sensation of places of consumption of creative products. The Learning orientation is passive on the Creative spectacles where the public watch creative performances but with opportunity of interaction in the annually created and creative spaces dedicated for these events. About the Reproducibility, both events have custom, bespoke, co-production which make them unique, especially with the creative spaces where spectacles occur, justified by the context with each territory or destination.

In these two destinations, creativity on events is a cultural, social and economic development strategy. There is direct intervention and support by the local public government in Óbidos and in Paraty there is a support from the municipality. It is plural the identity expressed in Creative spectacles where interests are covered, motivations and encouraged the participation of diverse populations, making these events inclusive. Creativity in shows may have this capacity and, as Richards & Wilson (2007: 14) point out, "The emphasis on creativity is also linked to a wider shift towards a plural vision of society in an era of increased mobility and social fragmentation".

In both Óbidos and Paraty, the Competitive environment at events is characterized by collaboration and co-opetition between public institutions and civil entities within each of these, leveraging the development of the creative process. About the engagement in the consumption process the Creative spectacles are characterized as fostering the visual element and the creative spaces as being promoters of multisensorial experiences and feelings. As opposed to cultural tourism where heritage is perceived as historic or contemporary, in creative spectacles as CIFO and FLIP, heritage is seen and experienced as transcendent, formulating individual sensations and diverse living moments.

## Conclusions

Cultural heritage has increasingly become a plural concept, from which different characteristics have been created and adapted, which have been witnessing its use for the creation of new tourism products and with the capacity to allow the differentiation of destinations to others. Governance as a lever for creativity is fostered in Óbidos through the local public governmental institution and with active participation of the community and the different stakeholders. Óbidos Criativa then has the role of creating, promoting and supporting creativity and innovation in events, with public and private support for events. In the case of Paraty, it refers to the absence of a creative orgware with policies and governance that promote cultural empowerment, unfolding in the intentional development of spectacles, spaces and creative tourism. The role of promoter of creativity in the territory has been occupied by the organizing association of FLIP. With the various actions and creative elements presented annually in this event, this organization has caused the stimulation (through competitiveness) to include creativity in the other main events of this destination. The local public governmental institution participates as financial and/or logistical support, and there is also the active involvement of the community and stakeholders.

It is in this line that creativity and innovation have come to affirm themselves as elements capable of producing distinctiveness between the territories and that the peripheral regions tend to be more active in what concerns events and culture that appear Óbidos and Paraty as destinations that, although of small size, have achieved the respective national tourist demarcations through the organized events. These events, as Castells (2009) refers, are increasingly sources of creative experiences which connect the global space of flows with the local space of places.

A paradigm shift or overcoming of the cultural tourism model can be observed, identifying the expectation of people who want to be more interactive than spectators, and to build their own experiences. Although creative tourism cannot yet be identified while existing in these destinations, events have brought creative elements to these territories, making the offer different from the type of cultural tourism.

This context, in turn, opens successive opportunities and possibilities for innovation and creativity, seen as elements capable of producing distinctions between territories and generating new social, cultural and economic opportunities. Creativity emerges as a strategy with the capacity to attract visitors through its capacity in the generation of products and services, and the platforms events are successful and increasingly used to achieve this goal, the tourism development of the territories.



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# The impact of Storytelling on cultural tourists' motivations, authenticity and involvement

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## Abstract

The search for stories has been increasing significantly in recent years given the changing needs and desires of tourists over time, the growth of the economy of experience and of technological innovations. As a result, a type of tourism demand has emerged from experience, a kind of demand which focuses specially on guided tours – storytelling becomes then an important part of the tourist's experience. This article appears essentially because of this assumption. The aim of the present work is to understand how the storytelling experience influences the total experience of the tourists' trip. In its essence, it puts forward a conceptual model in which we suggest that cultural motivations have a positive impact on the tourists' authenticity perceptions, a notion that will in turn have a positive impact on the way tourists are involved in their journey carried out in a context where storytelling plays this great part.

## Keywords

Storytelling, authenticity, involvement, tourism behavior.

## 1. Introduction

Cultural tourism has been considered a product since the 1970s, but it was only in 1990 that cultural tourism was recognized as a high-level mass-market activity (McKercher & Cros, 2002). Cultural tourism is an important product to the development of tourism at international, national, regional or local level.

According to the World Tourism Organization's forecasts, Cultural Tourism was one of the fastest growing market segments, accounting for one fifth of the global tourism market. A trend accompanied by the European Travel Monitor that showed that the European Cultural Tourism market grew by more than 20% in just one decade (Isaac, 2008).

Studies have shown that tourists, especially Europeans, have a preference for places where they can experience and know the way of life of other populations, which is why the figures for the cultural tourism market have grown more than 15% a year over the last decades (UNWTO, 2015). Cultural Tourism appears as the main revenue generator in tourism worldwide. When we compare the value of revenues generated by tourism industry (around 3.2 trillion USD), we found out -according to data from the Global Tourism Industry (UNWTO, 2015)- that an amount of money ranging between 800 billion and 1.1 trillion came from Cultural Tourism.

It has been shown that cultural tourism plays an important role in today's consumer society. It is thus important to understand the profile of the Cultural Tourist in order to approach the market and implement a more effective marketing strategy. Despite its importance, there are few studies on Cultural Tourism, specifically in its relation with Storytelling, an essential dimension of the cultural tourism experience.



Although Storytelling is just a form of communication, it has already become, and has been gaining more and more importance as a differentiating element in the transmission of any message. A feature that adds value and, therefore, is applied today in the business world and studied at the scientific level.

“Storytelling evokes a strong neurological response. Neuroeconomist Paul Zak’s research indicates that our brains produce the stress hormone cortisol during the tense moments in a story, which allows us to focus, while the cute factor of the animals releases oxytocin, the feel-good chemical that promotes connection and empathy. Other neurological research tells us that a happy ending to a story triggers the limbic system, our brain’s reward center, to release dopamine which makes us feel more hopeful and optimistic.” (Monarth, 2014).

This is because Storytelling has the power to familiarize people with what is being told (Lee & Shin, 2014), and strengthens the connection of the tourists to the places, which automatically contributes to give greater value to the product (Mora & Livat, 2013).

In addition, in tourism, storytelling has the power to transform the past into the present, as can be understood by the “tangibility of place [that] is crucial in connecting tourists to the historical past [...] This experience of being-there seems to partially dissolve the dimension of time and to accord place with the power to bring forth a powerful emotionality” (Chronis, 2012, p. 1806), as “Places do not constitute themselves in the form of interesting stories with central plots, coherences, and acting protagonists. That structuring and interpretive task is undertaken by tourism marketers and commercial techniques” (Chronis, 2012, p. 1799). A finding that Edensor (2001) also considers and that locates the emphasis on really becoming storytellers, both in tourist guides and in the local population.

Considering the mentioned aspects that define Storytelling, our main goal is to propose a conceptual model in order to analyze the relationships between cultural motivations, perception of authenticity and involvement of cultural tourists in the search for Storytelling.

## 2. Theoretical Contextualization

Based on the dichotomy between material and immaterial, Cultural Tourism is perhaps the most complete and comprehensive tourist product. That way, and even if it is not the main reason for traveling, it will always be considered in any destination (Isaac, 2008).

Starting from this extended concept of Cultural Tourism, it is important to consider the variety of definitions that have been proposed by different authors over the years in an attempt to effectively define what is Cultural Tourism.

Table 1. Definitions of cultural tourism

| Authors      | Definition/Description   |
|--------------|--|
| Wood (1984)  | "Examples of situations where the role of culture is contextual, where its function is to train the tourist in a general situation and without a particular perspective of a specific cultural identity."  |
| Smith (1992) | "It encompasses the picturesque or the color, the vestiges of a life in the process of extinction that remains in human memory with its outdated houses, its artisan roofs, its cars ... its handicrafts and manual works unrelated to all industrial techniques". |

|                               |   |
|-------------------------------|---|
| Silberberg (1995)             | "Those journeys carried out outside the habitual place of residence whose main or partial motivation is the interest in the historical, scientific or lifestyle aspects offered by a community, region, group or institution."                                      |
| Richards (1996)               | "The way tourists - those people who travel outside their places of residence - consume culture."   |
| McIntosch e Goeldner (1999)   | "All the aspects of tourism through which travelers learn about the history and heritage of others or about their current lifestyles and ways of thinking."   |
| Prentice (2001)               | "Tourism built, offered and consumed explicitly or implicitly as a cultural appreciation, both as experience and as a gain of knowledge".   |
| Beni (2003)                   | "The influx of tourists to host cities that offer as essential product the historical legacy of man at different times, representing from the heritage and cultural heritage, found in ruins, monuments, museums and works of art".                                 |
| McKercher e Cros (2002)       | "Cultural tourism is defined as a form of tourism that is based on the cultural assets of a destination and transforms them into products that can be consumed by tourists."  |
| Smith (2003)                  | "Cultural tourism is passive, active and interactive involvement with cultures and communities through which the visitor gains new experiences of an educational, creative and entertaining nature."  |
| Craik (2003)                  | "Frequent trips to other cultures and places to learn about their peoples, lifestyles, heritage and arts, genuine representatives of these cultures and their historical contexts."   |
| Petroman <i>et al.</i> (2013) | "It refers to the forms of art (culture) in the urban and rural area of a region or country, and is defined as a movement of people to cultural attractions away from their usual place of residence in order to assimilate information and experiences Cultural ". |
| Marujo <i>et al.</i> (2013)   | "Cultural tourism is characterized by the motivation of the tourist to know and experience places where its foundation is based on the history of a certain society."   |

Source: Adapted from Marujo, 2015

Smith (2003), Petroman *et al.* (2013) e Marujo *et al.* (2013) are the definitions that will matter the most to Storytelling, precisely because they address the question of the intangibility of contemporary cultural tourism (Richards, 2001).

"Therefore, the success of cultural attractions must share common characteristics, that is, they must tell a story, make the experience participative, be focused on quality, relevant to the tourist and provide a sense of authenticity" (Marujo, 2015, p. 4).

Undoubtedly, through the evolution of this concept over time it is possible to understand the relevance that Storytelling is assuming in this product, once the History and stories of the tourist destination is assumed as an essential aspect of cultural tourism and since Cultural Tourism, "offers something more or different to both the tourist and the community that welcomes the tourist" (McKercher & Cros, 2002).

## 2.1. Storytelling: the senses of the words

Storytelling has always been the mean to transmit local cultures and traditions, especially when orality was used on the detriment of writing. Today,

“Tourist numbers have boomed as wider processes of globalization and economic change have forced cities to reposition and reimage themselves to compete in the twenty first century economy. [...] Cities have reviewed and re-presented history and heritage, and they have promoted urban cultures and entertainments.” (Maitland, 2010, p. 177).

Words that lead to memorable experiences, a possibility that Tung & Ritchie (2011, p. 1372) highlight when they affirm that “many studies have centered on the interpretation of experiences through the concept of narratives”.

“Overall, it is in our view that storytelling acts to both consolidate and recover experiences from memory, and an appreciation of storytelling provides listeners with a deeper understanding of the intricate lives of storytellers and truly empowers researchers with a heightened sense of awareness for details in these stories” (Tung & Ritchie, 2011, p. 1373).

Thus, it is obvious that storytelling can be understood as a way to understand tourist experiences (Tung & Ritchie, 2011). Above all, when we assume that “since stories are not natural but human inventions, we cannot escape the challenge of multiple and even conflicting narratives” (Chronis, 2012, p. 1810).

Real, imaginary or a mix between reality and fiction, everything will surely depend on the storyteller. But it is certain that “The more the story can communicate a metaphoric, symbolic story, the more power the story will have to engage others” (Pera, Viglia, & Furlan, 2016, p. 52), in the use of what can easily be called metanarrative.

At the same time, with regard to the experiences the

“sensory aspects of destinations have recently been in focus as an important dimension in the process of facilitating positive tourist experiences. The countryside embraces local resources rich in multi-sensory stimuli that could be utilized in the planning and marketing of appealing tourist experiences addressed to segments of tourists, while fitting sustainable local development” (Agapito, Valle, & Mendes, 2014, p. 224).

So, from the importance of the stories/histories to the importance of who tells them and how they are interpreted, “a story creates a more personal connection between the individual and community members and can enable a more attractive positioning of the individual against fellow community members” (Pera, Viglia, & Furlan, 2016, p. 53). In this point, there are those who go even further and say that the, “Storytelling is a co-creative activity that is an example of such empowerment.” (Pera, Viglia, & Furlan, 2016, p. 53).

## 2.2. The tourists: public or agents of stories

Nowadays being a tourist implies a certain predisposition, diversified habits, and the will to escape certain cultural rules. Tourists take over as an integral part of the baggage and thus demonstrate knowledge of what it is to be a tourist (Edensor, 2001). Indeed, “tourism is never entirely separate from the habits of everyday life, since they are unreflexively embodied in the tourist” (Edensor, 2001, p. 61). And, it is indeed these potentialities that come from the various performances that can be considered by the tour guides to better convey their stories.

At this point, it is important to be aware of tourists' indispensability as co-creators in guided tours (Larsen & Meged, 2013). Also in this respect, Edensor (2001) points out that not only are the tourist agents / guides performers, but so can the tourists since they temporarily leave their place of comfort to be themselves somewhere else.

Here the tourist's performance will depend on its symbolic link to the place, but especially on the group where it is inserted, if there is one. Along with the group, the technologies and techniques available to the tourist contribute to the shaping of such performance - guides (books), maps, mobile applications. As the same author points out, it is necessary to consider that tourists are performers mainly, since they often follow recommendations taken from guides (books) and this way end up conditioning the provision of the guide (person) through the interaction that must exist between them (Edensor, 2001).

However, along the more or less active participation of tourists in performances, it is necessary to draw attention to the ease with which they can become storytellers through the use of social networks which allow them to share their experiences with other tourists. And the fact that the new technologies offer a wide range of possibilities that can easily replace the guides (people). These tools create yet another situation: more demanding, and consequently more inquisitive and curious tourists. This new situation will in turn makes it necessary for the guides to be interpretive and creative (Reisinger & Steiner, 2006), so that they can make a difference.

### 2.3. The power of words and the memory of experiences

Used in communicating memories and word-of-mouth promotion, stories are

“Narratives not only appeal to emotions, they also have the power to add a local touch to the standardized tourism destinations. In a world where there is an ever-expanding supply of tourism products, services and destinations, all pretending to be unique but actually often being nothing more than mere copies of each other, stories become one of the very few unique selling propositions many destinations have at their disposal” (Bryon, 2012, p. 29).

In this sense, Bryon (2012) states that,

“More and more tour guide organizations also try to go into the backstage of the tourist destination, to offer more interactive and multisensorial activities, and to develop more tours where the contemporary, local way of life has a more central place. The newest tour guiding types – the relational guides – go even further by sharing personal stories and experiences as a way of developing meaningful relationships with tourists” (p.41).

The role of the guide in the perspective of storytelling is achieved, not only by attracting the attention of tourists, but especially by having a strong impact on the tourists' memory.

In this regard, Larsen & Meged (2013) say that,

“Guiding, like many other tourist services, involves an interaction order where there is close proximity between tourists and front-stage staff who often have to perform at a specific moment to ensure that the service is informative, pleasurable and memorable to those consuming it. It is these moments of truth that determine whether a service succeeds or fails” (p. 91).

This is because tourists will experience and intrinsically change the way they look at the world, "Tourism is a process that encourages learning" (Maitland, 2010, p. 178), especially through the experience and the awakening of the senses, where storytelling is so important.

Real, imaginary or a mix between reality and fiction, everything will surely depend on the story/history. But it is certain that "the more the story can communicate a metaphoric, symbolic story, the more powerful the story to engage others" (Pera, Viglia, & Furlan, 2016, p. 52).

So, tourist guides play a determining role,

"Tour guides are one of the key front-line players in the tourism industry. Through their knowledge and interpretation of a destination's attractions and culture, and their communication and service skills, they have the ability to transform the tourists' visit from a tour into an experience." (Ap & Wong, 2001, p. 551).

More, "Tour guides are the essential interface between the host destination and its visitors. In fact, they are front-line employees who are very much responsible for the overall impression and satisfaction with the tour services offered by a destination" (Ap & Wong, 2001, p. 551). Similarly, Geva and Goldman (1991) consider that,

"The responsibility for achieving the satisfaction of the participants is mainly delegated to the guides who are in a good position to customize the quality of the tours according to the individual preferences and needs" (p. 177).

Therefore, it is increasingly essential that tour guides have prior knowledge of the tourist's profile so they can tailor the visits in terms of narratives, spaces and time, in order to overcome the expectations, allow the tourist's involvement and retain the authenticity of the local and of the stories/history.

#### 2.4. Cultural Motivation

Culture has always been pointed out as being the greatest motivation of the tourists' travels (Towner, 1985). Recent research on why the tourists look for cultural tourism highlights the importance of learning and the desire to live new experiences. Atmosphere is also seen as another and more and more important factor, something which is recognized as an element of the cultural product that motivates tourists (Richards, 2009).

Due the motivations and typologies of Cultural Tourism, recent research have concluded that there are different types of tourists who will be grouped according to the centrality and depth of the experiences based on their motivations (McKercher & Cros, 2002):

- Intentional Cultural Tourist: shows a high involvement with the visited places - travels for cultural reasons and seeks deep cultural experiences.
- Cultural Tourism Sightseeing: travels for cultural reasons, but the experience is superficial. He is selective in the choice of cultural attractions to visit and the trip is oriented towards leisure.
- Cultural Casual Tourist: culture is not the main motivation for the destination choice and the involvement in the experience is superficial. Tourists visit only the most iconic places that appear in the media.

- Incidental Cultural Tourism: does not travel for cultural reasons, but ends up participating in cultural activities, thus developing a superficial experience with them.
- Cultural Tourist Serendipitous: does not travel with cultural motivations, but once in the destination, ends up participating and getting involved in cultural activities, ending up benefiting from a deep cultural tourism experience.

Therefore, it should be clarified that the typology of the cultural tourist varies according to the centrality of the experience, and depends strongly on the travel motivation. While there are tourists who choose a destination because of any sort of cultural experience, there are those who simply do not consider this option when they choose their destinations. Cultural motivation is, therefore, an essential factor to evaluate this type of tourists' behaviours.

## 2.5. Authenticity

"The quest for authentic experiences is considered one of the key trends in tourism. (...) It is helpful for understanding tourists' motivation and behaviour as well as strategic and tactical implications concerning tourists' destination management" (Kolar & Zabkar, 2010, p. 652).

Therefore, authenticity emerges as an important variable of consumption, insofar as it directly influences tourism consumer's behaviour, but also because it can provide tips to tourism agents.

In this sense, and already relating the variable as the tourist product storytelling, Edensor (2001, p. 78) notes that the performances "can be conceived in more ambivalent and contradictory terms, can be understood as intentional and unintentional, concerned with both being and becoming, strategically and unreflexively embodied". However, they should be "continually enacted to retain their power, and the prescriptive conventions and values that inhere in them are rarely disrupted if they are performed unreflexively" (Edensor, 2001, p. 62).

In tourism, authenticity plays a vital role, especially as regards the allocation of tourist value (Taylor, 2001). Authenticity can be evaluated in two perspectives: the authenticity of the object and the authenticity of the experience (Kolar & Zabkar, 2010).

## 2.6. Involvement

Involvement as a factor that can influence consumers' decision-making began to be studied in 1947 and was defined as the relevance that an individual attributes to an object in face of its needs, value and interests (Montgomery & Bruwer, 2013).

A consumer's level of involvement with a product has a considerable influence on the pre-purchase, purchase and post-purchase decisions and allows different types of consumers to be distinguished. One way for marketers to succeed is to understand consumer behaviour patterns and build business strategies (Montgomery & Bruwer, 2013).

In the involvement study it is essential to consider that there are different levels - high or low. These levels depend on factors such as product knowledge, available information, participation / action - proving, experimenting. So, Montgomery & Bruwer (2013) adopted five dimensions of involvement for a better definition of the concept: value, interest, pleasure, importance and knowledge.

In tourism, and as far as storytelling is concerned, involvement is extremely important, since there is a close proximity between the service provider and the client/tourist, and in the case of

interpersonal relationships the degree of involvement increases substantially and competes strongly for customer satisfaction and the success of the tourist agent.

### 3. Conceptual Model

The depth of the experience contributes in a decisive way to the typology of the cultural tourist depending on how deeply it is involved in the cultural experience. There are cultural tourists who seek to get the maximum benefit / knowledge from the places visited, namely through Storytelling, while others engage in activities only superficially. Cultural motivation has therefore a significant impact in the perception of authenticity felt by cultural tourists and their involvement with Storytelling (McKercher & Cros, 2002).

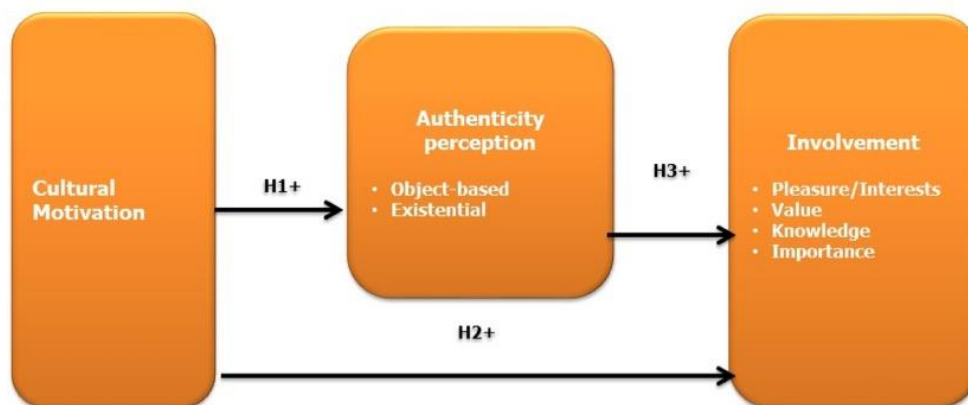


Figure 1. Conceptual model: Storytelling: cultural motivation, authenticity and involvement

Source: the authors

On the other hand, the depth of experience and the authenticity perception influence the involvement with cultural attractions, especially in the Storytelling experience (Kolar & Zabkar, 2010). In this context, the following hypotheses are proposed:

H1: Cultural motivation positively influences the object and the experience of the Storytelling perception of authenticity.

H2: Cultural motivation positively influences the involvement of tourists with Storytelling.

H3: The object and experience of the Storytelling perception of authenticity positively influences tourists' involvement.

### 4. Methodology

The methodology used in this work is based on a review of the existing theoretical literature on Storytelling. This study is based on the analysis of the taxonomy of methodologies applied to the measurement variables that determine the consumption of storytelling, variables like cultural motivation, authenticity and involvement. The authors intend to empirically test the proposed conceptual model by building a measurement instrument - questionnaire - developed based on pre-established scales. Then, it is our intention to collect data from tourists in three Portuguese World Heritage Historic Centers: Oporto, Guimarães and Évora.

All items will be measured using Likert scales and the subsequent data treatment and statistical analysis will be carried out using SPSS and LISREL software, for a confirmatory factor analysis and a structural equation model.

## 5. Results

The proposed conceptual model integrates the variables of consumption, cultural motivation, authenticity and involvement regarding Storytelling consumption. The model considers the cultural motivation; two dimensions of authenticity: (1) object-based authenticity; (2) existential authenticity, based on the authenticity consumption model of Kolar e Zabkar (2010); and four involvement dimensions: (1) pleasure/interest, (2) value, (3) knowledge and (4) importance, adapted from Gursoy & Gavcar, 2003, Montgomery & Bruwer (2013), and Bruwer, Chaumont & Saliba (2014).

Table 2. Construct and variables of cultural motivation in storytelling consumption

| Construct                          | Dimensions                | Variables  | Scale  |
|------------------------------------|---------------------------|--|--|
| Cultural Motivation                |                           | Relax mentally   | Likert 5 points: 1 = totally disagree; 5 = I totally agree |
|                                    |                           | Discover new places and things   |  |
|                                    |                           | Increase my knowledge  |  |
|                                    |                           | Have a good time with friends  |  |
|                                    |                           | Visiting cultural attractions/events   |  |
|                                    |                           | Visiting historical attractions/events   |  |
|                                    |                           | Interest in history  |  |
|                                    |                           | Stories motivate me on site visits   |  |
| Authenticity                       | Object-based Authenticity | The overall architecture and impression of the building inspired me                        | Likert 5 points: 1 = totally disagree; 5 = I totally agree |
|                                    |                           | I liked the peculiarities about the told stories   |  |
|                                    |                           | I like to visit places where stories are told  |  |
|                                    |                           | I search about the stories that are told me later  |  |
|                                    | Existential Authenticity  | I liked special arrangements, events, concerts, celebrations connected to the site         |  |
|                                    |                           | This visit provided a thorough insight into the Romanesque historical era                  |  |
|                                    |                           | During the visit I felt the related history, legends and historical personalities          |  |
|                                    |                           | I like unique experiences  |  |
|                                    |                           | I liked the calm and peaceful atmosphere during the visit                                  |  |
|                                    |                           | I felt connected with human history and civilization                                       |  |
| Adapted from Kolar & Zabkar (2010) |                           |  |  |
| Involvement                        | Pleasure /Interest        | I'm always looking for new emotions  | Likert 5 points: 1 = totally disagree; 5 = I totally agree |
|                                    |                           | Stories interest me a lot  |  |
|                                    |                           | Buying souvenirs that go back to the stories heard on the road transports me into the past |  |
|                                    |                           | Storytelling plays a central role in my life   |  |
|                                    |                           | Opportunity to relax   |  |



|  |   |   |  |
|--|---|---|--|
|  |   | When I hear stories, I feel like I'm part of them   |  |
|  |   | Opportunity to participate in new experiences   |  |
|  |   | I feel fulfilled when I participate in guided tours experiences   |  |
|  |   | Buying a trip is like buying a gift for me  |  |
|  |   | By participating in guided tours I feel a personal satisfaction   |  |
|  |   | Possibility of adventure  |  |
|  | Value   | I share the same values with people who participate in storytelling experiences                           |  |
|  |   | You can say a lot about a person by engaging in storytelling-based experiences or not                     |  |
|  |   | By participating in guided tours I can feel who I really am   |  |
|  |   | By participating in guided tours, people see me as I want to be seen                                      |  |
|  | Knowledge   | Traveling through the past through the stories is one of the most interesting ways to know a place for me |  |
|  |   | The main memories I keep from traveling are the stories I hear  |  |
|  |   | Opportunity to experience different cultures  |  |
|  |   | Comparing with my friends and family, I know a great variety of tourist destinations                      |  |
|  |   | Opportunity to meet new stories / histories   |  |
|  |   | I have the opportunity to teach and share knowledge when I participate in guided tours                    |  |
|  | Importance  | When I choose a destination for a trip, it's no big deal if I make a mistake                              |  |
|  |   | If after a purchase of a trip, my choice proves inadequate, I'm really annoyed                            |  |
|  |   | No other tourism product has as much importance to me as storytelling                                     |  |
|  | Adapted from Gursoy & Gavcar, 2003, Montgomery & Bruwer (2013), and Bruwer, Chaumont & Saliba (2014). |   |  |

Source: the authors

## 6. Conclusion

Tourists are looking more and more for unique, personal, intangible and differentiating experiences. Storytelling, with its power to awake the 5 senses and its capacity to allow people to easily transmit emotional, symbolic and spiritual values, gives life to memories and immortalize times and places. It is a different experience that will meet the desired exclusivity that tourists search for.

The proposed conceptual model intends to measure Storytelling's consumption variables as a tourism product based on cultural motivation, authenticity and involvement. The model can contribute to a deeper understanding of Storytelling as an important experience, and thus help managers to develop more effective marketing and communication strategies that will meet

demanding tourists' expectations. The work also intends to contribute to the development of the scientific literature on tourism and in particular on Storytelling.

There are still some limitations to consider in this study. The proposed conceptual model may not integrate all the determinant dimensions of storytelling consumption, so we propose to include other variables such as destination image or psychographic variables. On the other hand, this is only a theoretical study. Our aim is to deepen the study by collecting empirical data in world Heritage Historic Centers, but other tourism settings and destinations can be studied.

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# **THEME E**

**NEW TECHNOLOGIES APPLIED  
TO TOURISM MANAGEMENT  
AND RESEARCH**

# **TEMA E**

**AS NOVAS TECNOLOGIAS NA  
INVESTIGAÇÃO E NA GESTÃO TURÍSTICA**

## THEME E

We live in an increasingly technological world, an idea which may be a cliché, but is in fact an undeniable reality and the logical corollary of a long and intricate evolution which, deep down, dates back to the root of human nature itself and to its capacity of organizing and identifying as a community.

In this techno-society, especially after the advent of the digital age and the internet, the idea of community started to exist in a truly universal scale. However, globalization - instead of what was to be expected – highlighted the local and regional dimensions of phenomena. However, globalization - instead of what was to be expected – highlighted the local and regional dimensions of phenomena. The field of Tourism was no exception: local identities oppose the trend towards standardization, providing competitive factors of the territories. In a time-space dominated by connectivity and guided by logics of collectivized thinking on social networks, there are many challenges that arise in tourism research, but there are also huge challenges and uncertainties that arise in the planning and management of tourist activities.

## TEMA E

Vivemos num mundo crescentemente tecnológico. Esta ideia é um lugar-comum, mas é também uma realidade incontornável e o corolário lógico de uma longa e intrincada evolução que, no mais profundo do seu âmago, remonta à raiz da própria natureza humana e à sua capacidade para se organizar e identificar como comunidade.

Nesta nossa tecno-sociedade, sobretudo após o advento da era digital e da Internet, a ideia de comunidade passou a concretizar-se numa escala verdadeiramente universal.

No entanto, a globalização, contrariamente ao expectável, veio acentuar as dimensões locais e regionais dos fenómenos. No domínio do Turismo, isso não foi exceção: as identidades locais opõem-se à tendência para a uniformização, constituindo fatores de competitividade dos territórios.

Num tempo-espaço dominado pela conectividade e orientado por lógicas de raciocínio coletivizado em redes sociais, são muitos os desafios que se levantam na investigação em Turismo, mas são igualmente enormes os desafios e as incertezas que se colocam ao nível do planeamento e da gestão das atividades turísticas.

# **Cultural cartography. The use of gis as a tool for spatialization, analysis and representation of cultural manifestations in Mato Grosso (Brazil)**

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## **Abstract**

Throughout the history human societies have in various ways interpreted, represented and spatialized the geographic objects and events that occur in a geographic context. Historically, the map has been used as one of the principal means of communicating ideas, facts and events. Other uses for maps have been to interpret and make sense of daily practices occurring in a spatial and social context. The development of digital cartography and Geographic Information System (GIS) has made new uses of mapping techniques possible and also has revolutionized the procedures of geographic mapping, analysis and representation. In this article, GIS is used to map the main festivals and public celebrations; cultural expressions by the indigenous, African and Lusitanian social groups in the geographical context of the state of Mato Grosso, Brazil. The celebrations and manifestations, that were incorporated in the social memory throughout history, reproduce knowledge and forms of expression that each social group used to manifest its collective identity. The term "cultural cartography" is used to represent and analyze the intrinsic cultural and symbolic dimension in the spatial and daily practices of these groups in relation to their (re-)appropriation of territories in Mato Grosso. The term is also used in order to study the contribution of these groups towards the formation of the culture and identity of the people of Mato Grosso. Cultural cartography is found to be an useful tool for research and planning in regards to preservation of culture, intangible heritage and material heritage.

## **Keywords**

Mato Grosso; Cultural Cartography; GIS; Public Holidays and Celebrations.

## **1. Introduction**

Throughout the history of humanity human society has used various ways to interpret, represent and spatialize the geographic objects and events that occurred in the geographic space. Even before the invention of writing, cartography, as a form of flat geometric representation of the earth's surface, was already known and used by mankind in organizing settlements geographically, and also for representations of everyday practices in societies (religious, economic, political and cultural) at a particular historical moment. A great variety of peoples and cultures have drawn maps and indications of their culture, made with different techniques and materials with content of religious and especially political character, illustrating their power relations and dominant ideologies. Historically the map is the means of communication of ideas, facts, events and of daily practices projected in a social space. In analyzing the role of maps, Simielli ponders that the maps allow us to have spatial dominance and make synthesis of the phenomena that occur in a certain space. In our day-to-day or day-to-day life of the citizen, one can have a reading of space through different information and in cartography by different ways of representing this information. You can also have different

products representing different information for different purposes: tourism maps, planning maps, road maps, land use maps, geological maps, among others (2003:94).

In the metaphorical sense, the term map has always been used in non-geographic academic works by poets and writers in the sense of representation and manifestation of spatial thought as a tool to analyze the intrinsic cultural and symbolic dimension in the spatial and daily practices of groups and society. Precursor of Cultural Geography, Cosgrove (1998) points out that mapping is not restricted to mathematics but that it can also be material or non-material, present or desired, inwardly or in part, experienced, remembered, and designed in various ways. Regarding this, Warren (2004) considers that the maps are much more than papers. They are narratives, conversations, lives and songs lived in a place and are inseparable from the political and cultural contexts in which they are used, as well as social constructions, as Martinelli (1991) asserts.

For a long time, maps were rare and exclusive documents, accessed only by the men closest to the constituted powers, because they contained knowledge considered as strategic. Currently, maps are seen as useful tools in planning and management for preservation, development and innovation in the cultural field. Thus, digital cartography and GIS are useful tools for research of an area, in order to geolocalize activities, organizations and cultural agents. Additionally, these tools can be used to study the geographic manifestation of different spheres of culture. Geographic information systems (GIS) are automated computer systems used to store, analyze and manipulate geographic data, that is, data that represent objects, events and phenomena in which geographical location is an inherent characteristic of information and indispensable to analyze it (Silva, 2001). By offering mechanisms to combine the various datas, through manipulation and analysis algorithms, as well as to consult, retrieve and visualize the contents of the geographic database, GIS allows to spatialize and analyze the complex network that composes the sociocultural practices constructed by the agents in the process of (re-)production and (re-)appropriation of space. These practices have left and leave tangible and intangible records in the cultural landscape and identity of the people of Mato Grosso.

The United Nations Educational, Scientific and Cultural Organization - UNESCO has recognized cultural cartography as a crucial tool and technique for preserving tangible and intangible cultural elements. According to Soto Labbé (2008), cultural cartography is a territorial information model that allows locating the elements of the cultural activity of a territory - its cultural actors, patrimony and collective manifestations, in a system of spatial coordinates that, can be related to each other and analyzed according to their distance, distribution and density of space. This reading may privilege the analysis of variables derived from the territory, such as geoclimatic, sociodemographic, historical and shared social imaginaries.

In order to carry out our research within the proposed theme, we understand that History and Cultural Geography provide us with the theoretical inputs necessary for a proper approach to our object of study, since they allow us to identify the way in different places and moments a given reality are constructed, conceived, imagined, perceived. These constructions of the social world make explicit a field of competition where a variety of forms of appropriation of social codes are at stake. In the mapping work of the Mato Grosso festivities, we give an overview of the many classifications of celebrating, celebrating and congregating. Public rituals or festive celebrations reveal practitioners, members of cultural and political representations, who

positionate themselves in relation to other social groups in these public events. The events reveal the construction of social realities (CHARTIER, 1988: 89) that are (re)-produced in geographic space. The cartographic representations proposed in this work will prioritize everyday life, networks of sociability, popular knowledge, religiosity. In other words, the cartography is constructed by social practices in space and social representations of space lived and territorialized by different social groups in Mato Grosso, Brazil.

The Brazilian state of Mato Grosso is characterized by a diversity of cultural manifestations, festivals and rituals throughout its territory, mixed by the cultural heritage of Lusitanian, indigenous and African. With the purpose of better conducting the discussion of the Mato Grosso's festive and cultural panorama, we divided the festive practices into two sets; the European group of Iberian cultural ancestry, and the Mestizo group of African and indigenous descent. In the territory of Mato Grosso, especially in the Baixada Cuiabana - the oldest occupation area of Mato Grosso - cultural manifestations were considered sacred and profane and were important everyday elements of their cultures. Some of these cultural manifestations were: siriri, cururu, mascarados, boi –a serra, dança do congo, chorado and religious festivals to Catholic saints.

## **2. Cultural Cartography: spatialities and territorialities of Iberian, African and indigenous heritage**

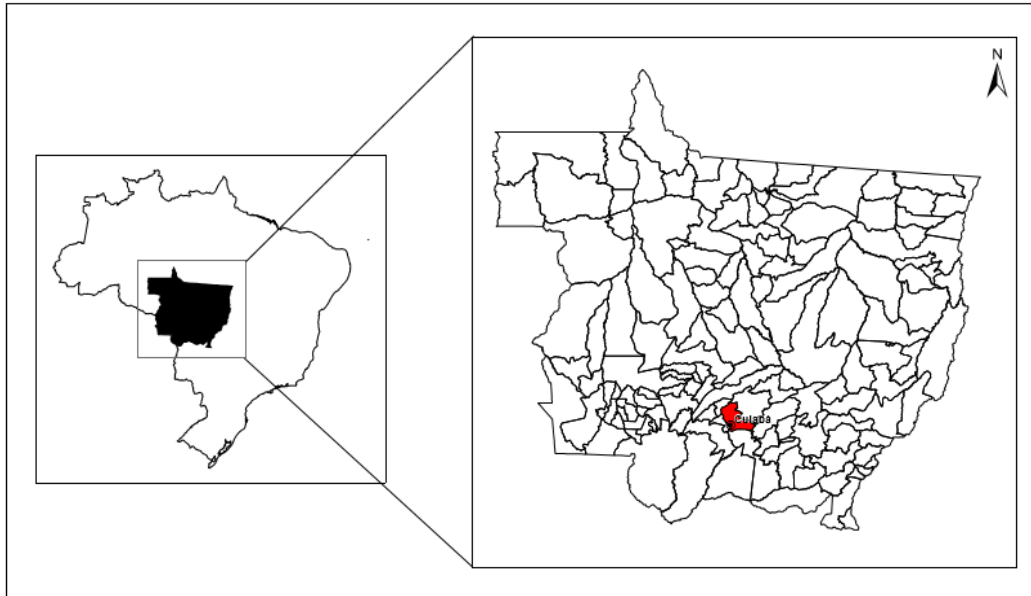
The territoriality of Mato Grosso was built by Indians, Africans and whites, of Spanish or Portuguese origin, in the eighteenth century. The ethnic identity was composed by the preponderance of the regional caboclo, descended from the Bororo, Paresi, Guató, Cayabi, Chiquitos or Bolivian Indians. This is due to the fact that, prior to the process of colonization of the territory, these social groups already possessed their territories in the Pantanal, Cerrado and Amazon Rainforest. Romancinni (2005) points out that the presence of the Coxipones Indians was reflected in the traits of the residents of São Gonçalo, in rhymes and songs, in pottery, in fishing, in the use of medicinal plants, in canoes made of tree trunk, in the folk healer, in the dances, among other cultural practices that evidenced the importance of the role played by the women.

The process of occupation of the territory that today constitutes Mato Grosso dates back to the sixteenth century, when, under the Treaty of Tordesilhas, the entire western area of Brazil, where the present territory of Mato Grosso (see Map 1) forms part of the Spanish Crown. The state of abandonment and the innumerable difficulties experienced by the inhabitants of the captaincies of São Vicente and São Paulo led them to organize, in the late 17th and early 18th centuries, expeditions with the purpose of discovering riches in the interior of Brazil and capturing Indians to market them as slaves (HIGA, 2005).

According to Maria de Fátima Costa (1999), advances on the lands belonging to Spain in the eighteenth century involved clashes between those who went there with those who were already there. The logic of indigenous territoriality is historically antagonistic to the Imotis (white people). The diverse ethnic-cultural groups (re-) produced their ways of life in these spaces, with their own logics of space use, permeated by the representations that guided their social practices. Before the arrival of the first conquerors in the interior of South America, Amerindian societies already occupied these lands, with different cultures and languages, such as Guaicuru, Paiguá, Guató, Pareci, Kayapó, Umutina, Guarani, among others. These groups, which each had



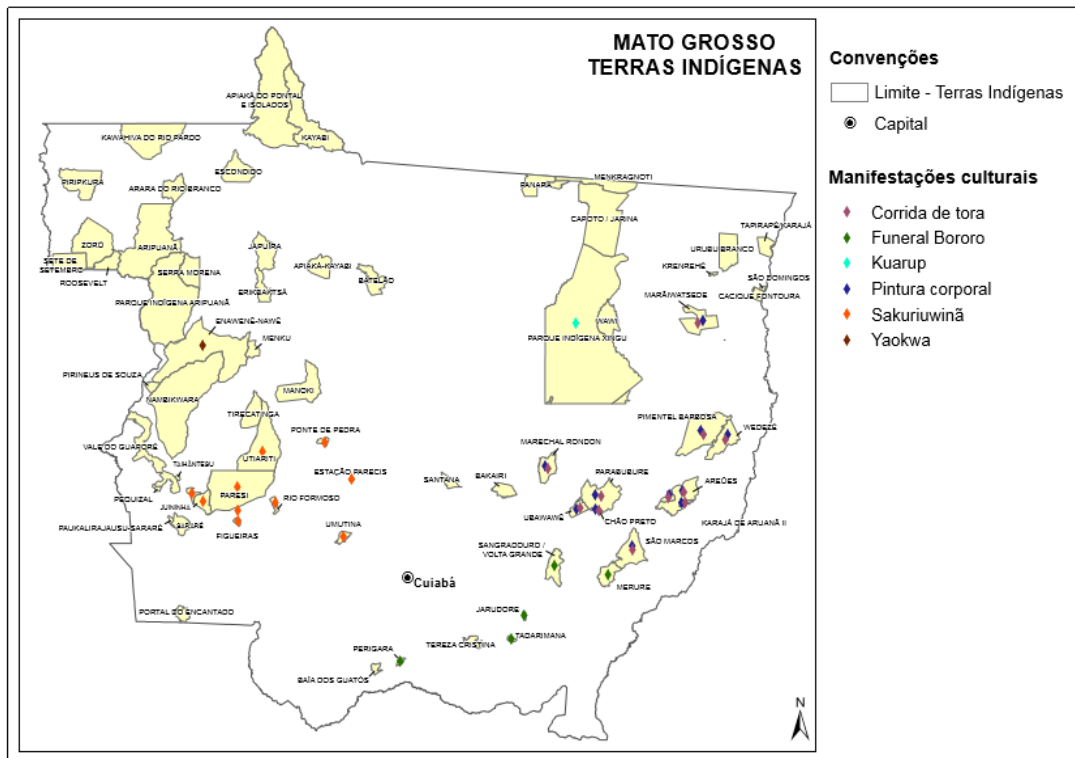
a natural demarcation of their territories, were nomadic, made pottery, some cultivated maize, cotton and established bonds of friendship or fought among themselves. By having acquired, for generations, empirical knowledge of their ecosystems, they maintained harmonious relations with their surroundings.



Map 1 - Current configuration of the Mato - Grossense territory

**Source:** *Rejane Gusmão (2017)*

In this sense, there existed a plurality of cultural characteristics with which the Portuguese conquerors came across. Resistant to the luso-paulista advance, indigenous groups like the Paiaguá and the Guaicurú promoted several assaults against the monsoons that transported people and goods to the population and mining nuclei of the Captaincy of Mato Grosso (SILVA, 2015). We consider that the construction of capitalist territory in Brazil was a product of the conquest and destruction of the indigenous territories, marked by the bloody struggle to destroy their territories. Indigenous peoples were decimated, their territories invaded, plundered, raped, "surrounded" and "confined" in indigenous lands and parks. The space of the indigenous cultural universe has suffered the interference both in space and time by capital. Resisting the process of struggle for its existential and cultural territories, since the territory was part of the Captaincy of São Paulo, there are about 44 ethnic groups distributed in 68 indigenous areas that occupy more than twenty municipalities in the state of Mato Grosso. Presently, the territories of the Surui, Zoró, Gavião, Arara, Rikbatsa, Enawenê-Nawê (Saluma), Nambiquara, Paresi, Umutina and Irantxe stand out; in the center, the Bakairi; in the north, the Kayabi, Apiaká and Paraná; in the South the Bororo; in the east the Xavante, Karjá and Tapirapé. In the Xingu Park, located in the North-Northeast of the State, the Txukarramae, Kayabi, Kamayurá, Kuikuru, Kalapalo, Suyá, Txikao, Trumai and Juruna (OLIVEIRA, 2005) can be analyzed in Map 2.



Map 2 - Current configuration of indigenous territoriality in Mato Grosso and location of cultural areas of intangible cultural heritage

*Source: Rejane Gusmão (2017)*

For these social groups, unlike non-Indians (Imotis), territorial boundaries are not established by the existence of physical landmarks built in the territory, but by symbolic landmarks or elements that compose the natural landscape and both serve as a reference for the territorial boundary and also has existential significance among indigenous peoples. Traditional indigenous territorial boundaries were taught and passed on through the generations. As far as their relation to these traditional territories was concerned, they worshiped their ancestors and their principal gods or sacred entities were represented by a cosmology, comprising past narratives and explaining the origin of the world, of human beings, of the elements of nature and of their ways of living in a group, as Little writes that the environmental knowledge, ideologies and identities - collectively created and historically situated - that a social group uses to establish and maintain its territory. The cosmography of a group includes its property regime, the affective bonds it maintains with its specific territory, the history of its occupation stored in the collective memory, the social use it gives to the territory and the forms of its defense (LITTLE, 2002:4).

The local culture is enlivened and often passed on from generation to generation, through rituals, registered by UNESCO as material and immaterial patrimony of these social groups. In Indian villages, dances and songs are reproduced for specific purposes, such as marriages, baptisms, gratitude for the good harvest, and mourning.

Kuarup is today one of the largest indigenous traditional festivals. Represented by changes of a sacred tree, called Kam'ywá, it is a ceremony of the Indians of the Upper Xingu, in Mato Grosso. The ceremony marks the end of mourning and sadness, while restoring joy, life and the beginning of a new life cycle. It is a reverence to the illustrious dead of the village after a year of

mourning. The Kuarup is an annual ceremony, held at the end of the dry season, between August and September, lasting a few days. The ritual is a reverence for the illustrious dead of the village after a year of mourning, a posthumous homage to Indian leaders and leaders. The ceremony marks the end of mourning and sadness, while restoring joy, life and the beginning of a new life cycle; the sacred place where the Kuarup begins is the Sagihengu. It is also where the indigenous communities affirm that the first Kuarup took place in honor of a woman: the Mother. The ceremony in this place honors life, although it is a funeral ceremony. Another sacred place is Kamukuwaká, considered place of passage of life and death. The place - a cave - was a prison tomb and a place of rebirth, where the chief Kamukuwaka and his relatives were prisoned. These were the ancestors of the Waura people, who were punished by the Sun, as they were envious of its beauty. It was at the Kamukuwaká shelter that the ritual of ear piercing began, a ritual causing the boy to die and the man to be born (IPHAN / UFMT, 2007/20011).

The Yaokwa Ritual of the Enawene Nawe Indigenous People is the longest and most important celebration held by the Enawene Nawe indigenous people, who inhabit a single village located in the northwest region of Mato Grosso State. A fundamental part of the Yaokwa occurs when men leave for the collective fishing of the dam. This practice is a distinguished feature of the Enawene Nawe socio-cosmological complex and is considered the high point of the ritual and the great emblem of the ethnicity. With a duration of seven months, the ritual defines the principle of the annual Enawene calendar, when the men leave for the most important fishing of the year that is made in a collective manner (IPHAN / UFMT, 2007/20011).

The Bororo Funeral begins with the procedure of dressing the dying patient, when the relatives hurt themselves through cutting themselves with piranha shells or teeth. Songs are recited. The next day, at sunrise, the body is buried in a shallow pit, covered with palm leaves and ritually irrigated daily with water to facilitate decomposition. This action is accompanied by dances. A hunt follows for the benefit of the deceased's relatives. The Bororo people believe that death is caused by an evil spirit that must repair the kin of the dead by delivering them a beast. All objects of the dead are burned. After about ninety days, the body is withdrawn from the grave for the second phase of burial, when the bones are washed, painted, adorned and accommodated in a basket and deposited at the bottom of a river or pond (IPHAN / UFMT, 2007/20011), as well as the corn festival that takes place in the Xavantes, Bakayri and other ethnic groups.

Xavante's body painting is different during ordinary life compared to during times when public ceremonies occur. Body ornamentation allows distinguishing individuals or groups, and is used in rituals to express the social categorization of individuals. Its meanings are linked to Xavante cosmology. The designs are made on the trunk, arms, thighs and legs. The colors that are predominantly used are black and red with tinctures of annatto and genipap (IPHAN / UFMT, 2007/20011).

The Tora de Buriti (Xavante) race - The village men form two age groups and on the eve of the race, they go out to cut two logs from 70 to 90 kg each. The log is carried on the athletes' shoulders for a distance of about eight kilometers. The group that arrives first wins. Women also run their own race with smaller logs weighing about 40-50 kg. At the end, the logs are placed in front of the houses as trophies and improvised seats. This celebration promotes great animation and sociability, valuing the strength and endurance of the young Xavante warriors (IPHAN / UFMT, 2007/20011).

Sakuriwinã or Ponte de Pedra is the place of a set of natural formations in the Chapada dos Paresi, with strong elements associated with the cosmology of Halíti, known today generically as the Paresi Indians. Therefore, a landscape identified as an area of great cultural value, because it is in this place that these natives are referenced to their ancestral origins. According to the origin myth of the Paresi, it was from the crevice of a rock, that the creator Enorê gave rise to the first couple. From this couple two twin couples were born. To this myth are associated narratives of aspects that characterize the differences between the world of Indians and non-Indians. From this place the founding hero Wazáre also distributed the groups Halíti by the sources of the tributaries of the rivers Juruena, Arinos, Sepotuba and Guaporé. According to the anthropological studies it is possible to recognize that territoriality and consciousness of common mythical origin are fundamental in the Halíti way of being. The identification and spatialization, by means of cultural cartography, of the mythical territories, as is the case, for example of the "Stone Bridge" that refers to the origin of the Paresi-Haliti people is of paramount importance for valorization and preservation of the cultural practices of these peoples. In addition to the cultural richness and the way of relating to nature, it can be seen that the greatest indigenous expressions of culture are in the form of songs, dances, narratives and, in the process of miscegenation with non-Indian and African men, leave their legacy in the Cultural manifestations, as is the case of Siriri and Cururu, as well as the contribution in the way of life, gastronomy and language of the people of Mato Grosso.

### **3. In the eighteenth and nineteenth centuries: the formation and consolidation of the Mato Grosso spatiality on the western border of Brazil**

The constituent lands of the Captaincy of Mato Grosso, created by the separation of the São Paulo Capitania in 1748, located to the west, were multi-ethnic in their character, likewise as all other territories Portugal conquered in the extension of its colonial empire. An important element of motivation for people to move towards Mato Grosso was the news of gold findings. Similar dynamics were found in other mining territories, such as Minas Gerais and Goiás (SILVA, 2015).

It was necessary to guarantee the effective occupation of these territories located in Spanish territory, established by the Treaty of Tordesillas, of 1494, and this process of territorial advance occurred mainly by the search for mineral riches, like gold and diamond, and for indigenous people to enslave. In this context, people from São Paulo were protagonists of these actions, fundamental for the conquest of territories for Portugal. The gold discoveries gave visibility to the invading Portuguese Crown, who soon tried to provide more control over these spaces that would later configure the two Capitania departments, Cuiabá and Mato Grosso (SILVA, 2015)

The symbolic power of the Crown, aiming at maintaining military and bureaucratic control in its colonial lands, relies on a series of symbols and rituals important for the transmission of cultural values to be considered common to all that were part of the Empire. Thus the festivities, with no apparent use of coercion, constituted a sophisticated persuasive instrument. Public ceremonies, explicit in various types of sacred and profane celebrations, were present in the formation of settlement nuclei, both in villages and in villages (SILVA, 2008).

In the political-economic sphere, in order to concretize territorial policies, the Portuguese Crown began in the eighteenth century the process of land distribution through the assignment of sesmarias to those who were willing to explore the lands of Mato Grosso. With this process of

territorial advance, the settlement of Cuiabá began, and Pascoal Moreira Cabral explored gold on the banks of the Coxipó River in 1719. The discovery of new deposits along the stream of Prainha by Miguel Sutil in 1722 resulted in that the settlement was transferred to the vicinity of the hill of Rosario, and that the former locality was elevated to the category of town - the Vila Real of the Lord Bom Jesus of Cuiabá -, in 1727, by act of Rodrigo César de Meneses (VOLPATO, 1987: 30-31).

The settlement of Cuiabá at the beginning of the eighteenth century represented the establishment of social groups that reproduced the ways of life mirrored in Europe, living under the authority of the same Portuguese monarchy, whose king occupied new territorialities in the Captaincy of Mato Grosso. In this regard, Gilian Silva, in a study carried out in Vila Bela da Santíssima Trindade, states that In the Captaincy of Mato Grosso, and specifically in Vila Bela da Santíssima Trindade and in its surroundings, with the promotion of the royal public festivities, its inhabitants held demonstrations of "Portuguese fidelity". Images of the monarch and local powers were constructed and made explicit with every gesture, word, act, in processions, processions, dances, dances, theatrical performances. It became necessary to consider also the sociabilities established between those who participated in the celebrations and celebrations. These public rituals ended up making sense when living in urban spaces that added representatives of metropolitan power, being one of the demonstrative moments of this meaning to the other settlers. [...] the baroque parties were moments of approach of the settlers with their metropolis, Portugal. In these public ceremonies, one can see the maintenance of the ties of belonging to the social body of the Portuguese Kingdom, hence the importance of reproducing, in the westernmost border areas of the Portuguese-American colony, parties and other functions such as those performed by virtue of weddings, Real births and deaths, assuring the conquest of the territory, reoccupying materially and symbolically the space (SILVA, 2008).

This does not mean that there was only the reproduction of socially oriented European practices, since the Capitania had, as members of its population, social groups from other cultural experiences, such as the many indigenous peoples, as well as the Africans and their descendants, displaced to serve as slave labor in the mining regions of the Captaincy of Mato Grosso, as well as the mestizos, as Gilian Silva (2015) states.

Indians, blacks and mulattos, enslaved or free, constituted the primordial workforce in the main economic activities that developed in the territory of Mato Grosso, operating in the gold mining, in the agricultural activities carried out in the sugar plantations and on the cattle farms, as cowboys, working with swine breeding, leather tanning and meat processing, in sugar and brandy production. In urban centers, they performed domestic services, and also worked in commerce, and in all activities that required manual labor, such as the transportation of water from springs or spouts to their masters' homes (SILVA, 2015).

These groups, important in the economic and social structure of the Mato Grosso captaincy, (re-)produced brands in the territory through their cultural practices, knowledge and religiosity that contributed to the production of Mato Grosso's culture. The miscegenation among the Indians and the white colonizers in the region contributed to the instrumentalization and the musicality, especially of the traditional riverside communities, such as the trough viola, the ganzá and the owl, besides the traditional dances. Cultural practices are manifestations of the traditions of social groups, creating and reinforcing identity ties. An example of the spatiality of

African territoriality and its contribution to the construction of Mato Grosso culture is evidenced in the analysis performed by Gilian Silva (2015). The representative brotherhoods of the Africans and their descendants, captives or freedmen, occupied religious temples of diverse forms in the captaincy of Mato Grosso. In the village of Cuiabá, for example, the Brotherhood of Our Lady of the Rosary used a chapel separated from the space of the main church, probably built in the first half of the 18th century, with the help of the Franciscans. In this same chapel, the brotherhoods of São Benedito and of São Francisco de Paula were established, but with imprecise dates, probably at the end of the eighteenth century or during the nineteenth century. However, the first church built in the village of Cuiabá by the Negroes, as we have seen, took place in its initial years, built in Rua do Sebo, dedicated to St. Benedict, which eventually collapsed in 1722. In that same locality they built an oratory dedicated to Our Lady of the Rosário, in the 1740s. However, another chapel was built by the negroes, located on the outskirts of the village, on Rosario Hill, in honor of Our Lady of the Rosary. This was the temple where the Brotherhood of Our Lady of the Rosary of the Blacks, formed in the first half of the eighteenth century, was approved. It was approved by the Bishop of Rio de Janeiro in 1751 and by the Bureau of Consciousness and Orders in the year 1783. The Brotherhood of Our Lady of the Rosary of the Blacks of Vila Bela collaborated in the construction of the chapel of Nossa Senhora do Monte do Carmo, where it was spatialized at the end of the 18th century. This was a phase in which the capital city was more stabilized, with more houses and the population itself (SILVA, 2015).

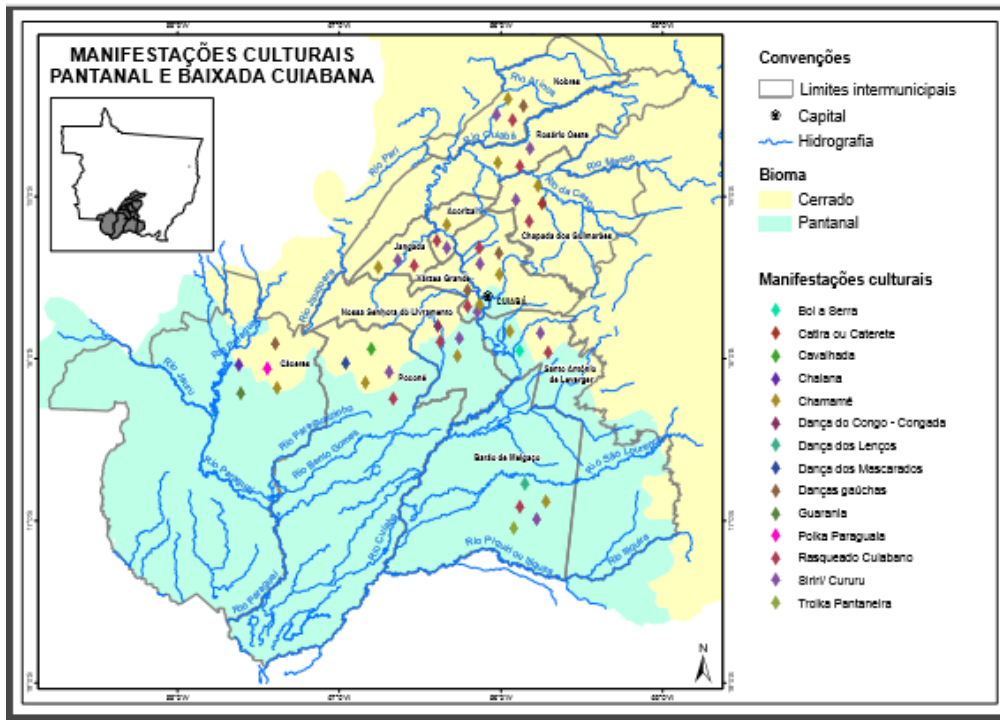
Cultural spaces and practices representative of Africans and their descendants contributed to the construction of the Mato Grosso culture, such as the feast in honor of São Benedito, held in Cuiabá, considered one of the most important tourist attractions in the capital of Mato Grosso.

The arrival of Africans and Portuguese, in the formation of Mato Grosso, is generally associated with the practice of mining, developed since the 18th century. However, even though it was an important practice, driving population displacement in the seventies, mining was not the only economic activity developed in Mato Grosso. The entry of cattle and the consequent formations of the first farms contributed to the maintenance and expansion of the migrant population, as well as the commercial supply routes of the region with products from the South and the North, and, of course, subsistence agriculture.

The productive and population occupation has been consolidated since the 18th century in the area denominated regionally as "Baixada Cuiabana", currently formed by municipalities 13 districts dismembered from the territory of Cuiabá and / or had their origin based on mineral and / or livestock extraction, Várzea Grande, Nossa Senhora do Livramento, Poconé, Santo Antônio de Leverger, Barão de Melgaço, Acorizal, Rosário Oeste, Barra do Bugres, Jangada, Nobres, Chapada dos Guimarães and Nova Brasilândia), besides the northern Pantanal. This region, as territory of older Portuguese occupation, is considered a reference for the identity of the entire state of Mato Grosso.

Territoriality understood as a set of practices and its material and symbolic expressions capable of guaranteeing the appropriation and permanence of a given territory by a social agent constitutes the subjective quality of the social group or individual that allows it, based on images, representations and projects. Become aware of your living space. The Pantanal / Cuiabana territoriality was historically constructed by the presence of the African black and the white of Spanish or Portuguese origin in the territory that leave records in the landscape through

the material and immaterial legacy represented in this work, through the spatialization of public celebrations in this space in the Map 3.



Map 3 - Territoriality of public celebrations in the Pantanal and Baixada Cuiabana

Source: *Rejane Gusmão (2017)*

The existence of social groups along the rivers that drain the "Cuiabana" lowland and the Pantanal plain, notably the Cuiabá and Paraguay rivers, allowed territorial identity constructions linked to the way of living and producing in these spaces. That is to say, the making of the objects that make up the material and immaterial riverside-pantaneira culture expresses the knowledge produced by the generations that inhabited this landscape through the ages, gather knowledge resulting from the conditions imposed by climatic seasonality, hydrography and the miscegenation of indigenous culture, African and white, originating peculiar forms of use of biodiversity.

The production of spatial forms in this territory is the result not only of geological / environmental factors such as climate, hydrography or topography, but they are also shaped by the ways of thinking of a society, of the forms of economic and social organization, by the distribution and appropriation of the natural resources, as well as cultural practices expressed in beliefs and values. It is through their territoriality that the pantaneiro and the riverside people express their conception of the world, its organization, hierarchies and social functions. The relations that the pantaneiro and the riverside ones come to have with their territory where for them the earth was not only a place of production but also the support of a vision of world and connectedness with place. Based on knowledge (re-)produced throughout the generations, the Pantanal-riparian communities and the remnants of quilombolas practiced extensive cattle-raising, fishing, subsistence agriculture, live bait removal, tourism and handicrafts, clay ceramics, the creation of nets and gastronomic products such as sweets and delicacies from local cuisine.

#### **4. Territories of resistance: spatialities of black territories in the Mato Grossoan space**

According to Gilian Silva (2015: 173), the Africans who went to the captaincy of Mato Grosso in the eighteenth century came from three macro-regions of Africa: Guinea-Bissau and Cacheu, from the northern part of West Africa; Costa da Mina, in West Africa, with the main export port being the fortress of São Jorge da Mina in present-day Ghana; Central Africa, in the region comprising Angola and Congo, having export ports in Luanda and Benguela, Angola. Due to its greater commercial connection with the captaincies of Rio de Janeiro, São Paulo and Bahia, the Cuiabá term received African slaves from these captaincies through the southern monsoons and the Goiás-Cuiabá land route. These slaves who landed in Bahia came predominantly from the Coast of the Mine in West Africa, while those who landed in Rio de Janeiro came from several regions of Central Africa, mainly from Angola. The slaves sent to Vila Bela in the second half of the eighteenth century were mostly traded through the Grão-Pará and Maranhão Trading Company, with slaves being landed at the port of Belém and then transported by the Madeira / Guaporé waterway to Reach the capital-town of the captaincy of Mato Grosso.

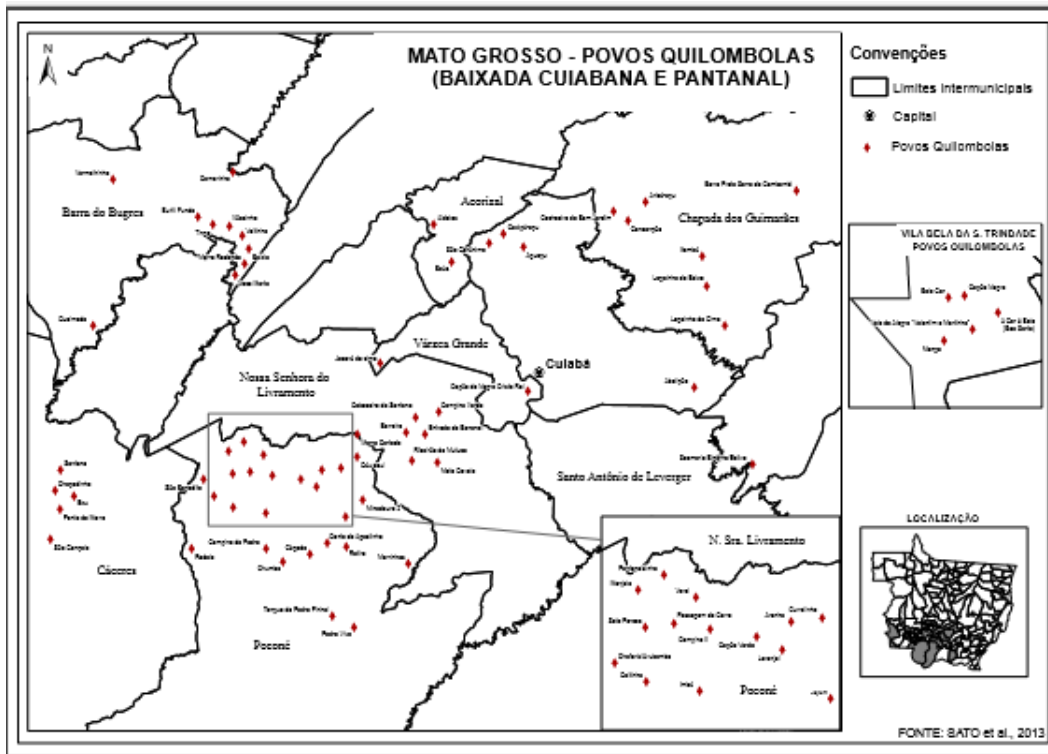
These slaves initially acted only in the Cuiaban mines and their surroundings, but with the expansion of the Guaporé valley conquests in the 1730s, they formed the population of the Mato Grosso mines region. With the creation of the captaincy of Mato Grosso in 1748. With the promotion of trade routes to the north, in the second half of the eighteenth century, supply of African slave labor was also offered through this path (SILVA, 2015: 174).

Gilian Silva affirms that indigenous, African and their descendants, captive or free, constituted the primordial labor force in the main economic activities that developed in the territory of Mato Grosso, acting in the mining of the gold, in the agricultural activities realized in the engenhos and in the Cattle ranches, cowherds, swine breeding, leather tanning and meat processing, sugar and spirits production. In the urban centers, they performed domestic services, in commerce, in all activities that required manual labor, such as the transportation of water from springs or spouts to their masters' homes (SILVA, 2015:177).

Many of the African or Creole captives, that is, the children of Africans born in Brazil, have formed communities resulting from their escape from being enslaved to their masters. The capital of the captaincy of Mato Grosso was named Vila Bela da Santíssima Trindade and located in the Guaporé River Valley. During the 18th century, one of the largest concentrations of escaped slaves settled in this valley, whose settlements are named "quilombos". One of the most important "quilombos" in this region was the Piolho, also named Quariterê, which brought together Indians and half-breeds of blacks and Indians. These social groups, escaping from white exploitation, began to live together in a community of fusion of cultural elements of indigenous and African origin. Between the eighteenth and nineteenth centuries other "quilombos" emerged in Mato Grosso, such as the "quilombos" Mutuca and Pindaituba, located in the Chapada dos Guimarães, the Sepoutuba and Rio Manso, near Vila Maria, now named Cáceres. Although there are many communities remaining in the "quilombos", according to the Palmares Foundation, only a few are legally registered, such as the Taquaral, Exu and Santana "quilombo" communities, Boi de Carro, Rodeio, Chafariz, Campinas 2, São Benedito, Retiro and Urubananba, Baixio and Vaca Morta, Boqueirão and Casalvasco, Abolição, Aguacu, Coxipó Acu and São Gerônimo, Ribeirao do Mutuca and Carrapatinho, besides the Mata Cavalo de Cima community that fights for their rights of ownership over the area Of Sesmaria Boa Vida. Most of these



communities are found in Baixada Cuiabana and Chapada dos Guimarães and Vale do Guaporé, as you can see in map 4.

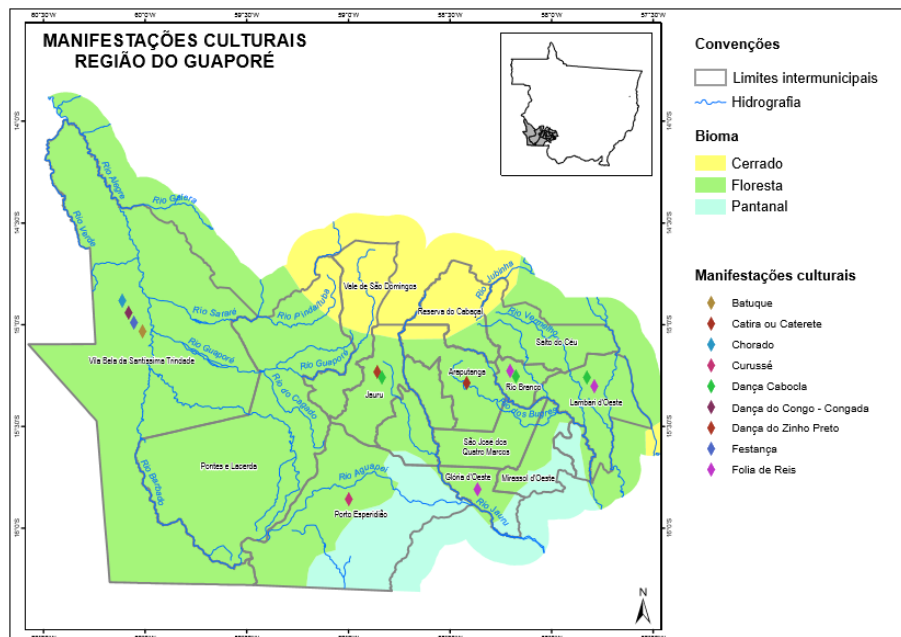


Map 4 - Spatialization of the black territory in the state of Mato Grosso

Source: Rejane Gusmão (2017)

Currently linked by identity bonds, these groups organize themselves with the aim of disseminating ideas and proposals to change Afrodescendant reality through the creation of associations of Quilombolas Remnants, Movements of Black Intelligence (MIN), cultural spaces (Belga Flor cultural space) , Afro Dance Group Ayoluwa, Samba de Raiz and Capoeira groups.

As examples of African-based cultural practices, the dance of the congo or congada represents the resistance of the blacks. It is a dance of dramatic character and colorful dress, associated with the use of swords, symbolizes the struggle between two African potentates, one representing the king of Portugal, the dominator, and the other representing the King of the Congo nation, that is, the Black and dominated Africa. They consist of two distinct parts, the "cantiga" and the "embaixada". In the "cantigas" the religious songs stand out, generally they were part of the festive celebrations of Our Lady of the Rosary and of Saint Benedict and dances that reflected the customs and tribal works. The "embaixada" is part of groups representing the two Kings and also represented the dance of praise to Saint Benedict, the saint who represented the final power to restore peace and forgiveness among the conflict groups. In addition to the Baixada Cuiabana, especially in Nossa Senhora do Livramento, this manifestation is traditional in the Guaporé Valley, notably in the town of Vila Bela da Santíssima Trindade, where the largest number of afrodescendant population was recorded (FERREIRA, 1997) as can be seen in map 5.



Map 5 - Spatialization of cultural manifestations of Afro origin in the Guaporé Region  
 Source: *Rejane Gusmão (2017)*

The "chorada" dance, where chorada means crying our crout is also of African origin. It arose in the period of the colony and empire, when fugitive slaves or transgressors were imprisoned and punished. Then, relatives of the slaves asked for their forgiveness and freedom by dancing the "chorada". It is also held in the towns of Vila Bela of the Holy Trinity and Cáceres, at the end of the feast of St. Benedict, by the women who work in the kitchen to hold their feast.

### 5. New pioneers of the twentieth century: spatiality and new territorialities of European descent from the South of Brazil

Between the first half of the nineteenth century and the first years of the twentieth century, the northern territory of Mato Grosso, whose natural predominance corresponds to the Amazonian domain, together with the western and northern portion of Brazil, constituted one of the little-known regions of the planet. With the desire to investigate and explore this previously unknown space, innumerable travelers and / or representatives of national and foreign scientific expeditions, went with the intention of unveiling or appropriating the numerous riches hitherto exploited. It is present in the social imaginary as a symbolic space, where the limits of barbarism and civilization are located, and geographical area seen as a reservoir of economic resources and population void, being imperative to conquer, populate, explore and colonize (ARRUDA, 1997).

The state of Mato Grosso, evoked as a marginalized space within its nation state, poor and empty, yet endowed with an enormous potential of natural resources, becomes a coveted space to be integrated into the process of economic and social development of the country. To occupy the "empty spaces" existing in the Northern Meso-region of Mato Grosso would be a solution to minimize some of the serious urban and rural conflicts that broke out in different parts of the national territory. Due to emerging interests, these "empty spaces" would be territorialized with the endorsement of the State that, through an eminently strategic policy of "integration", instrumentalizes it, seeking to insert it in the national context. Thus, since 1970, large agricultural and colonization projects have been proposed and implemented in North Mato

Grosso, developing on a material and contemporary basis (new techniques and social relations) (ARRUDA, 1997).

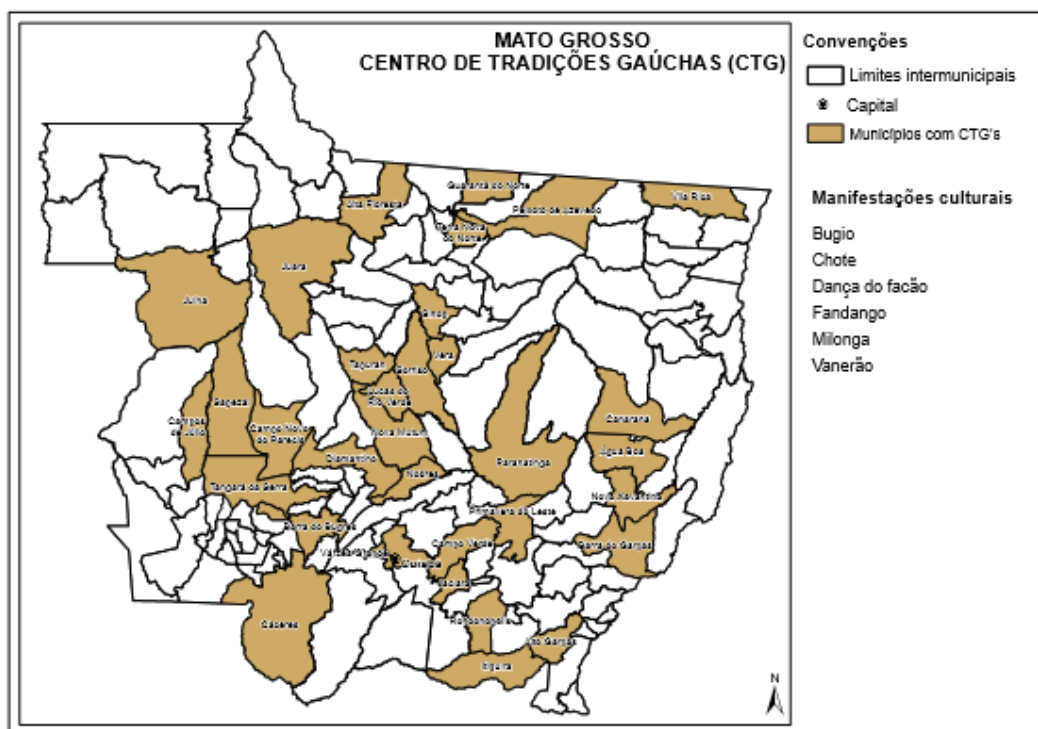
The North Mato Grosso space, previously conceived by the predominance of natural elements, is replaced by technical and manufactured objects, thus gaining a social product dimension. This technical-scientific progress and its socio-political conditions modify the region for the benefit of some hegemonic actors, responsible for new territorial relations, where the close ties and the predominance of economic interest overlap with the social. The social spaces, formerly conceived by existing communities, such as indigenous peoples, within their subsistence limits are territorialized and replaced by the spaces imposed by the new spatial ordering (ARRUDA, 1997).

In this new emerging spatiality, the North-Mato Grosso border as a work emerges with its territories mapped by history, by power relations, where the strategic dimension of space constitutes the main device. The border space changes with the arrival of new forms, with the penetration of companies that carry in their luggage the commitment to meet schedules, whose values are measured by global market standards. And the "new bandeirantes" return to the scene of political cartography to definitively farm the "left-overs" of Mato Grosso's territory, redefining and appropriating spaces, where they sell the dreams, design the cities, select their occupants and forge identities (ARRUDA, 1997).

The migrants who drive to the agricultural frontier are the Southerners or Gauchos, from Rio Grande do Sul and Paraná, descendants of diverse Europeans, especially Germans, Italians and Poles. These came from southern Brazil at the beginning of the century, for the most part, in search of a better life as farmers. The departure of these people from their spaces causes the ruin of many social relations to which they were, above all, submitted, destroying these existential territories, separating them their traditional codes of life and bringing them to a strange space where they have to map new territorialities. With memories of their old place and the scheduling of elements of the experience of the encounter with this new reality. These migrants begin to build in this new space the elaboration of new knowledge capable of giving new meanings and meaning to their lives (ARRUDA, 1997).

The experience and affectivity of these migrants lead to the construction of a space with similar characteristics to those of origin. Therefore, memory becomes a re-creation, bricolage of the places from which they came, through the space practices reflected in space. Individuals, through their daily practices, began to construct this new space and their brands become materialized in the urban landscape, in the reproduction of housing patterns (European style architecture) of the icons present in the place of origin. Social relations and cultural practices are maintained such as typical drinks, dances and parties that stem from the traditions of southern Brazilians (for example "gauchos" from Rio Grande do Sul).

In this sense, we agree with Hall (2006) when he affirms that the identities are processed through a cultural representation and are not born with the individual, but are apprehended through the social relations. The "Gaúcho" identity is, above all, a territorial identity, since it is intimately rooted in the territorial formation of Rio Grande do Sul, which gave particular aspects to these subjects in relation to their culture. In order to preserve and disseminate the Gaúcho tradition, the Centro de Tradição Gaúcha (CTG) is created and operates, notably in the expansion areas of the Mato Grosso border, as can be seen on the map 6.



Map 6- Territories and the new territorialities of the "Bandeirantes do Século XXI"

Source: Rejane Gusmão (2017)

The creation of Gaucho Tradition Centers - CTG's in these areas serves to preserve and disseminate the Gaucho tradition, as well as being used for moments of socialization among the gauchos, acting as a security mechanism as they provide a feeling of affection among people in the middle of a process of adaptation to a different culture. Among the cultural practices common in CTG's and parties in Rio Grande do Sul are the folklore of the dance of the Valsa. These dances and rhythms have no connection with the profane and occur at wedding parties, birthdays, in dances and soirees such as waltz, Facão, Milonga, Chote, Fandango, Vanerão, Bugio, tapas dance. The gaucho folk songs and dances have peculiar characteristics of the colonizers and the immigrants that were inserted in the state, making these cultural codes the main forms of cultural expression of Rio Grande do Sul. The earliest Gaucho musical representation is fandango.

The cultural representations explained in the festive practices are forms found by social groups to affirm and reproduce their identities. The population (re) creates signs, symbolisms and representations of the festive identity, which are materialized through new territorialities that overlap in space. Festive representations that are configured in the territory through the overlapping of cultural manifestations that (re-)produce and / or (re-)invent as a way of survival of the culture or appropriated by some groups as cultural capital to meet the capitalistic logic represented by the tourist activity. The cultural landscape is marked by hybridity, by permanences and ruptures, in which aspects of the sacred and profane have a tenuous border, almost imperceptible on festive occasions. This logic that manifests in the Mato Grosso space reveals the dynamics of Mato Grosso culture and space.

## 6. Between the sacred and the profane: the Mato Grosso festive practices

At the party, the sacred and the profane walked together, "as if within each religious feast there was a profane and vice versa" (DEL PRIORE, 1994). Full of rituals that did not end in the acts, in

the ritual itself, but of what they signaled, that is, the party became public manifestation space for various social sectors (AMARAL, 2000: 36).

The analysis of the festivities constitutes a fruitful space for understanding the processes of social change and even the construction of traditions (HOBBSBAWM e RANGER, 1997). Different authors have discussed definitions of the "party" category, emphasizing the need to think of it in their own social formations, even in the face of general references about their organization. The time of the party is considered as of fantasies and freedoms, and even as a time of utopias. On the other hand, these manifestations are inserted inside a playful territory, in which frustrations, revanches and demands of the groups that compose the society are experienced. Maria Cristina Bohn Martins (2006), when analyzing the celebrations celebrated in Jesuit-Guarani reductions in the Jesuit province of Paraguay, in the period between the beginning of the seventeenth century and the middle of the eighteenth century, understood as a set of collective rituals and celebrations that involve an entire group or community at a particular time, cyclical or exceptional. In this same way, José Ramos Tinhorão (2000) adds that, rather than as a collective use of leisure time, parties were moments of sociability, sometimes provided by ephemeris linked to the power of the State, or by the religious calendar established by the Church. For Camila Fernanda Guimarães Santiago (2003) there were many forms of appropriation, including by the local powers, of these occasions to represent their status and power.

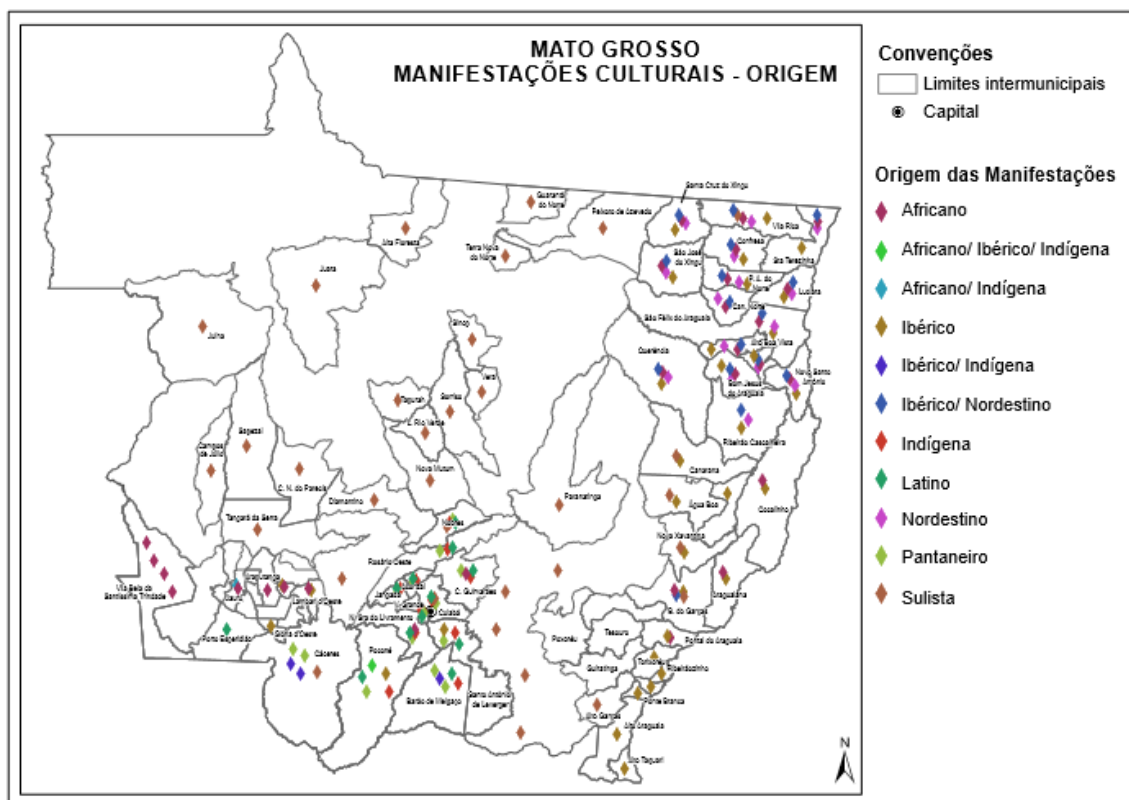
Other authors contribute significant conceptual tools for research on festivals and other cultural practices. Michel de Certeau (1994) made us reflect on the social places of production and on the senses given by the social groups to the general guidelines of conduct and use of space thrown upon them. In this way, the parties present themselves in this perspective as political and cultural representations, involving a whole set of practices that have as references "social places of production" - like the Church and the State, in the construction of belongings.

Moving further, from Roger Chartier we cut the notion of representation tied to that of appropriation. According to Chartier, events, like parties, do not have a universal and fixed meaning, because they are invested with plural and mobile meanings, built in the negotiation between an intention and a reception. Therefore, it is prudent to think about the expectations of the groups, the different forms of appropriations, impressions, perceptions. In this way, symbols, images and objects are not susceptible to a single reading, interpretation or single-way transmission (CHARTIER, 1998, 2002).

In this way, there are many images and meanings on the scene, presenting constructions of the social world that still go through the readings, impressions of the receivers of the images, symbols exposed in ceremonies, rituals, parties. It is evident that this set of symbolic elements registers, in different tonalities of meaning, a given social memory. The production of memory is part of what is visible, apparent and even palpable, although it is produced as a result of the cut that each individual makes of what accompanies, assists, participates and experiences in society. Representation, in this sense, is appropriate in different ways and forms, establishing the possibility of multiple registers, which are constituents of particular memories, that throw a general explanation about society, forming a social memory (SILVA, 2008).

The cultural practices reproduced by the colonizing agents in the territories they occupied were invested with plural and fluid meanings, built in the negotiation between an intention and a

reception. We must think of the expectation of groups, of differentiated forms of appropriation, of impressions and perceptions, even in the face of a range of cultural manifestations such as festivals. In these celebrations the elements of liturgical character were confused with the profane in a spectacle of intense rhythmic coloring, whose characteristics are contained in the insignia of power, in coronation ceremonies, funerals or successions, full of symbolic explanations. We list some of the main festivals or festive functions found in the data collection process for the research. These manifestations, resulting from European (especially Iberian) cultural legacies, indigenous and African, marked the spaces and culture of Mato Grosso, as can be seen in map 7.



Map 7 - Cultural landscapes as a social product

Source: Rejane Gusmão (2017)

Batuques, cururus, jongos and congadas were common practices among blacks enslaved and freed. The batuque, also or caiumba is a collective dance, whose choreography culminates with the umbigada, with a gesture associated with the old fertility rituals of Congo and Angola. Generally called batuques, the night parties of the slaves of Mato Grosso and all of Portuguese America were described as dishonest amusements, above all by representatives of political-administrative and religious power, with the fear that it was a question of pagan rituals and act as a catalyst of social disorder and revolt. The batuque was seen by much of Mato Grosso's colonial society as a threat to order, as a repulse to morality and to the Christian religion, a struggle between the peaceful civilization of the whites against the rebellious barbarism of enslaved Africans and Afro-descendants. These manifestations took place outside religious circles and often intersected with them. They were practices opposed by the constituted powers, distancing themselves from the Catholic and cultural liturgical standard of the modern monarchies, mirrored in Europe, representing an opportunity for blacks to meet. On the other

hand, this was not the only meaning given to the batuque in the colonial period of Mato Grosso. This revelry was also understood as a way of avoiding resistance to everyday slave labor - especially temporary escape and black revolt (SILVA, 2011).

The term "cavalhada" is medieval, constituting a simulacrum of medieval equestrian tournaments, fighting between Moorish hosts and Christian armies. Cavalhada comes from the Castilian caballada and means "portion of horses" or "cattle horse". The word in singular denotes "cavalcade party", but assumes other figurative senses like "venture company" or "prowess". In the plural, the meaning is more specific, the mounts mean "popular fun," in which several contenders, mounted on horses or donkeys, seek with spears or reeds, enlisting them, obtaining various prizes, usually chickens or ducks and other pieces, Suspended from the eye. The Cavalhadas are also called "mouriscas" and "mouriscadas", forms closer to the Hispanic designation of Moors and Christians (SILVA, 2011).

The cavalcade presents the "Battle of Charlemagne and the Twelve Pairs of France" against the Moors of Mauritania. This battle occurred in the sixth century AD, during the Carolingian dynasty, when the Muslims attempted to invade northern central Europe. The victory of Charlemagne under the Moors was spread as a Christian lesson, in which "good" overcomes "evil." The staging of the horses was introduced by the Jesuits into the Brazilian Colony under the permission of the Portuguese Crown for the purpose of catechizing the "gentile" and "African slaves." Initially, they occurred mainly on solemn occasions, when a real celebration was celebrated, in weddings or in the silver wedding of authorities (SILVA, 2011).

Generally, it was staged with 24 horsemen, being 12 Christians and 12 Moors. The knights, for the most part, were members of families holding goods, in the localities where the event took place. This cultural practice appears in the colonial scenery of Mato Grosso as part of the religious festivities, in honor of the saints, and of celebrations and important public celebrations, such as the reception given to the governors and captains-generals and religious authorities, besides the tributes to the events of Births, anniversaries and weddings of members of the Portuguese Royal Family. The number of days for their execution - usually three - was determined by the senates and chambers, but although they were tournaments on almost all festive programs, they were not rigidly fixed on the calendar (SILVA, 2011).

Associated with this festivity, one can see the Dance of the Masked, men adorned with colorful cheetahs and masks. Also decorated in these festivities are the stands constructed of taquara, which support the candles and guarantee greater visual beauty. Its occurrence is recorded in the festivals of São Benedito and Divino Espírito Santo when it involves the whole community of Poconé, and there are records of the presence, as a lower intensity, of this cultural manifestation also in Porto Esperidião and Cáceres.

As a record of the blend of European (Iberian) contradiction, indigenous dances and African rhythms, the masquerade dance stands out. Its peculiarity lies in the fact that it is danced exclusively by men, half of whom wear colorful and richly adorned women's clothes and the other half wear men's clothing. In ancient times, dancing was performed in religious festivities, private parties and in the family home. It is a manifestation typically of the pantano municipality of Poconé. (FERREIRA, 1997).

Another type of Portuguese influence is the São Gonçalo Dance, which honors the Portuguese Saint and was held since the 13th century, inside the churches of São Gonçalo. This saint was

celebrated on January 10, the date of his death in 1259, and was honored in Brazil at the beginning of the 20th century. The dance is considered purely religious, passed from father to son as the *siriri* and *cururu*, integrating the popular parties. The instruments used during the singing are the same as the *cururu*. Danced in a circle, the dresser invites all the presents to kiss and reverence the saint, then begins the song that is repeated several times. It is a celebration of praise that rejoices all participants, the tradition of the feast and dance of São Gonçalo is of paramount importance, keeping alive the faith and popular traditions that many do not recognize as fruit of our past. The festivals of São Gonçalo are most celebrated in the cities of Caceres and Poconé, however in literature it is presented as one of the most fervent traditions in Mato Grosso.

The cult of the saint is part of the Portuguese territoriality and of Catholicism and is part of the Iberian heritage in the Mato Grosso space, because with the images of the saints brought by the Portuguese colonizer, came the beliefs that gave origin to Brazilian popular Catholicism (STEIL 2001) . Thus, most of these feasts follow the dates and Catholic calendar and sometimes coincide with the lay, civil calendar.

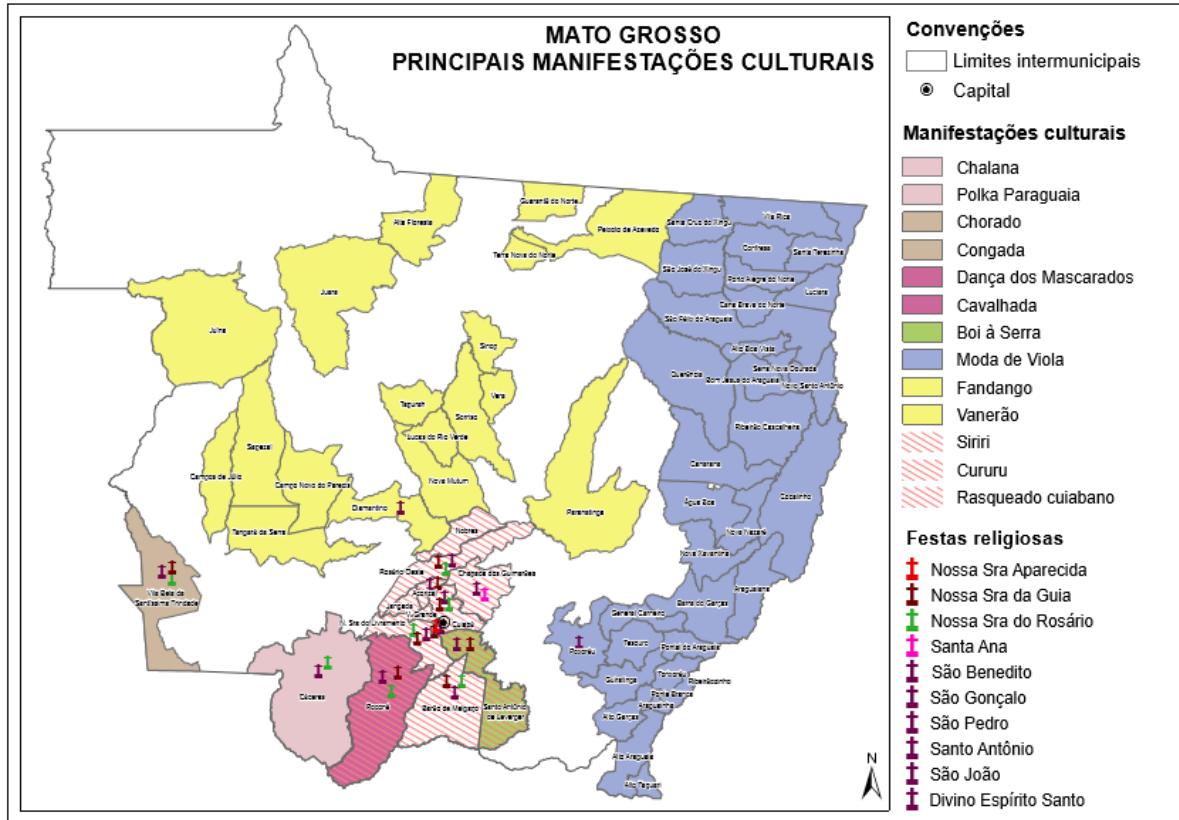
Manifestations of Afro-Christian syncretism, which fuse the spritual entities of *candomblé* with Catholic saints, are common in popular festivals based on the religious calendar. Another aspect to be considered is that with Christianity, the Catholic Church transformed some of the pagan rituals in honor, conferring onto them a sacred character in accordance with Christian principles. In order to elucidate this fact we will use the "Festaça", which is held in the municipality of beautiful Vila of the Holy Trinity, in celebration of the final harvest of rice, beans, corn and cassava, in addition to the celebration of the holy Divine Holy Spirit, Mother of God and Holy Trinity, in addition to Saint Benedict.

The Portuguese saints are also associated with the act of founding the city composing the toponymy of the cities, as well as the symbolic role of patron and protector of the city. The religious festivals have a strong influence that defines the life of these communities. For example, in Mato Grosso, the festivals have a great importance in the regions of older colonization such as Baixada Cuiabana and Pantanal Mato Grosso, such as Acorizal, initially denominated Brotas, in reference to Our Lady of Brotas; Chapada dos Guimarães with denomination of Sant'Ana da Chapada dos Guimarães, in reference to its patron Sant'Ana (Festa de Sant'Ana); Rosário Oeste in reference to its patroness N. Senhora do Rosário; Santo Antônio de Leverger (Patron Saint Anthony); Barão do Melgaço (Feast of Our Lady of Sorrows (patroness), Várzea Grande (patroness of Nossa Senhora da Guia), Cuiabá (Feast of Senhor Bom Jesus de Cuiabá), etc. Besides these saints and their respective parties, there is a preponderance of festivals and religious feasts that are common in most of the territory of Mato Grosso, namely: Feast of Saint Benedict, Feast of the Divine Espirito Santo, Feast of Saint John, Feast of Saint Peter, Feast of Saint Gonçalo, Feast of Saint Anthony, Feast of Our Lady Of the Conception, Feast of Our Lady Aparecida, and Feast of Saint Sebastian among others. These can be identified on map 8 in this article.

The indigenous people leave their contribution to the Mato Grosso dances in the *Siriri* and *Cururu* dances. Milton Pereira Pinho (2010), better known as Guapo, affirms that he affirms the origin of *cururu*, which is uncertain and still very much discussed, but that probably came from *bacururu*, the ritual and funerary dance of the Bororo Indians, and is presented with the



accompaniment of two guitar players who make the first voice (thinner / sharper) and the second voice (thicker / bass) and the ganzá. Both of these dances are often practiced in the cities and rural areas of the "cuadabana".



Map 8 - Cartography of the main cultural events in Mato Grosso

Source: Rejane Gusmão (2017)

The Siriri is a folk dance that is part of the traditional festivals and religious celebrations that stem from indigenous jokes, with Latin American rhythm and expression. Like musical instruments, they accompany the viola of trough, the cracacha (ganzá) and the owl or tamboril. The corporal expression and the choreography transmit the respect and the cult to the friendship, reason why it is known like dance message. It is practiced by children, men and women.

The cururu practice was present in the urban and rural spaces of the Captaincy of Mato Grosso, along with the batuques and congadas. According to Cristiane dos Santos Silva, cururu dance was usually performed at night, which caused concern on the part of the authorities regarding possible excesses of drunkenness or occurrences of crimes. Although it in its songs refers to parts of Sacred Scripture, cururu's dance both was controlled, in view of the threat of revolts of the blacks that participated of it, and also was seen like a space of relief to the tense daily chores of slavery.

Cururu was present in many devotional festivals, demonstrating that practices considered pagan or proper to blacks enslaved or freed mingled with sacred manifestations. In this dance, the presence of men in the development of this function is remarkable. It was attended by at least two singers, one of them playing musical instruments, such as the viola-de-cocho and the ganzá.

The tunic was made of a single piece of wood, seamless and unopened on the front of the instrument, and its five-stringed strings were made from animal guts such as the monkey and the hedgehog. Already the ganzá was a percussion instrument made of taquara. The Cururu was composed of a greater number of singers, most of them played the viola-de-trough; The others, the ganzá and the adufo, which consisted of a tambourine made of cowhide, deer or other animal. Those who did not play the instrument continued to dance (SILVA, 2011).

Challenges were also common in Cururu's wheels, also called as strikes, when a cururueiro challenged the other, who, like the first, responded with another challenge. The Cururu was always singing two voices, one being more serious and one more acute. The singers stand in a semi-circle or wheel and begin the presentation, with comics about the region, praising saints or challenging. The steps of the ballet were marked, turning to the right and stamping feet every two steps. This sound of the junction of the feet gave color to the dance (SILVA, 2011).

The "boi-a-serra" is a diversion deriving from the ox-bumbá and in Mato Grosso the dance being performed in the riverside communities, in the religious and profane festivals of the territory. The main figure is the ox that is usually made by the local community, decorated with colored fabric with embellishments with materials such as wires, fabrics, taquaras, among others and the head made of the animal's own skull, characterizing the other masked characters, varying slightly from place to place. The great playful moment is when the dancer takes the ox on his back and goes out on the streets dancing and playing with the people. The lively tradition of the ox-to-saw remains in the municipalities of Cuiabá and Santo Antônio do Leverger.

The most popular of the dances is the rasqueado. This dance is the one that finalizes the feasts of saints, but there is nothing of sacred in its origin. In the history of this dance we can find the history of the city. In Mato Grosso, the musical expression brings in its historical process a whole saga, which began after the end of the Second War of the Paraguayan War, when the prisoners were confined to the right bank of the Cuiabá river. Here remaining resulting in various influences on customs, language, and mainly folk dances: the Paraguayan polka and the Siriri, giving origin to the mato-grossense rasqueado. (GUAPO, 1985: 35).

The division between sacred feasts and profane feasts seems to be a rather unproductive division in view of the intersection of festive practices in sacred spaces and those of other non-religious social practices. Many dances have been reproduced in festive functions not necessarily related to the events of Catholicism, such as the troika Pantaneira, Chalana, Dance of the Black Handkerchiefs, Milonga, Chote, Fandango, Vanerão, Caerete, Buggio, Fashion of Viola, Pastorinhas, Forró (Northeastern Music), Catira, Pericón, Guarânia, Polka Paraguay, Boi a Serra, Chamamé Pantaneiro and / or Gaúcho. These festive practices made and are part of the rich cultural mosaic of the state of Mato Grosso.

## **Conclusions**

The celebrations that take place in the territory Mato Grosso are composed by legacy elements of European, African and indigenous traditions. These celebrations and manifestations are incorporated in the social memory, reproducing knowledge and forms of expression of the culture that each social group used to express their collective identity. On these occasions, the symbolic power permeated the construction of the territorialities of the social groups responsible for these festive manifestations, producing the cultural identity of Mato Grosso.

The religious syncretism evident in festive practices was the result of the interaction of social groups: Europeans, Africans and Indians. In order to understand the temporal and spatial dynamics of the cultures and their territorializations, GIS contributed greatly to carry out the cultural cartography of Mato Grosso.

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# **THEME F**

**MANAGEMENT OF  
PORTUGUESE INFLUENCED  
HERITAGE WORLDWIDE**

## **TEMA F**

**GESTÃO DO PATRIMÓNIO DE INFLUÊNCIA  
PORTUGUESA NO MUNDO**

## **THEME F**

The list of World heritage sites of Portuguese influence is characterised by its spatial discontinuity, quite diversified geographical locations and different settings in social, cultural and political contexts, placed in territories with different development paths.

This results in quite particular challenges in the process of management of those sites.

On the one hand, by enhancing the connections and memory filiations underlining this network, particularly the Portuguese heritage; on the other hand, by working on the specific special framework of each one of the nodes or vertices of this set.

In addition to the general principles of sustainability and long-term guarantees associated with managing any site listed by UNESCO, the future of this network might be achieved through the balance between this sense of belonging to a collective memory, and the proper local and regional contextualization of each of these assets.

## **TEMA F**

A lista de Sítios Património Mundial de origem portuguesa é caracterizada pela descontinuidade espacial, por localizações geográficas muito diversificadas e pelo enquadramento em contextos sociais, culturais e políticos também diferentes, posicionados em territórios com trajetórias de desenvolvimento também estas diferenciadas. Daqui resultam desafios muito particulares no processo de gestão destes valores patrimoniais.

Por um lado, sustentando as conetividades e filiações de memória que suportam esta rede, em particular a herança portuguesa que é matriz deste conjunto de bens classificados.

Por outro, trabalhando o enquadramento espacial específico de cada um dos nós ou vértices deste conjunto.

Para além dos princípios gerais de sustentabilidade e garantias de perenidade de longo prazo associados à gestão de qualquer lugar classificado pela UNESCO, o futuro desta rede poderá passar pelo balanço e equilíbrio entre este sentido de pertença a uma memória de conjunto e a devida contextualização local e regional de cada um desses valores.

# **Dimensões do patrimônio cultural da capitania de Mato Grosso. Os grupos sociais na formação da fronteira oeste da América portuguesa (1719-1822)**

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## **Resumo**

A pesquisa analisa as dimensões do patrimônio cultural do Mato Grosso - Brasil, na perspectiva da atuação dos grupos sociais que formaram essa região de fronteira luso-americana com os domínios espanhóis, no período de 1719 a 1822. O perfil de sua população, com seus grupos constitutivos, foi estudado, bem como seus espaços de vivências, territorialidades, saberes e fazeres, constituidores de suas identidades. A temática investigada foi construída a partir da leitura paleográfica e transcrição de fontes documentais existentes em arquivos brasileiros e portugueses: Arquivo Público do Estado de Mato Grosso – APEMT; Casa Barão de Melgaço – CBM; Arquivo Nacional da Torre do Tombo – ANTT; Arquivo Histórico Ultramarino – AHU; Biblioteca Nacional de Portugal – BNP. A descoberta de veios auríferos, no século XVIII, motivou muitos deslocamentos populacionais para os espaços formadores da Capitania de Mato Grosso, que possuía como componentes de sua população grupos sociais de culturas diversificadas. Havia uma pluralidade de características culturais com as quais se depararam os conquistadores portugueses. A atuação da população foi fundamental no processo de produção e reprodução dos seus bens patrimoniais, não contando em boa parte das vezes com os recursos provenientes dos bens da Fazenda Real, apesar da arrecadação de diversos tributos por parte da Coroa lusitana. Tanto nas áreas rurais como urbanas, os grupos sociais construíram roças, quilombos, aldeias indígenas, missões religiosas, casas, arraiais e vilas, igrejas e capelas, e do mesmo modo promoveram festas, celebrações e demais práticas culturais.

## **Palavras-chave**

Mato Grosso; Fronteira; Patrimônio Cultural.

## **1. Introdução**

A pesquisa analisa as dimensões do patrimônio cultural do Mato Grosso - Brasil, na perspectiva da atuação dos grupos sociais que formaram essa região de fronteira luso-americana com os domínios espanhóis, no período de 1719 a 1822. A população da capitania de Mato Grosso atuou na produção do seu patrimônio material e imaterial, construindo seus espaços de vivências, territorialidades, saberes e fazeres, componentes de suas identidades culturais.

A temática investigada foi construída a partir da leitura paleográfica e transcrição de fontes documentais existentes em arquivos brasileiros e portugueses, que guardam parte considerável da memória histórica sobre o Mato Grosso – Brasil, senda essas instituições: Arquivo Público do Estado de Mato Grosso – APEMT; Casa Barão de Melgaço – CBM; Arquivo Nacional da Torre do Tombo – ANTT; Arquivo Histórico Ultramarino – AHU; Biblioteca Nacional de Portugal – BNP. As fontes consultadas indicaram variadas pistas sobre a atuação dos grupos sociais na produção do seu patrimônio cultural, material e imaterial, entre os séculos XVIII e XIX.

Alguns autores contribuíram para a análise proposta. Michel de Certeau (1994; 2002) nos fez refletir sobre os lugares sociais e sobre os sentidos dados pelos grupos sociais às orientações gerais de conduta e de uso do espaço lançadas sobre eles. De Roger Chartier (1988) recortamos a noção de representação vinculada à de apropriação como chave explicativa fundamental na construção do objeto de estudo. É importante destacar das análises empreendidas por Chartier,



que os eventos, acontecimentos, não possuíam um sentido universal e fixo, pois estiveram investidos de significações plurais e móveis, construídos na negociação entre uma intenção e uma recepção. Portanto, torna-se prudente pensar nas expectativas dos grupos, nas diferenciadas formas de apropriações. Desse modo, percebe-se que a produção do patrimônio cultural é dinâmica, fluida. Para Chartier (2002), os grupos sociais tomaram ao longo de suas experiências sociais diferenciadas estratégias diante de sistemas normatizadores da vida social. Norbert Elias (1995) também contribui nessa discussão teórico-metodológica. Para Elias, torna-se necessário construir cada objeto de pesquisa no interior do sistema de relações que lhe conferem fisionomia e perfil próprio. Segundo esse autor, no processo de investigação é necessário tomar o cuidado para que os valores culturais do pesquisador não o impeçam de apreender elementos de formações sociais do passado e que contemporaneamente possam parecer secundários.

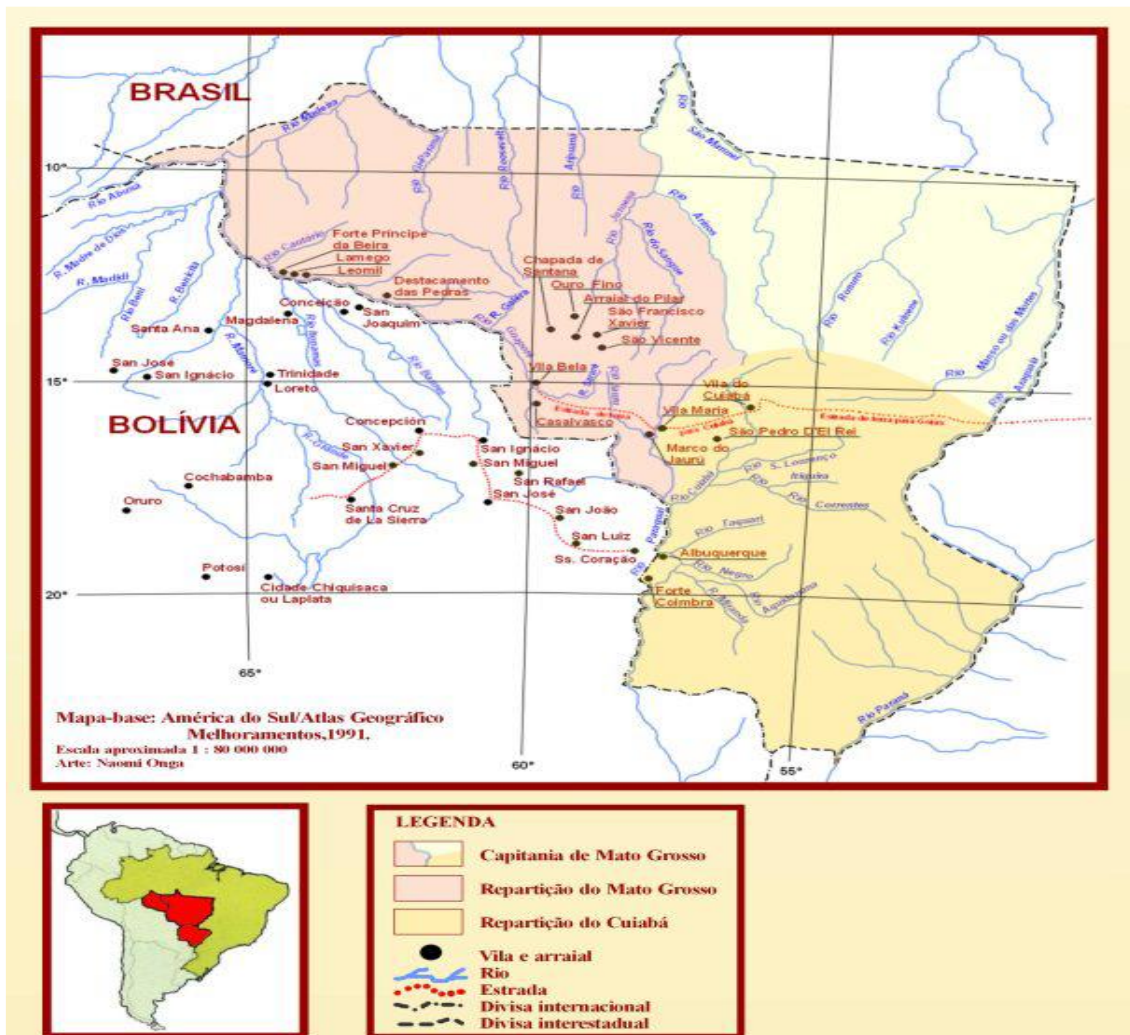
Havia uma pluralidade de características culturais com as quais se depararam os conquistadores portugueses. A atuação da população foi fundamental no processo de produção e reprodução dos seus bens patrimoniais, não contando em boa parte das vezes com os recursos provenientes dos bens da Fazenda Real, apesar da arrecadação de diversos tributos por parte da Coroa lusitana. Tanto nas áreas rurais como urbanas, os grupos sociais construíram roças, quilombos, aldeias indígenas, missões religiosas, casas, arraiais e vilas, igrejas e capelas, e do mesmo modo promoveram festas, celebrações e demais práticas culturais.

## **2. A formação da capitania de Mato Grosso e dos elementos do seu patrimônio cultural**

A capitania de Mato Grosso (Mapa 01) teve sua formação decorrente do avanço bandeirante luso-paulista, visando o aprisionamento indígena, e da descoberta de veios auríferos. Sua localização era o espaço de fronteira com os domínios castelhanos, territorialidade que esteve reivindicada pelas Coroas ibéricas durante o século XVIII. Portugal e Espanha através dos Tratados de Limites setecentistas buscaram afirmar suas posições geopolíticas sobre um vasto território, ocupado por muitas nações indígenas, bem como pelos brancos, africanos e seus descendentes, escravizados ou livres. Todavia, essa fronteira não se referiu apenas às demarcações materiais do espaço. Foi uma ação de conquista, existindo uma fronteira plural, caracterizada por encontros e desencontros de culturas distintas. As nações indígenas existentes nas terras do Oeste luso-americano possuíam seus códigos sociais próprios, como línguas, costumes, práticas culturais e suas relações com o meio circundante singular aos olhos europeus. Os portugueses relacionaram-se com essa diversidade étnica, presente também nos grupos de africanos e seus descendentes que compuseram essa configuração social.

Na formação da capitania de Mato Grosso, os grupos sociais produziram os elementos constituidores do seu patrimônio cultural. De 1719 a 1736, verificou-se os momentos iniciais da ação de conquista do espaço pelos bandeirantes, sertanistas e mineradores. Esse grupo conjugou uma aliança com o Governador e Capitão-General Rodrigo César de Meneses, da capitania de São Paulo. De 1736 a 1752, as instituições representativas da monarquia portuguesa passaram a ser ocupadas por reinóis, ocorrendo a substituição dos luso-paulistas pelos nomeados do rei. Com o advento do Tratado de Madrid, a defesa da fronteira Oeste provocou o desmembramento da capitania de São Paulo, dando origem à criação da capitania de Mato Grosso, em 1748, e a fundação de sua vila-capital, Vila Bela, em 1752. Na segunda metade do século XVIII, verificou-se a atuação dos governadores e capitães-generais, da recém

criada capitania de Mato Grosso, no intuito da consolidação da fronteira com os domínios hispano-americanos, por causa das negociações dos Tratados de Limites, em especial o de Madrid, de 1750 e o de Santo Ildefonso, de 1777.



Mapa 1: Capitania de Mato Grosso (séculos XVIII e XIX)

Fonte: FERNANDES, 2003: 83

As terras situadas à Oeste da América portuguesa foram conquistadas através do avanço bandeirante luso-paulista sobre territórios que pertenciam à Espanha, segundo o Tratado de Tordesilhas de 1494. Os bandeirantes luso-paulistas almejavam aprisionar indígenas, para uso como mão-de-obra em diversas atividades, e extrair metais preciosos. Essa fase foi a da ocupação desse espaço pelos bandeirantes, sertanistas e mineradores. De 1719 a 1736, uma elite formada pelos primeiros conquistadores estabeleceu uma aliança com a monarquia portuguesa através do Governador e Capitão-General Rodrigo César de Meneses.

Muitos arraiais, minas e lavras foram surgindo com o desenvolvimento da extração aurífera, sobretudo nas proximidades dos rios Coxipó e Cuiabá. Entre os anos de 1718 e 1722, foram construídas capelas nos núcleos iniciais da mineração, a de São Gonçalo e a de Nossa Senhora da Penha de França, nos arraiais de São Gonçalo e da Forquilha, nas proximidades do rio Coxipó (SÁ, 1975: 13).

No ano de 1722, com a descoberta de novas lavras às margens do córrego da Prainha, afluente do rio Cuiabá, foi erguido o arraial do Cuiabá, o que fez com que a concentração populacional se desse no entorno dessa jazida aurífera. Nesse espaço, levantou o Capitão Mor Jacinto Barbosa Lopes uma igreja à sua custa, coberta de palha, dando-lhe o título de Igreja do Senhor Bom Jesus. Ainda nesse arraial foi levantada a primeira capela construída pelos pretos, dedicada a São Benedito, no lugar chamado depois de Rua do Sebo, mas que acabou ruindo, não sendo novamente levantada (SÁ, 1975: 11-15). Em 1724 surgiu o Arraial de Nossa Senhora da Conceição, com uma capela dedicada à santa, Arraial do Ribeirão, Arraial do Jacé, Lavra do Mutuca; em 1728, as Minas do Alto Paraguai; em 1730, o Arraial dos Cocais (JESUS, 2011: 25-26).

A exploração aurífera nessa região passou a ser controlada pela Coroa portuguesa. Em 1726, o Governador e Capitão-General da capitania de São Paulo, Rodrigo César de Meneses, se deslocou para as minas cuiabanas para instalar uma estrutura de fiscalização, controle, administração e justiça em nome da metrópole. Isso representou o começo da mudança do controle das minas auríferas das mãos dos mineradores e sertanistas para as mãos dos representantes da monarquia. Isto se fez sentir com a elevação do arraial do Cuiabá para a categoria de vila. No dia 27 de janeiro de 1727, Rodrigo César de Meneses mandou levantar pelourinho, escolheu algumas casas para servir de sede do Senado da Câmara (SÁ, 1975: 19).

Segundo Carlos Alberto Rosa, a criação da vila garantiu condições básicas de governabilidade, no interior de um sistema comum a outros domínios portugueses (ROSA, 2003: 16). Para Luiza Rios Ricci Volpato, com a Vila do Cuiabá se estabeleceu uma ligação maior do núcleo com a sede da capitania de São Paulo, da qual fazia parte. Esse ato representou perspectivas de estabilidade do povoado (VOLPATO, 1987: 31).

Na década de 1730 a rede de igrejas cresceu com o avanço da expansão de ocupação das terras próximas às zonas de mineração. Diversas localidades se dedicaram ao plantio de vários gêneros alimentícios que serviam para o abastecimento da população, bem como a instalação de engenhos. Uma capela dedicada a Santo Antônio foi construída dentro do espaço da freguesia do Cuiabá, a partir de 1734, em terras de engenhos situados no entorno do rio Cuiabá, conhecidas como Rio Cuiabá Abaixo. Essa construção foi realizada através da doação de parte das terras pertencentes aos engenhos dos capitães Manoel de Silveira Sampaio e João Mendes Coelho (ACBM/IPDAC Pasta 90 – nº 2117 Caixa 24).

Ainda nessa fase, encontraram ouro no rio Galera, próximo ao Sararé, afluentes do rio Guaporé. As características da vegetação desse espaço, com florestas mais densas, próprias de uma região amazônica, serviram para nomear as novas minas como “Mato Grosso”. Foi intenso o fluxo de pessoas para essas novas lavras, levando à formação de arraiais e igrejas, como Arraial de Nossa Senhora do Pilar, Arraial de Santa Ana e Arraial de São Francisco Xavier da Chapada.

O agrupamento de pessoas no Arraial de Nossa Senhora do Pilar ocorreu por volta de 1735. Estava situado entre o Arraial de Santa Ana e as lavras do córrego Monjolo (LUCÍDIO, 2004: 16). Possuía uma capela, construída pela iniciativa de seus moradores, dedicada a Nossa Senhora do Pilar (AMADO e ANZAI, 2006: 48). Com o passar dos anos, essa capela precisou ser reedificada, por estarem suas paredes feitas de madeira muito danificadas, “comidas de cupim”. O aumento da população desse arraial também fez com que reedificassem a capela de Nossa Senhora do Pilar, arcando seus moradores com os custos (AMADO e ANZAI, 2006: 59).

Ainda em 1735 também teve início à formação do mencionado Arraial de Santa Ana, localizado nas proximidades do rio Sararé, afluente do rio Guaporé, formador da Bacia Amazônica. Os moradores desse arraial também construíram uma capela, feita de pau-a-pique e coberta de palha, dedicada à Santa Ana, nomeadora da povoação. Posteriormente, foi o templo religioso reedificado e coberto de telhas (LUCÍDIO, 2004: 17).

Um novo processo se desenvolveu de 1736 a 1752. Instituições representativas da monarquia portuguesa passaram a ser ocupadas por reinóis, ocorrendo a substituição dos luso-paulistas pelos nomeados do rei. Isto se intensificou com a criação da capitania de Mato Grosso em 1748 e com a fundação de sua vila-capital, Vila Bela da Santíssima Trindade, em 1752. Essa foi uma fase de crescimento da mineração, alcançando produção de cerca de uma tonelada por década. Isso se fez refletir na quantidade de igrejas e capelas formadas nessa fase.

Em 1736 foram lançados editais para repartir datas minerais que levaram à formação do Arraial de São Francisco Xavier. No ano seguinte, os mineiros dessa povoação construíram uma capela de madeira e coberta de palha dedicada ao santo nomeador do arraial. Foi grande o crescimento econômico e populacional desse arraial, fazendo com que no ano de 1739 possuísse a maior parte da população das Minas do Mato Grosso (LUCÍDIO, 2004: 15-19). Todo esse desenvolvimento fez com que no ano de 1743 sua igreja se tornasse sede de uma nova freguesia, responsável pelas capelas das Minas do Mato Grosso.

Na década de 1740, a população do Arraial de São Francisco Xavier construiu uma nova igreja, de pedra e coberta de telha de barro cozido. Essa iniciativa obteve auxílio financeiro da Irmandade do Santíssimo Sacramento (AMADO e ANZAI, 2006: 47). Os membros dessa irmandade do Arraial de São Francisco Xavier eram mineradores e em nome dessa associação ajudaram a custear a re-construção de sua igreja. É provável que essa associação tivesse datas minerais ou angariasse recursos provenientes mineração.

Ainda nessa década de 1740, no reinado de D João V, diante da proximidade de seu governo com o Papado de Bento XIV, a Igreja reconheceu o direito da posse portuguesa dessas áreas mineradoras, considerada zona de litígio entre as Coroas ibéricas. Foi criada a Prelazia de Cuiabá sobre essa área no ano de 1745. A criação da Prelazia de Cuiabá e da capitania de Mato Grosso foram eventos relacionados, como demarcações do poder religioso e civil. Esse espaço era pertencente à capitania de São Paulo e sua individualização serviu de importante ação geopolítica, sobretudo por ser acompanhada da construção de uma vila-capital localizada nos limites da fronteira com os domínios espanhóis. Vila Bela foi fundada pelo Governador e Capitão-General D. Antônio Rolim de Moura, às margens do rio Guaporé, na região das minas e arraiais do Mato Grosso, em 1752.

A segunda metade do século XVIII, terceira fase do desenvolvimento da estrutura social da capitania de Mato Grosso, bem como de seu patrimônio cultural, caracterizou-se pela atuação dos governadores e capitães-generais. Eles tinham o intuito de consolidar a fronteira com os domínios hispano-americanos, num contexto de negociação dos Tratados de Limites.

Foram os seguintes governadores e capitães-generais: D. Antônio Rolim de Moura, de 1752 a 1765; João Pedro da Câmara, de 1765 a 1769; Luís Pinto de Sousa Coutinho, de 1769 a 1772; Luís de Albuquerque de Melo Pereira e Cáceres, de 1772 a 1789; João de Albuquerque de Melo Pereira e Cáceres, de 1789 a 1796; Caetano Pinto de Miranda Montenegro, de 1796 a 1803.

Com a assinatura dos Tratados de Limites, o desenho territorial da América portuguesa foi sendo definido na segunda metade do século XVIII (FERREIRA, 1996: 09). Os reis Fernando VI, de Espanha, e D. João V, de Portugal, celebraram o Tratado de Madri a 13 de janeiro de 1750. Almejavam definir a totalidade dos limites entre suas possessões na América do Sul. Para esse trabalho, constituíram as chamadas “partidas”, ou seja, as expedições mistas que tinham por finalidade reconhecer e demarcar os limites (COSTA, 1999: 214).

Com o Tratado de Madri, Portugal intentou assegurar as terras conquistadas pelos sertanistas paulistas no oeste e sul do Estado do Brasil. Ao norte, no vale amazônico, era preciso garantir a defesa daquele território diante da possibilidade de investidas de franceses, holandeses, espanhóis e ingleses (CHAVES, 2008: 66). O principal parâmetro adotado para justificativa da ocupação era o princípio do *uti possidetis*, ou seja, da ocupação efetiva do espaço. Dessa forma, as terras ocupadas pelos luso-brasileiros ficariam incorporadas ao Império português (CHAVES, 2008, p. 71). O estabelecimento do *uti possidetis* materializou-se sobre os territórios fronteiriços através da instalação de fortes militares, povoações e reduções de índios (CARVALHO, 2012: 37). Portugal cedeu a Colônia de Sacramento e a Coroa espanhola reconheceu a ocupação lusitana das margens orientais do Guaporé, Madeira, Paraguai e Paraná (VEIGA, 2001: 62-63). As preocupações geopolíticas na América do Sul estiverem presentes sobretudo na administração de D. José I e de seu primeiro-ministro, o Marquês de Pombal. Apesar do Tratado de Madri ter sido negociado em 1750, enfrentaram a tarefa inevitável de implementar o referido acordo, para delinear as fronteiras de seus territórios coloniais na América do Sul (MAXWEL, 1996: 52).

As ações empreendidas de criação da Prelazia do Cuiabá (1745), da capitania de Mato Grosso (1748) e da fundação de Vila Bela da Santíssima Trindade (1752) serviram para legitimar a posse das terras da fronteira Oeste aos portugueses. Mas com as negociações dos Tratados de Limites, sobretudo o de Madri, de 1751, e o de Santo Ildefonso, de 1777, a monarquia portuguesa buscou ainda mais construir edificações para assegurar esse domínio. Era preciso demonstrar o princípio *do uti possidetis*, da posse e uso do espaço conquistado, levando à formação de novas construções na capitania de Mato Grosso, dentre as quais, Fortaleza de Nossa Senhora da Conceição (década de 1750) / reedificada e renomeada Fortaleza de Bragança (1771), Fortaleza de Coimbra (1775), Fortaleza do Príncipe da Beira (1776), Povoação de Albuquerque (1778), Casalvasco (1783). Nessas guarnições militares também foram construídas capelas que compuseram a crescente estrutura do patrimônio cultural mato-grossense.

D. Antônio Rolim de Moura Tavares (1751-1765) tomou posse do governo no dia 17 de janeiro de 1751 (CANOVA, 2011). Seguindo as determinações da monarquia, fundou a vila-capital, levantou seu Pelourinho, a câmara municipal e nomeou oficiais de Justiça. Em 1752, no local de edificação de Vila Bela, deu ordem para que fizessem quase sobre o porto do rio Guaporé uma capela coberta de palha, dedicada a Santo Antônio. Nessa igreja celebraram missas até o fim do mesmo ano. Todavia, essa construção tinha um caráter provisório e logo foi construída outra igreja maior, ainda dedicada a Santo Antônio, em substituição à antiga capela, na praça e lugar destinado para se fazer a matriz da Santíssima Trindade (AMADO e ANZAI, 2006: 52-53). A capela de Santo Antônio serviu de igreja matriz, por ordem do bispo do Rio de Janeiro, D. Antônio do Desterro. Isso fez com que a matriz de Vila Bela se tornasse a nova sede da freguesia do Mato Grosso, em 1754.

Dentre as instruções dadas à Rolim de Moura pela Coroa lusitana, pode-se mencionar, a fundação de missões religiosas para a evangelização dos grupos indígenas, uma na repartição do Mato Grosso e outra na repartição do Cuiabá. Para cumprir essa ordem régia, vieram para essa capitania padres da Companhia de Jesus, sendo eles Estevão de Castro e Agostinho Lourenço. No termo do Cuiabá, foi criada a Missão de Santa Ana do Santíssimo Sacramento, na região de Serra Acima ou Chapada, no ano de 1751. (Annaes do Sennado da Camara do Cuyabá (1719-1830), 2007: 114). No termo do Mato Grosso, foi fundada a aldeia de São José, nas margens do rio Guaporé (AHU – Mato Grosso. Caixa 08. Doc. 521).

O que se observou na fronteira Oeste foi o explícito uso da mão-de-obra indígena de forma compulsória, nos serviços domésticos e nas atividades econômicas locais. Os grupos indígenas que ofereceram resistência ao avanço da conquista territorial foram considerados como uma força interna a ser combatida pelos grupos militares, políticos e elites locais. Com as reformas pombalinas, as missões ou aldeamentos passaram ao controle das autoridades políticas da capitania de Mato Grosso, acompanhadas pelos juizes de fora e Ouvidores. O lugar atribuído aos índios nesse contexto estava circunscrito a sua utilidade como força de trabalho para os colonos, catecúmenos para os missionários e também povoadores para a metrópole.

Segundo Julita Scarano, o governo lusitano impediu a permanência dos padres regulares nas regiões mineradoras no século XVIII, pois se preocupava com ações de contrabando do ouro ou de socialização de informações sobre a exploração das datas minerais com outros religiosos regulares do espaço colonial hispano-americano. O governo julgava ser muito maior a possibilidade de um membro de Ordem Religiosa fazer contrabando, pois possuindo casas em diversos pontos do Brasil e nos domínios de outras Coroas tinha facilidade de contatos, podendo enviar ouro e diamantes sem grande dificuldade para os domínios de outras Coroas (SCARANO, 1975: 16-17).

No entanto, na capitania de Mato Grosso, apesar de ser uma região mineradora, instalaram-se missões religiosas para a cristianização dos indígenas na segunda metade do século XVIII, com a presença de regulares que dispunham de licenças especiais para realizarem seu trabalho (ARAÚJO, 2000: 307). Entende-se que a fundação de aldeias e missões indígenas fez parte das estratégias da monarquia para a garantia de posse dessas terras (AMADO e ANZAI, 2014).

Ainda no governo de Antônio Rolim de Moura, em 07 de dezembro de 1753 deu-se princípio à construção de outra capela em Vila Bela, em honra a Nossa Senhora Mãe dos Homens (AMADO e ANZAI, 2006: 54). A construção dessa obra foi realizada por iniciativa do juiz de fora Teotônio da Silva Gusmão e benzida no ano seguinte, em 21 de novembro de 1754 (AMADO e ANZAI, 2006: 55-56). Teotônio da Silva Gusmão construiu a referida capela em madeira, utilizando a mão-de-obra de seus escravos, além da ajuda de esmolas do povo e de seus próprios emolumentos na prestação dos serviços reais (AHU – Mato Grosso. Caixa 07. Doc. 468).

Em 1755, Teotônio da Silva Gusmão enviou carta ao rei D. José I solicitando a mercê de um alvará que desse aos seus sucessores a responsabilidade pela proteção e administração da capela de Nossa Senhora Mãe dos Homens, da vila-capital. Para Teotônio, bem como os vereadores e procurador da câmara de Vila Bela e o próprio Antônio Rolim de Moura acreditavam que não era possível deixar a capela nas mãos dos reverendos párocos da vila-capital. Entendiam que “para o futuro pode haver alguma controvérsia com os reverendos párocos, que ambicionavam estender a sua jurisdição, e tudo querem advogar a si”. Isso ocorria porque o clero secular

atuante em Vila Bela era encomendado, vivendo dos rendimentos das ofertas, esmolas por missas e demais sacramentos católicos. Esse clero não era pago pelos recursos da Fazenda Real, não tinha cômguas pagas por essa fonte de recursos. Portanto, administrar uma igreja ou capela era a garantia de obtenção de rendimentos aos padres (AHU – Mato Grosso. Caixa 07. Doc. 468).

Outro exemplo de iniciativa da população pelos bens religiosos foi o ocorrido no dia 12 de agosto de 1755, ainda na vila-capital. Foi derrubada a capela de Santo Antônio que era coberta de palha e localizada na praça da vila-capital servindo de igreja matriz. No lugar desse templo foi levantada a igreja da Santíssima Trindade, feita em madeira sobre alicerces de pedra, feita à custa da Irmandade do Santíssimo Sacramento, também com o auxílio do juiz de fora de Vila Bela, Teotônio da Silva Gusmão (AMADO e ANZAI, 2006: 59-62).

Observou-se que a ação do padroado régio, visando à construção de igrejas e capelas e o custeio de sacerdotes, foi quase inexistente. Exceto com relação às capelas das fortificações militares, aldeias e missões indígenas edificadas na Prelazia do Cuiabá, ao longo do século XVIII (AHU – Mato Grosso. Caixa 09).

Segundo relato de Rolim de Moura no ano de 1757, foi comum que as pessoas assistissem as missas em ranchos nesses primeiros tempos, apesar dos esforços para edificarem as primeiras capelas. A primeira igreja erguida pela população ficava muito próxima à borda do rio Guaporé, o que fez com que a construção ruísse diante das enchentes provocadas pela sazonalidade das águas na Bacia Amazônica. Essa foi a capela onde os sacramentos eram ofertados, sobretudo no tempo da Quaresma (APEMT. Mato Grosso – Secretaria de Governo (1750-1767). Livro de Provisões, Vila Bela, 02 de abril de 1757).

Tanto o universo católico de Vila Bela como o da Vila do Cuiabá, com seus respectivos termos, eram predominantemente administrados pelo clero secular. Apesar de existirem padres do clero regular, jesuítas, atuando nas aldeias e missões indígenas criadas por Rolim de Moura, as medidas tomadas no governo de D. José I fizeram com que seu poder de atuação fosse reduzido. É o que se evidencia no conteúdo do texto do *Diretório que se deve observar nas povoações dos índios do Pará e Maranhão*, de 03 de maio de 1757, que substituiu e suprimiu o *Regimento das Missões*. Percebe-se com isso a intenção de fazer com que os eclesiásticos se reservassem unicamente às suas funções espirituais. Os aldeamentos indígenas ficaram sob o controle do governador da capitania, a quem competia a escolha e a nomeação dos diretores daqueles núcleos populacionais, espaços que também constituíram a Prelazia de Cuiabá (SILVA, 1828).

Essas mudanças marcaram os anos finais da administração de Antônio Rolim de Moura. Outras mudanças políticas nessa fase também influenciaram no desenvolvimento da administração eclesiástica da Prelazia do Cuiabá. A principal foi a expulsão dos jesuítas, uma das medidas das reformas pombalinas do reinado de D. José I, que fez com que o clero secular passasse a ser o responsável pela evangelização dos índios, juntamente com as autoridades coloniais. Em 1758 recebeu o governo a ordem para que saíssem dos seus domínios os religiosos jesuítas situados nesses sertões, fossem eles portugueses ou castelhanos. Os jesuítas situados nessa fronteira deveriam ser encaminhados para o Pará, para em seguida serem transportados para Pernambuco. Nessa correspondência, os jesuítas foram descritos como espiões que poderiam avisar aos padres castelhanos sobre tudo o que ocorria nos domínios lusitanos na América (AHU – Mato Grosso. Cód. 613, rolo 38, 1758: 14).

Esse regalismo exercitado pela Coroa, na segunda metade do século XVIII, não escondia o propósito de resistência e de combate à autonomia de ações e à liberdade econômico-financeira usufruídas pelas ordens religiosas. O governo português visou controlar o exercício do poder praticado pelos eclesiásticos no interior de cada aldeia e, no limite, de tolher a ação dos padres na administração civil e temporal que exerciam naquelas povoações. Nessa esfera é que se enquadra a decisão pombalina de secularizar as aldeias transformando-as em paróquias, ou até mesmo em vilas. Com isso, a administração temporal transitava para o âmbito da monarquia lusitana. Os eclesiásticos deveriam restringir as suas atividades ao plano da religião, ou seja, à administração dos sacramentos e ao exclusivo exercício do seu múnus sacerdotal (BOSCHI, 1998: 307). Apesar da expulsão desses religiosos a partir de 1759, alguns deles ainda foram enviados pela monarquia por causa dos seus conhecimentos em edificações de templos religiosos (AHU – Mato Grosso. Caixa 12. Doc. 730).

Em 1763, para o término da construção da igreja matriz de Vila Bela, os moradores enviaram uma carta ao rei pedindo esmolas pelos bens da Fazenda Real. Justificaram que o templo estava ameaçado de ruir e não tinham mais os moradores recursos para sua reedificação completa “porque as posses de cada morador são muito desiguais” (AHU – Mato Grosso. Caixa 19. Doc. 1165). Em 1764, os fregueses do Senhor Bom Jesus, através da câmara da Vila do Cuiabá, enviaram pelo segundo ano consecutivo o pedido de ajuda para ampliação da igreja matriz. Justificaram os moradores que pagaram as três obras de reedificação dessa igreja, desde sua construção original. Contudo, encontravam-se sem maiores possibilidades financeiras nesse momento e precisavam de uma igreja matriz “mais forte e de moderna arquitetura” (AHU – Mato Grosso. Caixa 12. Doc. 722). A Coroa, por outro lado, solicitou mais informações sobre o que seria realizado e os valores do custeio, mas sem dar um parecer definitivo. Receber os recursos não era uma tarefa fácil, pois existia uma extensa lista de exigências a cumprir, o que acabava por fazer com que os moradores procurassem outros meios de realizar as obras.

O Tenente-Coronel João Pedro da Câmara tomou posse do governo da capitania de Mato Grosso em 1º de janeiro de 1765 (FERREIRA, 1996: 49). Durante sua administração (1765-1769), a capitania de Mato Grosso contava com a Vila do Cuiabá e Vila Bela, as aldeias de Santa Ana e São José, os redutos do Sítio das Pedras e de Nossa Senhora da Conceição e os arraiais de mineração (ARAÚJO, 2000: 126). Outras povoações se formaram nesse período, como Lavrinhas, Leomil e o Arraial de São Vicente (LUCÍDIO, 2004: 15-19).

O terceiro governador, Luís Pinto de Souza Coutinho tomou posse no ano de 1769 e a governou até 1772 (FERREIRA, 1996: 50). Durante seu governo foram tomadas algumas medidas importantes. Mudou o nome de diversos lugares da capitania, que antes tinham invocação religiosa, para nomes de referência de localidades lusitanas. O Forte da Conceição passou a chamar-se Forte de Bragança; o Lugar de São João (aldeia dos índios) passou a chamar-se Lamego; o Lugar de São José (aldeia de índios) – Leomil; o Lugar de Santa Ana (aldeia de índios, no distrito de Cuiabá) – Guimarães; Sítio das Pedras – Destacamento de Palmela, Arraial dos Araés – Amarante. Percebemos que essa ação foi mais uma medida visando reforçar o poder da monarquia frente ao catolicismo, intensificada no governo de D. José I e as reformas pombalinas. Luís Pinto de Souza Coutinho também criou na Vila do Cuiabá, em observância da carta régia de 22 de agosto de 1758, uma Legião de Auxiliares e em 1771 deu início à construção da igreja matriz da Santíssima Trindade em Vila Bela (CARVALHO, 2012: 37). As igrejas matrizes,



principais templos da estrutura eclesiástica foram edificadas e mantidas pela ação de seus fregueses, sobretudo entre aqueles reunidos em irmandades religiosas.

O Capitão-General Luís de Albuquerque, nomeado por patente de 03 de julho de 1771, tomou posse no ano de 1772. Seu governo durou quase dezessete anos (FERREIRA, 1996, p. 54-55). A principal preocupação de Luís de Albuquerque era fortificar a extensa fronteira com os domínios hispano-americanos (VEIGA, 2001: 82). Foram edificadas novas fortificações militares, bem como novas povoações, com parte da política pombalina de defesa da fronteira. A fundação do Forte de Coimbra, conhecido também por Presídio de Coimbra ou Nova Coimbra se deu a treze de setembro de 1775, da parte do poente do rio Paraguai, para além dos limites determinados pelo Tratado de Madri. O lançamento da primeira pedra do Forte Príncipe da Beira ocorreu em 26 de maio de 1775. Viseu ou Porto dos Guarajús foi fundado em 1776, a noventa léguas acima do Forte Príncipe da Beira. Vila Maria do Paraguai foi fundada em 06 de outubro de 1778. Essa localidade visava facilitar a defesa da fronteira, a comunicação e o comércio entre Vila Bela e Cuiabá. A Povoação de Albuquerque foi erigida no dia 21 de setembro de 1778, na margem ocidental do rio Paraguai. Em 1781 criou o Arraial de São Pedro Del Rei, nas lavras de Beripoconé, descobertas em 1777. Casalvasco foi fundada em 1782, na margem oriental do rio Barbados. Sua capela tinha como padroeira Nossa Senhora da Esperança, a mesma santa a quem o tio de Luis de Albuquerque erigiu capela no Lugar de Abrunhosa, no reino (AMADO e ANZAI, 2014).

No ano de 1778, Luís de Albuquerque comunicava ao Conselho Ultramarino o termo da nova fundação denominada Vila Maria do Paraguai, situada na margem esquerda do rio Paraguai. Essa povoação estava situada no caminho entre a Vila do Cuiabá e Vila Bela, constituída por alguns casais de índios, num total de mais de sessenta indígenas dos domínios hispano-americanos que fugiram da Missão de São João de Chiquitos. Essa fundação foi pensada para facilitar e guarnecer o comércio entre as duas vilas da capitania (AHU – Mato Grosso. Caixa. 20). Essa localidade deu origem à freguesia de Vila Maria do Paraguai, considerada uma das freguesias dos índios da Prelazia do Cuiabá. Essa freguesia foi criada também no governo de Luís de Albuquerque, através de pedido feito à Coroa portuguesa, no ano de 1779. O edital de confirmação dessa nova jurisdição católica tem data de 04 de abril de 1780 e foi executado em 1781 (MORAES, 2005: 42). Esses índios foram cooptados pela monarquia lusa, com promessas e instrumentos de trabalho, para a criação de povoações, importantes nas negociações dos limites entre os domínios ibero-americanos. A Matriz de Vila Maria possuía um Vigário, que recebia sua cômputa pela Fazenda Real, assim como havia feito Antônio Rolim de Moura com o Vigário da igreja de Santa Ana da Chapada, dedicada também aos índios (ANTT. Maço 17. Caixa 17. 09 de julho de 1803).

Também no governo de Luís de Albuquerque, no dia primeiro de julho de 1779, lançou esse Governador e Capitão-General a primeira pedra da capela que em Vila Bela mandou erigir a Santo Antônio de Lisboa, com assistência das esmoladas da “nobreza da terra” e povo. No alicerce de um ângulo da capela-mor lançou Luís de Albuquerque algumas marcas de prata, símbolos em que estavam lavradas as armas reais e o ano 1779, que as repartiu entre as pessoas principais de Vila Bela. Essa capela estava situada junto ao rio Guaporé, no final da rua denominada de Santo Antônio. A construção deveria ser bem sólida, para não ser arruinada pelas inundações provocadas pela cheia do rio Guaporé, e para isso, deu Luís de Albuquerque uma grande esmola ao santo, pois Santo Antônio de Lisboa era considerado o patrono dos militares (AMADO e

ANZAI, 2014: 219-220). Essa iniciativa albuquerquina serviu de embrião para a formação da Irmandade Militar de Santo Antônio de Lisboa, de 1785, que teve como seus membros os atuantes no corpo militar da capitania de Mato Grosso (ACBM/IPDAC Pasta 55 – nº 1067).

Percebemos que existiu uma demanda popular pelos bens constituidores do patrimônio cultural mato-grossense. Essa iniciativa contribuiu para que a rede de igrejas, capelas e de associações de leigos se formasse, compondo a estrutura eclesiástica da Prelazia do Cuiabá.

Foram construídas nesse período capelas militares, que receberam recursos provenientes da Fazenda Real, do mesmo modo como as igrejas para o atendimento aos indígenas, mesmo de forma irregular. No destacamento de Nossa Senhora da Conceição havia uma capela dedicada à virgem Maria (AHU – Mato Grosso. Caixa 11. Doc. 681). Outra estava situada no Forte do Príncipe da Beira, possuindo um capelão militar para atender essa guarnição e aos moradores circunvizinhos (ANTT - Maço 17. Caixa 17. Avulsos. Lisboa, 09 de julho de 1803). Do mesmo modo, foi edificada capela no ano de 1785, na Povoação de Casalvasco, dedicada a Nossa Senhora da Esperança (AMADO e ANZAI, 2006: 251-252).

O Capitão-General João de Albuquerque de Mello Pereira e Cáceres tomou posse do governo da capitania no ano de 1789 (FERREIRA, 1996: 58). Em sua administração (1789 a 1796), houve a tentativa de estabelecimento de mais um aldeamento de índios, na Aldeia Carlota. Esta teve origem na captura de um quilombo que congregava escravos fugidos e índios nativos. Devolvidos os escravos aos antigos donos, os índios foram oficialmente batizados e autorizados a formar uma povoação no mesmo lugar onde tinha sido apreendido o quilombo (ARAÚJO, 2000: 317). Também em seu governo, outras ações dos fregueses continuaram. Na década de 1790, os moradores dos arraiais de São Francisco Xavier e de Santa Ana, ambos da comarca eclesiástica do Mato Grosso, representados nas pessoas de José Leme do Prado e Francisco Xavier de Abreu solicitaram a separação de suas capelas da jurisdição do bispado do Rio de Janeiro. Queriam que suas igrejas fossem integradas à jurisdição do Bispado do Pará, sobretudo pela localização geográfica em que se encontravam, considerada muito distante da sede do atual Bispado. Segundo os fregueses, era grande a demora no envio de padres para suas localidades, perante a longa viagem que enfrentariam e das ameaças de ataques dos índios pelo percurso. Reclamavam principalmente do alto custeamento dos serviços prestados pelos padres enviados pelo bispado do Rio de Janeiro, que exigiam o dobro do pagamento pelas desobrigas e demais serviços litúrgicos (AHU – Mato Grosso. Caixa 27. Doc. 1599).

Caetano Pinto de Miranda Montenegro tomou posse do governo da capitania no ano de 1796 (FERREIRA, 1996: 60). Em seu governo (1796-1803), relatou à Coroa o quadro eclesiástico da Prelazia do Cuiabá. Informava que não havia a instalação e nem posses de Ordens Monásticas ou Mendicantes e nem religiosos pertencentes a elas (AHU – Mato Grosso. Caixa 34. Doc. 1787). Sobre a Comarca de Mato Grosso, disse o governador que a mesma tinha uma única paróquia, em Vila Bela, com algumas capelas sob sua jurisdição. Uma delas era a do forte do Príncipe da Beira, que tinha um capelão militar pago pelos moradores dos arredores e da povoação de Casalvasco, atendida também pelo referido capelão militar nas ocasiões das desobrigas. Nos arraiais de São Vicente, Nossa Senhora do Pilar, Santa Ana, São Francisco Xavier da Chapada e Ouro Fino também havia capelas com seus respectivos capelões. Os moradores das Lavrinhas, Aguapeí e Jaurú só tinham assistência sacramental na ocasião das desobrigas anuais, que mesmo assim não eram regulares. Disse ainda que não existiam padres colados na comarca

eclesiástica de Mato Grosso (ANTT- Ordem de Cristo. Padroado do Brasil. Bispado do Rio de Janeiro. Maço 17. Caixa 17. Vila Bela, 03 de julho de 1801).

Sobre a Comarca Eclesiástica do Cuiabá, estava constituída por três freguesias ou paróquias: a de São Luiz, da Vila Maria do Paraguai, que principiava no rio Jaurú, passando o rio Paraguai e indo até o Sangrador ou Ribeirão do Melo; a do Senhor Bom Jesus, da Vila do Cuiabá, com extensão que ia desde o Sangrador ou Ribeirão do Melo até a Serra da Chapada dos Guimarães; a de Santa Ana, localizada na Chapada ou Lugar de Guimarães, que prosseguia até o Rio Grande, aonde acabava a dita comarca (ANTT- Ordem de Cristo. Padroado do Brasil. Bispado do Rio de Janeiro. Maço 17. Caixa 17. Avulsos. Lisboa, 09 de julho de 1803). A freguesia de São Luiz de Vila Maria e a freguesia de Santa Ana da Chapada tiveram suas origens na instalação de índios em seus espaços, por isso seus párocos recebiam uma cõngrua e Guizamentos pagos pelos recursos da Fazenda Real. A Freguesia do Senhor Bom Jesus do Cuiabá era constituída por sua igreja matriz e as capelas de Nossa Senhora do Bom Despacho, de São Gonçalo e de Nossa Senhora do Rosário, todas da Vila do Cuiabá; e mais quatro capelarias, a de São Pedro D'El Rey, a de Nossa Senhora do Livramento, estas duas com seus capelães, a de Santo Antônio de Rio Abaixo e a de Nossa Senhora do Rosário de Rio Acima, as quais não possuíam capelães próprios (AHU – Mato Grosso. Caixa 38. Doc. 1938).

As duas comarcas eclesiásticas da Prelazia do Cuiabá tinham seus territórios correspondentes aos dos termos ou repartições da capitania de Mato Grosso, no final do século XVIII. Cada uma delas possuía seu Vigário da Vara e da Igreja. A comarca eclesiástica do Mato Grosso estendia-se desde os limites com a capitania do Pará até o rio Jaurú. A comarca eclesiástica do Cuiabá estendia-se do rio Jaurú até o rio Grande, nos limites com a capitania de Goiás (ANTT- Ordem de Cristo. Padroado do Brasil. Bispado do Rio de Janeiro. Maço 17. Caixa 17. Avulsos. Lisboa, 09 de julho de 1803).

Sertanistas, mineiros, grupos sociais livres e escravizados africanos e afro-descendentes, indígenas, portugueses, oficiais régios e as suas irmandades religiosas arcaram com o custeio de manutenção dos templos. Esse panorama eclesiástico foi palco da espacialização das irmandades religiosas que se formaram na fronteira Oeste da América portuguesa. Esses grupos associativos estavam relacionados ao processo de expansão das conquistas portuguesas, presentes em vários continentes, desde o reino aos demais espaços coloniais.

### **3. Os grupos sociais da capitania de Mato Grosso**

A descoberta de veios auríferos, no século XVIII, motivou muitos deslocamentos populacionais para os espaços formadores da Capitania de Mato Grosso, controlados pelos representantes da monarquia portuguesa. Entretanto, não apenas as práticas sociais espelhadas na Europa foram reproduzidas nessas terras, pois a capitania mato-grossense possuía como componentes de sua população grupos sociais provenientes de outras experiências culturais, como os muitos povos indígenas, africanos e seus descendentes, deslocados para servirem como mão-de-obra escrava nas regiões mineradoras.

Os grupos sociais da capitania de Mato Grosso eram constituídos por brancos, reinóis, indígenas, africanos e seus descendentes escravizados ou libertos, numa sociedade marcada pela hierarquização e diferenciação entre indivíduos e grupos sociais. A ação de conquista colocou em enfrentamento grupos diferenciados de portugueses, luso-brasileiros, africanos, afro-descendentes e uma variedade de populações indígenas, tais como Cruane, Cuchiane, Curiane,

Guachevane, Acopone, Araripocone, Ariocone, Coxipone, Gregone, Guahone, Pavone, Pocone, Bobiare, Bororo, Chacorone, Itapore, Tambegui, Tamoringue, Aricá, Cuiabá, Elive, Guale, Jape, Popu, Tuete, Guaná, Guató, Guaicuru e Paiaguá (ROSA, 2003: 14).

Diversos grupos étnico-culturais produziam e reproduziam seus modos de vida nessas especialidades. As sociedades ameríndias tinham entre si uma demarcação cultural dos seus territórios, fabricavam cerâmica, algumas cultivavam milho, mandioca, algodão e estabeleciam laços de cooperação ou de disputas entre si (LUCÍDIO, 2013). A conquista dessas terras levou à extinção de diversos grupos indígenas. Muitos foram expulsos de seus territórios ou obrigados a trabalhar para os colonizadores.

Estima-se que desembarcaram na América portuguesa 50 mil africanos escravizados até 1600, 160 mil no período entre 1600 e 1640, 400 mil entre 1640 e 1700, 960 mil entre 1700 e 1760 e 726 mil entre 1760 e 1800 (LARA, 2007: 17). Esses dados se aproximam dos oferecidos por outros levantamentos (Tabela 06), em que apontam para o total de número de 2.227. 970 africanos desembarcados na América portuguesa no século XVIII, entre a região amazônica, Bahia, Pernambuco e o atual sudeste do Brasil.

Os que foram para a capitania de Mato Grosso, no século XVIII, vinham de três macro-regiões da África, Guiné-Bissau e Cacheu, da parte norte do Oeste da África; Costa da Mina, no Oeste da África, tendo como principal porto de exportação a fortaleza de São Jorge da Mina, na atual Gana; África Central, na região que compreende Angola e Congo, tendo como portos de exportação em Luanda e Benguela, em Angola (JESUS e SYMANSKY, 2007: 62-63). Por ter maior ligação comercial com as capitanias do Rio de Janeiro, São Paulo e Bahia, o termo do Cuiabá recebeu escravos africanos vindos dessas capitanias pelas monções do sul e pelo caminho terrestre Goiás-Cuiabá. Esses escravos que desembarcaram na Bahia provinham predominantemente da Costa da Mina, na África Ocidental, enquanto que os que desembarcavam no Rio de Janeiro vinham de diversas regiões da África Central, principalmente de Angola. Os escravos enviados para Vila Bela, na segunda metade do século XVIII, foram em grande maioria comercializados através da Companhia de Comércio do Grão-Pará e Maranhão, sendo os escravos desembarcados no porto de Belém e em seguida transportados pela via fluvial Madeira/Guaporé até chegar à vila-capital da capitania de Mato Grosso (AHU – Mato Grosso. Caixa 17. Doc. 1054. Capitania de Mato Grosso, 1773).

Indígenas, pretos e mulatos, escravizados ou livres, constituíram a mão-de-obra primordial nas principais atividades econômicas que se desenvolveram em Mato Grosso, atuando na extração aurífera, na agricultura, nos engenhos e nas fazendas de gado. Atuaram ainda nos criatórios de suínos, na curtição de couros e no processamento da carne, na produção do açúcar e aguardente. Nos núcleos urbanos, realizaram serviços domésticos, no comércio, e em todas as atividades que exigiam trabalho manual (SYMANSKI, 2011: 112-114). Os grupos de indígenas, africanos e seus descendentes, cativos ou libertos, juntos representaram ao longo do século XVIII mais de 3/4 da população e formaram irmandades religiosas representativas dos homens de cor da capitania de Mato Grosso, como as irmandades de Nossa Senhora do Rosário e de São Benedito.

A capitania de Mato Grosso foi marcada pela miscigenação de sua população, sendo pequena a quantidade de brancos. Os primeiros conquistadores reivindicaram para si cargos e privilégios que os diferenciariam dos que se dirigiam para a cata do ouro nas minas do Cuiabá e Mato

Grosso. As disputas giravam entorno da posse das datas minerais, mas também acerca da posse da terra, do comércio de escravos e demais produtos para o abastecimento, da ocupação de cargos da administração e justiça das vilas, da arrematação de contratos de serviços, como da cobrança dos dízimos, junto às câmaras municipais da Vila do Cuiabá e de Vila Bela. As elites locais mato-grossenses foram resultantes dessas atividades. Porém, essa camada abastada também era composta por pessoas de cor, pois era reduzido o número de brancos na capitania de Mato Grosso. Um dos espaços de sociabilidades das elites locais eram as igrejas e capelas representativas de suas irmandades religiosas, sobre a igreja matriz. Formaram em Mato Grosso as associações de São Miguel e Almas, do Senhor Bom Jesus do Cuiabá e do Santíssimo Sacramento (SILVA, 2015).

Os militares eram um grupo social formado com indivíduos de diferenciados grupos étnico-culturais. Foram fundamentais para a guarnição da fronteira. Estiveram presentes nos espaços urbanos e rurais, nas guarnições, nos destacamentos e nas fortalezas. Formaram a Irmandade de Santo Antônio de Lisboa para se agregarem, reforçando sua identidade de grupo (SILVA, 2015).

Todos esses grupos sociais produziram seu patrimônio cultural, promovendo festas e celebrações públicas, com missas, procissões, bailes, encenações teatrais, concursos de poesias, músicas e danças. Os santos religiosos católicos de suas irmandades também foram reverenciados nas festas anuais, conferindo dinâmica ao modo de vida da população mato-grossenses.

### **Conclusões**

A descoberta de veios auríferos, no século XVIII, motivou muitos deslocamentos populacionais para os espaços formadores da Capitania de Mato Grosso, controlados pelos representantes da monarquia portuguesa. Entretanto, não apenas as práticas sociais espelhadas na Europa foram reproduzidas nessas terras, pois a capitania mato-grossense possuía como componentes de sua população grupos sociais provenientes de outras experiências culturais, como os muitos povos indígenas, africanos e seus descendentes, deslocados para servirem como mão-de-obra escrava nas regiões mineradoras. Havia uma pluralidade de características culturais com as quais se depararam os conquistadores portugueses.

A atuação da população foi fundamental no processo de produção e reprodução dos seus bens patrimoniais, não contando em boa parte das vezes com os recursos provenientes dos bens da Fazenda Real, apesar da arrecadação de diversos tributos por parte da Coroa lusitana. Tanto nas áreas rurais como urbanas, os grupos sociais construíram roças, quilombos, aldeias indígenas, missões religiosas, casas, arraiais e vilas, igrejas e capelas, e do mesmo modo promoveram festas, celebrações e demais práticas culturais.

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# **A Concepção de sustentabilidade em políticas públicas de turismo. Análise de um município com centro histórico classificado como Patrimônio Mundial da UNESCO**

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## **Resumo**

O patrimônio cultural oferece uma riqueza de recursos herdadas das sociedades do passado e que exigem políticas públicas e modelos de desenvolvimento de preservação e respeito à sua diversidade e singularidade. Esta exigência de sociedades preocupadas com sua história surge frente a situações periódicas e graduais de massificação e descaracterização de territórios que podem ser ocasionadas pelo turismo. Neste sentido, quais as ações públicas para o turismo que um governo local realiza de modo singular e com sustentabilidade em sítios patrimônio mundial da UNESCO? O presente trabalho aplicou o método estudo de caso na cidade de Ouro Preto para responder esta questão. Importante destino turístico do Brasil que possui um patrimônio histórico-cultural internacionalmente reconhecido foi a primeira cidade brasileira a ter o seu centro histórico declarado como Patrimônio Histórico e Cultural da Humanidade pela UNESCO. O referencial deste estudo versa sobre cultura, turismo, políticas públicas, sustentabilidade e desenvolvimento turístico, os quais auxiliaram na coleta e na análise de dados sobre as ações do governo local por meio do esquema analítico de Scott (2011). Como resultados, verificou-se a inexistência de ações do governo local da cidade estudada na maioria dos objetivos deste esquema analítico, exceto algumas ações focalizadas em prosperidade local, controle local, riqueza cultural e desenvolvimento econômico. Conclui-se que o esquema analítico aplicado pode auxiliar na gestão turística de cidades classificadas como patrimônio cultural pela UNESCO por meio da identificação e compreensão das prioridades e da abrangência de ações de governos, presentes em políticas públicas de turismo em nível local.

## **Palavras chave**

Patrimônio cultural; políticas públicas; governo local; desenvolvimento turístico; Ouro Preto.

## **1. Introdução**

O turismo está relacionado profundamente ao desenvolvimento da humanidade e se tornou um importante setor econômico, conseqüentemente, tem se transformado em um motor essencial do progresso socioeconômico de diversas localidades. Distintos países, regiões, municípios, empresas (públicas e privadas) e comunidades têm se atentado a essa área, estabelecendo estratégias e prioridades que orientam o desenvolvimento do turismo.

Os atuais viajantes do século XXI, impulsionados pelo legado de uma atividade iniciada no século XVIII, são motivados pela forma de pensar o desconhecido, desfrutando da contemplação de monumentos, ruínas e obras de arte que sobreviveram ao longo do tempo, trazendo hoje este

mesmo sentimento que temos diante do desfrute de um bem de patrimônio cultural (Velasco, 2013).

Por sua vez, o patrimônio cultural, que é um dos principais elementos motivadores do fluxo turístico, apresenta uma riqueza de recursos que são herdadas das sociedades do passado e que exigem políticas públicas e modelos de desenvolvimento de preservação e respeito à sua diversidade e singularidade. Esta exigência de sociedades preocupadas com sua história surge frente a situações periódicas e graduais de massificação e descaracterização de territórios que podem ser ocasionadas pelo turismo.

Neste contexto, surge o seguinte problema de pesquisa: quais as ações públicas para o turismo que um governo local realiza de modo singular e com sustentabilidade em sítios patrimônio mundial da UNESCO?

Para responder esta questão, aplicou-se o método estudo de caso na cidade de Ouro Preto. Esta cidade é um importante destino turístico do Brasil e possui um patrimônio histórico-cultural internacionalmente reconhecido pela sua relevância e preservação histórica. Esta cidade está localizada na região central da unidade federativa de Minas Gerais, uma das 27 existentes que compõe a República Federativa do Brasil. Seu patrimônio cultural é composto, principalmente, por bens materiais (igrejas, capelas e museus) de influência cultural portuguesa dos séculos XVII, XVIII, XIX e XX, existentes no seu território que integra o Circuito do Ouro, região reconhecida pela sua história colonial do Brasil e de Portugal. Foi a primeira cidade brasileira a ter o seu centro histórico declarado como Patrimônio Histórico e Cultural da Humanidade pela UNESCO.

O enquadramento teórico considerou conceitos sobre cultura, turismo, políticas públicas, sustentabilidade e desenvolvimento turístico, os quais auxiliaram na coleta e na análise de dados sobre as ações do governo local por meio do esquema analítico de Scott (2011). Este esquema é constituído de 15 objetivos de políticas públicas de turismo e 22 formas de atuação governamental, os quais direcionaram o levantamento de dados por meio de documentos de domínio público e de entrevistas com roteiros semiestruturados junto a atores-chave do turismo na cidade estudada.

Como resultados, por um lado, verificou-se que as ações do governo local da cidade estudada realizam ações focalizadas em: desenvolvimento econômico; prosperidade local, sustentabilidade; e, riqueza cultural. Por outro lado, ações que poderiam ser induzidas ou realizadas pelo governo local não foram identificadas, como: qualidade do emprego; equidade social; bem-estar da comunidade; diversidade biológica; eficiência de recursos; e, pureza ambiental.

Conclui-se que o esquema analítico aplicado pode auxiliar na gestão turística de cidades classificadas como patrimônio cultural pela UNESCO por meio da identificação e compreensão das prioridades e da abrangência de ações de governos, inclusive relacionadas a noção multidimensional de sustentabilidade, presentes em políticas públicas de turismo em nível local.

## **2. Políticas Públicas de Turismo e Centros Históricos como Território Turístico Cultural**

As viagens podem ser alocadas entre as mais antigas necessidades do ser humano, deslocando-se pelos territórios para diversos fins, em busca de alimentos, de trocas de mercadorias, de intercâmbios culturais, bem como à procura de novos territórios. Atualmente, a relação entre

deslocamentos humanos e viagens turísticas se constitui em um dos principais fenômenos do mundo, o turismo, capaz de impactar toda a sociedade contemporânea.

Em função de sua relevância para o desenvolvimento de diversos países e regiões, além de seus impactos econômicos, socioculturais e ambientais, o turismo tem chamado a atenção de pesquisadores e gestores públicos de diferentes vertentes analíticas (Knupp, 2016).

Ele é um sistema aberto que, em alguns aspectos, é um microcosmo da sociedade em geral, operacionalmente é complexo, envolvendo o comportamento cooperativo e competitivo, muitas vezes em simultâneo, pelas partes interessadas (Scott, 2011). Para outros é “um campo de práticas histórico-sociais que pressupõem o deslocamento dos sujeitos em tempos e espaços diferentes daqueles dos seus cotidianos” (Gastal e Moesch 2007:11). Ou mesmo é um “[...] processo elaborado e complexo de decisões sobre o que visitar, onde, como e a que preço” (Beni, 2003:36), enquanto para Bezerra (2003:48) o turismo é “atualmente a atividade econômica mais promissora do mundo e vem se firmando cada vez mais como grande gerador de divisas e empregos”.

Percebe-se, a partir das definições apresentadas, que o turismo possui diversas definições, indo de um “fenômeno”, “sistema”, “campo de práticas” à uma “atividade econômica”. Emmendoerfer et al (2016:75) afirma que o turismo “possui múltiplas abordagens, resultando em tantas definições quanto o número de autores que estudam esta área de conhecimento”. Logo, é de se notar que falta nos estudos sobre o turismo uma definição “universal” que ajude no entendimento dessa atividade.

(...) el turismo es un fenómeno intrínsecamente transversal que se aborda por múltiples disciplinas científicas. Cada uno de los autores que trabajan sobre el turismo lo hace desde las teorías y conceptos que dominan su ámbito de conocimiento y esto terminan por trasladarse a las definiciones propuestas (Velasco, 2013:6-7)

O que se constata é que o turismo tem se desenvolvido, crescido e se tornado a atividade mais promissora do mundo (Bezerra, 2003). Emmendoerfer et al (2016) argumentam que nos últimos 15 anos o turismo tem se tornado mais complexo no que tange a sua articulação com indivíduos e organizações da economia criativa.

Fato que justifica o empenho de governos, nas diversas regiões do planeta, estarem atentos às oportunidades de aumento de renda e geração de emprego resultantes dessa atividade (Knupp, 2016). Nesse sentido, concordamos com Pham, Dwyer e Spurr (2012) quando eles afirmam que esse empenho tem reforçado a imagem do turismo em círculos amplos e reduzidos, em termos políticos e geográficos, públicos e privados, o que vem incentivando o desenvolvimento turístico em continentes, países, regiões e municípios (Jafari, 1994).

Ainda no que se refere ao crescimento da atividade turística e suas interferências nas localidades, Castro e Tavares (2016:62), afirmam que embora o turismo possa trazer benefícios, os “ganhos para a localidade receptora do turismo não são garantias, podendo significar até mesmo prejuízos para os ganhos econômicos de agentes externos a essa localidade”, ou seja, apesar de ser vista como uma atividade econômica e geradora de recursos, o turismo pode apresentar efeitos inversos aos esperados, podendo até gerar prejuízos à localidade em que a atividade está instalada.

É por isso que a atividade turística deve ser planejada, levando em consideração todos os aspectos socioambientais e simultaneamente as questões mercadológicas que garantam a viabilidade econômica da atividade (Oliveira; Minasse; Marques, 2015). Neste caso, uma das maneiras de projetar a atividade turística é através do planejamento e elaboração de políticas públicas.

Seguindo o caminho dos estudos sobre políticas públicas, é possível perceber o deslocamento da ação baseada no planejamento para a análise do funcionamento do Estado e de seus governos, centrais, subnacionais e locais. Sendo assim, as interações entre atores políticos são de extrema importância para investigar as políticas públicas, através de seus fluxos, sua dinâmica, de modo a identificar as agências públicas e os atores participantes. Sabe-se da existência de uma multiplicidade das distintas definições de políticas públicas (Dye, 1972; Haas, 1992; Borzel, 1997; Frey, 1997; Campbel, 2002; Faria, 2005; Fisher et al., 2007, dentre outros), no entanto, em algumas destas concepções há uma convergência de ideias no sentido de considerar políticas públicas como uma rede de decisões que se encontra dentro de um processo dinâmico, com complexas interações entre atores políticos.

As políticas públicas, segundo Secchi (2013), são diretrizes formuladas para enfrentarem um problema público, nesta condição “[...] um problema só se torna público quando os atores políticos intersubjetivamente o consideram problema (situação inadequada) e público (relevante para a coletividade)” (Secchi, 2013:10).

Neste sentido, a forma de atuação dos governos reflete as diferentes impressões sobre o papel do Estado para lidar com os problemas da sociedade e como isto interfere no seu modo de articulação com a sociedade. Em campos específicos, os governos têm se dedicado a formular políticas públicas para resolução de problemas, além de desenvolver e planejar determinadas atividades a fim de assegurar ganhos para a sociedade.

Para Secchi (2013), as políticas públicas possuem um ciclo, resumido em sete fases sequenciais e interdependentes, sendo elas: 1) Identificação do problema; 2) Formação da agenda; 3) Formulação de alternativas; 4) Tomada de decisão; 5) Implementação; 6) Avaliação; e, 7) Extinção.

O ciclo de políticas públicas “raramente reflete a real dinâmica ou a vida de uma política pública” (Secchi, 2013:43), uma vez que as fases se misturam e a sequência, conseqüentemente, é alterada. No entanto, o autor afirma que o ciclo é um esquema que permite a visualização e interpretação da política pública.

No turismo, as políticas públicas são desenvolvidas para auxiliar no desenvolvimento local e regional de determinados destinos turísticos. Para Henz e Anjos (2014:13) “o desenvolvimento harmônico da atividade turística é o principal papel das políticas públicas aplicadas ao turismo, onde cabe ao Estado propiciar, construir e apoiar a infraestrutura de acesso e também a infraestrutura urbana”.

Um dos objetivos das políticas públicas de turismo contemporâneas é justamente a sustentabilidade, definida pela OMT (Organização Mundial de Turismo) nos seguintes termos:

O desenvolvimento do turismo sustentável atende às necessidades dos turistas de hoje e das regiões receptoras, ao mesmo tempo em que protege e amplia oportunidades para o futuro. É visto como um condutor de gerenciamento de todos

os recursos, de tal forma que as necessidades econômicas, sociais e estéticas possam ser satisfeitas, sem desprezar a manutenção da integridade cultural, dos processos ecológicos essenciais, da diversidade biológica e dos sistemas que garantem a vida (OMT, 2003:24).

A sustentabilidade do turismo tem se tornado objeto de várias discussões, suscitadas em especial sob o patrocínio da OMT<sup>1</sup>. Ela implica que as políticas nesse setor devem assegurar modos de relações de consumo no presente que não afetem as possibilidades de consumo futuro. No cerne desse conceito está a questão ambiental, que se tornou o centro de diversas discussões num mundo marcado pela busca incessante pelo desenvolvimento; o fenômeno do turismo passa a ser tratado como uma atividade que pode trazer desenvolvimento para diversas regiões e também entra em pauta nessa discussão (Knupp, 2016).

Podemos considerar a sustentabilidade como elemento significativo na mensuração do desempenho turístico, ou seja, como um dos principais parâmetros de análise existentes. Além disso, ela trabalha para o aperfeiçoamento da atividade turística, o que passa também pela necessidade de incorporação de inovações no planejamento da atividade turística, na formulação e na implementação das políticas públicas de turismo. Destacamos a relevância desse aspecto porque ele pode comprometer a própria continuidade de desenvolvimento do turismo.

Todavia, a transformação rápida e acentuada da infraestrutura urbana pode acarretar numa sensação de perda tanto histórica quanto cultural nos destinos turísticos (Peixoto, 2003). Segundo Castro e Tavares (2016), por ter seu desenvolvimento atrelado ao desenvolvimento do modo de produção capitalista, o turismo acabou se apropriando e utilizando de espaços, dando a eles um novo significado e uma nova função, permitindo, a partir disso, uma intrínseca relação entre turismo e espaço.

Os autores ainda argumentam que, no que se refere à atividade turística nos centros históricos das cidades, “[...] o turismo tem a característica de criação de novos objetos nos lugares, mas também se apropria de objetos preexistentes, atribuindo-lhes, em vários casos, novos significados e novas funções” (Castro; Tavares, 2016:64).

O termo “centro histórico”, para Peixoto (2003), representa mais do que um objeto em um determinado espaço. Para ele o centro histórico é a representação de

[...] tudo o que nos arriscamos a perder no contexto de uma urbanização galopante, incluindo aquilo que por vezes nunca se teve: o espaço público, a qualidade de vida, as referências identitárias, a cidade à escala humana (Peixoto, 2003:2)

Diante disso, começa-se a notar uma íntima ligação entre o patrimônio cultural e o desenvolvimento do chamado turismo cultural, uma vez que a atividade turística permite ao turista ter este contato com o patrimônio. Segundo Lobato (2016), esse segmento pode tanto

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<sup>1</sup> “Grande parte da literatura de turismo hoje valoriza a importância do desenvolvimento do turismo ‘sustentável’. Seja qual for o significado preciso do termo, um elemento essencial de uma indústria de turismo sustentável é a viabilidade econômica. Às vezes esquecido, o conceito de sustentabilidade tem uma dimensão econômica ao lado de suas dimensões social e ambiental. Eficiências econômicas resultam em menor uso de recursos com impactos sociais e ambientais potencialmente menos adversos da sua utilização” (Dwyer e Spurr, 2010, p. 01).

“vender” o patrimônio cultural para o uso e consumo dos turistas, quanto ajudar na preservação dos bens patrimoniais.

O conceito de cultura<sup>2</sup> tem suscitado um debate extenso e profundo que decorre das origens do pensamento ocidental, sendo que o debate do conceito de turismo tem alcançado menor extensão, por ser mais jovem e não ter uma única definição como ponto de partida (Velasco, 2013). Assim, “o conceito de turismo cultural enfrenta uma dificuldade inicial que é delimitar de forma concreta o âmbito da realidade a que queremos referir” (Velasco, 2013:6).

A partir de la década de los ochenta del siglo XX aumenta de manera significativa la práctica el turismo cultural. Este aumento está relacionado con la importancia creciente que las sociedades dan al valor “cultura”. Las sociedades post-industriales son sociedades de consumo. Durante décadas, el consumo estaba relacionado con la idea de acumulación –las personas consumían acumulando bienes-, pero a partir de un determinado momento las personas empezaron a consumir bienes o servicios para distinguirse, para ser consideradas más sofisticadas, más informadas o más cultas. Este consumo de distinción se concentra, en especial, en consumo de cultura. Y este consumo cultural se ve reforzado por la irrupción de otra dimensión: el consumo se centra cada vez menos en objetos tangibles y se centra, de manera creciente, en consumo de experiencias. Y la cultura es un espacio idóneo para ello. (Velasco, 2013:10)

Considerando este contexto de definições conceituais, Velasco (2013:12) afirma que “el turismo cultural sería el conjunto de fenómenos y relaciones que se dan entre los actores turísticos con el objetivo de impulsar las diferentes actividades que permitan a los turistas disfrutar de manifestaciones culturales, artísticas y patrimoniales en un entorno distinto al habitual”.

A ideia de sustentabilidade também entra no debate sobre a dimensão cultural, trazendo uma conexão com a dimensão social, discutindo sobre quais são as dinâmicas de intercâmbio cultural. De maneira simplificada, esta dinâmica se assenta em que a comunidade anfitriã conhece e conserva seu patrimônio e o turista seja capaz de compreender aqueles valores culturais, mediante sua experiência de viagem, por meio de visitas e interpretação planejadas, mas este modelo ideal não acontece de fato nos destinos culturais consolidados e ainda menos nos novos espaços (Velasco, 2013).

De outro modo, observa-se que a apropriação do patrimônio cultural pelos agentes ligados diretamente ao turismo, tem gerado práticas que negligenciam ou até mesmo excluem a história e as dinâmicas socioespaciais próprias da localidade, adequando os centros históricos aos

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<sup>2</sup> Muchas definiciones existen sobre el término cultura, para nuestro argumento utilizaremos aquí una propuesta anterior en la que considerábamos que estas pueden agruparse en tres enfoques: el cognitivo, expresivo e interpretativo (Velasco, 2013). El enfoque cognitivo agruparía las definiciones que consideran que la cultura es el conocimiento acumulado o los saberes que debe dominar un ciudadano culto. En el enfoque expresivo encontramos todas aquellas que señalan que la cultura es la suma de las prácticas o expresiones que el ser humano ha desarrollado en su proceso de adaptación y creación de su medio vital: el lenguaje, el arte, el derecho... Por último, el enfoque interpretativo agrupa aquellas definiciones de cultura que consideran la cultura como la capacidad que tienen las diferentes sociedades para dotar de significado o valor a las prácticas o expresiones anteriores. Esta simplificación nos permite avanzar en el discurso (Velasco, 2016:306).

modelos estéticos do turismo global, transformando e reduzindo-os em apenas cenários para o acontecimento de atividades para o lazer e o turismo (Castro e Tavares, 2016).

Segundo Silva e Silveira (2015), ao receber o título de patrimônio tombado, espera-se dos municípios que desperte na população, e também aos atores ligados ao turismo, um interesse de preservação do bem tombado, no entanto, não é isso que geralmente acontece. Percebe-se que o interesse econômico em torno de um bem material é maior que o interesse pela conservação local.

Para que isso não aconteça, Lobato (2016) sugere que a população local perceba e aposses do patrimônio cultural local como parte de sua identidade, além de participar das ações voltadas ao desenvolvimento do turismo em sua cidade e das políticas ligadas à preservação do patrimônio. Diante disso, verifica-se a importância da participação da comunidade na promoção do turismo cultural.

### 3. Métodos

O campo da análise de políticas públicas está em constante desenvolvimento, desde quando se iniciaram os estudos sobre as políticas públicas na primeira metade do século XX. Sua perspectiva, clássica e recente, vão desde os estudos pioneiros das décadas de 1940 e 1950, o ciclo de políticas públicas, as teorias de implementação, o novo institucionalismo, bem como suas críticas, até os modelos aplicados que inserem discussões a respeito da formação de agendas, da mudança de políticas públicas, da inserção das ideias e do conhecimento. Envolvem também temas emergentes das ciências políticas como a teoria democrática contemporânea, a deliberação e a legitimidade das ações do Estado por meio de seus governos.

Ainda segundo Scott (2011), estudos de políticas públicas de turismo fornecem informações úteis sobre quem recebe o quê, quando e por que no processo de política de turismo, elas são formuladas e implementadas em ambientes dinâmicos, onde há um padrão complexo de decisões, ações, interação, reação e feedback.

Em comparação com a discussão teórica da política, há apenas uma pequena literatura metodológica em matéria de política de turismo. Existe algum acordo que o estudo da política de turismo envolve complexidade, dinamismo e mudança, e como resultado Stevenson, Airey e Miller (2008) recomendam o uso de múltiplas abordagens para entender a formulação de políticas, bem como a utilização do desenvolvimento da teoria fundamentada (Scott, 2011:31).

O levantamento de dados foi realizado por meio de questionário semiestruturado, entrevistando os principais atores-chave do turismo na cidade de Ouro Preto. O trabalho baseou-se no modelo apresentado por Scott (2011) que apresenta um esquema analítico com 15 objetivos das políticas públicas de turismo e 22 formas de atuação do governo no setor turístico.

Quadro 1 - Objetivos das Políticas Públicas de Turismo e Formas de Atuação Governamental.

| <b>Objetivos das Políticas Públicas de Turismo</b> | <b>Formas de Atuação Governamental</b>                                     |
|--|--|
| <b>Desenvolvimento Econômico</b>                   | - Pesquisa e divulgação de informações sobre tendências futuras do mercado |
|  | - Fortalecimento da imagem do destino                                      |



|  |   |
|--|---|
|  | - Garantir acesso efetivo ao mercado e prestação de consultoria e apoio aos negócios  |
| <b>Competitividade</b>                             | - Sistemas de qualidade e de classificação obrigatórios poderiam tornar-se voluntários e ser colocados nas mãos do setor privado ou terceiro setor  |
| <b>Prosperidade Local</b>                          | - Criação de empregos em turismo  |
|  | - Contribuição para o desenvolvimento de infraestrutura   |
| <b>Qualidade de emprego</b>                        | - Fortalecer as atividades que garantem empregos de tempo inteiro e durante todo o ano, para incentivar a formação e oportunidades de progressão na carreira  |
| <b>Equidade social</b>                             | - Canalizar gastos e renda para as pessoas desfavorecidas e os pobres   |
|  | - Ajudar os pobres a participarem da oferta turística e apoiar a constituição de empresas dentro de comunidades pobres  |
|  | - Estímulo ao turismo social  |
| <b>Atendimento ao visitante</b>                    | - Proporcionar às pessoas, incluindo a população nacional, uma experiência de viagem de qualidade, lúdica e educativa;  |
|  | - Promover o turismo como um fim em si mesmo, isto é, um direito disponível futuro do turismo em sua área, consultando outras partes interessadas   |
| <b>Controle local</b>                              | - Garantir boa informação e empoderamento para tomar decisões sobre o desenvolvimento do turismo que possa afetar seu futuro  |
| <b>Bem-estar da comunidade</b>                     | - Realizar um planejamento cuidadoso para garantir que a comunidade local não sofra com o turismo, como através do congestionamento do tráfego, barulho, comportamento desrespeitoso, e competição por recursos vitais, como a água |
| <b>Riqueza cultural</b>                            | Apoiar a conservação da cultura; os sítios de patrimônio e tradições históricos, controlando o desenvolvimento do turismo e o comportamento do visitante para garantir que a riqueza cultural e a autenticidade não sejam perdidas  |
| <b>Integridade Física</b>                          | - Implantação e design de novas estruturas de todos os tipos  |
|  | - Boa manutenção de espaços abertos e a redução de lixo   |
| <b>Diversidade Biológica</b>                       | - Gestão para a conservação e para a manutenção do turismo enquanto atividade geradora de renda para a conservação  |
| <b>Eficiência de recursos</b>                      | - Encorajar formas de turismo e gestão de sistemas que são eficientes, promovendo fontes de alternativas e incentivando a redução, reutilização e reciclagem  |
| <b>Pureza ambiental</b>                            | - Promoção de formas menos poluentes de transportes e minimizar e controlar as descargas de esgoto em ambientes sensíveis   |
| <b>Sustentabilidade</b>                            | - Investimentos diretos ou indiretos no desenvolvimento do turismo e de estratégias para a gestão ambiental   |
| <b>Política Internacional de boa vontade e paz</b> | - Busca e cultura da paz  |

Fonte: Adaptação de Scott (2011).

Com base nesse estudo, foi possível a elaboração de 13 perguntas voltadas as políticas públicas de turismo para possível verificação de ações na cidade de Ouro Preto com a criação, implementação e ações relacionadas as políticas públicas com cunho sustentáveis dentro de uma cidade patrimônio da humanidade. Nessa pesquisa, buscou-se levantar as práticas

sustentáveis dentro da elaboração de políticas públicas de turismo, de forma a compreender uso da sustentabilidade como figura praticada nas discursões e planejamento do turismo na cidade. O desenvolvimento da prática do turismo, principalmente em sítio histórico sem planejamento e ações, contribui para um crescimento desorganizado, sem sustentabilidade e sem pensar nas próximas gerações.

A partir dos questionários semiestruturados, foram realizadas as entrevistas com atores do turismo, a saber, representantes das seguintes instituições: C&VB-OP - Convention and Visitors Bureau de Ouro Preto; SETIC - Secretaria Municipal de Turismo, Indústria e Comércio; IPHAN - Instituto do Patrimônio Histórico e Artístico Nacional; Vereador, representante da CMOP - Câmara Municipal de Ouro Preto; Presidente do COMTUR - Conselho Municipal de Turismo de Ouro Preto; ADOP - Agência de Desenvolvimento Econômico e Social de Ouro Preto; ACEOP - Associação Comercial e Empresarial de Ouro Preto; e o SEBRAE – Serviço Brasileiro de Apoio às Micro e Pequenas Empresas. Destaca-se que todos os atores entrevistados estão como membros representantes no COMTUR.

#### **4. O Desenvolvimento do Turismo em Ouro Preto (MG) Brasil**

Ouro Preto originou-se em 1698 pelo arraial de Padre Faria, e em 1711, com a junção de outros arraiais de seu entorno, elevou-se a vila, denominada então de Vila Rica. O principal marco econômico que assinalou sua origem foi o ciclo do ouro, desenvolvendo a vila marcada por acontecimentos históricos que remontam à época colonial do país. Destaca-se a guerra dos emboabas (1708), a revolta contra o quinto da coroa portuguesa (1720), inconfidência mineira (1789), sendo também capital da província em 1823 após a independência do Brasil e, a partir daí, denominada de Ouro Preto. Posteriormente passa a ser capital do estado de Minas Gerais até 1897 e à época considerada um importante polo econômico do país (Lazaroni, 2016).

O município de Ouro Preto está localizado a 95 quilômetros de Belo Horizonte, atual capital do estado, e mantém conservada grande parte de seus monumentos coloniais, diferenciada por sua arquitetura colonial, museus, igrejas, pontes, casarões, esculturas e ornamentos religiosos que retratam a cultura local e fatos importantes da história do país. Em 1920 foi reconhecida como patrimônio nacional e em 1933 foi elevada a Patrimônio Nacional, sendo, cinco anos depois, em 1938 tombada pela instituição que hoje é o IPHAN. Finalmente, no dia 05 de setembro de 1980, na quarta sessão do Comitê do Patrimônio Mundial da UNESCO, realizada em Paris, Ouro Preto foi declarada Patrimônio Cultural da Humanidade (PMOP, 2017).

Passou por diversos ciclos e crises econômicas, destaca-se o ano de 1897, onde o esgotamento do ouro e a transferência da província, Ouro Preto passou por um período de estagnação econômica, com redução considerável de sua população. Só voltou a se recuperar a partir de meados de 1940 com a instalação de uma fábrica de alumínio e de indústria de mineração, aumentando assim, novamente, o número de habitantes (Oliveira, 2010 apud Lazaroni, 2016).

Destaca-se, por fim, que por volta dos anos de 1960 o turismo cultural foi introduzido como uma realidade para a população de Ouro Preto, onde turistas das mais variadas origens, atraídos principalmente pelo valor histórico e o conjunto barroco, começaram a frequentar a cidade (Emmendoerfer et al., 2016). Na última década, os segmentos turísticos que mais tem sido destacados na cidade de Ouro Preto, por meio da gestão pública, envolvendo o centro histórico, são: o cultural, o de eventos e o de negócios (Emmendoerfer e Soares, 2014).

Hoje o turismo movimentou a economia da cidade, fomentando empregos e trazendo divisas para o município. São inúmeros os equipamentos e serviços de apoio à atividade turística, desde meios de hospedagem, bares e restaurantes, agências turísticas, guias de turismo, dentre outros, além de órgãos governamentais e associações da sociedade civil organizada para discutirem e planejarem ações para a organização e o desenvolvimento do turismo.

#### **5. Gestão pública do turismo em cidades Patrimônio da Humanidade: o caso de Ouro Preto, Brasil**

Para dar início ao roteiro de entrevistas, a abordagem primária é a respeito da elaboração e implementações das políticas públicas de turismo na cidade e se há participação dos moradores durante todo o processo. De acordo com os entrevistados as políticas públicas de turismo são criadas dentro do COMTUR, destacando-se as últimas políticas que são o Plano Municipal de Turismo, elaborado em 2010 e revisado em 2015, e a Política Municipal de Turismo elaborada em 2015. Porém, estas ações aconteceram tardiamente, há outro problema destacado que é a dificuldade de se colocar em prática, ou a implementação das mesmas, é preciso criar ações de investimentos para que esses projetos saiam do papel, como afirma o representante da ADOP.

Falta então um planejamento e uma priorização desta pasta, para que essa política seja sustentada, que a política possa também buscar sustentação com esse fundo de desenvolvimento do turismo, que talvez um esboço para a parceria público privada, uma abertura para essa parceria, sendo outro caminho para captação disso.

Também se reconhece que há participação dos moradores através dos seus representantes dentro do COMTUR, e para uma maior participação indica-se o aumento do número de audiências públicas para que haja uma participação mais coesa da comunidade. Como citado o COMTUR como o grande gerador de políticas públicas de turismo no município, hoje é um conselho deliberativo e consultivo e nos últimos 10 anos veio se fortalecendo, sendo mais participativo, com uma boa representação. Conforme a Lei municipal nº 659 de junho de 2011, dispõe sobre as atribuições e competências do COMTUR e em seu Artigo 3º define que compete ao COMTUR:

Elaborar o Plano Municipal de Turismo para o município; Assessorar o executivo municipal nos assuntos relacionados ao setor turismo, analisando e manifestando sobre as ações do poder público, inclusive sobre a aplicação do fundo municipal de turismo; fiscalizar a movimentação orçamentária do FUMTUR e eleger o comitê gestor deste fundo, dentre outras competências (OURO PRETO, 2011).

Atualmente não se passa nenhum projeto pela Câmara Municipal de Vereadores afeto ao turismo sem antes escutar este conselho, reafirmando assim a importância que o conselho exerce nas discussões políticas dentro do município, assim, a atuação do COMTUR ganha mais destaque e fortalece suas decisões. Contudo, o COMTUR poderia ter mais eficácia, se o governo ao mandar qualquer projeto consultasse antes o conselho ou mesmo que as iniciativas de ações viessem do próprio COMTUR. Compreende-se o papel de grande relevância que o COMTUR tem nas políticas públicas de turismo em Ouro Preto e acredita-se que a tendência é que haja ainda mais o fortalecimento dentro do conselho em prol da melhoria do turismo na cidade.

Levantado a questão da inclusão social na atividade turística, se haveria de alguma forma a promoção dentro da cidade da equidade social com a inserção do morador por meio do turismo, compreendeu-se de forma unânime pelas instituições entrevistadas que a inclusão social no turismo na cidade de Ouro Preto acontece apenas gerando empregos diretos e indiretos para os seus moradores, sendo que, a atividade turística em Ouro Preto emprega hoje 2700 empregos diretos, segundo RAIS relatório anual do Ministério do Trabalho, Brasil (2016), possivelmente este número aumenta considerando que há um grande número de empregos indiretos.

Não existe uma sistematização, uma política clara de inclusão, falta organizar com uma política de inclusão de incentivo, implantação, regulação. Falta muito, embora se tenha uma participação muito efetiva do SEBRAE no município ainda é muito pouco explorada essa questão, falta um direcionamento, uma política de inclusão e de promoção deste turismo comunitário (representante da ADOP, 2017).

Conclui-se aqui que não há ações voltadas para a inclusão social dentro da cidade de Ouro Preto de forma a agregar o morador dentro do seu espaço urbano. Uma possibilidade para esse desdobramento seria a criação de projeto de cunho social para que haja maior integração do morador dentro do turismo, como compreender a pertença do morador e a importância do espaço que ele vive. A necessidade da inclusão social na atividade turística que entre nas pautas de discussão do COMTUR, para que o turismo possa atingir a todos que residem em Ouro Preto. Destaca-se Gastal e Moesch (2007) da importância do seu turista cidadão, sendo uma prática de compreensão do turismo, para que se torne a inclusão dentro do turismo na cidade.

O turista cidadão é aquele morador da localidade que vivencia práticas sociais, no seu tempo rotineiro, dentro de sua cidade, de formação não rotineira, onde é provado em relação à cidade. Turista cidadão é aquele que resgata a cultura da sua cidade, fazendo o uso estranhamento da mesma. Este estranhamento inicia no momento em que o indivíduo descobre, no espaço cotidiano, outras cultura, outras formas étnicas e outras oportunidades de lazer e entretenimento. Quando se encontra na situação de turista, este sujeito aprende a utilizar os espaços ambientais, culturais, históricos, comerciais e de entretenimento com uma percepção diferenciada do seu cotidiano (Gastal e Moesch, 2007:65).

Levantaram-se durante as entrevistas perguntas relacionadas a emprego na cidade de Ouro Preto, sendo uma delas se há ações para formação e aperfeiçoamento de mão de obra dentro de trade, a qualificação e atualização no setor turístico são de grande importância, manter-se atualizadas nas mudanças, tendência, contribuindo para a formação de um melhor profissional. Segundo o representante do SEBRAE (2017):

Ações de qualificação é um item de atenção da gestão pública, mas acredita-se que essas ações não estejam bem estruturadas como deveria, pois se reconhece a necessidade, mas deve ser preciso uma ação de mão dupla procurada pelo trade com a prefeitura para essas capacitações.

As atividades relacionadas à qualificação acontecem de forma muito fragmentada dentro do trade em Ouro Preto, mas destaca-se no Plano Municipal de Turismo como afirmado pela representante da SETIC que há plano de requalificação para os envolvidos com turismo e outras ações que serão colocadas em prática, deve-se destacar que hoje não há ações acontecendo na cidade, tendo visto, que o Plano Municipal de Turismo ainda não passou pela Câmara Municipal.

Neste sentido, o representante da ADOP afirma que “a agência nasceu com o intuito de qualificar e promover a formação dos envolvidos com o turismo”, mesmo com as parcerias pouco ainda é feito para formação dos profissionais do turismo na cidade.

Outro ponto a destacar é por muitas vezes a falta do empresariado em investir e incentivar os seus funcionários para que participem dessas formações. Assim, percebe-se que muito precisa ser feito dentro do turismo para contribuir com a formação de mão de obra qualificada a fim de atender e proporcionar uma experiência qualificada para o turista. Levando em consideração que o turismo em Ouro Preto é um grande gerador de empregos, destaca-se uma rotatividade muito alta dentro das empresas ligadas ao turismo. De forma unânime os entrevistados concordaram que os baixos salários e a busca pelo emprego em outras áreas, tais como a mineração que se destaca na região de Ouro Preto, os funcionários veem o trabalho com o turismo como um “bico”, até aparecer outro trabalho.

Resultantes da baixa remuneração e concorrendo com os empregos na área de mineração, pode-se dizer que muitas vezes o empresário não cativa seu funcionário de forma que este queira crescer dentro da empresa e se qualificar para se manter. Não há nenhuma pesquisa feita na cidade para compreender essa rotatividade, acredita-se que seria de grande importância esse acompanhamento, principalmente porque na Universidade Federal de Ouro Preto existe o curso de Turismo que todos os anos forma profissionais qualificados para serem inserido no mercado. Segundo Scott (2011), fortalecer as atividades que garantem empregos de tempo inteiro e durante todo o ano, para incentivar a formação e oportunidades de progressão na carreira são questões norteadoras que precisam ser repensadas e debatidas para que haja uma diminuição dessa rotativa e um funcionário que compreenda a importância da atividade turística dentro do seu trabalho e ao seu redor contribui para essa redução.

A palavra sustentabilidade vem sendo introduzida dentro das políticas públicas de turismo com intuito de preservação a uso mais consciente de tudo que o turismo oferecer, para que haja um empoderamento maior dentro das discussões de políticas públicas. Em sua totalidade, a sustentabilidade não é considerada dentro do turismo na cidade de Ouro Preto, ainda é preciso se pensar muito a sustentabilidade tanto como patrimonial quanto ambiental em uma cidade com intenso fluxo turístico e que a questão da sustentabilidade é de fundamental importância para a perpetuação do turismo. O representante da ADOP coloca a questão da sustentabilidade do turismo em Ouro Preto trabalhada de forma muito incipiente e fragilizada:

Falar de sustentabilidade ainda é muito frágil, precisamos como cidadãos ouropretanos entendermos isso como um valor e que esse valor seja traduzido inclusive na precificação do produto. Hoje o turista não que vê só o produto, ele que vê como é feito o produto, dessa forma pecamos muito nessa sustentabilidade, não há uma integração, inclusive dos órgãos públicos. Temos um turismo que está de um lado, meio ambiente que está do outro lado, patrimônio que está do outro lado, quando na verdade não tem um processo que visa valorizar essa sustentabilidade.

Também não foram identificadas ações que venham do trade relacionadas a sustentabilidade, conseqüentemente entra-se na discussão de redução de lixo e de possíveis ações para essa diminuição como a conscientização tanto na cidade pelos moradores, pelo trade e os próprios turistas. Hoje não há ações da prefeitura e entidades que incentivem ou monitorem a questão do lixo na cidade, não há uma política clara de redução, haja vista que a cidade não faz nenhum

tipo de campanha para reciclagem. Se há uma consciência de separação, não se tem a estrutura adequada de coleta, muito menos a sua destinação. São ações que norteiam a secretaria Municipal de Meio ambiente, sendo que, haja apresentação ou projetos para a diminuição e estimular a própria mudança de hábito do morador a compreender de formar mais sustentável o lixo que se produz. São formas de compreender os impactos que a grande produção de lixo pode gerar em uma cidade histórica como Ouro Preto que sofre na questão da destinação do seu lixo, são necessárias leis e maior atuação do poder público em conjunto com iniciativa privada.

Durante a pesquisa foram feitas perguntas relacionadas às questões ambientais e se o turismo sustentável é fomentado na cidade, para aferir como a cidade trabalha com o turismo ambiental, se há ações de conservação e monitoramento das áreas verdes. De forma unânime, os entrevistados afirmaram que não há nenhum tipo de conservação, ação ou monitoramento da prática de turismo ambiental. Segundo o representante da ADOP, “Ouro Preto tem um mosaico de riquezas sub explorado, são os atrativos ecológicos, quatro parques instalados na cidade com outros ainda em criação, um mosaico verde, existe sim a noção dessa riqueza, talvez muito mais valorizado pelo que vem de fora do que do próprio ouro-pretano”. Ele ainda afirma em relação a não arrecadação do ICMS ecológico, “o município perde hoje com a arrecadação do ICMS ecológico por falta de uma política e de investimento na gestão, inclusive desses parques, dessas áreas que a cidade tem”. Falta fomentar a prática na cidade, não apenas para o turista, mas que o próprio morador tenha acesso de forma sustentável às áreas verdes do município. O representante da Câmara Municipal de vereadores afirma:

Temos hoje um potencial, um nicho maravilhoso que se refere ao turismo rural, ecológico, de aventuras que é pouquíssimamente explorado. Se você pegar o guiamento do centro de Ouro Preto você conta no dedo quem oferece algo além das igrejas e museus. Então temos uma riqueza do ponto de vista ambiental que é muito pouco explorado, a gente tem guerreiros que militam no ecoturismo. Nós não temos os marcos reguladores. Se não temos no turismo histórico, cultural que é a nossa grande bandeira quiçá no de aventura, ecológico.

Há uma ausência de trabalho conjunto entre as Secretarias de Turismo e Meio ambiente para pensarem em projetos de integração e monitoramento dessas áreas verdes, e que haja de forma sustentável a exploração dessa grande riqueza natural pelo turista que busca não só o histórico e cultural, e sim um diferencial dentro da sua viagem. Na atual conjuntura, não há nenhuma integração entre ambas as secretarias.

A gente peca muito nessa parte do turismo ecológico aqui em Ouro Preto fica muito no cultural, é preciso buscar estudos para compreender as potencialidades que se tem, para ser usufruída de forma sustentável. Tudo está pronto, mas a forma de trabalhar, explorar isso sem causar grandes impactos, eu desconheço. Ouro Preto precisa avançar muito nessa questão do turismo em áreas naturais, de forma sustentável (Representante da SETIC, 2017).

É indispensável fomentar a conservação ambiental, iniciar pelo próprio tratamento de esgoto que a cidade não tem, incentivar e investir em associações de reciclagem que possam consumir todo o lixo reciclável da cidade. Além de impulsionar uma parceria do trade e a prefeitura para incentivar a diminuição do lixo, principalmente nas épocas de grandes eventos na cidade,

buscando práticas de separação do lixo, espaço para possível armazenamento enquanto o lixo não é recolhido pelo município. O diálogo com a comunidade para a prática da coleta seletiva, mas como foi afirmada pela maioria dos entrevistados, a separação é feita pelos moradores, mas não há um recolhimento adequado, muitas vezes no final o lixo acaba sendo misturado. Compreende-se importância de uma gestão mais preocupada com o meio ambiente, todavia, Ouro Preto é reconhecido como Patrimônio Mundial da Humanidade, mas ainda peca nas ações direcionadas para as questões ambientais.

A importância de uma integração entre as secretarias de um município interajam de forma construtiva e parceira todas as ações importantes para uma cidade. Quando se leva a questão da integração das Secretarias de Cultura e Patrimônio e Secretaria Turismo em Ouro Preto não há uma integração de forma consistente, há certa aproximação, mas não existe uma sistemática instaurada na cidade para valorizar essa integração, percebe-se que há muita coisa desacetada com relação a possíveis ações de conservação, são feitas de formas desconectadas. Segundo o representante da SETIC:

A conservação do centro histórico e demais áreas não passa pelo turismo ou ele fica na Secretaria de Cultura e Patrimônio que tem aprovação, monitoramento de projetos, de reformas e do próprio IPHAN. Sendo assim, isentou-se a Secretaria de Turismo, mesmo não havendo esse contato, não omite a Secretaria de Turismo de quando for desenvolver um projeto, seja ele qual for, uma ação de integração com as outras secretarias.

Para se discutir inúmeras questões do turismo dentro de uma sociedade, precisa-se pensar na educação que o seu morador ou próprio turista tem do espaço que vive. Levantou-se uma discussão em relação a promoção da educação turística na cidade de Ouro Preto, de forma, a compreender como a questão educacional ligada ao morador e ao turista acaba se tornando uma ferramenta com grande potencial para se compreender a importância da atividade turística na cidade, tornando o turismo como estímulo para o aprendizado.

O turismo educacional consiste em envolver o homem com o espaço seja ele (físico, geográfico, ecológico, etc.). Proporcionando uma nova visão sobre os conteúdos abordados em sala. Pela ótica da inovação na área da educação aos poucos o turismo educacional, também chamado de turismo pedagógico, vem ganhando espaços no âmbito escolar, incentivando novas oportunidades de conhecimento. (Scremin e Junqueira, 2012:27)

A educação turística é de grande relevância se trabalhada dentro das escolas para auxiliar o aluno a crescer com a pertença e importância que sua cidade tem. Segundo o representante do IPHAN “a educação turística não existe, a gente tem uma ação de educação patrimonial, é um programa que está funcionando desde 2009, mas ninguém fala com relação ao turismo, fala-se para o cidadão usufruindo da sua cidade”. De forma geral, não há projetos de educação turística em ação na cidade, não há dentro das escolas o ensino do Turismo ou mesmo do patrimônio.

Quando se trata da imagem de Ouro Preto, destaca-se a necessidade de ainda mais investimento para fortalecer sua imagem, “hoje a concorrência está muito grande”, afirma o representante da SETIC, é preciso se destacar para continuar a receber turistas. A imagem de Ouro Preto é consolidada, mas precisa ser fortalecida, considera o representante do IPHAN. A cidade tem que ser melhor em todos os aspectos, se ela melhora em todos os aspectos, ela está melhorando

concomitantemente a sua imagem. Destaca-se uma boa participação da cidade em grandes feiras nacionais e internacionais, levando a marca Ouro Preto onde todo dia é histórico, marca criada para a cidade e hoje já bem utilizada pela trade. Outro importante meio de divulgação da cidade são as ações em redes sociais que incentivam o turista a conhecer a cidade. Como afirma o representante da ADOP, Ouro Preto precisa mais que um plano de marketing atualizado, precisa de infraestrutura:

Muito mais que um plano de marketing é estruturar a cidade, posicionar a cidade com boa estrutura, mobilidade urbana, publicidade, receptivo. O marketing da cidade passa pela preparação da cidade para ser o que ela é, porque senão fica uma cidade meio fantasiosa. Para fortalecer a imagem de Ouro Preto, além de colocar para rodar um plano de marketing, sendo um bom plano de ação, alinhado com plano municipal de turismo, e fazer acontecer e não falta pouco, falta muito.

Dessa forma, a imagem de Ouro Preto é forte e reconhecida mundialmente, mas a cidade peca nas questões estruturais como afirma os entrevistados, corre-se o risco do turista não encontrar o turismo que ele compra. Por isso é preciso um debate intensificado entre os atores do turismo, para que haja a criação de políticas públicas que fortaleçam o turismo, consequentemente melhore a cidade em todos os aspectos. Mas que esses debates sejam estruturados, transformando as políticas em ações que sejam implementadas e monitoradas. Desta forma, uma política pública de turismo precisa partir do princípio da sustentabilidade através de ações e programas que envolvam sua população e seus visitantes em níveis econômico e social.

A Tabela 1 sintetiza os resultados obtidos pela presente pesquisa junto aos entrevistados representantes dos vários atores do turismo na cidade de Ouro Preto frente à sua gestão pública, correlacionando com o esquema analítico de Scott (2011), que traz os objetivos das políticas públicas de turismo e as formas de atuação governamental.

Tabela 1 - Objetivos e atuações identificadas na atuação da Gestão Pública de Ouro Preto

| <b>Objetivos das Políticas Públicas de Turismo</b> | <b>Formas de Atuação Governamental</b>  | <b>Atuação da Gestão Pública de Ouro Preto</b>  |
|--|---|---|
| <b>Desenvolvimento Econômico</b>                   | <ul style="list-style-type: none"> <li>- Pesquisa e divulgação de informações sobre tendências futuras do mercado</li> <li>- Fortalecimento da imagem do destino</li> <li>- Garantir acesso efetivo ao mercado e prestação de consultoria e apoio aos negócios</li> </ul> | Apesar de ser um destino reconhecidamente importante, existe uma necessidade de mais investimento para fortalecer sua imagem. O SEBRAE tem feito um trabalho de consultoria na cidade, mas ainda de forma fragmentada e com pouca adesão por parte do empresariado. |
| <b>Competitividade</b>                             | - Sistemas de qualidade e de classificação obrigatórios poderiam tornar-se voluntários e ser colocados nas mãos do setor privado ou terceiro setor  | Ouro Preto participa do estudo de Competitividade elaborado pelo governo federal, mas não do sistema nacional de classificação de meios de hospedagens e nem possui sistemas próprios de qualidade e de classificação.  |
| <b>Prosperidade Local</b>                          | <ul style="list-style-type: none"> <li>- Criação de empregos em turismo</li> <li>- Contribuição para o desenvolvimento de infraestrutura</li> </ul>   | Existem ações para formação e aperfeiçoamento, a qualificação e atualização de mão de obra dentro de trade no setor turístico, mas as   |



|                                 |   |  |
|---------------------------------|---|--|
|                                 |   | atividades relacionadas à qualificação acontecem de forma muito fragmentada e com baixa adesão.  |
| <b>Qualidade de emprego</b>     | - Fortalecer as atividades que garantem empregos de tempo inteiro e durante todo o ano, para incentivar a formação e oportunidades de progressão na carreira  | Falta o empresariado investir e incentivar os seus funcionários para que participem dessas formações. Existe uma alta rotatividade dentro das empresas ligadas ao turismo.   |
| <b>Equidade social</b>          | - Canalizar gastos e renda para as pessoas desfavorecidas e os pobres<br>- Ajudar os pobres a participarem da oferta turística e apoiar a constituição de empresas dentro de comunidades pobres<br>- Estímulo ao turismo social   | Não existe equidade social com a inserção do morador por meio do turismo, acontece apenas gerando empregos diretos e indiretos, mas não há ações voltadas para a inclusão social ou mesmo projetos de turismo de base local ou turismo social.                         |
| <b>Atendimento ao visitante</b> | - Proporcionar às pessoas, incluindo a população nacional, uma experiência de viagem de qualidade, lúdica e educativa;<br>- Promover o turismo como um fim em si mesmo, isto é, um direito disponível futuro do turismo em sua área, consultando outras partes interessadas | Só existe um Centro de Atendimento ao visitante em Ouro Preto, implantado recentemente em 2015, não existe um trabalho de qualificação de guias de turismo na cidade.  |
| <b>Controle local</b>           | - Garantir boa informação e empoderamento para tomar decisões sobre o desenvolvimento do turismo que possa afetar seu futuro  | Existe participação da população nas decisões e elaboração das políticas do setor, por meio do COMTUR e da Câmara Municipal, bem como setor de pesquisa na prefeitura, mas não existem fóruns de discussão e conferências mais abrangentes.                            |
| <b>Bem-estar da comunidade</b>  | - Realizar um planejamento cuidadoso para garantir que a comunidade local não sofra com o turismo, como através do congestionamento do tráfego, barulho, comportamento desrespeitoso, e competição por recursos vitais, como a água   | Não existe a promoção da educação turística na cidade de Ouro Preto, não há projetos de educação em ação na cidade relacionada ao turismo.   |
| <b>Riqueza cultural</b>         | Apoiar a conservação da cultura; os sítios de patrimônio e tradições históricos, controlando o desenvolvimento do turismo e o comportamento do visitante para garantir que a riqueza cultural e a autenticidade não sejam perdidas  | Existem ações de educação patrimonial, projetos isolados, mas não existe um trabalho conjunto entre todas as escolas do município. A questão da integração das Secretarias de Cultura e Patrimônio e Secretaria Turismo em Ouro Preto não existe de forma consistente. |
| <b>Integridade Física</b>       | - Implantação e design de novas estruturas de todos os tipos<br>- Boa manutenção de espaços abertos e a redução de lixo   | Não há ações da prefeitura e entidades que incentivem ou monitorem a questão do lixo na cidade, não há uma política clara de redução do lixo.  |
| <b>Diversidade Biológica</b>    | - Gestão para a conservação e para a manutenção do turismo enquanto atividade geradora de renda para a conservação  | Não há nenhum tipo de conservação, ação ou monitoramento da prática de turismo ambiental, não existem marcos regulatórios. Também é constatada a ausência de trabalho conjunto entre as Secretarias de Turismo e Meio ambiente .                                       |

|                               |  |  |
|-------------------------------|--|--|
| <b>Eficiência de recursos</b> | - Encorajar formas de turismo e gestão de sistemas que são eficientes, promovendo fontes de alternativas e incentivando a redução, reutilização e reciclagem | A cidade não faz nenhum tipo de campanha para reciclagem, reutilização e redução a fim de promover fontes alternativas de recursos.                                |
| <b>Pureza ambiental</b>       | - Promoção de formas menos poluentes de transportes e minimizar e controlar as descargas de esgoto em ambientes sensíveis                                    | Não existe tratamento de esgoto em Ouro Preto.   |
| <b>Sustentabilidade</b>       | - Investimentos diretos ou indiretos no desenvolvimento do turismo e de estratégias para a gestão ambiental  | A sustentabilidade não é considerada dentro do turismo na cidade de Ouro Preto, não foram identificadas ações que venham do trade relacionadas à sustentabilidade. |

*Fonte:* Elaboração própria com base em dados da pesquisa.

A partir dos dados da Tabela 1 e considerando que “a política de turismo cultural é um conjunto de ações, impulsionadas por atores governamentais, com a intervenção ou não de outros atores sociais, tendentes a melhorar as relações que se dão entre os atores turísticos e culturais e as ações e dinâmicas” (Velasco, 2016: 309-310), observa-se que para que de fato hajam cidadãos desfrutando de manifestações culturais fora de seu entorno habitual, há necessidade de ações articuladas entre agentes públicos e privados. Em Ouro Preto isso é ainda incipiente mas com manifestações de envolvimento de atores governamentais e privados sendo realizadas de forma paulatina (Emmendoerfer e Soares, 2014), mas ainda insuficientes para legitimar uma política de turismo com foco no patrimônio cultural em nível internacional.

### **Conclusões**

Este estudo contribui como uma forma de evidenciar a abrangência de uma política pública de turismo que pode ser aferida por meio de tipos de objetivos e de formas de atuação de um governo local em um determinado território considerado destino turístico. Esta análise permite também observar as prioridades e as questões consideradas importantes em uma política pública de turismo em destinos reconhecidos como Patrimônio Mundial da Humanidade pela UNESCO.

A questão da sustentabilidade foi identificada neste estudo como sendo algo periférico na política pública de turismo no caso empírico observado, algo que surpreende considerando que esta questão é uma das que mais vem sendo discutidas na sociedade contemporânea e, principalmente, fundamental para a continuidade de um destino que tem como seu principal segmento o turismo cultural. Neste sentido, destaca-se que não existe em Ouro Preto uma política de turismo cultural consolidada nas bases de ações articuladas, com envolvimento de atores do turismo integrados e que possui ações implementadas.

Ressalta-se que a presença plena de todos os objetivos e formas de atuação do governo tratadas por Scott (2011) deve ser tratado pelas pessoas interessadas em políticas públicas de turismo como uma forma ideal de concebê-la. Entretanto, a presença de múltiplos objetivos e formas de atuação governamental pode revelar esforços do Estado em buscar ser mais inclusivo e integrador no tratamento de questões importantes como a sustentabilidade por meio da política pública de turismo.

A importância de se trabalhar as políticas públicas de turismo em Ouro Preto nasce da necessidade de uma cidade patrimônio ter consolidadas políticas públicas consistentes. Ocorre

na cidade uma falta de continuidade nas gestões, sendo motivo para a não continuidade de projetos e ações, que impacta de forma negativa o andamento dos projetos relacionados ao turismo. Precisa-se destacar que uma cidade boa para o turista, primeiro dever ser boa para o seu morador, sendo que as políticas públicas devem trazer a clareza dessa importância durante sua elaboração.

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# Cultura Bairral as a heritage resource in Lisbon

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## Resumo

Cultural Tourism in Lisbon: Historical Lisbon and Kola San Jon festival, two applications for Heritage, two patrimonial resources that can be created as "tourist products" where neighborhood ethics and culture, such as solidarity and neighborhood relationship can be an added value to oppose the tourism consumption, growing at present in Lisbon. UNESCO's classification of heritage leads to a paradox: tourism policies (local and national) end up being a way of getting extra credit to pursuit tourism attractiveness in the territories, a solution to overcome the economic crisis and to remain in the cities global competition. This is an ambiguous process in which culture and economic values oppose each other, reducing heritage resources to the economic value, reducing historical centers to the tourist occupation, forgetting the cultural polyvalence and social diversity in cities. The aim of the communication is to discuss about two heritage proposals, already in Tentative List: "Historical Lisbon, Global City", promoted by the City Council of Lisbon, in January 2016, and the application of the Kola San Jon festival, in bairro Cova da Moura, immaterial heritage, promoted in 2013 by a local association, Moinho da Juventude. Each one claims the value of neighborhood (cultura bairral) as a cultural resource of the city, though with little presence in the first one, and as a central value in Kola San Jon proposal.

## Palavras chave

Neighborhood; Cultura bairral; heritage; tourism.

## O dilema sócio urbano: a gentrificação turística e a saturação de alojamentos turísticos

Na atualidade o crescente interesse turístico por Lisboa tem exposto um dilema sócio-urbano, colocando em oposição a rentabilidade económica, estimulada pelo turismo, face à preservação da "autenticidade" dos bairros, bem como o desequilíbrio na oferta residencial permanente, sobretudo para as classes médias e de fracos recursos. Contudo, os bairros históricos são um dos principais interesses turísticos em visita.

Desde os anos 90 do século XX que se procurou implementar em Lisboa uma política de reabilitação urbana nos bairros antigos, porém com resultados lentos. Contudo, nos últimos anos deu-se um salto qualitativo graças ao investimento turístico, que tem incidido predominantemente na reabilitação dos velhos edifícios, nos quais instala equipamentos hoteleiros, como os hotéis boutique, hostels e uma disseminação de alojamentos locais, a par da alteração da rede comercial, orientada agora para o consumo turístico. Como resultado o Centro Histórico de Lisboa tem sofrido uma significativa alteração conformando-o a um lugar de consumo de actividades de entretenimento e turismo.

A alteração da ocupação residencial provocada pela entrada da ocupação residencial temporária, originando um desequilíbrio a favor da ocupação turística, conduz ao dilema instalado entre o crescente interesse turístico e as outras vocações urbanas, nomeadamente residencial. Por um lado o interesse turístico é alimentado pelo valor patrimonial material da cidade (conjuntos urbanos, arquitetura, traçados urbanos, monumentos, arqueologia e bens decorativos como a calçada ou o azulejo) que, em conjunto com a autenticidade bairral, representam a mais valia da singularidade de Lisboa, por outro, porque se orienta para o consumo turístico, exclui justamente a cidade viva, i.e. as comunidades que vivem (residem ou

trabalham) e uma parte importante no contributo para a preservação desse próprio “bem patrimonial material”.

A recente creditação de “património Unesco” do Fado, a par das candidaturas para o Centro Histórico de Lisboa e a festividade Kola San Jon, são uma mais-valia que levará a uma ainda maior atração da cidade.

Sociologicamente a cultura bairral é um processo em que as comunidades residentes são o ator central na produção de “modos de vida em bairro”, a continuação desse valor cultural (e turístico) depende então, quer da continuidade das comunidades residentes, quer da transmissão de uma memória e valores de vivência em bairro.

Este dilema que se vive na actualidade em Lisboa ocorre noutras cidades com centros históricos patrimoniais, refletindo a penetração dos fluxos de capital global que privilegia quer os consumos de luxo, as indústrias turísticas, as atividades criativas (TIC), onde a valorização da classificação patrimonial UNESCO acaba por deter um papel controverso. Os diferentes estudos que têm analisado as consequências da classificação patrimonial que se acompanha por uma incidência turística apontam para a instalação de um paradoxo: a salvaguarda do património também se tornou num predador desse património.

Poder-se-ia dizer em síntese que a patrimonialização e a incidência turística dos lugares têm levado a uma gentrificação, à sua conformação enquanto lugares de entretenimento e consumo turístico e a tendência para a monofunção desses lugares. Citando Gotham: “as empresas da *global economy* (Disney, Sony ...) extraem dos sítios as singularidades locais que constituem em *marcas* e servem para a refabricação de uma cidade-fantasia, revocacionando o bairro para o lazer e consumo, eliminando a característica de bairro, como lugar de vivência, expulsando os que não possuem capacidade económica e se conformam com este padrão, seja do lado dos residentes, seja de outras atividades urbanas.” (Gotham, 2005:1102 1114)

Os bairros históricos submetidos às lógicas do capital global, que tem encontrado neste segmento de lazer um novo investimento lucrativo, resolvendo a crise nos outros sectores imobiliários, acabam por se transformar em bairros enclave, frequentados por diversos estratos de turistas e *beautiful people*.

### **A candidatura a património UNESCO Lisboa Histórica Cidade Global**

A consagração do Fado como património imaterial da humanidade, que tem em Lisboa um “berço” simbólico, estimulou a vontade de classificação de outros bens patrimoniais da cidade, como a recente candidatura “Lisboa Histórica, Cidade Global”, em 2016, herdeira e complementar da candidatura da “Baixa Pombalina” e a consagração da festa Kola San Jon do bairro da Cova da Moura, como Bem Imaterial de Portugal, em 2013.

Na candidatura “Lisboa Histórica, Cidade Global”, o território, em proposta de Bem Patrimonial, circunscreve o Centro Histórico, considerando a Baixa Pombalina e a Frente Ribeirinha como nó central, estendendo-se até aos bairros históricos (Alfama, Castelo, Mouraria, Bairro Alto e Bica, Madragoa, nomeadamente), admitindo que neste conjunto se estabelece uma Paisagem Histórica Urbana (Historical Urban Landscape) singular, no interior da qual se estrutura um sistema complexo de relações entre a forma física, a sua organização espacial e as conexões entre as morfologias urbanas, a paisagem natural do rio, os bairros com as suas vivências e os

elementos históricos disseminados, valorizando desse modo aspectos históricos, naturais, sociais, culturais. (Bandarin F. e Oers, Ron Van, 2015)

Nesta candidatura reúnem-se dois âmbitos. Por um lado evidencia a configuração visual do Centro Histórico, conformando-se à hegemonia visual do consumo turístico, como tem vindo a realçar J. Urry (Urry, 1997: 6) e por outro salienta a importância dos bairros históricos, onde as comunidades residentes foram sedimentando uma cultura de vida em bairro, que ao longo do século XX foi adquirindo interesse antropológico, urbano e turístico.

Na investigação que fiz sobre as representações turísticas de Lisboa ao longo do século XX ressalta que a cidade de consumo turístico, recomendada pelos guias turísticos, fixou-se quase desde o início do século, representação essa na qual os bairros históricos ocupam um lugar central, nomeadamente os (pitorescos, autênticos, *trendy*) bairros históricos da Colina do Castelo, Alfama em primeiro lugar; a multicultural Mouraria na atualidade; o (elegante) Chiado; o (animado e *fashion*) Bairro Alto, com a bela Alameda de S. Pedro de Alcântara e o *smart square* do Príncipe Real. (Gonçalves, 2015)

Com exceção da Mouraria, bairro que foi atravessado por um propósito de renovação urbana, nos anos 40 de XX, cujas operações urbanísticas desencadeadas então, efetuaram uma fractura considerável no seu tecido antigo, a preservação dos Bairros Históricos, quase desde o início de XX, que se encontrou intimamente ligada ao interesse turístico demonstrado. Um dos aspectos mais focado para a singularidade de Lisboa foi justamente a presença de vivências de bairros, ditas autênticas, e que começam logo no início de XX, atribuindo a Alfama e Mouraria, mas igualmente à vida de rua que se testemunhava na frente ribeirinha entre o Mercado da Ribeira – Cais do Sodré e Alfama, onde os populares, as suas actividades e a dinâmica bairral foram centrais para o “tourist gaze”.

A cultura bairral, assente na proximidade, nas redes de vizinhos, favorecida pelas velhas malhas urbanas, na continuidade das famílias e lugar de acolhimentos de imigrantes, foi-se recriando a partir das comunidades residentes, combinações de classes populares urbanas e surtos migratórios, rural/urbano na primeira metade do século XX e transcontinental em fins do XX e nos últimos anos também lugar de atracção residencial para “estudantes *erasmus*” e artistas que partilham com os primeiros fracos recursos económicos. O desinteresse pelo investimento imobiliário nestes bairros permitiu a presença duma composição social muito diversificada, justamente porque permaneceram bairros de habitação acessível, na mesma medida em que possuíam poucas condições de habitabilidade.

Na actualidade, o impacto do turismo revelou a fragilidade do acesso residencial permanente dos estratos sociais médios e economicamente mais debilitados em Lisboa, ao ver o parque habitacional transferido para modalidades de alojamento temporário, nomeadamente os novos produtos turísticos de hospedagem como o *airbnb* ou os hostels, ameaçando por isso a cultura bairral.

A sua classificação patrimonial pode vir a acentuar ainda mais a monofunção turística que começa a expressar-se no Centro Histórico, originando movimentos críticos da sociedade civil, como o Movimento "Quem vai poder Morar em Lisboa" que desde 2016 tem vindo a chamar a atenção para a perda de escolha residencial permanente naqueles bairros.



### **A festa Kola San Jon na Cova da Moura**

O bairro da Cova da Moura, situado na periferia urbana da cidade, no concelho da Amadora, expressa o “espírito” de autoconstrução como a solução para resolver o acesso à habitação, que o mercado “legal” não oferecia. Depois de uma primeira ocupação com famílias com um perfil sociológico semelhante ao dos moradores nos bairros de Alfama ou Mouraria, nos anos 40, nos terrenos de uma quinta desativada, cresceu consideravelmente em 1974, com a chegada dos “retornados” e de um número considerável de famílias de Cabo Verde e um menor número de famílias vindas de outros países africanos PALOP. (Carvalho M<sup>a</sup> L., 2010)

O bairro clandestino com uma forte presença étnica, expressando o impacto da descolonização, foi crescendo orgânica e demograficamente, alimentado pelo surto migratório pós colonial, constituindo-se reserva de mão-de-obra para as importantes obras públicas em consequência da realização da Exposição Mundial de 1998 em Lisboa. Nos anos 90 do século XX foi-se estabelecendo uma representação pública negativa do bairro, associado com o tráfico de droga, nomeadamente. Contudo o bairro, em contraponto da perceção negativa externa, estabeleceu uma rede de solidariedade importante que lhes tem permitido combater a marginalização social e o reganho de dignidade enquanto lugar residencial, desde logo pelo carácter da auto construção das habitações, das combinações culturais trazidas de Cabo Verde e na identidade comum encontrada pela resistência às adversidades e preconceitos. Como refere Marco António da Silva: “O projecto da casa é um reflexo directo da cultura, gosto pessoal e capacidade económica, não existindo um projecto completo. Este estará em constante evolução, consoante as necessidades e o crescimento do agregado familiar, ou as possibilidades económicas. As referências arquitectónicas partem portanto do imaginário e da experiência de quem as constrói, ao invés de um qualquer treino formal ou académico. As casas têm sempre uma carga profundamente pessoal e cultural.” (Silva, M. António, 2010: 85)

Godelieve Meersschaert, coordenadora da Associação Moinho da Juventude, presente desde a sua origem em 1985, compara o bairro com Alfama, onde a par de uma comunidade que representa a vivência bairral, a migração, a discriminação e simultaneamente os valores de solidariedade é, igualmente, o testemunho edificado de um período após o 25 de Abril de 1974, que expressa o pós-colonialismo, a resistência, os costumes e tradições da diáspora cabo verdiana. Na história urbana da cidade, imediatamente após a abertura democrática em 1974, emergiram diversos movimentos sociais em defesa do direito à habitação, bem escasso em Lisboa e no país para os estratos sociais economicamente fragilizados, onde programas como o SAAL (Serviço de Apoio Ambulatório Local; 1974-1976), o movimento de habitações em regime de cooperativa e a autoconstrução foram iniciativas que procuraram resolver o deficit residencial, incluindo a importância da participação dos cidadãos, movimento social urbano que declinou ainda nos finais da década de 70, não sem ter deixado algumas marcas que ainda prevalecem na cidade. O bairro da Cova da Moura possui na sua génese, justamente, uma forte componente de autoconstrução e desse modo a participação ativa dos residentes.

A associação procurou desde logo encontrar soluções para melhorar as condições de habitabilidade no bairro e um apoio às condições de vida dos moradores, mas igualmente de dinamização cultural, sendo o principal parceiro em todo o processo urbano no sentido de resolver a sua condição ilegal (no plano urbanístico) e de deficit de habitabilidade e qualidade de vida urbana. Ao longo dos anos tem promovido as particularidades culturais dos residentes

(rap, Batuque Finka Pé, e as festividades do Kola San Jon), procurando desse modo alterar “as representações negativas” atribuídas ao bairro.

O Projecto “Sabura”, desenvolvido desde 2004, constitui uma das principais propostas para a requalificação do bairro. Inspirado nas experiências desenvolvidas em outros contextos de intervenção, nomeadamente em bairros sociais de Joanesburgo, África do Sul e em Den Haag, nos Países Baixos, tem como principal objectivo mostrar que a realidade no bairro é bem diferente daquela que é apresentada pela comunicação social, onde se confundem acontecimentos pontuais e fracturantes com o quotidiano das pessoas. (Carvalho M<sup>a</sup> L., 2010: 55)

Aqui os fluxos turísticos possuem uma outra motivação, procurando mais a troca e aprendizagem cultural onde, a par da festa Kola San Jon, outras expressões culturais têm sido produzidas, destacando por exemplo a presença no bairro da Cova da Moura do bailarino e coreógrafo Faustin Linyekula, Artista na Cidade em 2016 convidado pela Bienal Artista na Cidade.

A festa Kola San Jon, que decorre na Cova da Moura desde 1991, festividade com origem na diáspora cabo verdiana, produzida já em contexto pós colonial, encontra-se intimamente associada à origem e vida social do bairro da Cova da Moura. Como enunciam na proposta de candidatura, “a construção do bairro assentou de forma importante em práticas de entajuda e reciprocidade e o valor cultural da festa possui nesse magma a sua fonte de criação. A sua aceitação no Inventário Nacional do Património Cultural Imaterial de Portugal, em Setembro de 2013 (promovida pela Associação Moinho da Juventude, com a fundamentação científica elaborada por Júlia Carolino, Ana Flávia Miguel e Rui Oliveira), traz uma creditação complementar ao movimento de dignificação do bairro e da sua afirmação como um bairro para viver, contra a proposta de demolição que ainda se encontra no horizonte de resolução dos “territórios Augi (Áreas Urbanas de Génese Ilegal)”. Neste sentido, torna-se um recurso simbólico importante para os migrantes que enfrentam um quotidiano com problemas sociais e económicos graves, nomeadamente, rendimentos muito baixos, desemprego e difícil integração na sociedade portuguesa.

Em comum para ambos os bairros a fragilidade dos residentes em acederem ao mercado formal da habitação e simultaneamente terem produzido “valores culturais” que contribuem para o “valor patrimonial turístico”, explorado ou extraído por atores externos aos bairros, sobretudo no caso dos bairros históricos de Lisboa. Excluídos os velhos residentes nos bairros do Centro Histórico de Lisboa, por não serem os proprietários das habitações que, subitamente, adquiriram um valor grande graças à atracção turística, excluídos os residentes no bairro da Cova da Moura, por não serem proprietários do terreno sobre o qual edificaram as suas habitações (em auto construção). O direito à cidade torna-se limitado pois no processo os agentes ficam reduzidos aos técnicos especialistas e representantes políticos, bem como proprietários do terreno, ou as empresas de indústrias turísticas ou de entretenimento, excluindo justamente a quem mais importava, os moradores, inquilinos ou “proprietários” de habitações em autoconstrução.

### **Uma hipótese de saída; conclusão**

A literatura académica que cruza o problema do património, do urbano, das comunidades e o turismo tem chamado a atenção para a importância dos “comuns” desse terceiro elemento que complementa o mercado e o espaço público. (Linebaugh, 2008)

A questão do comum levanta-se na medida em que, de acordo com vários autores, na nova economia assente nas actividades criativas de inovação e tecnologias de informação, a captura da mais valia faz-se cada vez mais fora do processo produtivo. A produtividade e a criatividade das pessoas realizam-se em redes e sobretudo fora do trabalho, levando a que o capital global procure não só controlar a propriedade privada, a propriedade pública, mas também esse valor comum originado em redes interconectadas, inventando estratégias para drenar a produtividade comum do *socius*.

Transposto para as questões do património e o turismo, recorrendo à compreensão de P. Gonzalés: o património imanente diz o autor, é o conjunto de ideias, afectos, relações sociais, comportamentos e formas materiais que historicamente chegaram até nós através de um processo gradual de decantação. Desse ponto de vista a matéria-prima não se encontra nas mãos de nenhum grupo em particular, mas no *socius*, nas comunidades vivas do presente; os seus corpos e vidas tornaram-se o capital fixo do qual é extraído valor pela economia do turismo. Nessa medida os valores comuns pertencem às pessoas, às comunidades múltiplas. A privatização dos *comuns* estendeu-se até às entidades imateriais entre as quais o património. Este, destacado ainda em finais do século XIX como parte importante da identidade dos estados-nação, foi sendo sancionado e gerido pelos estados e instituições a partir de um processo de gestão de patentes e direitos de autoria. Muitas vezes expropriado diretamente pelo Estado, para a sua suposta proteção, o património tem sido nos últimos tempos privatizado por causa da redução do investimento público, processo que ocorre em Itália, na Grécia e em Portugal, privatização que não o devolve às comunidades que o produziram, mas ao mercado para a sua exploração económica. (Gonzalés, 2013: 482)

Como refere aquele autor, o retorno da extracção rentista faz com que a renda do património imanente (que resulta da decantação da produção patrimonial onde as comunidades tiveram e têm uma parte importante) seja progressivamente expropriada pela propriedade imobiliária que adquire o valor suplementar justamente desse comum. E não se trata só das habitações, mas também se encontra presente na iconografia, na gastronomia ...

O património de um bairro, de uma festa, de uma paisagem, tem um valor ontológico imanente enquanto faz parte da vida viva das comunidades que o produzem, contudo quando é seleccionado, transformado e transportado para fora das comunidades, participa de uma realidade transcendental e torna-se um problema para as comunidades que o produzem se a apropriação do valor é efectuada por actores externos e (exógenos) ao património e ao seu processo de transformação. (Gonzalés, 2013: 522)

A cultura bairral, na sua diversidade social, seja no centro histórico, seja na Cova da Moura, a par dos elementos materiais e paisagísticos, fazem o conjunto complexo da singularidade patrimonial de Lisboa. As comunidades residentes, o novo surto de movimentos sociais em torno da defesa dos bairros antigos são uma parte importante e parceiro privilegiado nos destinos do valor patrimonial da cidade.

De acordo com a crítica pós colonial e antropológica o processo de patrimonialização tendeu a criar um Outro cristalizado (transcendente), a sugestão de Gonzalés é que as comunidades patrimonializadas deixem de representar outros e se apresentem a si próprias com as suas vidas, i.e. deixem de encenar performances para experiências turísticas e, como na Cova da Moura, festejem a vida comum ali e na diáspora, que acontece com a festividade da Kola San Jon.

Na reapropriação do *comum* pelas comunidades vivas não persiste uma nostalgia e a erradicação do turismo, antes procura-se que, na gestão do espaço urbano e economia turística, não se externalize o valor gerado pelo património, mas reverta para as comunidades, que estas vivam nas suas diversidades e tensões e não se transformem em performadores de um cliché turístico ou sejam expulsos para outros territórios economicamente desvalorizados.

Bauman encontra na figura do “turista” a metáfora da modernidade líquida em que vivemos, ou o seu oposto, o vagabundo – “o sem abrigo”, caricaturando estas figuras da modernidade líquida como gado em transumância, saltando de pasto em pasto; o primeiro parte quando se esgota a sua erva autêntica, o segundo sai quando é expulso. De certa forma em algum momento das nossas vidas todos partilhamos / participamos dessa figura.

Habitar um lugar tornou-se difícil. O síndrome do turista traduz a efemeridade das relações e, uma vez que a presença num lugar é transitória, reduzida ao consumo de “novidades”, que depressa se esgotam, empurrando-(n)os para um novo e fresco pasto, a construção de laços, de relações de confiança e responsabilizações mútuas é redundante, uma perda de tempo. Vive-se de momento em momento, para o momento. (Franklin A., 2003:208) Na mesma medida em que somos compelidos à transumância, incapazes de tecer laços de relação duradouros, inundados de objectos, agarramo-nos às *Marcas*, como a possibilidade de podermos voltar a ser capazes de encontrar uma bolha familiar, uma âncora de identificação.

Contudo, como diz Bauman, é possível encontrar um equilíbrio apesar da precariedade, do recolhimento provisório através das *Marcas* e de enclaves de mesmidade, pois em cada um de nós subjaz a curiosidade de encontrar outros, de experienciar a alteridade, vontade de conhecer os outros, algo que é possível na interacção.

As cidades encontram-se agora povoadas por uma imensa pluralidade de pessoas; nativos, migrantes, *global people*, turistas, refugiados ... constituindo-se num meio onde se misturam a mixofilia e a mixofobia, a vontade de entrar em contacto com outros e o medo de se misturar. (Franklin A., 2003:216)

A viagem aos bairros pobres pode traduzir um certo voyeurismo e estetização da pobreza, se o olharmos como um bairro de sofrimento e privação, porém se os interpretarmos como lugares de esperança e solidariedade, então a viagem turística pode transformar-se num processo educativo para ambos, turistas e residentes. Como refere Steinbrink, em síntese, o *slum tourism* é um meio para reflectir sobre a alteridade, do processo auto construtivo do Outro em ambos, turistas e residentes. (Steinbrink, 2012: 20) O turismo cultural complementa essa vontade de entrar em contacto com a alteridade, as muitas culturas que somos capazes de produzir.

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# **THEME G**

**TERRITORY, TOURIST ROUTES  
AND CULTURAL LANDSCAPES**

# **TEMA G**

**TERRITÓRIO, ROTAS TURÍSTICAS E  
PAISAGENS CULTURAIS**



## THEME G

Over the past few years, territory has been positioning itself as key element in thematic tourism, as it is able to gather the values of the identity of places, the authenticity of the practices, the global communications and technological diversity, cultural differentiation, sustainability support and notoriety.

All these values are attraction factors for any tourist destination, and simultaneously find a solid expression in the organisation of trial experiments and participation in the daily activities in places and in the exploitation of the resources of the territory, along routes which are the result of cooperation between local and regional *stakeholders*.

These routes, clearly anchored in landscape elements, either natural or built, find a superlative appreciation in cultural elements (tangible and intangible), in history, in traditional practices and in the specific socioeconomics of places. This set of characteristics are especially endowed to give a proper answer to an increasing demand of new tourists in search of alternative forms of tourism, of experiences that break with their daily lives, of contact with forgotten traditions and adventures in unusual places.

This topic aims at integrating the texts that may have the core of their approach in the affinity between the area's resources, the motivation of visitation and the cultural identity.

## TEMA G

Ao longo dos últimos anos o território tem vindo a assumir-se como elemento fulcral das temáticas turísticas. Isto sucede porque ele consegue congrega os valores da identidade dos lugares, da autenticidade das práticas, das comunicações tecnológicas globais e da diversidade e diferenciação culturais, suportes de sustentabilidade e de notoriedade.

Todos estes valores, simultaneamente fatores de atração para qualquer destino turístico, encontram uma sólida expressão na organização de formas de experimentação e participação no quotidiano dos lugares e de aproveitamento dos recursos do território, através de rotas que resultam de uma cooperação entre os *stakeholders* locais e regionais.

Estas rotas, claramente ancoradas em elementos paisagísticos, naturais ou construídos, encontram nos elementos culturais (tangíveis e intangíveis), na história, nas práticas tradicionais e na socioeconomia específica dos territórios, uma valorização superlativa. Este conjunto de características apresenta-se especialmente dotado para dar resposta a uma procura crescente de novos turistas em busca de formas alternativas de turismo, de experiências de rotura com o seu quotidiano, de contacto com tradições esquecidas e de aventuras em lugares inusitados.

Este tópico propõe-se integrar os textos que possam ter na afinidade entre os recursos do território, a motivação da visitação e a identidade cultural o centro da sua abordagem.

# The vibrant cultural landscapes of the cold desert of Himachal: A case study of Spiti and Kinnaur regions

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## Abstract

The cold desert Cultural Landscape of India is situated in the Himalayas and stretches from Ladakh in the north to Kinnaur in the south. The region constitutes a Cold Desert biome with harsh climatic conditions, due to its location on the leeward side of the Himalayas, and its very high elevation (ranging from 3000 – 5000m ASL). A huge seasonal variation is seen in the climatic conditions, from short and dry summers, to long, windy and freezing winters. The soil is not very fertile and the climatic conditions allow very short growing seasons making it a bare landscape. Water resources are minimal and comprise glacier-fed streams. These physiographic peculiarities and ensuing harsh climatic conditions have led to the emergence of a unique Cold Desert ecosystem as well as a Culture which is unique. The population belongs predominantly to the Indo-Mongoloid (Tibetan) race. Spiti, is known as the 'middle country' that lies between Tibet and India. Throughout history, it kept changing hands among the various kingdoms of Tibet, Ladakh, Kinnaur, Lahaul and Kullu. The intangible cultural heritage of this region is also exceptional and diverse. The natural heritage is unique and displays an extremely fragile ecosystem that shows a complex relationship of the climatic and geomorphological processes, and exhibits very less but highly endemic diversity. Many rare and special varieties of flora and fauna are found here so much so that many national parks and wildlife reserves have been declared here by the Government for their protection. Furthermore, the Cold Desert has been declared as the 16th Biosphere Reserve of India in 2009 that includes Pin Valley and National Park and surroundings, Chandratal and Sarchu, and the Kibber Wildlife Sanctuary in H.P. The Great Himalayan National Park Conservation Area is also near this region. The presence of these unique cultural and biodiversity elements in the landscape has high significance of regional, national and global levels. The Cold Desert region has a unique culture of its own, which is an amalgamation of Indian and Tibetan influences, is reflected in the form of Buddhism practiced here and further manifest in its art, architecture, lifestyle, food, clothing, dance, music etc. The region is an exceptional testimony to this cultural tradition which has evolved over centuries and is living. The Cold Desert Cultural Landscape of Himachal has a large repository of exceptional intangible cultural resources ranging from performing arts, crafts, literary works, customs, myths and beliefs.

## Keywords

Cultural Landscape; Tangible and Intangible Heritage; Impact of Tourism.

## 1. Introduction

A cultural landscape is defined as "a geographic area, including both cultural and natural resources and the wildlife or domestic animals therein, associated with a historic event, activity, or person or exhibiting other cultural or aesthetic values."<sup>1</sup> In the simple terms it can also be said that, where ever successful societies reside there they leave their cultural imprints, which contribute to the cumulative cultural landscape.<sup>2</sup> The term "cultural landscape" was first used by the geographer Otto Schlüter in the early 20th century. He argued and defined geography as a 'landscape science' and defined two forms of landscape: the original landscape or landscape that existed before major human induced changes and

<sup>1</sup> <https://www.nps.gov/tps/how-to-preserve/briefs/36-cultural-landscapes.html>.

<sup>2</sup> <https://www.e-education.psu.edu/geog571/node/145>.

the 'cultural landscape' a landscape created by human culture and further emphasized on the task to trace the changes in these two landscapes. Later on Carl Sauer promoted and developed the idea of cultural landscapes. His cultural landscape theory states that the cultural landscape is shaped by humans and various cultural aspects<sup>3</sup>. His classic definition of a 'cultural landscape' reads as: *"The cultural landscape is fashioned from a natural landscape by a cultural group. Culture is the agent, the natural area is the medium, the cultural landscape is the result"*. Sauer stressed on the agency of culture as a force in shaping the visible features of the Earth's surface in delimited areas. Since then the concept of cultural landscapes has been variously used, applied, debated, developed and refined within academia. Due to all this, the World Heritage Committee in 1992 included 'cultural landscapes' as an option for heritage listing properties that were neither purely natural nor purely cultural in form (i.e. 'mixed' heritage) and has defined it as "cultural properties [that] represent the combined works of nature and of man."<sup>4</sup> A 2006 academic review of the combined efforts of the World Heritage Committee, multiple specialists around the world, and nations to apply the concept of 'cultural landscapes', observed and concluded that: *"Although the concept of landscape has been unhooked for some time from its original art associations ... there is still a dominant view of landscapes as an inscribed surface, akin to a map or a text, from which cultural meaning and social forms can simply be read."*<sup>5</sup> Within academia, any system of interaction between human activity and natural habitat is regarded as a cultural landscape.

## **2. Cold Desert Cultural Landscape of India:**

The cold desert Cultural Landscape of India is situated in the Western Himalayas. It stretches from Ladakh in the state of Jammu and Kashmir in the north, comprising the Leh and Kargil districts of Ladakh division to Kinnaur in the south, in the state of Himachal Pradesh comprising Spiti region of the Lahaul and Spiti district and a part of Kinnaur District in the state. The region constitutes a Cold Desert biome with harsh climatic conditions, which can be attributed to two factors. One is its location on the leeward side of the Himalayas, which makes it a rain-shadow zone inaccessible to the annual south eastern monsoon winds that sweep the rest of the country, thus creating desert like conditions with low levels of precipitation. Second is its very high elevation ranging from 3000m to 5000m above sea level, which adds to the coldness in its environment. Due to these factors there is a huge seasonal variation in the climatic conditions, ranging from short and dry summers with harsh sunlight to long, windy and freezing winters. Temperature variations are from 36°C (maximum) during the day to -32°C (minimum) at night temperature. Blizzards, snowstorms and avalanches are common. The soil is not very fertile and the climatic conditions allow very short growing seasons making it a bare landscape. Water resources are minimal and comprise glacier-fed streams. These physiographic peculiarities and ensuing harsh climatic conditions have led to the emergence of a unique Cold Desert ecosystem as well as a Culture which is unique. The population belongs predominantly to the Indo-Mongoloid (Tibetan) race.

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<sup>3</sup> <https://sites.google.com/site/humangeo123/cultural-landscape-theory>

<sup>4</sup> UNESCO (2012) Operational Guidelines for the Implementation of the World Heritage Convention UNESCO World Heritage Centre. Paris. Page 14

<sup>5</sup> [https://en.wikipedia.org/wiki/Cultural\\_landscape#cite\\_note-10](https://en.wikipedia.org/wiki/Cultural_landscape#cite_note-10)

### 3. Himachal Pradesh a General overview

A part of the cold desert cultural landscape is situated in Himachal Pradesh which is predominantly a mountainous State located in North–West India. Himachal shares its international border with China. The State has highly dissected mountain ranges interspersed with deep gorges and valleys. It is also characterized with diverse climate that varies from semi tropical in lower hills, to semi arctic in the cold deserts areas of Spiti and Kinnaur. Altitude ranges from 350 meters to 6975 meters above mean sea level. It is located between Latitude  $30^{\circ} 22.40$  N to  $33^{\circ} 12.20$  N and Longitude  $75^{\circ} 45.55$  E to  $79^{\circ} 04.20$  E. Population of Himachal Pradesh is 68.56 lakh persons as per the Census report for the year 2011. 89.01% of the total population inhabits 20,604 villages in the rural areas of the State. These villages are sparsely distributed across the State having population density as low as 1 person per square kilometer in the remote and tribal area of Lahaul & Spiti, Hamirpur district has largest population density of 369 persons per square kilometer as against 123 persons per square kilometer for the whole State. Himachal Pradesh is one of the few states of the country where gender equality is an integral part of the social ethos as well as the overall development strategy. Female literacy is well above the national level and women employment is much higher than in most states of the country.



Figure 1 - Digital Elevation Model, H.P.

Source: [https://www.researchgate.net/figure/231175191\\_fig1\\_Figure-1-Digital-elevation-model-DEM-of-Himachal-Pradesh](https://www.researchgate.net/figure/231175191_fig1_Figure-1-Digital-elevation-model-DEM-of-Himachal-Pradesh)

#### 3.1 Geology and Geomorphology

Himachal Pradesh with its complex geological structures presents a complicated topography with intricate mosaic of mountains ranges, hills and valleys. Composed of recent Alluvium, Shiwalik hills are made up of rocks such as sandstone, shale and clay that came into existence

during the Eocene, Miocene and Pliocene period. The central part that extends from Chamba district in the north to Shimla district in the south is mainly represented by group of rocks which originated in middle Proterozoic period. In the north eastern portion unclassified Granites borders the central part in between Kullu, eastern Shimla, Lahaul Spiti and parts of Kinnaur district. The eastern greater Himalaya presents the Triassic formation which is found in Kaza tehsil of Lahaul Spiti district.

### 3.1.1. Topography and Climate

Topographically, the state can be divided into three zones:

1. The Shiwaliks or Outer Himalayas: It covers the lower hills and in this zone, altitude varies from 350 m to 1500 m.
2. Inner Himalayas or mid-mountains: Altitude varies from 1500 m to 4500 m above mean sea level.
3. Alpine zone or the greater Himalayas: Has altitude above 4500 m above mean sea level and comprises areas of Kinnaur district, Pangi tehsil of Chamba district and area of Lahaul & Spiti district.

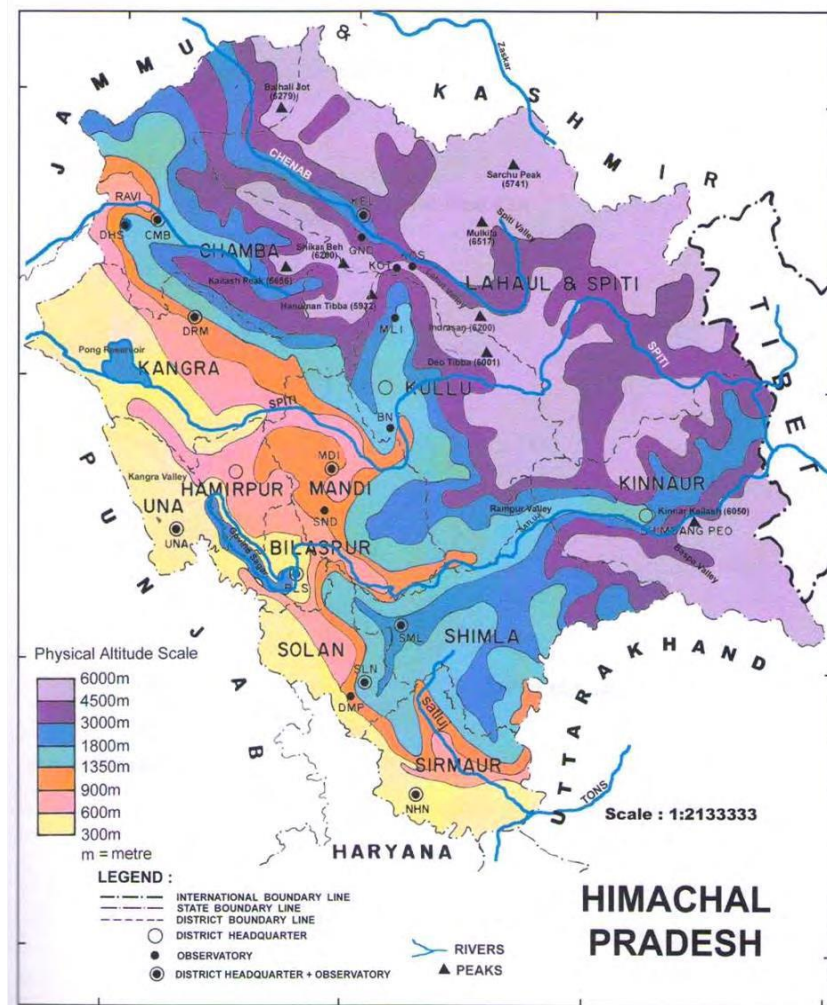


Figure 2 – Topographical map of HP.

Source: <http://www.mapsofindia.com/maps/himachalpradesh/himachalpradeshphysical.htm>

The climate varies across the state with the altitude. In the southern low tracks between an altitude of 400-900 it is hot sub humid type, between 900-1800m altitude warm & temperate, between 900-2400m cool & temperate, cold alpine & glacial above 2400-4800m altitude. Bilaspur, Kangra, Mandi, Sirmour, and Una districts experience sub tropical monsoon, mild and dry winter and hot summer. Shimla district has tropical upland type climate with mild and dry winter and short warm summer. Chamba district experiences, humid subtropical type climate having mild winter, long hot summer and moist all season. Kullu district experience mainly humid subtropical type of climate with mild winter moist all season, long hot summer and marine. During the period from January to February heavy snowfall in higher reaches create conditions for low temperature throughout the state making it unpleasant and series of western disturbances also affect the state.

#### **4. Cold Desert Cultural Landscape of Himachal Pradesh**

The physiographic peculiarities and ensuing harsh climatic conditions have led to the emergence of a unique Cold Desert ecosystem as well as Culture of the community, which is unlike any other in the world. Within this one geographic unit lie many settlements, scattered across the landscape at locations that provide marginally improved conditions for habitation, nestled within valleys protected from harsh winds and located near rivulets. The settlements are small, isolated, sparsely populated and their planning a testament to the harsh terrain and environment. The population belongs predominantly to the Indo-Mongoloid (Tibetan). The people are simple folk used to hard labour with colorful customs, myths, beliefs and conventions that contrast with the barren and harsh environment and form the cultural highlight of this region. The Cold Desert region has a unique culture of its own, which is an amalgamation of Indian and Tibetan influences, is reflected in the form of Buddhism practiced here and further manifest in its art, architecture, lifestyle, food, clothing, dance, music etc. The region is an exceptional testimony to this cultural tradition which has evolved over centuries and is living. The Cold Desert Cultural Landscape of Himachal has a large repository of exceptional intangible cultural resources ranging from performing arts, crafts, literary works, customs, myths and beliefs.

Despite a common narrative, two distinct regions of human habitation and culture can be distinguished within this cold desert, namely:

- (1) Spiti Valley and
- (2) Kinnaur (H.P.).

Although they have been closely linked throughout the ages politically and socially, the two regions have different histories attributable to their isolated geographic locations and separate access routes, from Indian as well as Tibetan sides. Spiti valley was more isolated and split into eastern and western valleys, connected with Ladakh & Tibet on eastern side & Kinnaur and Kullu on western side through high passes. Kinnaur is adjoining western Tibet and shares its eastern boundary with it. On the south and south eastern sides its boundary runs alongside the boundary of Uttar Kashi district of Uttarakhand, on its south-west lies the district of Shimla and in north-west is Spiti. Kullu touches it on north and north-west.

##### **4.1 Spiti**

Spiti is literally known as the 'middle country' lies between Tibet and India. Historically it was loosely ruled by a hereditary *wazir* (chiefs), styled '*Nono*' and in between, for brief periods, this

also came under the sway of various invaders. Throughout history, it kept changing hands among the various kingdoms of Tibet, Ladakh, Kinnaur, Lahaul and Kullu. later on in the 19<sup>th</sup> century its parts were sacked by the armies of Jammu and Kashmir. In 1846 it passed under the East India Company. But no real changes occurred and the traditional ruler, the Nono continued exercising their power. A century ago Rudyard Kipling in *Kim* called Spiti. “a world within a world” and a “place where the gods live”<sup>6</sup>- and this is a description that holds true to the present day.

Spiti’s landscape is spotted with Buddhist monasteries, small villages, and rare examples of natural beauty. In practical isolation for centuries, Spiti has developed a unique culture and life that has remained focused around its several monasteries. The people of this region are largely Buddhist and followers of the Geluk-pa sect. Religion plays a major role in everyday life as piles of ‘mani’ stones, prayer flags and ‘chortens’ testify. The intangible cultural heritage of this region is also exceptional and diverse. The natural heritage is unique and displays an extremely fragile ecosystem that shows a complex relationship of the climatic and geomorphological processes, and exhibits very less but highly endemic diversity. Many rare and special varieties of flora and fauna are found here so much so that many national parks and wildlife reserves have been declared here by the Government for their protection. The Government of India has been declared this Cold Desert as the 16th Biosphere Reserve of India in 2009, which includes Pin Valley and National Park and surroundings, Chandratal and Sarchu, and the Kibber Wildlife Sanctuary in H.P. The Great Himalayan National Park Conservation Area is also near this region. The presence of these unique cultural and biodiversity elements in the landscape has high significance of regional, national and global levels.

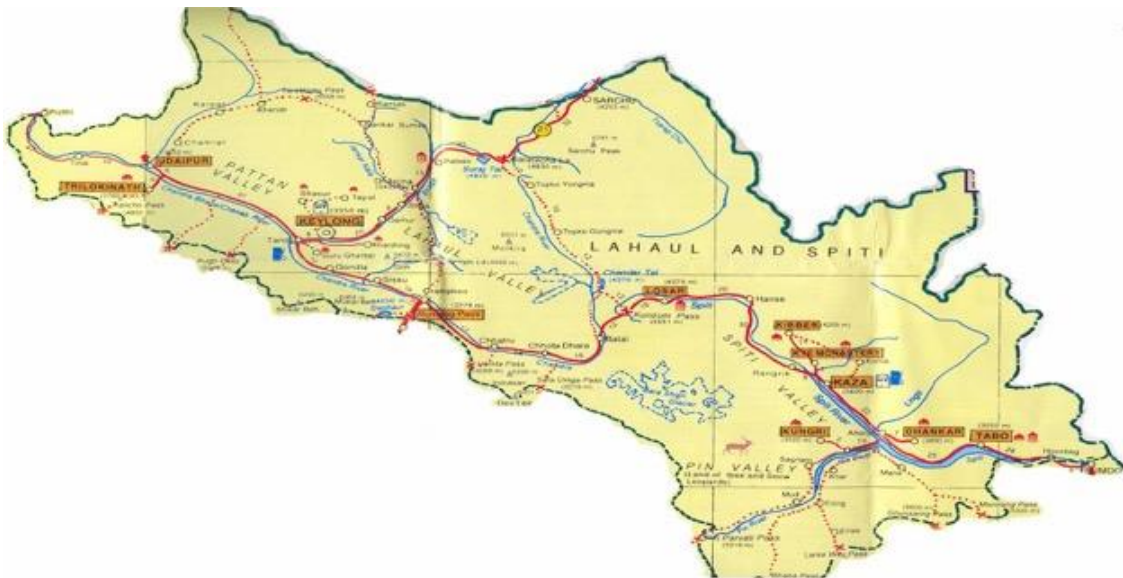


Figure 3 - Map of Lalul ans Spiti

Source: <http://lahul&spitinic.in/Maps.htm>

Spiti has its sub divisional headquarters at Kaza and is inhabited by over 113 villages, of which 81 are permanent settlements and 32 are temporary. The inhabitants are largely dependent on agriculture, wild and medicinal plants for their livelihood. About 118 species of the Medicinal and Aromatic Plants are known from the valley. Almost all settlements in the

<sup>6</sup> file:///C:/Users/USHA%20SHARMA/Desktop/kplng033.pdf

property are associated with Buddhist monasteries known as Gompas with prayer flag fluttering on top. These shrines are the centers of the people’s cultural life and have influenced their religious beliefs for centuries. The architecture of the region is an interesting amalgamation of Indian and Tibetan influences, and monastic buildings reflect a deeply Buddhist approach. Important Gompas in the H.P. region include Dhankar, Ki, Tabo, Mud, Gungri, Lidang, Hikim, Sagnam, Mane Gogma and Giu. Each settlement and its Gompa have their own unique association and the predominant culture is intensely introverted. There are other architectural manifestations unique to this region. One is the Chorten (a Buddhist shrine, typically a saint's tomb or a monument to the Buddha), which are remarkable types of stupas, and the Mani walls, long and thick platform-like row of stones, faced with carved stones inscribed with holy mantras.

Table 1 - Demographic data of Lahul & Spiti and Kinnaur District

|   |   | Lahul and Spiti |        | Kinnaur |        |
|---|---|-----------------|--------|---------|--------|
|   |   | 2011            | 2001   | 2011    | 2001   |
| 1 | Actual Population                         | 31,564          | 33224  | 84,121  | 78,334 |
| 2 | Male                                      | 16,588          | 18,441 | 46,249  | 42,173 |
| 3 | Female                                    | 14,976          | 14,783 | 37,872  | 36,161 |
| 4 | Population Growth                         | -5.00%          | 6.17%  | 7.39%   | 9.91%  |
| 5 | Area Sq. Km                               | 13,841          |        | 6,401   |        |
| 6 | Density/km                                | 2               | 2      | 13      | 12     |
| 7 | Proportion to Himachal Pradesh Population | 0.46%           | 0.55%  | 1.23%   | 1.29%  |

Source: <http://www.census2011.co.in/>

The intangible cultural heritage of the cold desert cultural landscape is also exceptional and diverse including agricultural and medicinal practices. Buddhist lamas (priests) in monasteries and villages of Spiti and Kinnaur chant sacred texts representing the spirit, philosophy and teachings of the Buddha<sup>7</sup>. The performing arts (traditional dance including mask dance, theater, contemporary plays, folk music), craft-making techniques (thangkas painting<sup>8</sup>, carpet weaving, pashmina and marino shawls and local quilt weaving, prayer flags of cloth, gold, silver, bronze sculptures, copper objects, wooden furniture including manuscript shelves, stone, stucco and clay), customs, sacred paintings, agriculture farming, kitchen-gardening, folk songs (related to giving birth, wedding, death etc ), rituals and beliefs (medicinal ritual, language and literature (heroic accomplishments, folk stories, legends, classical and vernacular language, dialects, songs, poems, ancient scripts), etc. are parts of cultural legacy and well-maintained intangible heritage traditions of the area. Among the floral elements, medicinal and aromatic plants are one of the livelihood options for the people here. Among the faunal elements, Woolly Hare, Tibetan Gazzle, Snow Leopard, Himalayan Black Bear, Himalayan Brown Bear, Snow Leopard, Red Fox, Tibetan Wolf, Himalayan Ibex, Himalayan Marmot, Himalayan Blue Sheep, Red Billed Chough, Chukar Partridge, Snow Partridge, Blue Rock Pigeon, Snow Pigeon, Himalayan Snowcock, Lammergeier, Himalayan Griffon, Golden Eagle,

<sup>7</sup> The “Buddhist chanting of Ladakh: recitation of sacred Buddhist texts in the Trans-Himalayan Ladakh Region, Jammu and Kashmir, India”, has been inscribed since 2012 as one of elements on UNESCO’s Representative List of the Intangible Cultural Heritage of Humanity.

<sup>8</sup> “Some of the most exquisite tapestries in the world are created by those living in Ladakh and Spiti” Zurick David, Julsun Pacheco, (2006) *Illustrated Atlas of tthe Himalayas*. New Delhi, Indian Research Press. p.79.



Rosefinches, etc. are found in the area. Presence of these unique cultural and biodiversity elements in the proposed landscape has high significance at regional, national and global levels.

#### 4.1.1. Kinnaur:

Kinnaur called likewise Koorpa and pronounced and spelt as Kanawar (Victor Jacquemout)<sup>9</sup>, Kanawar (James Bailie Fraser 1820)<sup>10</sup>, Koonawur by Alexander Grant (1841)<sup>11</sup> and Edward Thornton (1862)<sup>12</sup>, or Kunawur (Thomas Thomson and Andrew Wilson 1876)<sup>13</sup>. In the Simla District Gazetteer of 1904<sup>14</sup>, Kinnaur has been mentioned as lying immediately to the south of Spiti. The tract of the country, so far as extant historical evidence reveals, had been a part of the Bushahr (Rampur) state, one of the 21 hill states and their tributaries, which were integrated in the year 1948 to form Himachal Pradesh. The uniqueness of the country is the peculiarity of the language and the religious belief system of the people inhabiting here<sup>15</sup>.



Figure 4 - Map of District Kinnaur  
Source: <http://hpkinnaur.nic.in/Maps.htm>

<sup>9</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 1  
<sup>10</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 1  
<sup>11</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 1  
<sup>12</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 1  
<sup>13</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 1  
<sup>14</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 1  
<sup>15</sup> Tobdan. (2008), *Cultural History of Western Himalayas Bashahr Kinnaur*. New Delhi, Aryan Books International. pp. 28-49

Culturally it does not bear any explicit imprint of the dominant social order of the neighbouring south-west territory<sup>16</sup>. This region is inhabited only on the bank of River Satluj and other large streams and the villages lying from 7000 to 12000 feet above sea level are thinly scattered. 'Face of the country presents high hills and low dales with rapid and rushing streams and streamlets and is marked by precipitous sky high mountains with their paks usually covered with perpetual snow.' (Singh1965:3)<sup>17</sup> In this part of the cold desert the forest cover consists of rose dog and draft bushes only. Vast barren, desolate and rocky stretches devoid of the tree cover can be seen as far as one could see. It is also rich in the fauna as one can find blue sheep, brown bear, Himalayan black bear, Tibetan antelope, ibex, small Tibetan grey fox, Himalayan wolf, snow leopard etc in the moist and dry forest and in arid zone of this region and for the wild life protection Lippa Asrang, Rachcham Chitkul and Rupi-Baspa wild life sanctuaries have been established by the state government. Kinnaur is also famous for its tangible and intangible heritage in the form of handicrafts and handloom and folk knowledge. Here the Religious faith and beliefs of the society are closely linked to their culture. the religious conviction of the populace is intertwined with their social life. the close bond which existed and continues to persist between their socio-economic activities and the monastic organization is manifestly the natural outcome.

Imperial Gazetteer of India records<sup>18</sup> that 'the religion of the Kunawaris show the same mixed origin as their ethnical peculiarities. the northern villages profess Buddhism of the Tibetan model; in the south, Hinduism prevails, while the middle region shades off gradually from one faith into the other, producing grotesque mixtures of ceremonies and beliefs'. Earlier Gerard too had carried the same impression about the spread of the two religions. Lamaism, worshiping primitive native deities and belief in Spirits, Demons, Omens and Dreams is quite common.

### **5. Impact of Tourism on Cultural Landscape**

Tourism is generally seen in terms of economic impact, jobs and taxes. But the range of impact from tourism is broad. It often influences areas beyond those commonly associated with tourism. The impact of tourism can be sorted into seven general categories<sup>19</sup>: Economic, Environmental, Social and cultural, Crowding and congestion, Services, Taxes and Community attitude. Each category includes positive and negative impacts.

In the last 20 years the flow of tourists is continuously growing in the cold desert cultural landscape due to its natural beauty and rich cultural heritage and it is clearly visible in the table 2, which clearly depicts that the number of domestic visitors touches about 60 to 70% to the total population of the area in Lahul and Spiti in seven out of twelve months and 30 to 40% in Kinnaur. No doubt economic is booming in this area, but this unchecked inflow of visitors has degraded the environment of this high altitude cold desert to some extent. Waste and pollution is being generated enormously, natural resources attraction spots are being jeopardized through improper uses and overuses, infrastructure development has altered

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<sup>16</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 2.

<sup>17</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 3.

<sup>18</sup> Verma. V. (2002). *Kanauras of Kinnaur A Schedule Tribe in Himachal Pradesh*. Delhi: B.R. Publishing Corporation. p. 140.

<sup>19</sup> Chawla, Romila (2006). *Impacts of Tourism* (Ed). New Delhi, Sonali Publications. pp. 1-2.

landscape appearances, visible pollution has increased. The destruction or loss of flora and fauna is occurring at alarming rate. Unsustainable infrastructure development is rampant; migration of labour class is disturbing the ethnic communities which have led to ethnic issues.

Table 2 - Month Wise and District Wise Domestic Visitor Arrival in Himachal Pradesh

| S. No | Distt.         | Apr   | May   | Jun   | July  | Aug   |
|-------|----------------|-------|-------|-------|-------|-------|
| 1     | Lahaul & Spiti | 20050 | 24285 | 26417 | 23392 | 21925 |
| 2     | Kinnaur        | 26133 | 26632 | 30807 | 15877 | 15114 |

| Sep   | Oct   | Nov   | Dec   | Jan | Feb | Mar  | Total  |
|-------|-------|-------|-------|-----|-----|------|--------|
| 19618 | 16751 | 8651  | 9949  | 321 | 229 | 4453 | 176041 |
| 14942 | 19267 | 12801 | 14150 | 346 | 279 | 3716 | 180064 |

Source:[http://tourism.gov.in/sites/default/files/Other/Himachal%20Pradesh%20Final%20Report\\_%20new.pdf](http://tourism.gov.in/sites/default/files/Other/Himachal%20Pradesh%20Final%20Report_%20new.pdf)

Cultural decay issues are cropping up as crime, use of drugs, smuggling is rising. Folk culture and customs are being replaced by popular culture and fake-culture. Loss of cultural heritage is dying a slow death. In addition to the tourist problem phenomena such as global warming and Himalayan glacier melting are adding to the challenges being faced by the community and threatening their whole way of life<sup>20</sup>.

### Conclusions

The vibrant cold desert cultural landscape of Himachal Pradesh comprises a stunning bare landscape in the north-eastern part of Himachal beyond the Greater Himalayas that is dotted with lofty mountains kissing the blue sky, clear streams in deep gorges and little vegetation that provides uninterrupted breathtaking views; a setting that receives abundant sunlight and snow but little rainfall. This region, spread across parts of Jammu & Kashmir (J&K) and Himachal Pradesh (H.P.) has been documented to have a unique Cold Desert ecosystem with rare and endangered varieties of flora and fauna, so much so that many national parks and wildlife reserves have been declared here for their protection. The human settlements are small, isolated and sparsely populated. This cultural landscape is a trans-Himalayan marginal plateau land and edge region between the Greater Himalayas of India and the main Tibetan Plateau, which is an unparalleled location both physically and culturally. Rooted in Buddhism, the culture of the region is strongly affiliated with Tibet but traces of Indian influences make it unique and one of its kind, which is also manifest in its architecture and intangible traditions that are already world renowned. It has a unique culture of its own which is an amalgamation of Indian and Tibetan influences, is reflective in the form of Buddhism practiced here and further manifest in its art, architecture, lifestyle, food, clothing, dance, music etc. It provides

<sup>20</sup> Kandari. O.P., Ashish Chandra, (2004). *Tourism Biodiversity and Development Vol 6, Tourism and Sustainability*. Delhi. Isha Books. pp. 1-2.

an exceptional testimony to this cultural tradition which has evolved over centuries and is still living.

The Cold Desert Cultural Landscape of India has a large repository of exceptional intangible cultural resources ranging from performing arts, crafts, literary works, customs, myths and beliefs. The Cold Desert has been declared a Biosphere Reserve of India and comprises an ecosystem of unusual scientific and natural interest. It is home to several rare and endangered species of flora and fauna, especially the Snow Leopard, Tibetan Antelope and Himalayan Wolf, which are included in the Red List of IUCN as Critically Endangered Species. The variety of flora found here has been used traditionally for various purposes by the community including medicinal, and is deemed to be of Outstanding Universal Value for the purposes of conservation.

Tourism management, Government initiative in policy making and planning and local community participation is the need of the hour as the nature and rate of tourism growth in this area and the environment affected by expanding its activities can add to the potential for its own destruction.

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# **Cenários da Pesca. O patrimônio naval de Camocim (Ceará) como paisagem cultural e o turismo no litoral do Nordeste brasileiro**

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## **Resumo**

O presente trabalho traz uma reflexão preliminar acerca da atratividade turística do patrimônio naval de Camocim, cidade localizada na região Nordeste do Brasil. Este patrimônio é representado, principalmente, pelos chamados botes bastardos, embarcações feitas com técnicas tradicionais da carpintaria naval e da pesca artesanal. Toma-se como referência os estudos realizados pelo Instituto do Patrimônio Histórico e Artístico Nacional (IPHAN) na região que culminaram na proposta de atribuição da chancela de Paisagem Cultural à Praia das Canoas. Buscou-se identificar as repercussões de tais estudos junto aos moradores da localidade, agentes promotores do Turismo na cidade, turistas e agentes do poder público municipal. Sendo assim, a pesquisa pretendeu apresentar como a Praia das Canoas tem sido apropriada pelos diferentes sujeitos desta investigação, pondo em evidência as suas visões a respeito do espaço, com seus saberes e fazeres relacionados às embarcações. Baseada no uso da observação direta, a pesquisa se valeu de entrevistas semiestruturadas realizadas com dois representantes de cada esfera envolvida. Apesar do reconhecimento da atratividade turística do lugar, com alguns dos sujeitos pesquisados apontando para a estratégia de um envolvimento mais efetivo da comunidade de pescadores no processo de turistificação da praia, prevalece nos roteiros locais o Turismo de Sol e Praia, pouco atento aos seus patrimônios ou dimensão “cultural”. A ausência das políticas públicas de educação para o patrimônio, em parceria com ações da iniciativa privada, parece explicar esta pouca atenção dada à Praia das Canoas e suas embarcações tradicionais como atrativos turísticos culturais

## **Palavras-chave**

Praia das Canoas; Patrimônio Naval; Paisagem Cultural; Camocim; Brasil.

### **1. Paisagem cultural, patrimônio e turismo no Nordeste do Brasil**

Desde 1992, a Organização das Nações Unidas para a Educação, a Ciência e a Cultura (UNESCO) adotou o conceito de Paisagem Cultural como uma nova tipologia de reconhecimento dos bens culturais. No Brasil, o Instituto do Patrimônio Histórico e Artístico Nacional (IPHAN) em concordância com a UNESCO, regulamentou a paisagem cultural como instrumento de preservação do patrimônio cultural brasileiro em 2009.

No entanto, para que se dê início a um processo de chancela é necessário definir, primeiramente, o recorte territorial que será trabalhado e, em seguida, a abordagem que será dada a este recorte de forma que passe a ser compreendido como “uma porção peculiar do território”.

Seguindo a ideia da peculiaridade ou singularidade expressa na paisagem, Camocim, localizado a Noroeste do Estado do Ceará, conserva, possivelmente, um dos mais antigos exemplos de patrimônio naval, representado pelos botes bastardos. Tais embarcações notabilizam-se pela permanência do uso das “velas latinas”, tais como as utilizadas no Ocidente desde a Idade Média. Sendo assim, “a presença ativa dos bastardos e a dinâmica do porto pesqueiro,

considerado o maior porto de embarcações à vela do Ocidente é o ponto inicial para o estudo da Chancela da Paisagem Cultural de Camocim” (IPHAN, 2009: 34).

Em 2010 o Iphan realizou estudos na cidade para desenvolver diretrizes para um plano de preservação e valorização do patrimônio naval, tendo como exemplares os referidos botes bastardos. Um dos projetos desse plano associava-se à atribuição da Chancela de Paisagem Cultural à Praia das Canoas, onde localizam-se os botes, o que permitiria desenvolver ações para sua preservação e valorização.

No entanto, não houve a atribuição de chancela em Camocim, assim como a maioria das outras paisagens brasileiras que passaram pela fase de estudos. Até a data de realização desse trabalho sabe-se que apenas o Rio de Janeiro foi a única paisagem brasileira a receber essa atribuição. Isto talvez se deva à complexidade desse instrumento jurídico de patrimonialização que requer a colaboração de diferentes atores ou entes públicos: União, estados, municípios e sociedade civil.

A pesca artesanal é uma das competências econômicas do município, sendo o objeto do interesse desencadeador desta pesquisa que adotou como procedimentos metodológicos principais a observação direta, de inspiração etnográfica, consulta a documentos historiográficos e a análise das falas dos entrevistados. Os sujeitos da investigação foram dois representantes de cada um dos grupos de atores sociais envolvidos: pescadores, agentes do turismo local e turistas. O modelo de entrevistas foi a semiestruturada e os nomes dos entrevistados, em favor dos seus anonimatos, são fictícios.

É a partir dos valores culturais atribuídos à pesca que se constroem todos os discursos aqui envolvidos, partindo das vertentes materiais e imateriais pertencentes a esse ofício. Busca-se, com isso, a interpretação da paisagem pesqueira como expressão e modo de produção da identidade local. Neste sentido, afirma Yázigi (2002, p. 34) que “na estrutura da personalidade do lugar, a paisagem assume especial destaque, pois é precisamente dela que nos chega muito da percepção.” Essa percepção é o divisor de águas no que diz respeito ao olhar do turista sobre a paisagem.

No entanto, o turista só passa a utilizar a cultura local como motivação para suas viagens a partir do momento em que surgem políticas culturais por meio dos órgãos de patrimonialização. Para tanto, tais políticas devem ressaltar a imagem do lugar por meio do *marketing* turístico.

A mesma lógica se aplica à comunidade local, que também só se empodera de seus valores culturais identitários quando essas políticas culturais atraem para eles algum benefício ou ganho social, uma vez que o patrimônio não é uma categoria nativa, mas do órgão gestor que constrói o discurso e define o seu valor “histórico e artístico”.

## **2. A construção do lugar: o porto, a estrada de ferro, a pesca e os botes**

Quem viu tuas velas vogando ao luar.

Tem vontade de sempre te amar.

Sempre, sempre "Rainha do mar”.

Trecho do Hino à Camocim.

Camocim possui a maior faixa litorânea do Ceará com cerca de 60 Km de praias<sup>21</sup>, algumas ainda quase que inexploradas e outras que já possuem tanta expressividade cultural gerada pela interação entre o homem e o espaço que até fazem parte da identidade do município. É o caso da Praia das Canoas, ícone do cenário pesqueiro da região e objeto de pesquisa deste trabalho.



Figura 1 - Localização do município de Camocim/CE.

Fonte: IPECE, 2005.

A importância da atividade pesqueira na construção da identidade local, remonta ao final do século XVI, momento do início da colonização desta porção do território nacional.

No intervalo de 1594 a 1614, o porto de Camocim serviu como ponto estratégico do aparato militar vindo de Pernambuco para combater os franceses no Maranhão. Daí decorrem as primeiras referências sobre a região, como sendo um lugar de passagem, descanso e abastecimento das tropas portuguesas. Por outro lado, o intenso tráfico de nossa fauna e flora realizado entre os índios Tabajaras e franceses na Serra da Ibiapaba pelo rio Camocim, despertou a necessidade dos portugueses de estabelecer o domínio português na região. Efetivamente, Pero Coelho acaba vencendo os franceses em 1604, iniciando, por assim dizer a colonização da capitania [do Ceará] (PINHEIRO, 2004 *apud* SANTOS, 2008: 28)

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<sup>21</sup> O Município de Camocim está situado a 2°54'08" de Latitude sul e 40°50'28" de Longitude Oeste, situado no extremo Noroeste do estado do Ceará. Possui área de 1.123,94 km<sup>2</sup>. O Acesso Rodoviário se faz pela BR-222, BR-402, CE-085 e CE-362, e dista a pouco mais de 300 km da Capital. Segundo o censo do IBGE de 2010, a população de Camocim foi estimada em 60.184. Mais sobre o assunto no endereço eletrônico <http://www.cidade-brasil.com.br/municipio-camocim.html>.



Desse modo, Camocim se ergueu à beira do mar. As primeiras letras sobre os pescadores da região são encontradas numa carta escrita pelo poeta cearense Lívio Barreto em 1894, descrevendo os contrastes urbanos. Nesta carta enviada a um amigo, descrevia as características do casario nas proximidades da estação e do porto e as pequenas e baixas casas construídas à beira-mar que, segundo ele, eram de pescadores do lugar. Tratava-se de:

Um conjunto urbanístico em contraposição à singeleza das casas dos pescadores, que, segundo o tenente Octávio de Santana, Oficial da Armada, “...tinha como cobertura [...] a vela que acionava suas canoas; chegava do mar estendia a vela e de manhã tirava, a casa tinha como parede folha de coqueiro[...]” (SANTOS, 2008: 36)

No final do século XIX, a população de Barra do Camocim, como era denominado originalmente, chegou a 5 mil habitantes. Em 1868, passou a consolidar-se como núcleo urbano com a criação do distrito policial, sendo elevada à categoria de Vila no ano de 1879, pela Lei Nº. 1849 de 29 de setembro. Naquela data se comemora o aniversário de emancipação da cidade, momento em que passou a ser chamada pelo nome do rio que desde o princípio demonstrou sua “vocaç o para a exploraç o das potencialidades portu rias” (SANTOS, 2008: 30), determinantes para o desenvolvimento econ mico local. A partir de ent o Camocim passou a se destacar pela movimentada zona portu ria, que recebia embarcaç es de v rias partes do mundo atrav s das  guas do Rio Corea .

Em 1881, foi inaugurada a sua estaç o de trem, ponto inicial da Estrada de Ferro de Sobral, que, ao lado do Porto, provocou o crescimento econ mico, pol tico e social da regi o, em torno das atividades “da crescente ind stria do charque e o com rcio de importaç o e exportaç o de outras mat rias-primas da regi o” (SANTOS, 2011: 10). Com isso, a cidade passou a atrair populaç es circunvizinhas.

Mas, a partir da d cada de 1950, a estrada de ferro foi perdendo um pouco de sua import ncia comercial, quando houve a ligaç o ferrovi ria direta da capital do estado   cidade de Sobral. Conseq entemente, o movimento de exportaç o e importaç o diminuiu, j  que os produtos provenientes da regi o de Sobral n o iriam mais ter de passar pelo porto de Camocim, fazendo com que a estaç o ferrovi ria fosse desativada em 1977.

Com isso, o litoral camocinense, antes povoado por navios de carga e passageiros, passou a ser ocupado por pequenos barcos de pesca, dando lugar a embarcaç es ligadas   pesca da lagosta que teve forte ascens o em Camocim ainda em meados do final da d cada de 1960.   neste per odo que chegavam no lugar os chamados “botes bastardos”, embarcaç es tradicionais vindas da capital Fortaleza, possivelmente em funç o das not cias sobre a prosperidade da pesca na regi o, ainda povoada por vilas de pescadores. Estas, conforme pode ser visto na figura 3, se caracterizam pelo casario r stico, sem a construç o do calçad o, bem diferente dos sofisticados casar es que haviam h  1,1 Km de dist ncia dessa praia.



Figura 2 - Praia das Canoas

*Fonte: Mauro Viana, cerca de 1960.*

Logo, a pesca industrial se tornou uma saída para a sobrevivência econômica do município. No entanto, o uso de um modelo de exploração predatória acarretou a queda subsequente nas produções, fazendo com que a maioria das empresas migrassem para outros portos, ao longo da década de 1980 e meados dos anos de 1990. Hoje em dia, a pesca industrial ainda resiste, embora muitas embarcações de Camocim busquem os portos onde se possa ter um maior número de pescados.

A pesca artesanal, por sua vez, sempre esteve presente no litoral de Camocim, mesmo que a historiografia local tenha privilegiado o porto e estrada de ferro. Assim, as pequenas embarcações, a exemplo dos botes bastardos, compuseram historicamente a paisagem local.



Figura 3 - Bote Bastardo

*Fonte: Rafael Ummus, 2014.*

Desde que chegaram ao litoral de camocinense, esses botes passaram a ser construídos por carpinteiros do lugar, compondo o quadro de embarcações pesqueiras da cidade e tornando-se importantes para a atividade da pesca na região. Eles estão situados, principalmente, no cais pesqueiro da Praia das Canoas, que recebeu esse nome dos próprios moradores, por ser

um lugar originado de uma vila de pescadores de canoa e por essas serem as embarcações tradicionais de maior número nessa praia.



Figura 4 - Vista aérea da Praia das Canoas

Fonte: *Blog Pesquisa em Camocim, 2012*

Hoje, não há ocorrência de embarcações deste tipo em nenhum outro lugar do mundo. Desde que chegou ao litoral de camocinense, o Bote Bastardo iniciou um processo de construção e modificação da paisagem onde está inserido, tornando-se praticamente impossível visualizar esta paisagem sem a existência deles. Além de economicamente importantes, os bastardos são considerados pelo Iphan como de grande valor histórico para a navegação mundial.

Os Bastardos destacam-se por conservar o uso das 'velas latinas'. As velas latinas armadas com vergas foram criações árabes, introduzidas na cristandade pelos cruzados, por volta do ano 1000DC. Séculos mais tarde, foi a adaptação destas velas nas caravelas dos descobrimentos que propiciou aos portugueses a navegabilidade necessária para as grandes navegações do século XV. Os botes de Camocim são, ao que se saiba, as últimas embarcações do ocidente a preservarem as técnicas de uso e manufatura de mastros, vergas e velas bastardas - preservando assim as técnicas de confecção e uso de um dos equipamentos mais importantes da história da navegação mundial. (IPHAN, 2010: 12)

Os botes bastardos caracterizados como patrimônio, guardam em sua estrutura, técnicas tradicionais da carpintaria naval e da pesca artesanal. Apresentam, assim, importante valor na composição da paisagem local, principalmente pelo fato de que estes botes permanecem em atividade no cenário da pesca regional, sendo a principal fonte de renda para várias famílias de pescadores.

A grande ocorrência dessas embarcações tradicionais aponta para Camocim como sendo, possivelmente, o maior porto de embarcações à vela do mundo. Preservam a engenharia herdada de gerações predecessoras, historicamente ligada à colonização portuguesa. O Iphan, ao indicar a sua importância na história da navegação mundial, destacou os botes bastardos como patrimônio naval brasileiro, propondo um plano para a sua salvaguarda em seu contexto sociocultural e ambiental através da atribuição da chancela de paisagem cultural como instrumento de sua patrimonialização

## 2.1. O Projeto Barcos do Brasil e o Patrimônio Naval de Camocim.

Por meio do Projeto Barcos do Brasil, realizou-se uma espécie de varredura do litoral brasileiro em busca da identificação de lugares e contextos litorâneos que ainda guardassem preservadas, em maior ou menor escala, alguns dos principais elementos que singularizam o patrimônio naval do Brasil. Ganham destaque na realização dos estudos para o projeto a presença dos botes bastardos como sendo um dos mais significativos exemplos de embarcação tradicional brasileira. Dada a raridade deste tipo de embarcação, enfatizou-se a sua fundamental importância para a história da navegação nacional e mundial.

Foram alvo deste levantamento os dados a respeito da utilização de embarcações tradicionais de madeira e da vela como principal elemento propulsor, da existência de carpintaria naval e de outros ofícios correlatos ainda em atividade, da pesca artesanal, da ocorrência de celebrações marítimas e de outras manifestações intangíveis (IPHAN, 2011).

No âmbito dos estudos deste projeto foi elaborado pela empresa contratada pelo IPHAN um relatório no qual constam as informações que serviram de subsídios para inventariar e diagnosticar a Paisagem Cultural e o Patrimônio Naval de Camocim.

Segundo dados apresentados no relatório, na fase dos trabalhos de campo, os pesquisadores contaram com a colaboração dos moradores e da administração pública local. Além disso, consultaram também a Marinha do Brasil, através da Agência da Capitania dos Portos em Camocim, para obtenção de listagem das embarcações registradas no município. Enfim, o universo da pesquisa foi representado por:

Pescadores, proprietários de embarcações, mestres, carpinteiros navais, catraieiros, artesãos, hoteleiros, empresários, motoristas de transporte frigorífico de pescado, guias de turismo, comerciantes, diretores de empresa, donos de restaurante, turistas, “bugueiros”, associados da Colônia de Pescadores Z1, entre outros. (IPHAN, 2010: 2)

No documento, é dito ainda que a administração local se demonstrou interessada no projeto e cooperou com a pesquisa, fornecendo informações junto à Secretaria da Cultura e do Turismo.

Os lugares onde há ocorrência do patrimônio naval representam alguns dos contextos considerados favoráveis à aplicação do conceito de paisagem cultural. Por esse motivo, a chancela de algumas dessas localidades seria uma das ações previstas no projeto Barcos do Brasil.

Sendo assim, o referido projeto surgiu no intuito de salvaguardar o patrimônio naval em seu contexto sociocultural e ambiental, visto ser ele considerado um dos ramos mais ameaçados de desaparecimento do patrimônio brasileiro. Tal se daria em decorrência da substituição de embarcações tradicionais por barcos de alumínio, fibra de vidro, motorização, ou seja, materiais sem relação com os ecossistemas em que estão inseridos e seus contextos socioculturais. Além do mais, a não valorização desse patrimônio acarreta perdas significativas no âmbito do patrimônio imaterial.

Associadas ao patrimônio naval registram-se inúmeras manifestações do patrimônio cultural brasileiro. Muitas igrejas, capelas, ranchos, festas profanas e religiosas, costumes, estórias, culinárias, músicas, danças, paisagens e folclore

estão intimamente relacionadas com contextos pesqueiros que guardam uma porção preciosa e pouco difundida do patrimônio brasileiro. (IPHAN, 2009: 5)

O projeto buscou desenvolver ações de identificação com a realização de inventários, cadastros e diagnósticos, tais como ações de preservação, com propostas de tombamento, registro e chancela da paisagem cultural, além de outras ações de valorização do patrimônio naval brasileiro.

Vale a pena ressaltar que as embarcações tradicionais de Camocim, em conjunto com as atividades pesqueiras, estão situadas em um contexto urbano. Essa característica singulariza a região, pois, geralmente, tais atividades são mais comuns em comunidades pesqueiras afastadas das cidades. Tal condição motivou o interesse do IPHAN no estudo do patrimônio naval da região e na potencial atribuição da chancela de paisagem cultural.

## 2.2. Paisagem Cultural no litoral do Ceará

Em Camocim, a identificação dos botes bastardos como patrimônio naval ocorreu em 2008, durante as primeiras fases do projeto Barcos do Brasil. Mas, o diagnóstico e levantamento de informações mais detalhadas em relação a eles só ocorreram em março de 2010, desenvolvidos pelo Atelier de Arquitetura S.S., que buscou descrever em seu trabalho, a situação geográfica e inserção regional do município; os aspectos socioeconômicos; os agentes e as organizações atuantes que interferiam diretamente na Paisagem Cultural e Naval; os problemas encontrados e as recomendações para promoção da preservação do patrimônio e do desenvolvimento econômico e social da cidade (IPHAN, 2010).

A pesquisa de campo em Camocim teve duração de quatro dias, sendo realizada no período de 16 a 20 de março de 2010. Dentre as informações coletadas, foram buscados dados a respeito da quantidade da frota. Naquele momento foram cadastradas 34 embarcações, sendo 22 Botes Bastardos e 12 canoas. Na ocasião conversaram com o Sr. Manoel Silva ou Manoel Pescador, presidente do Sindicato dos Pescadores profissionais e artesanais de Camocim, que informou haver cerca de 100 Botes Bastardos à época, alguns parados e outros em situação precária.

Houve também o interesse sobre as formas de utilização destas embarcações. Foi apontado que o principal uso dado a eles era a pesca artesanal, atividade já presente no cotidiano do município através dos pescadores de canoa. Conforme já apontado, esta atividade pesqueira cresceu com a chegada dos botes. A este respeito, Claudio, pescador da Praia das Canoas desde 1986, disse em entrevista realizada na data de 25 de abril de 2016 que, até meados de 1985, ainda existiam botes bastardos em outras localidades, como o município de Acaraú. Os donos dessas embarcações começaram a vendê-las nesse período para empresários de Camocim que, conseqüentemente, passou a atrair pescadores dessas regiões.

Desse modo, a importância dos botes diz respeito também à geração de emprego e renda, pois dessas atividades depende a subsistência de grande número de famílias que representam grande parte da população camocinense. Apesar de ser uma atividade tradicional oriunda de uma comunidade de pescadores, destaca-se localmente o fato de esta estar inserida no contexto urbano. Assim, mesmo com as modificações sofridas na orla pelo processo de urbanização ao longo do tempo que, de certa forma, influenciaram a relação do pescador com o rio, a comunidade permanece econômica e culturalmente ligada às atividades tradicionais da

pesca. Isto é, na paisagem da praia das canoas as embarcações referenciam a tradicionalidade das atividades pesqueiras, servindo de suporte material privilegiado no processo simbólico de construção de suas identidades.

Conforme já indicado, o modo de construção dos botes e quem os fazem também foram alvos de interesse da pesquisa sobre os Barcos do Brasil. Nesta investigação foram identificados os carpinteiros navais atuantes e aposentados, bem como os seus estaleiros. É importante assinalar que, ao longo de toda a orla urbana de Camocim, durante a fase de campo da pesquisa do presente trabalho, observou-se a existência de apenas um estaleiro de botes, situado na Praia dos Coqueiros. Assim como foi constatado nos estudos coordenados pelos arquitetos do IPHAN, muitos dos estaleiros ainda existentes são improvisados nos quintais dos próprios carpinteiros navais.

No documento são apresentados os relatos sobre as dificuldades de se conseguir matéria-prima para a construção das embarcações, visto que as principais madeiras utilizadas são provenientes de desmatamento e os órgãos de fiscalização ambiental proíbem a sua retirada, além de impedir a sua comercialização. Dessa maneira, vai se tornando cada vez mais difícil a atividade do carpinteiro tradicional.

Surge, assim, o impasse em relação aos carpinteiros navais, agravado pela ameaça de descontinuidade da atividade, pois muitos já possuem idade avançada. Antônio Sabino, dono de um Bote Bastardo e também pescador há 42 anos, afirmou que seu bote foi construído em Camocim pelo mestre carpinteiro 'João Sapiel'. No entanto, este mestre carpinteiro não construía mais embarcações há seis anos, pois estava muito velho.

A partir desses pontos levantados e apresentadas as principais dificuldades de se preservar os botes bastardos, iniciou-se o processo de desenvolvimento de estratégias para sua proteção. Tais estratégias contemplariam não apenas o patrimônio material, mas também seriam destinadas aos que se ocupam do seu uso e fabrico, isto é, a dimensão dos conhecimentos tradicionais ou do saber fazer.

Dentre as propostas criadas com o objetivo de implementar políticas de preservação do patrimônio naval da cidade, representado principalmente pelos botes bastardos, surge a Chancela da Paisagem Cultural como instrumento de salvaguarda do referido patrimônio. Como já sugerido, este instrumento engloba as dimensões sociocultural e ambiental do objeto que se deseja preservar.

Na Paisagem Cultural destacam-se as duas vertentes patrimoniais, material e imaterial, na definição da embarcação como principal elemento ou símbolo de uma construção naval secular. Assim, além da própria embarcação, ganham relevo as atividades relacionadas a ela, tais como a pesca e as técnicas de construção naval que pressupõem conhecimentos tradicionais passados de geração a geração, responsáveis pela preservação das embarcações. Com isso:

Há de se criar um vínculo entre todas as partes, um "ciclo virtuoso". Da mesma forma que não há barcos sem o mar e sem o rio, não haverá pescadores sem peixes, nem peixes sem a pesca sustentável. Conceber junto à comunidade camocinense a justa valorização da pesca artesanal, que fortaleça o pescador, a cadeia produtiva, o associativismo, os mestres da carpintaria naval e todas as

técnicas tradicionais, poderá vir a ser o diferencial, na preservação do patrimônio naval brasileiro (IPHAN, 2011: 15).

Como já indicado, com isso faz-se referência a dimensão imaterial deste patrimônio, representada pelo saber fazer e demais manifestações culturais associadas à atividade pesqueira. Além disso, os botes bastardos, como também já demonstrado, são emblemas de determinado momento da história de Camocim quando a cidade passou por transformações ligadas à sua produção econômica.

### 2.3. O instrumento da chancela

A Chancela da Paisagem Cultural é um instrumento de preservação que reconhece o valor cultural de uma porção definida do território nacional que possua características singulares da interação do homem com o meio ambiente.

Para o IPHAN (2011: 32), “é imprescindível estabelecer um pacto que envolva o poder público, a sociedade civil e a iniciativa privada, num processo coletivo e gestão compartilhada”. Assim, com a criação do Plano de Gestão desenvolvido a partir do pacto estabelecido entre as referidas esferas, surge a necessidade de um regime colaboração entre os diferentes atores sociais envolvidos.

No caso de Camocim, durante o desenvolvimento do Plano de Gestão, houve, a princípio, disponibilidade do poder municipal, estadual e federal para parcerias envolvendo a manutenção das embarcações à vela, em especial o Bote Bastardo, bem como em outros projetos ligados à pesca e à construção naval (IPHAN, 2010).

Pretendiam também, com o Ministério do Turismo, através do Programa de Desenvolvimento do Turismo (PRODETUR), criar parcerias com entidades de educação para o turismo.

Em relação à sociedade civil organizada, buscaram parceria com a Colônia de Pescadores de Camocim (Z1) e Sindicato dos Pescadores, a fim de atentarem para as principais dificuldades enfrentadas pelos pescadores dentro da atividade da pesca e, a partir dessas reivindicações, promoverem possíveis soluções.

No entanto, a maioria dessas propostas de ações descritas no documento de diretrizes para um plano de preservação e valorização do patrimônio naval de Camocim não foi colocada em prática, em decorrência da não atribuição da chancela de Paisagem Cultural à Praia das Canoas.

O reflexo desses projetos não implementados está na percepção dos turistas e da própria população sobre os valores atribuídos à paisagem cultural, nela destacando-se as embarcações tradicionais.

### **3. Turismo na Praia: o patrimônio como atrativo.**

Esta parte versa sobre as diferentes percepções dos atores envolvidos nesta pesquisa a respeito da Paisagem Cultural de Camocim e seu patrimônio naval. Assim, está dividido em três partes. Na primeira busca-se descrever o modo como a comunidade se relaciona com o espaço definido pelo IPHAN como Paisagem Cultural, bem como os sentidos que moradores e pescadores atribuem às embarcações tradicionais; a segunda, por sua vez, está voltada para a percepção dos agentes que trabalham no turismo local a respeito da Praia das Canoas e do seu

patrimônio naval, visando descrever problemas e possibilidades relacionadas à potencialidade turística da paisagem cultural. Na última parte, o foco da descrição reside na apresentação da visão dos turistas a respeito do espaço e seus artefatos.

O conjunto dessas três partes aponta para um complexo mosaico de visões que se complementam na forma de interpretação da singularidade natural, histórica e/ou cultural do lugar. Da inter-relação entre as diferentes visões ou sentidos atribuídos ao espaço pode-se compreender melhor possibilidades e entraves no seu processo de turistificação.

### 3.1. Moradores e pescadores

O modo como uma comunidade vê e se relaciona com determinada paisagem depende muito da sua relação de pertencimento com o lugar, considerada fundamental para manter as características culturais desses indivíduos, uma vez que passam a se tornar conscientes de sua identidade histórica e cultural, reforçam os sentimentos de orgulho e pertença sobre seus valores identitários (FREITAS, 2008).

Por isso, é de fundamental importância uma maior participação das comunidades envolvidas nos processos de patrimonialização ou de construção do sentido histórico para suas expressões culturais, sobretudo as de natureza material. Todavia, é importante ressaltar que nem sempre os valores históricos e culturais atribuídos pelos órgãos de patrimonialização, fundados no discurso do “resgate do passado” ou da “retórica da perda” (GONÇALVES, 1996), são aqueles manifestamente celebrados e utilizados pelas comunidades e povos que habitam e fazem uso do bem cultural patrimonializado. Isto é o que ocorre no caso de Camocim, onde a população local e a comunidade envolvida diretamente com o patrimônio naval e a paisagem cultural não os veem, a princípio, da mesma forma que o IPHAN.

Para os moradores, os botes representam uma prática que faz parte do cotidiano local, a atividade pesqueira, sobretudo a artesanal. Essas embarcações estão associadas à atividade tradicional da pesca, estando em maior número em relação às da pesca industrial. É evidenciada dessa maneira a importância não apenas do “valor de uso” dos botes, mas também a sua representatividade no contexto cultural do município, pois “difícilmente se encontrará uma família que não tenha qualquer envolvimento com a pesca” (SOUZA, 2016: 49). Logo, estas embarcações estão ligadas ao processo de construção, em torno das atividades pesqueiras, de referências identitárias para a comunidade.

Mas, entre os pescadores e o bote existe, sobretudo, uma relação de trabalho e meio de subsistência. A maioria desses pescadores iniciou a atividade pesqueira quando muito jovem, como Claudio Freitas, de 49 anos, que começou a pescar em botes bastardos aos 18 anos e Antônio Sabino de Araújo, atualmente com 54 anos, mas que se iniciou na arte da pesca ainda aos 12, primeiro pescando de canoa e, quando atingiu a maior idade, passando a pescar também de bote. Poucos têm alguma escolaridade e encontram na pesca o único ofício que sabem realizar, embora sejam recorrentes as queixas quanto às dificuldades crescentes da atividade pesqueira.

A este respeito, Antônio Sabino, mestre e dono de bote, declarou que a dificuldade em encontrar peixe próximo à costa faz com que os pescadores tenham de percorrer longas distâncias à procura do pescado, tornando a atividade mais difícil e perigosa. Tal perigo e dificuldade se devem ao fato de que a propulsão da embarcação é à vela e, assim, dependem



do vento para se deslocarem. Desse modo, a possibilidade de ficarem à deriva é grande. Por isso, têm muitas vezes que ancorar em portos de outros estados, como Maranhão e Piauí, pois o gelo que abastece as câmaras frigoríficas que garantem o armazenamento dos pescados vai acabando em função da decorrência do número de dias que levam no percurso de ida e volta à costa. Assim, precisam atracar no porto mais próximo. Os mais comuns são em Tutóia, no Maranhão e no município de Luís Correia, no vizinho Estado do Piauí.

Quando isso ocorre, o dono da embarcação tem que arcar com alguns prejuízos. Devido a isso, o pouco de dinheiro que sobra da produção é dividido entre os pescadores. Muitas vezes ocorre que esses pescadores, em busca de melhorias, acabam migrando para a pesca industrial que, por sua vez, oferece maiores salários e mais segurança, visto que as embarcações são a motor.

Tal fator é citado no documento de diretrizes para um plano de preservação do patrimônio naval de Camocim e apontado como um agravante para a continuidade da pesca artesanal.

é preocupante a quantidade de barcos motorizados que já navegam na região. Este processo de transformação, influenciado pela ilusão de melhores rendimentos a partir do uso do motor, poderá ser o estopim que conduzirá as embarcações tradicionais para o “cemitério dos barcos”, e por sorte, para mais um capítulo das memórias da história naval brasileira (IPHAN, 2010: 13).

Isto dificulta ainda mais essa relação que já é estremecida e que talvez se tornaria mais fortificada se existissem políticas voltadas para a valorização desses profissionais que se encontram cada dia mais desmotivados com a profissão.

Portanto, para que se possa pensar em ações de patrimonialização da paisagem através dos valores históricos atribuídos ao bote, primeiro deve-se pensar na forma como esses pescadores o veem para que, a partir disso, sejam trabalhadas ações de identificação cultural. Isto é, o que irá legitimar a constituição da paisagem e dos botes como patrimônio será o significado e o valor simbólico atribuídos a ambos pela comunidade.

Nessa mesma direção, também aponta Vasconcelos (2012: 56) ao afirmar que “se pode entender que paisagem não é uma coisa preexistente, mas algo construído a partir da percepção de um observador”. É essa percepção que dará sentido patrimonial à paisagem cultural, bem como ao bote se os pescadores entenderem que fazem parte desse contexto como peça fundamental para a preservação desse patrimônio.

Os pescadores entrevistados para este trabalho foram questionados sobre o que eles acham da presença dos turistas na orla da Praia das Canoas e qual a relação que estabelecem com eles. As respostas foram bem parecidas, girando em torno da ideia de que a presença dos visitantes é positiva, pois gera renda para a cidade e, muitas vezes, alguns deles param, fotografam, conversam com pescadores e até mesmo compram algum peixe.

O exemplo demonstra como os turistas podem interagir, a partir da atratividade exercida pela paisagem, com os moradores locais e suas atividades laborais de subsistência. Neste sentido, falando a respeito da percepção da paisagem para o turismo, Yázigí (1999: 134) afirma que “é

preciso ter muito claro que a paisagem interessa antes a seus próprios habitantes e que só numa relação de estima deles com ela é que despertará o interesse de transeuntes, visitante, turistas.” Isto é, é a partir da produção do espaço pelos moradores do lugar que poderá se estabelecer a relação turística entre visitante e visitado.

Diante da presença do turista e dos seus desdobramentos, ao reconhecerem a importância da presença dos visitantes para a economia local como um todo, os pescadores demonstram conhecer o potencial atrativo da paisagem em que estão inseridos. No entanto, a escassez da oferta turística ou da inserção dos pescadores, com seus saberes e fazeres, nos pacotes turísticos evidenciam como os agentes do turismo local apreendem a paisagem do lugar.

### 3.2. Agentes promotores do Turismo local

Visando investigar as possíveis inserções da paisagem cultural de Camocim e dos botes bastardos como produtos turísticos, buscou-se também analisar a visão dos agentes que promovem e vendem os atrativos da cidade sobre a importância de ambos para o desenvolvimento do turismo local. Tal intento se deu devido ao papel exercido por estes profissionais na construção do olhar do turista sobre a paisagem.

A percepção desses agentes sobre o espaço que os circunda lhes possibilita a descoberta de novas oportunidades para a promoção do turismo local, bem como o surgimento de novos segmentos neste mercado. Assim, por exemplo, a depender da percepção deles sobre o lugar é possível se desenvolver o turismo cultural ou o ecoturismo a partir dos dois elementos culturais citados anteriormente, tendo em vista a atual ausência de atrações que envolvam essas práticas dentro da localidade.

Ana Neves, agente de turismo do receptivo local e atuante no setor há 14 anos, afirmou que, quando recebe um grupo de turistas na cidade, oferece dentro do pacote uma manhã livre para um *city tour* e sugere que apreciem a chegada dos pescadores na Praia das Canoas. Justificando, a agente, que tem irmão pescador, diz tratar-se de um verdadeiro espetáculo que os turistas devem vivenciar.

Essa chegada dos pescadores de canoa acontece diariamente entre 9:00 e 10:00 horas da manhã. São pescadores que saem toda madrugada para a pesca chamada de “ir e vir”. Essas embarcações chegam quase ao mesmo tempo, formando um enfileirado de velas ao longo da praia. Quando chegam, encontram grande número de pessoas à espera, entre eles familiares, atravessadores ou moradores das proximidades em busca de peixes frescos.

A fala da agente de turismo pode ser compreendida como expressão da visão corrente acerca do potencial turístico do lugar. Nela estão em evidência os valores simbólico e cultural da relação existente entre os pescadores e o meio natural. Todavia, diante da pouca efetividade de políticas públicas de promoção do lugar, a praia e suas embarcações parecem figurar como moldura do turismo de sol e mar explorado localmente.

Além disso, quando perguntada sobre os projetos que o IPHAN desenvolvera dentro do plano de preservação do patrimônio naval de Camocim, voltados para a atividade turística, demonstrou desconhecimento. A proposta tinha intenção de adaptar um Bote Bastardo para passeios turísticos como forma de atribuir à embarcação um segundo uso, de forma a garantir sua preservação utilizando o turismo como ferramenta de valorização desse patrimônio.

Após ser apresentada a essa proposta, declarou que poderia ser viável, se bem planejada, podendo ser importante para o desenvolvimento do turismo local. Desse modo, possibilitaria também o aumento do fluxo turístico, visto que seria uma atividade dentro de um segmento novo na cidade, o turismo cultural. Este estaria voltado para o patrimônio e abarcaria suas duas vertentes – natural e cultural – e, de certa forma, atrairia um público que viaja especialmente em busca de atrativos que possibilitem esse tipo de experiência.

Outro agente da cidade, Ruan Gomes, que trabalha na promoção do turismo em Camocim através de mídias sociais, há 6 anos, demonstrou também como a paisagem é trabalhada turisticamente. Em entrevista realizada no dia 11 de abril de 2016, contou que sempre faz postagens de belas imagens da Praia das Canoas e dos botes bastardos. Porém, não tinha conhecimento de que faziam parte do patrimônio naval brasileiro e nem que tinham sido alvo de estudos do IPHAN. No entanto, também acha que as propostas que o órgão apresentou na época para transformar o Bote Bastardo em atrativo turístico são válidas. Para ele:

Seria um diferencial, pois o turista busca por esse tipo de atrativo e a cidade não oferece. Contribuindo para aumentar o fluxo turístico na cidade, pois a partir do momento em que se oferecem atrativos diferenciados, como no caso do passeio em um bote que só existe em Camocim e que guarda uma riqueza histórica, chamaria a atenção de um público que busca esse segmento dentro do turismo.

Perguntado sobre qual seria a melhor alternativa para fazer da Praia das Canoas um produto turístico atrativo, a partir da atribuição da chancela de paisagem cultural pelo IPHAN, respondeu que para isto seria importante fazer com que a comunidade passasse a ter mais conhecimento sobre o assunto, para que pudesse transmitir esse tipo de informação ao turista, chamando ainda a atenção para as ações de divulgação e *marketing*.

Ambos os entrevistados, indagados sobre qual o trabalho que o IPHAN poderia fazer para tornar as propostas possíveis, deram a mesma resposta. Os projetos em parceria com o poder público local precisam ser retomados. Todavia, o representante da Secretaria de Turismo e Desenvolvimento Econômico de Camocim, quando entrevistado disse não conhecer tais projetos, afirmando que estes haviam sido realizados na gestão anterior. Assim, as informações sobre os acordos de cooperação entre a municipalidade, o governo do Estado e o IPHAN necessários à atribuição da chancela de Paisagem Cultural, não haviam sido repassadas. Apesar disso, disse reconhecer a importância da patrimonialização do lugar e suas embarcações na construção da “imagem do município”.

Essa imagem a ser construída e promovida pelo poder público e iniciativa privada constituiria, assim, a atratividade turística da Praia dos Botes. No entanto, como isto ainda não ocorreu, a visão dos turistas sobre a paisagem, os habitantes e seus artefatos está relacionada apenas à fruição de um lazer associado ao turismo de sol e praia e não de um turismo cultural, aquele motivado pela história e pelo valor patrimonial da paisagem, associados aos modos de saber fazer dos residentes.

### 3.3. Barcos e barquinhos: a visão dos turistas sobre a Paisagem Cultural de Camocim.

Diante da importância que a paisagem representa para o turismo, se faz cada vez mais importante estudar as suas múltiplas dimensões e o modo como podem influenciar a percepção do visitante. Nesse sentido, indica Moreira (2009, p.3) que

Diferentes abordagens sobre paisagem apontam para a compreensão de que ela se constitui como a porção visível do espaço geográfico, sendo então a primeira instância do contato do turista com o lugar a ser visitado e está no centro do eixo de atratividade deste lugar, sejam elas sociais, ambientais, culturais, políticas, etc. Ela constitui-se, assim, como um dos elementos mais importantes da atratividade nos locais turísticos, pois um não se desvincula do outro, sendo diretamente relacionados entre si.

A considerar a Paisagem Cultural de Camocim, vale investigar se os atrativos nela contidos, como a relação do homem com o rio e o mar, com as embarcações tradicionais, são atraentes para o turista. Por isso, buscou-se primeiramente investigar a visão do turista sobre a paisagem sem que este soubesse dos valores patrimoniais atribuídos pelo IPHAN. A intenção era observar apenas a sua visão de visitante sem a influência de qualquer tipo de informação sobre o fator patrimonial. A partir disso foram-lhes repassadas informações sobre os estudos realizados pelo órgão e as representações simbólicas conferidas à paisagem cultural.

Rayanne Rodrigues, turista vinda do Rio de Janeiro, em entrevista realizada em abril de 2016, quando perguntada se havia incluído em seu pacote de viagens a visita à Praia das Canoas, afirmou que não. A visita à praia teria se dado por conta própria, pois achou a paisagem muito linda e ficou encantada com o colorido dos “barcos”. Também chamou a sua atenção o fato de aquele ser o meio de trabalho dos pescadores que ali estavam, percebendo, então, que todas aquelas cores não serviam apenas para embelezar a orla.

Afirmou ainda que se a oferta de visitação à praia das canoas estivesse incluída no roteiro, certamente se interessaria em conhecer melhor a história do lugar. Quando perguntada sobre a história dos botes no litoral pesqueiro de Camocim e os estudos realizados pelo IPHAN para a chancela da paisagem, disse não conhecer. Isto é uma evidência do desconhecimento ou de falta de uma maior atenção por parte dos promotores do turismo local a respeito das ações do órgão federal responsável pelas políticas de salvaguarda dos bens patrimoniais e de suas implicações no mercado turístico.

Perguntada sobre o que o IPHAN ou poder público local poderiam fazer para promover a visitação e fazer com que os turistas conhecessem melhor os botes e a sua história, respondeu que a prefeitura deveria criar um monumento explicativo para os visitantes. Dessa maneira, disse que como ficou interessada na história local, ao receber tais informações, outros turistas iriam querer visitar e saber um pouco mais sobre a história do lugar e suas embarcações. Sugeriu também a utilização de uma das embarcações que ficam abandonadas à beira da praia, por falta de reparos, como espaço de visitação e objeto museal. O bote assim exposto atrairia mais a atenção dos turistas. Segundo ela, tais ações facilitariam a interpretação dos visitantes sobre a importância cultural da paisagem, pois se o visitante chega e não vê informações a respeito, a princípio ele vai se interessar apenas pela beleza da orla, mas não vai saber tudo que a envolve.

Thaís Lima, turista entrevistada em 26 de maio de 2016, afirmou também não conhecer a história dos botes e nem os estudos do IPHAN. Mas, disse que, quando andou pela orla, achou interessante a presença das embarcações na praia. Chegou até a comentar com os amigos que havia achado muito bonita aquela paisagem. Disse ainda que se tivesse sido questionada sobre a importância dos botes para o turismo sem que fosse mencionada sua história, não seria tão

interessante quanto saber que os mesmos carregam uma identidade cultural forte. Segundo ela:

É esse contexto histórico que faz com que a paisagem se torne ainda mais atraente. É isso que a gente gosta de ouvir quando visitamos um lugar novo. Lamento saber disso só agora. Talvez se soubesse no momento que os vi passaria a olhar com outros olhos.

Ela finaliza dizendo que os botes podem representar importância significativa para o turismo de Camocim. No entanto, seria interessante que, antes de promover a visita, fossem trabalhadas ações de educação patrimonial com a comunidade, para que entendam o significado dos botes para a paisagem e, conseqüentemente, sua importância para o turismo. Sugere também que o poder público ou o setor privado, representado pelas agências de turismo, insiram a visita aos botes em roteiros, dando ênfase no contexto histórico-cultural. Para tanto deveriam se utilizar, do apelo visual da imagem do destino, pois considera bastante atraente.

É possível notar a diferença das percepções das turistas antes e depois de saberem sobre os valores atribuídos à paisagem estudada. A fala das duas também reforça o potencial que a mesma tem para o turismo. Mas, para isso são necessárias ações de promoção que possibilitem uma interpretação que estimule essas percepções e os sentidos dos visitantes, de modo a estabelecer uma compreensão de suas características singulares.

#### **4. Considerações Finais**

A Paisagem Cultural como instrumento de preservação e patrimonialização contribui para um novo entendimento a cerca das discussões sobre o patrimônio; marca uma evolução dos conceitos patrimoniais, os bens preservados deixam de ser apenas materiais e passam a ter os valores e sentidos atribuídos aos saberes e fazeres de grupos no meio natural.

Por ser um instrumento ainda relativamente novo, enfrenta certos desafios para tornar-se realidade, abrindo margem para a subjetividade de interpretação de seus conceitos e objetivos. Porém, se pode notar que, por se tratar de um elemento de valorização e preservação de manifestações culturais tradicionais de grande importância para a afirmação identitária de lugares e povos, esse instrumento pode beneficiar o desenvolvimento local se direcionado para o turismo.

Partindo dessas compreensões, este trabalho buscou descrever os sentidos atribuídos à paisagem cultural de Camocim pela perspectiva dos diferentes atores envolvidos na pesquisa. Sendo assim, tais sentidos foram investigados a partir dos estudos realizados pelo IPHAN acerca do patrimônio naval da cidade que deram destaque ao “Bote Bastardo” como embarcação tradicional da região de importância de alcance mundial.

Notou-se que as percepções da comunidade, dos agentes do turismo local, dos gestores públicos e dos turistas apontam para diferentes aspectos da paisagem que se acrescentam ao sentido “patrimonial” do lugar atribuído pelo IPHAN. Assim, apesar das diferenças nas leituras da paisagem realizadas pelos diferentes sujeitos da pesquisa, foram observadas aproximações quanto às maneiras de “turistificar” a Praia das Canoas e promover os botes bastardos à condição de atrativo.

Assim, para os turistas entrevistados, o interesse em vivenciar novas experiências relacionadas à tradição cultural local da pesca artesanal por meio de embarcações tornadas características ou “peculiares” da Praia das Canoas indica a potencialidade turística do processo de patrimonialização proposto pelo IPHAN.

Os promotores do turismo local, embora desconhecessem a realização dos estudos do patrimônio naval e da Paisagem Cultural, demonstraram também interesse na promoção da paisagem e dos saberes e fazeres associados às embarcações tornadas típicas do litoral de Camocim por meio de políticas públicas de patrimônio. Para eles, a atividade turística seria um forte instrumento para promover a valorização do patrimônio. No entanto, a praia e a história de suas embarcações não costumam integrar os roteiros turísticos por eles ofertados.

Por sua vez, moradores e pescadores têm a Praia das Canoas e os botes bastardos como local e meio de subsistência, reconhecendo também a importância da atividade turística para o desenvolvimento econômico local. Seus relatos indicam a apreensão do papel do turismo na melhoria das condições de vida, já que além da interação dos visitantes com a comunidade, pode haver também a comercialização do pescado.

Diante do exemplo de Camocim, pode-se concluir que ainda existe um longo caminho para que a patrimonialização das paisagens brasileiras seja concretizada. A maior dificuldade está relacionada à complexidade de tal processo que requer o estabelecimento de um regime de colaboração entre diferentes agentes públicos e privados. Para tanto, gestores públicos precisam reconhecer, de fato, a importância da chancela do Patrimônio Cultural como forma de promoção turística, econômica e cultural do lugar. Isto é, faz-se necessário compreender como as singularidades da relação estabelecida entre o homem e o meio natural podem constituir-se em atratividade turística e promotoras de melhorias para o bem-estar da população.

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# Are the Lighthouses Only a Croatian Cultural Story or do They Have a Human Role in Tourism?

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## Abstract

Since the 1980s, there is a growing interest in forms of tourism close to nature and individual experience (ecotourism), as a reaction to the excessive development of mass tourism. In the attempt to enrich the coastal tourist offer with competitive and within global framework innovative products in the beginning of the 21<sup>st</sup> century the valorisation of lighthouses in Croatia started. The idea of evaluating lighthouses as tourist accommodation facilities virtually opens the possibility of financial self-preservation of cultural heritage monuments. It is known that many European castles and palaces are not involved in the tourist offer only as a cultural attraction but also as luxury accommodation facilities so that, by analogy, lighthouses can be saved from decay in a similar way. The purpose of this research is to analyse lighthouses that are protected as cultural heritage monuments in Croatia, Italy and Slovenian (Northern Adriatic region), to determine if their cultural and historical value could become devaluated because of their integration in the tourism offer. Based on the qualitative methodological approach, holistic, natural, environmental, cultural and ecological factors were taken into account in the period before and after selected lighthouses were subjected to tourism activities in order to determine possible effects on the devaluation process in regards to integration into a successful tourism product. The research will thus show if the integration of lighthouses in the tourism offer is contributing to the process of lighthouse preservation and restoration in the Northern Adriatic or are lighthouses in the region considered only as individual tourism accommodations that do not preserve the value of a cultural heritage monument that they represent.

## Keywords

Sustainable tourism; cultural heritage; lighthouses; Croatia; Slovenia and Italy.

## 1. Introduction

In the late nineties of the twentieth century, company Plovput Ltd. from Split has launched a complex investment project called Stone lights to ensure the continuity of man's presence on the lighthouses. Croatian Adriatic, an authentic cradle of civilization, for over 5000 years, writes its history on stone sea cliffs on which Austria-Hungary Monarchy during the 19<sup>th</sup> century built lighthouses to ensure maritime safety and to strengthen its naval power. Often located in hardly accessible isolated locations, lighthouses offer a unique sense of true beauty. Built of white stone, with a meter or more thick walls, lighthouses today are the most pleasant summer retreat on the Adriatic. Located in landscapes of particular natural beauty, lighthouses now host tourists with adventurous spirit, who in these historical buildings seek a rest from the chaotic everyday life.



The goal of the Stone Lights project is to permanently preserve all lighthouse buildings on the eastern Adriatic Sea, as well as find and record unlisted ruins of lighthouse buildings and other former buildings of sailing safety that were erased from the records. The first phase of the project included 11 lighthouses that have been transformed into summer vacations buildings while preserving its cultural identity. Today a total of 14 lighthouses have already been converted and the goal sit to continue with this project over the coming years.

## **2. Defining the problem**

In the last 20-30 years, the tourism trends in the world indicate a change in tourists' behaviour. Their priority now is to experience a destination, not only to visit it and relax. Since the 1980s, there is a growing interest in forms of tourism close to nature and individual experience (ecotourism, sustainable tourism), as a reaction to the excessive development of mass tourism in line with increased awareness on environmental issues (Pančić, Kombol, 2000). From mid-1990s after the conflict in neighbouring countries tourism on the Croatian coast and islands gradually began to recover. Until then, the leading concept of development of mass bathing tourism was focused on simple and according to many people overused tourist product which was based on natural attractions: sun and sea. This concept is slowly disappearing. However, there is a delay in the application of new ideas that are arising from the need for segmentation of the tourism market and accordingly redefining the concept of tourism development with the application of selective tourist offer which should be based on quality tourist product that is able to satisfy the more and more demanding tourist (Jadrešić, 1991, Luković, 2008).

## **3. Theoretical background**

In the era of globalization, the meaning of tourist travel, more than ever, is based on detachment from everyday life (Pearce, 1994, Šergo et al 1998). The bulk of tourism demand is physically concentrated in the cities, the fact is that there is a growing interest for a destination with as strong and visible sense of a place, as a local response to the omnipresent global. Tourism product, in order to remain competitive in an increasingly demanding market, more and more seeks to emphasize the local identity and, among other things, it integrates natural and cultural heritage. The heritage, as a preserved and cherished natural and cultural treasure from the past that needs to be preserved for future generations, is one of the most important factors for preserving the local identity, and more often one of the important pillars of a recognizable tourist product. Destinations that can offer psychophysical relaxation are becoming increasingly popular (Kovačić, et al., 2015). Seclusion and exclusivity are the terms which have been increasingly mentioned in the competitive tourist offers in all tourism strategies, and thus in Croatian tourism.

It also has to be noted that while putting cultural and natural heritage sights in to tourism offer we need to ensure their long term preservation by integrating them in the present time in giving them a new meaning in today's world (Markelj, 2012). Lighthouses represent unique elements along the coast line in the Northern Adriatic region that have to be viewed not as individual cultural heritage object or monuments but as a part of the cultural landscape. They represent a fragile eco-system that cannot exist as such without a balanced and sustainable development (Markelj & Ivanković, 2015).

The more a cultural landscape preserves its traditional features, the greater its advantage with regards to future sustainable tourism development is (Randelli, Romei, Tortora, & Mossello,

2011). And the more authentic the tourist product is the greater the experiences of individual tourist are.

#### **4. The Analyse of Project Stone Lights**

Lighthouses on the Adriatic coast have always attracted attention with their mystique, as well as the attractiveness of the isolated locations on the islands and the coast.

##### *4.1. Historical development*

Lighthouses in the modern sense of the word have begun to be built on the Adriatic since the beginning of the 19th century when the Austro-Hungarian Monarchy wishing to develop a powerful navy raised an initial network of lighthouses.

During the Austro-Hungarian Empire was built a total of 65 lighthouses – in 1818 the oldest on Cape Savudrija in Istria, and the youngest in 1899. During the Second World War many of the lighthouses were damaged or destroyed and many lighthouse keepers died and went missing. Then during the 19th and 20th century generations of lighthouse families have lived in lighthouses and maintained them. Along the whole Adriatic coast on prominent capes of the Croatian islands and coast are located lighthouses with identifiable lighthouse towers and massive stone buildings. Since its construction in the 19th century, lighthouses have for generations been maintained by the lighthouse families.

With the automatization of the lighthouses during the 1990s, maintaining contact with speed boats and the introduction of satellite navigation in maritime traffic, the need for lighthouse families is significantly reduced thereby the lighthouses are losing their former navigation and residential function (Šerić, 2003, Opačić, 2005). Even though they are treated as cultural and historic monuments, about 15 years ago the idea and vision were formed on the management of lighthouses with an aim of their conservation. The idea of evaluating lighthouses as tourist accommodation facilities virtually opens the possibility of financial self-preservation of monuments of cultural heritage by their integration into the tourist offer. It is known that many European castles and palaces are not involved in the tourist offer only as an attraction but also as luxury accommodation facilities so that, by analogy, lighthouses can be saved from decay in a similar way.

World examples of the lighthouse conversion rest largely on their protection, while the examples of their connections with the tourist purpose are rare (Opačić et al., 2010). In Chile, for example, the idea evolved to organize the physical environment of the lighthouses as a nature park. Scandinavian countries, in the international movement for protecting the lighthouses, tried to find the way of alternative forms of income for the former lighthouse keepers and their families, and that they are thus kept as a valuable element. It also means encouraging the activities of which other residents of the island towns can live (Pearson, L.F. 1995), these places almost everywhere, as well as in Croatia, display depopulation. British attempts to preserve lighthouses are directed towards research projects, so their use is opened to the scientific institutions.

In late nineties, the company Plovput Ltd. sets up the project Stone Lights based on acquisition of positive experiences in the conservation of lighthouses by integrating history, ecology and tourism. The aim of the project was to commercialise lighthouses' edifices by remodelling them into apartments. In that way, financial means intended for renovation and preservation

of lighthouses as cultural and historical monuments as well as financial means intended for their revitalisation would be obtained. Including lighthouses in tourist offer, their primary role, that is the safety of navigation and life together with other lighthouse keepers (for example on the Island of Palagruža), would not be heavy.

The Stone Lights project, according to many authors, the investment project is complete integration of man, history, ecology and tourism. Conceived as the lighthouses of Croatian tourism, the project has set new criteria for the relationship between man and nature.

Croatia is one of the few countries in the world to integrate the lighthouses as accommodation facilities in its tourist offer without failing to satisfy the two above mentioned elements of modern tourism demand: search for local identity and aspiration for peace and quiet in the ecologically clean, natural environment of the exclusive, isolated island and coastal locations. Unlike the experience of other countries which are in the conditions of automatization of sailing with lighthouse conversions attempted to protect the lighthouse as a cultural heritage (for example Chile, Scandinavian countries, the United Kingdom), the advantage of their valorisation in Croatia is derived from their position at attractive secluded locations. Lighthouses on Croatian islands and the coast can satisfy even the most usual activity during tourist trips, enjoying the sea, which represents a comparative advantage relative to the competition. The Stone Lights project is a component of the environmentally acceptable Croatian tourist offer, the model of providing funds for permanent maintenance of lighthouse buildings, cultural and historical monuments. This is a model of tourist valorisation of unused capacity, applicable for other buildings on the coast and on the islands who have lost their primary function, such as old abandoned school and buildings etc.. For this project component model of tourist offer that provides the ability to increase the additional spending through special kind of tourist services that can be offered at these locations. This model of managing gives satisfactory results and stands out the most significant effect, which the tourist use of lighthouses shall not interfere with the basic function of lighthouses that is safety in navigation.

After having completed the analysis of the present situation and after the economic analysis of accommodation capacities, from 2001 to 2009, 14 lighthouses have gradually been included in the tourist offer, Savudrija, Rt Zub near Novigrad, St. John at sea near Rovinj, Porer before Premantura, Veli Rat on Long Island, Rivanjske sister, Prisnjak near Murter, St. Peter at Makarska, Host, Plocica, Struga Lastovo, Susac, Palagruza and Sveti Andrija near Dubrovnik.

The intention of Plovput Ltd. is to remodel 28 more lighthouses into accommodation capacities.

The overall surface of all 48 lighthouses in Croatia is 10.398 square meters, 83% of overall area are living edifices and 17% are supporting edifices from which is evident that lighthouses are a significant tourist potential on attractive and eminent locations. Although lighthouses involved in the tourist offer differ in their attractiveness, size, number of apartments, vicinity of tourist destinations and traffic infrastructure, one of the most important preconditions of their successful tourist valorisation is location. According to location features, author Perišić divided lighthouses into three groups (Perišić, 2009):

- lighthouses at the open sea on uninhabited islands

- lighthouses situated on inhabited islands away from island villages
- lighthouses on mainland close to urban villages.

Each group offers different tourist offer and possibilities. While one group offers solitude on the open sea islets, the other group offers the possibility to become familiar with the life of domicile people on bigger inhabited islands and the third group of lighthouses on mainland offers the possibility to learn about natural and cultural attractions in the immediate and distant areas. Lighthouses at the open sea, mainly on uninhabited islands, are situated on far away islands and cliffs and offer to the fullest extent solitude to advocates of Robinson tourism. On such islands, the dream of having own island becomes true.

## **5. The possibility of implementing the Stone Lights project to Slovenia and Italy**

While the project stone lights is seen as a good example of restoring and protecting as well as implementing cultural heritage object to the sustainable tourism development in Croatia it has to be noted that it could be extended also to the Slovenian and Italian coast while it bears the same Austro-Hungarian lighthouses as the exist in Croatia.

In order to extend the successful project to Slovenia and in to the Italian region of Friuli Venezia Giulia and Veneto, the research has according to Perišić definition identified three lighthouses on mainland close to urban centres<sup>22</sup> that could adopt the Plovput's Stone Lights project model.

### **5.1. Possible implementation of the project to Slovenia**

The relatively small 46 kilometres long Slovenian cost line harbours several lighthouses among witch is a neocortical lighthouse that was built in the 19<sup>th</sup> century on the tip of the peninsula in the medieval town of Piran. The mentioned lighthouse witch the locals have named "Punta" represents a good possibility for implementing the Plovput's model.

A brief history of the light house reveals that before the lighthouse, a church of St. Mary stood there. The church was modified into a lighthouse sometime between 1871 and 1872 (Darovec at al, 2007). Attached to the light house, there is also an area for the lighthouse family, similar to those of the lighthouses along the Croatian coast and islands. Although the local community has begun attempts to restore the lighthouse tower, the Plovput's model of converting the lighthouse in to tourism accommodations facilities while preserving the cultural monument could be applied and positive results could be expected. It has to be noted that the community of Piran has already band al motorized vehicles in the vicinity of the lighthouse and the surroundings were protected as a national cultural and natural landmark. Piran today is one of Slovenia's more known medieval towns that are very well known among tourist visiting Slovenia. The possibility of converting the lighthouse in to a tourism accommodation facility while preserving its cultural significance and appearances is in the interest of the community and future regional development plans for the town.

### **5.2. Possible implantation of the project to Italy**

On the Italian coastline in the region of Friuly Venezia Giulia and Veneto, two lighthouses could be identified to adopt the Plovput's model. Historically, a part of the Italian coastline was also

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<sup>22</sup> One lighthouse "Punta" has been identified in Slovenia and two "Bibione lighthouse" and "Molo Santa Teresa Trieste" in Italy.

under the Austro-Hungarian Monarchy and thus the same type of lighthouses as in Croatia and Slovenia can also be found in Italy. The two appropriate sights to adopt Plovput's model are the lighthouse in Trieste Molo Santa Teresa and the lighthouse in Bibione near the Tagliamento river estuary. Both of them reflect the Austrian architectural style and have a place where the lighthouse family used to live. Apart from the two mentioned lighthouses it has to be noted that the Italian coastline between Trieste and Venezia has numerous light houses from different periods. The lighthouses today are mainly not in use but represent a significant cultural heritage landmark that should be protected.

The lighthouse in Bibione was built in 1913 and later rebuilt after being bombed in 1917. Today, the building is in the hands of a local custodian and does not have a proper management plan (Powlett, 2016). Plovput's model could thus also be implemented here to benefit the cultural heritage monument. The lighthouse in Trieste Molo Santa Teresa is home to the Trieste section of the Italian Naval League and thus cannot be used in future tourism development because it already has an established management plan (Auriemma & Karinja, 2008).

Apart from the above mentioned lighthouses, the Italian coastline as mentioned consists of several smaller ones that do not have the possibility of accommodating people and also a bigger one called the Faro della Vittoria in Trieste. This lighthouse is 70 meters high and was constructed from white marble stone from Vrsar in Istria but does not bear the architectural resemblance of the ones built in the time of the Austro-Hungarian Monarchy. The lighthouse was constructed in 1927 and dedicated to the Italian victory in the First World War (Mantini, 2007). Unfortunately, Plovput's model is not applicable here because the tourism offer of the lighthouse is limited only to a tower with a viewpoint.

## **6. Results**

Analysis of tourist traffic to the lighthouses shows that the proximity and accessibility of the coast is still one of the most important factors of their tourist utilization. It has been determined that the efficiency of the lighthouse decreases proportionally with distance from mainland, or from major populated islands. Although the profitability of the project of integration of the lighthouses in the accommodation tourist offer is relatively small and period of cost recovery long and unlikely, it has already been proven that tourist evaluation has enabled the preservation of Croatian lighthouses as a cultural heritage. This is, along with the maintenance of lighthouses which serve the safety of navigation, in the long run, the most important result of this project. Some authors (Kovačić et al, 2011) presume that the development model on Croatian lighthouses should be based on the some preconditions, like rational use of existing resource base, promotion of environment safety measures and infrastructural advancement preservation of cultural characteristics and rise in the quality of the experience of tourists and life quality of domicile residents.

Croatian islands and coastline often had in the past numerous strengths and weaknesses. They still have them more than ever before especially when it comes to development of selective forms on tourism on islands.

## Conclusion

In the attempt to enrich the tourist offer in the Croatian coastal area with competitive and in a global framework innovative tourism product, company Plovput Ltd. (Split, CRO) in 2001 has started the conversion of lighthouses on the Croatian islands and along the coast into the tourist accommodation capacity (Višič, 2011).

With the implementation of the project Stone lights the lighthouses are gradually being included into the tourist offer. In this way, funds are generated for maintenance and revitalization of the lighthouses which are important as cultural heritage monuments, as well as for those lighthouses which function is safety of navigation.

Although the profitability of the project of integration of the lighthouses in the accommodation tourist offer is relatively small and period of cost recovery long and unlikely, it has already been proven that tourist evaluation has enabled the preservation of Croatian lighthouses as a cultural heritage. This is, along with the maintenance of lighthouses which serve the safety of navigation, in the long run, the most important result of this project. Tourism on Croatian lighthouses accepts the principles of sustainable development and has a wider social importance. Research results presented in this paper show that the selectivity of tourism contributes to the quality of supply, safety, and satisfaction of tourists.

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# Elementos da geodiversidade em roteiro geoturístico no centro histórico de Natal/RN, Nordeste do Brasil

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## Resumo

As rotas urbanas que integram a geodiversidade à história/cultura do lugar onde se inserem constituem instrumento de aquisição de conhecimento, funcionando na promoção do patrimônio. A identificação da geodiversidade no Centro Histórico de Natal (RN), permite que conceitos de geociências sejam apropriados pela população de forma lúdica, com a observação do ambiente construído. Natal, fundada em 1599, foi construída com três tipos de rochas: (i) arenito ferruginoso, primeiro material pétreo utilizado, fato verificado nas construções dos edifícios mais antigos, bem como em blocos na pavimentação de ruas. Estas são encontradas nas falésias ao longo do litoral; (ii) arenitos calcíferos, também utilizados no início da construção de Natal, foi usada para enquadrar os espaços e detalhes construtivos das igrejas do século XVIII. São identificadas no litoral, compondo os recifes; e (iii) granitos, utilizados no início do século XX e extraídos de pedreiras na cidade de Macaíba. Estes foram usados em obeliscos/pedestais, entre 1913 e 1922. Como se viu, ao longo da evolução de Natal, foram utilizadas rochas extraídas das pedreiras/depósitos da cidade e arredores, quebrando idéia de que essas vinham de Portugal em lastro de navio. Essas rochas estão atualmente fora do contexto geológico original, mas podem ser consideradas como “afloramentos artificiais”. Com isso organizado criou-se um roteiro urbano que integra a geodiversidade a história/cultura do lugar. O itinerário tem doze pontos de parada e pode ser percorrido de forma autônoma, com a ajuda de um folheto informativo, bem como sob a orientação de um profissional com conhecimentos em educação patrimonial.

## Palavras chave

Geodiversidade; Patrimônio Cultural; Roteiro Geoturístico; Geoturismo Urbano; Natal.

## 1. Introdução

O desenvolvimento da cidade de Natal, no que concerne ao espaço ocupado pela *urbis*, foi um processo lento. Até a década de 1930, a capital do Rio Grande do Norte possuía apenas seis bairros, reflexo das tentativas, algumas vezes frustradas, de planejamento urbano desenvolvidas ao longo da história natalense, como aponta Souza (2008).

É possível, portanto, afirmar que boa parte da história da cidade está presente nestes bairros, sobretudo nos primeiros (Cidade Alta e Ribeira), aqueles que compõem o chamado Centro Histórico de Natal. Em julho de 2014 foi publicada no Diário Oficial da União a portaria que oficializa o tombamento desse Centro Histórico, uma área de 28 hectares compreendida, principalmente, entre os bairros da Cidade Alta e Ribeira (Figura 1).



Dentro desta região agora protegida legalmente, há uma ampla utilização de rochas na pavimentação de ruas, construção e ornamento de prédios e monumentos diversos, que remontam ao início da colonização da cidade e perpassam os séculos com o emprego de diferentes tipos de rochas. E, por sua vez, estas são exemplos da geodiversidade local, pois são representantes da diversidade natural dos componentes geológicos da região.



Figura 1 – Imagem de satélite com os limites de tombamento dos bairros Cidade Alta e Ribeira, que compõem o Centro Histórico de Natal.

Fonte: Google Eartg (imagem de janeiro/2013)

Nos últimos anos a proposição de percursos urbanos que integram os aspectos geológicos com a história e a cultura do local em que estão inseridos vem funcionando como uma importante ferramenta para promover a educação patrimonial e ambiental, constituindo assim importante instrumento de divulgação das atividades ligadas ao trinômio geodiversidade-geoconservação-geoturismo. Desta forma, a descoberta e observação dos aspectos geológicos da cidade induzem àqueles que participam do percurso a adotarem uma postura mais consciente e empenhada na construção da qualidade do meio ambiente urbano.

A proposição de um roteiro geoturístico urbano, principal objetivo desse artigo, percorrendo os principais pontos do Centro Histórico de Natal se justifica pelo fato de que, ao longo de sua evolução urbana, foram utilizados em seus principais monumentos e logradouros, materiais geológicos extraídos das pedreiras e depósitos dos arredores da cidade. Estes materiais, por se encontrarem fora do seu contexto geológico original, podem ser considerados “afloramentos artificiais”, materializando-se perante os olhos sob a forma de pavimentos, revestimentos, cantarias, obeliscos e pedestais.

## 2. O Bairro da Cidade Alta

A área proposta para o roteiro geoturístico em lide está localizada na região central da Cidade de Natal, abrangendo especificamente uma fração do bairro da Cidade Alta (primeiro bairro de Natal). Todos os pontos de observação estão inseridos nas poligonais de tombamento do

Centro Histórico de Natal aprovado pelo Ministério da Cultura em 16 de julho de 2014, como também fazem parte do Circuito Cultural de Natal. A área, de fácil acesso e locomoção, foi escolhida por abranger um conjunto representativo de logradouros, edifícios e monumentos históricos, construídos em épocas distintas, nas quais foi empregada uma grande variedade de tipos de rochas (Figura 2).

### 3. Edifícios e Monumentos Históricos da Cidade Alta

A arquitetura das edificações do bairro da Cidade Alta são exemplos da Arquitetura Colonial da época, apresentam singeleza em seus traços arquitetônicos, sendo marcados pelo peso, rigidez e caráter estático de suas formas. Esta estética está presente principalmente nos templos religiosos, como a Igreja de Santo Antônio, Igreja de Nossa Senhora da Apresentação e Igreja do Rosário dos Pretos. Também são encontrados exemplos de uma Arquitetura Eclética que apresentam um conjunto de características de diversas épocas combinadas, com influências neoclássicas, neocoloniais e *art nouveau* (Carvalho, 2010).



Figura 2 – Mapa do bairro da Cidade Alta com destaque para os diferentes monumentos históricos construídos com diferentes tipos de rochas (arenito ferruginoso, arenito calcífero e granito).

Fonte: autores

### 4. As Rochas Utilizadas

A Cidade de Natal, fundada em 1599, foi construída em três tipos de rochas (Figura 3) de acordo com Nascimento e Carvalho (2013) e como representada na Figura 2.

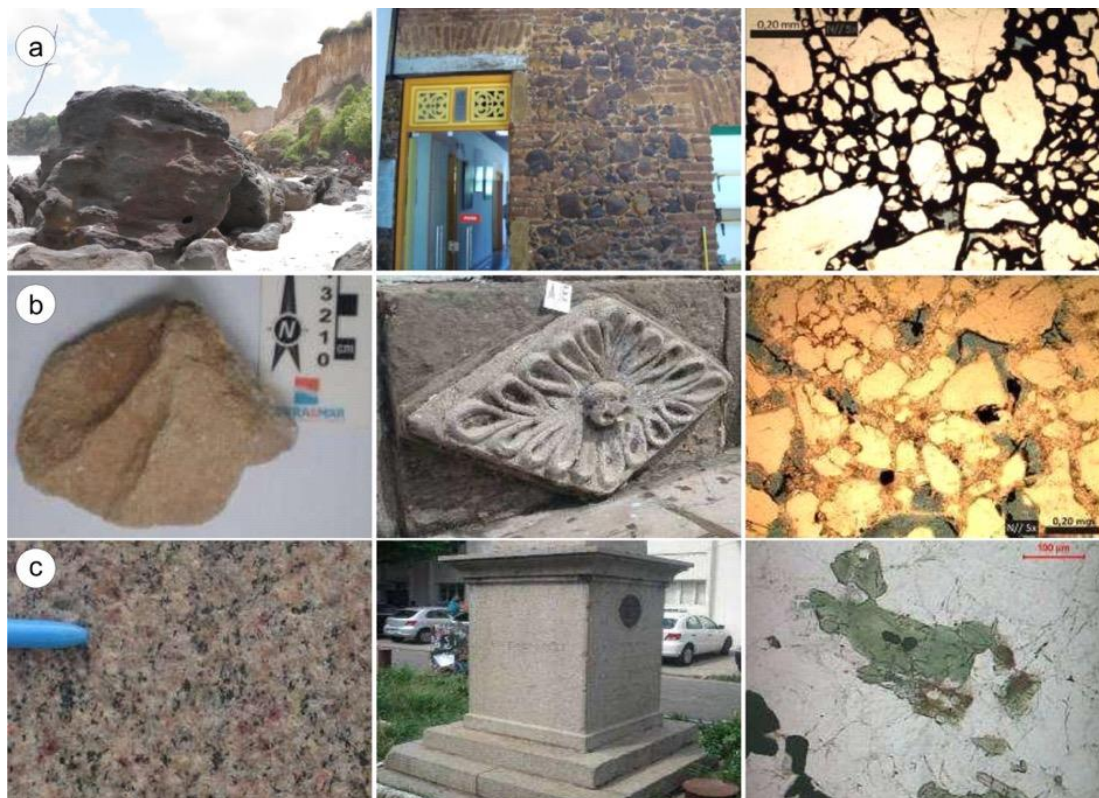


Figura 3 – Imagens das diferentes rochas utilizadas nos monumentos históricos. Da esquerda para direita tem-se em (a) arenito ferruginoso com a rocha em campo, nas falésias da Praia de Cotovelo, na construção de paredes e em seção delgada mostrando o cimento rico em ferro que aglutina grãos de quartzo; (b) arenito calcífero com um fragmento obtido na reforma de Igreja de Nossa Senhora da Apresentação, sob a forma de cantaria na Igreja de Santo Antônio e em seção delgada com cimento formado por calcita agrupando grãos de quartzo; (c) granito como um fragmento obtida em pedreira na cidade de Macaíba, utilizada como obelisco e em seção delgada mostrando diferentes minerais, como anfibólio (verde), minerais opacos (preto) e biotita (castanho).

Fonte: autores

#### 4.1. Arenitos Ferruginosos

Primeiro material pétreo utilizado na arquitetura local, fato comprovado nos sistemas construtivos das edificações mais antigas (alicerces da Igreja Nossa Senhora da Apresentação). Por se apresentarem na forma de blocos com tamanhos irregulares, sua aplicação ficou limitada a elementos estruturais, compondo as fundações/alvenarias das edificações, além de utilização como blocos para pavimentação dos primeiros logradouros da cidade. Essas rochas, de natureza sedimentar, são formadas essencialmente de quartzo e minerais opacos, originadas a partir da compactação, cimentação e do retrabalhamento de grãos de outras rochas preexistentes. Neste caso em especial a cimentação dos grãos é propiciada pela precipitação de óxidos de ferro, o que dá uma tonalidade avermelhada ou amarronzada aos blocos. Essas rochas correspondem àquelas encontradas nas bases das falésias no litoral potiguar (Figura 3a).

#### 4.2. Arenitos Calcíferos

Usados também nos primórdios da construção de Natal, compõem a arquitetura na forma de cantarias utilizadas para emoldurar os vãos e detalhes construtivos das igrejas setecentistas

(igrejas Santo Antônio e Nossa Senhora da Apresentação). Estas rochas também podem ser encontradas no Pelourinho (coluna de pedra) e nas soleiras/detalhes das fachadas de construções (antiga sede do IPHAN/RN). A formação dessas rochas se dá semelhante à anterior, contudo sua cimentação foi feita, predominantemente, por cristais de calcita, um mineral de carbonato de cálcio que é precipitado a partir da água do mar pura ou por meio de água doce (Cabral Neto et al., 2014) e ajuda na solidificação e coesão da rocha. No Rio Grande do Norte, corpos de arenitos calcíferos são encontrados ao longo de boa parte do litoral leste e norte e tem sido objetos de estudo das geociências marinhas e costeiras desde o final do século XIX. Estas rochas são identificadas no litoral, em particular nos cordões de arrecifes (recifes de arenitos) (Figura 3b).

#### 4.3. Granitos

Utilizados já no início do século XX e extraídos de pedreiras a cerca de 20 km de distância da área urbana de Natal (no município de Macaíba). Essas rochas foram usadas em obeliscos, colunas e pedestais, principalmente entre 1913 e 1922 (praças André de Albuquerque, Padre João Maria e Sete de Setembro). O granito é uma rocha ígnea formada em subsuperfície pelo resfriamento de líquidos magmáticos. As características de cada granito, como composição, textura e estrutura, podem ser diferenciadas, contudo aquelas usadas nos monumentos são semelhantes e podem ser descritas como monzogranito, devido a presença de feldspatos (Figura 5). Além disso, possui uma textura equigranular, definida pela semelhança no tamanho dos cristais dos minerais que o compõe (Figura 3c). Esta rocha também é chamada de Granito Macaíba, uma vez que o local em que ela ocorre, no Rio Grande do Norte, fica na cidade homônima.

### 5. Roteiro Geoturístico – Pontos a Visitar

Em diversos lugares do mundo, a geodiversidade local é atualmente utilizada como objeto principal de atividades turísticas e de recreação por meio do chamado Geoturismo, que é caracterizado por Dowling e Newsome (2011) como a ação de turismo em que as paisagens, fósseis, rochas e minerais são usados para a divulgação dos processos que criaram estes aspectos naturais.

Apesar de tratar dos exemplos de natureza abiótica, o Geoturismo não está restrito a ser desenvolvido em ambientes naturais de ocorrência. Nos centros urbanos também é possível criar roteiros que mostrem o uso da geodiversidade na construção e desenvolvimento das cidades, utilizadas nos monumentos, prédios e ruas para sustentação ou beleza arquitetônica.

Stern *et al.* (2006) mostram que a diversidade de uso das rochas nas cidades está atrelada, principalmente, à facilidade de obtenção e durabilidade do material pétreo, e que roteiros geoturísticos nas cidades podem também incluir outros atrativos culturais, históricos e até mesmo facilidades e serviços, como lojas, restaurantes e bares.

No Brasil, algumas cidades já possuem roteiros geoturísticos bem desenvolvidos e que vem sendo oferecidos aos visitantes de grandes cidades, como Curitiba e São Paulo. No caso da capital paulista, Del Lama *et al.* (2015) apontam um possível roteiro geoturístico por meio de prédios e monumentos históricos, que recontam a evolução da cidade e nos quais foram utilizados os diferentes tipos de granito que ocorrem no estado.

Em Natal, em especial no bairro da Cidade Alta, um roteiro geoturístico foi criado focando a união dos elementos da geodiversidade que foram empregados nos principais monumentos históricos e culturais da região. Esse roteiro, sob a forma de mapa (Figura 2) é reproduzido a seguir e está disponível para qualquer interessado em fazer geoturismo no Centro Histórico de Natal.

#### 5.1. Ponto 1 - Rua Voluntários da Pátria (Santa Cruz da Bica)

O trecho final da Rua Voluntários da Pátria, na altura Praça da Santa Cruz da Bica, compõe, juntamente com a Travessa Pax e a Rua Quintino Bocaiúva, os últimos vestígios remanescentes da pavimentação original da cidade, datada do final do século XIX. Segundo depoimento do viajante Henry Koster, no início do século XIX (1810), a cidade de Natal “não é calçada em parte alguma e anda-se sobre uma areia solta [...], apenas alguns habitantes possuíam calçadas construídas diante de suas casas” (Koster, 2002). Porém, ainda na segunda metade do século XIX, os presidentes da província sentem a necessidade de investir no melhoramento urbano da capital, visto que até aquele momento ainda se observa um péssimo estado das ruas e espaços públicos da cidade (Ferreira e Dantas, 2006). Este calçamento, conhecido popularmente como “pé de moleque”, corresponde à justaposição de blocos irregulares do arenito ferruginoso. Importante ressaltar que, ao longo do tempo, intervenções posteriores na pavimentação deste logradouro promoveram a complementação dos trechos faltantes do calçamento original por blocos irregulares de pedra granítica (Figura 4).



Figura 4 – Rua Voluntários da Pátria com sobreposição de rochas – granitos (em cinza) e arenitos ferruginosos (em marrom) – estas últimas remanescentes das primeiras pavimentações. *Fonte: autores.*



Figura 5 – Visão frontal da Igreja de Santo Antônio (conhecida também por Igreja do Galo), com suas pilastras formadas por arenitos calcíferos. *Fonte: autores.*

#### 5.2. Ponto 2 - Igreja Santo Antônio (Igreja do Galo)

Terceiro templo religioso construído na cidade de Natal, a Igreja Santo Antônio (Figura 5), também conhecida como Igreja do Galo, é um dos mais belos exemplares da arquitetura barroca do Rio Grande do Norte. A data exata de construção da igreja é desconhecida, porém é provável que a obra tenha ocorrido em pelo menos três etapas, sendo a primeira, finalizada em agosto de 1766, de acordo com a data inscrita sobre a porta principal do templo. Ela integra juntamente com a Igreja Nossa Senhora da Apresentação, o conjunto de monumentos

do Centro Histórico de Natal, no qual a utilização da pedra foi mais expressiva, seja no aspecto quantitativo - já que estas foram utilizadas nas fundações, alvenarias e elementos decorativos - , quanto pela qualidade estética dos trabalhos em cantaria, os quais podem ser considerados verdadeiras obras de arte que se integram à arquitetura destes monumentos. Desta forma, as rochas utilizadas nas cantarias da Igreja Santo Antonio correspondem aos arenitos calcíferos.

### 5.3. Ponto 3 - Igreja Nossa Senhora da Apresentação

A Igreja Nossa Senhora da Apresentação (Figura 6) é o representante mais antigo da arquitetura religiosa em Natal. A Matriz teve origem no ano de fundação da cidade, em 1599, correspondendo, na ocasião, a uma singela capela de taipa. Em 1619, o templo original foi reformado, ampliando sua área em planta. Durante a ocupação holandesa, transformou-se em templo calvinista e, após a expulsão destes do território potiguar, a igreja passou por serviços de recuperação que se estenderam até 1694, mas que ainda mantiveram a sua feição colonial. Nos séculos XVIII e XIX (a partir de 1789) outros reparos foram empreendidos e considerou-se a igreja concluída em 1862, quando foi finalizada a construção da sua torre. Após tantas intervenções, a fachada colonial havia sido descaracterizada pela inserção de vários elementos ecléticos, os quais foram removidos na obra de restauração empreendida no ano de 1995, devolvendo ao monumento seu aspecto colonial original. A utilização da pedra neste exemplar ocorreu de maneira extensiva, seja como sistema construtivo (fundações e alvenarias), seja como elemento decorativo (cantarias e elementos integrados). É importante ressaltar que na época da construção deste monumento (séculos XVII e XVIII), praticamente não existiam estradas interligando a capital ao interior. Deste modo, devido à dificuldade para transportar os materiais, as rochas utilizadas na construção dos monumentos edificados no período (igrejas Nossa Senhora da Apresentação e Santo Antônio) foram extraídas das proximidades. Os trabalhos em cantaria que embelezam as fachadas e interiores desta igreja - cunhais, arco cruzeiro, cercaduras das portas e janelas – foram executados com os arenitos calcíferos, enquanto que em suas fundações e alvenarias lançou-se mão dos arenitos ferruginosos.



Figura 6 – Igreja de Nossa Senhora da Apresentação com suas pilastras e cercaduras das janelas feitas com arenitos calcíferos.  
*Fonte: autores.*



Figura 7 – Coluna dos Mártires - monumento comemorativo ao centenário da Revolução de 1817, todo elaborado em granito.  
*Fonte: autores.*

### 5.4. Ponto 4 - Praça André de Albuquerque

A Praça André de Albuquerque é o logradouro público mais antigo de Natal, sendo considerado o “marco zero” da fundação da cidade. No seu entorno, foram construídos importantes prédios

públicos, com destaque para a igreja matriz e a casa de câmara e cadeia (construída e reconstruída diversas vezes e demolida definitivamente no início do século XX), tendo também sido palco de diversos festejos, manifestações e celebrações religiosas ao longo dos anos. A denominação atual deste espaço público foi dada em 1888, em homenagem a André de Albuquerque Maranhão, líder e mártir da Revolução de 1817. Vários projetos paisagísticos mudaram as feições da praça ao longo do tempo, com destaque para a intervenção de 1907, de autoria de Herculano Ramos, na qual foi nivelado o piso, construído o passeio de contorno, um pavilhão central e um coreto de ferro batido. Em 1999 a praça passou por outra mudança, na qual foi retirado o coreto e o piso pavimentado com placas de diferentes rochas (granitos, gnaisses). A Coluna dos Mártires, monumento comemorativo do centenário da Revolução de 1817, foi inaugurada pelo presidente do Instituto Histórico e Geográfico do RN, Cel. Pedro Soares, em 12 de junho de 1917, tendo sido implantada em frente à Igreja Nossa Senhora da Apresentação. De acordo com informações contidas na Revista do Instituto Histórico e Geográfico (v.XV, n.1 e 2, p.83-86;143), “o monumento, trabalhado em granito das jazidas existentes no município da vila de Lages, sob a direção do senhor Miguel Micussi e planta do engenheiro Willy Ficher, apresenta inscrições latinas gravadas em duas faces da coluna quadrangular, além de medalhões de bronze”. O granito utilizado na cantaria do monumento (Figura 7) possui granulometria fina a média, textura equigranular, composto por quartzo, K-feldspato e biotita, com plagioclásio em menor quantidade. As biotitas ocorrem de forma disseminada e, em alguns locais, formam nódulos onde há uma maior concentração dos minerais máficos.

#### 5.5. Ponto 5 - Rua Cel. Lins Caldas

Na rua cel. Lins Caldas o calçamento é semelhante ao encontrado nas demais ruas originais de Natal, feito com arenitos ferruginosos (Figura 8), justapostos em blocos semelhantes a um pé de moleque. Esses arenitos foram retirados do litoral da cidade de Natal, nas praias de Areia Preta, Artistas, do Meio e Forte. O mesmo está ao lado da Casa do Estudante (abrigo antigamente a Escola de Aprendizes Artífices)



Figura 8 – Rua Cel. Lins Caldas em frente a Casa dos Estudantes com pavimentação quase que completa em blocos de arenitos ferruginosos (blocos em marrom escuro).  
*Fonte: autores.*



Figura 9 – Rua Quintino Bocaiúva com resquício da pavimentação original formada por blocos de arenitos ferruginosos (em marrom escuro) justapostos a blocos de granitos (em cinza).  
*Fonte: autores.*

## 5.6. Ponto 6 - Rua Quintino Bocaiúva

A Rua Quintino Bocaiúva, originalmente denominada de Rua do Rosário, é um dos mais antigos logradouros da cidade. Já existem referências a mesma no registro de concessão de terras da cidade desde 1706, informando que no lote fronteiro ao de Antonio Henrique de Sá, “se quer fundar a Igreja de Nossa Senhora do Rosário”. Como já foi dito anteriormente, este é um dos últimos logradouros da cidade que ainda conserva o calçamento original, executado no final do século XIX, formado pela justaposição de blocos irregulares de arenito ferruginoso (Figura 9). Esta rocha aflora ao longo de nosso litoral e foi o primeiro material pétreo utilizado nos exemplares arquitetônicos de do Centro Histórico de Natal. As formas e tamanhos irregulares destas rochas limitaram sua aplicação em elementos decorativos de cantaria e sua utilização ficou restrita às fundações e alvenarias de pedra, além da utilização dos blocos para compor a pavimentação das primeiras ruas da cidade (Dantas, 2001). A análise da lâmina dessa rocha revela que a mesma possui um arcabouço formado por grãos de quartzo moderadamente a pobremente selecionados, predominantemente angulosos a subangulosos, com empacotamento frouxo e submaduros. Além dos grãos de quartzo monocristalinos, também compõem o resistato alguns grãos de quartzo retrabalhados de um arenito mais antigo (cimentação de quartzo proveniente de uma diagênese mais intensa) e grãos de turmalina. A porosidade primária da rocha é preenchida pelo cimento ferruginoso, material este que também ocupa o espaço dentro dos grãos de quartzo, preenchendo as linhas de fraqueza (fraturas) dos mesmos.

## 5.7. Ponto 7 - Pedra do Rosário

O sítio histórico conhecido como Pedra do Rosário localiza-se na margem esquerda do rio Potengi, no prolongamento da Rua Quintino Bocaiúva e corresponde ao local onde foi encontrado, no dia 21 de novembro de 1753, um caixote contendo uma imagem de Nossa Senhora.



Figura 10 – Pedra do Rosário, formada em arenitos ferruginosos, é local onde foi encontrada a imagem de Nossa Senhora da Apresentação, Padroeira de Natal. *Fonte: Carvalho (2010).*

O local no qual o caixão encalhou equivale a um “grande bloco isolado de arenito ferruginoso, revestido por ostras e mariscos, medindo, aproximadamente, 5,5m de extensão, 1,20m de largura e uma altura máxima de 1,90m”, pertencente à Formação Barreiras. Desde o ano de



1974, a pedra que dá nome ao local encontra-se escondida sob as fundações de uma plataforma de alvenaria, construída no local pela Prefeitura, para funcionar como um mirante. Encravada no bloco de arenito (Figura 10), ergue-se uma coluna de alvenaria que transpassa a plataforma e sustenta no topo uma réplica da imagem da santa. Do mirante construído pela prefeitura é possível se desfrutar de uma bela visão dos manguezais e do estuário do Rio Potengi.

#### 5.8. Ponto 8 - Travessa Pax

A Travessa Pax, localizada ao lado do prédio do Solar Bela Vista, ainda preserva em toda sua extensão – porém mal conservado – o calçamento em pé de moleque, chamado desta forma devido à semelhança na disposição das pedras (arenitos ferruginosos – Figura 11) com a dos amendoins colocados sobre o doce. A primeira fase dos serviços de pavimentação da cidade ocorreu a partir de 1904, utilizando a mão-de-obra dos retirantes da seca, sob o comando da Comissão de Engenheiros chefiada por Sampaio Correia. O material rochoso utilizado foram os blocos irregulares de arenito ferruginoso, extraídos das praias do Meio, da Ponta do Morcego e de Areia Preta. “Esse tipo de pavimento ocupou por vários anos as principais vias públicas de Natal, calçamento feito com pedra irregular, mas eficiente, que ainda existe em algumas ruas do centro histórico da Cidade” (Dantas, 2000; Emerenciano, 2007). Este tipo de pavimentação inicialmente atendeu à demanda da vida urbana da cidade, já que o transporte público era feito pelos bondes. Porém, com a popularização dos automóveis a partir da década de 1920, começaram a surgir vários problemas e a pavimentação original começou a ser substituída. As rochas utilizadas nesta segunda etapa do calçamento das ruas da cidade foram os granitos extraídos das pedreiras situadas em Jundiá e em Macaíba (Dantas, 2000). Desta forma, a preservação da Travessa Pax é fundamental para garantir que as futuras gerações terão acesso a esse importante registro da história da cidade de Natal. O que se observa, porém, é que apesar de ser tombado como patrimônio histórico estadual desde 2007, este logradouro histórico não tem recebido a devida atenção das autoridades públicas, já que as pedras originais têm sido removidas de vários trechos, sendo substituídas por outros tipos de rocha. Além disso, a via continua aberta ao tráfego de veículos, acelerando ainda mais seu processo de degradação.

#### 5.9. Ponto 9 - Praça 7 de Setembro

Em 1914, foi demolido um quarteirão inteiro da Rua da Conceição com o objetivo de implementar no local um novo espaço público, a Praça 7 de Setembro. Em 1922, em comemoração ao 1º Centenário da Independência do Brasil, foi erguido no centro da praça o Monumento da Independência, projeto do escultor A. Bibiano Silva, o qual corresponde a duas figuras alegóricas trabalhadas em bronze, colocadas sobre pedestal de granito (Figura 12) das jazidas de Macaíba. No pedestal de granito trabalhado em cantaria estão fixados escudos e placas de bronze com inscrições em latim. De acordo com Dantas (2001), “o uso do granito, proveniente principalmente das pedreiras de Jundiá e Macaíba, ganhou gradativa importância para os mais diversos fins construtivos, em Natal, no início do século XX”. Ainda segundo esse autor, o granito extraído das pedreiras de Macaíba se mostrou adequado ao trabalho cantaria, sendo utilizado para diversos fins, desde a pavimentação de ruas e a modernização do porto, até os ricos trabalhos de cantaria que adornam os pedestais e obeliscos dos monumentos inaugurados na capital no primeiro quartel do século XX. A observação macroscópica das

características dos granitos utilizado nos pedestais das praças 7 de Setembro, Padre João Maria e Praça André de Albuquerque, revela semelhanças indicativo de possuir a mesma origem. A análise macroscópica da rocha utilizada no pedestal do Monumento da Independência apresenta uma coloração cinza claro a rosada, textura equigranular, granulometria fina a média e uma fraca foliação marcada pelo alinhamento dos anfibólios. Trata-se uma rocha equigranular, com destaque para cristais milimétricos de anfibólio e titanita (por vezes alterados), além de matriz quartzo-feldspática. A rocha é composta, predominantemente, por quartzo, K-feldspato, plagioclásio e anfibólio ( $\pm$  titanita). Em alguns pontos, a oxidação dos anfibólios e titanita gera nódulos com coloração avermelhada em torno dos agregados de minerais.



Figura 12 – Praça 7 de Setembro com monumento comemorativo a Independência, com sua base formada por granitos provenientes das pedreiras de Macaíba.

*Fonte: autores.*



Figura 13 – Soleira em arenito calcífero encontrada na antiga sede do IPHAN/RN. *Fonte: autores.*

#### 5.10. Ponto 10 - antiga Sede do IPHAN/RN

Tombada em 1990, pela Fundação José Augusto, a antiga Sede do Instituto do Patrimônio Histórico e Artístico Nacional no RN, localizada na Rua da Conceição, foi edificada no local onde existira o antigo Armazém Real da Capitania do Rio Grande. De acordo com os Livros de Registro de Concessão de Terras, arquivados do IHG/RN, existem referências a este imóvel, construído em alvenaria de pedra e cal, desde 1731. Em 1880, foi construída uma nova edificação no terreno onde estavam as ruínas do antigo Armazém, e ali, a partir de 1881, residiu o padre João Maria, na época em que o mesmo era o pároco da cidade de Natal. Em 1987, o imóvel foi adquirido pela Fundação Nacional Pró-Memória, com a finalidade de instalar a Representação do IPHAN no Rio Grande do Norte. Alguns anos depois, em 1995, o edifício passou por obras de restauração, resgatando as feições originais (coloniais) e evidenciando os vestígios históricos encontrados – soleira de pedra de uma porta da fachada, parede de pedra, esteios de madeira da estrutura, antigas fundações, etc. A soleira de pedra da fachada (Figura 13) é formada pelo trabalho em cantaria de um arenito calcífero. Apresenta estratificação plano-paralela, granulometria média a grossa, grãos subangulosos a subarredondados, coloração creme, sendo composto, essencialmente, por grãos de quartzo cimentados por carbonato de cálcio. Além desse arenito, também compõem esta alvenaria, blocos irregulares

do arenito ferruginoso. Estes blocos possuem coloração escura, marrom avermelhada, compostos por grãos de quartzo cimentados por óxido de ferro.

#### 5.11. Ponto 11 - Pelourinho (IHG/RN)

O Instituto Histórico e Geográfico do Rio Grande do Norte – IHG/RN foi criado em 29 de março de 1902, com o objetivo de pesquisar e divulgar a história do Estado. A atual sede do Instituto, construída em 1906, está localizada no núcleo original de formação da cidade, encontrando-se inserida no perímetro de tombamento do Centro Histórico de Natal. Nos tempos do império, ao se instalar uma nova vila, erguia-se em local público uma coluna de madeira, de pedra ou de alvenaria a qual era dada a denominação de Pelourinho. A primeira referência ao pelourinho da cidade de Natal data de 6 de fevereiro de 1696. Em outubro de 1732, foi construído um novo pelourinho no centro do antigo Largo da Matriz (hoje, Praça André de Albuquerque), o qual, segundo a tradição oral, recolhida por Câmara Cascudo, era encimado por um globo feito de argamassa (um dos símbolos das Armas Reais de Portugal). Este segundo pelourinho foi retirado do local de origem em meados do século XIX, passando ser utilizado como um banco na Cadeia Pública da cidade. Em 1904, este monumento foi recolhido por membros do Instituto Histórico e Geográfico do Rio Grande do Norte e levado para a Intendência Municipal (local da atual Prefeitura). Em 24 de dezembro de 1963, o pelourinho foi doado oficialmente pela Prefeitura Municipal do Natal ao IHG/RN, onde se encontra instalado até os dias atuais. O pelourinho corresponde a uma peça de arenito calcífero esculpido numa forma cônica, com diâmetro de aproximadamente 35 centímetros e 1,75 metros de altura (Figura 14).



Figura 14 – Monumento conhecido por Pelourinho, formado em arenito calcífero, que se encontra na entrada do Instituto Histórico e Geográfico do RN.

*Fonte: autores.*

#### 5.12. Ponto 12 - Praça Padre João Maria

Originalmente chamada de Praça da Matriz, este espaço público já aparecia registrado em um mapa da cidade, elaborado no terceiro quartel do século XIX. A Praça Padre João Maria recebeu esta denominação em 1909, em homenagem ao santo vigário de mesmo nome, que havia morrido poucos anos antes. A partir de então, transformou-se num local de romarias e peregrinações dos fiéis, ritual este ainda recorrente, visto a quantidade de fitas votivas e flores



Figura 15 – Monumento ao Padre João Maria com a base do busto elaborado em granito proveniente das pedreiras de Macaíba. *Fonte: autores.*

colocadas todos os dias no pedestal de granito (Figura 15) que sustenta a herma do vigário. Modelado pelo escultor Hostílio Dantas, o busto em bronze do Padre João Maria está afixado sobre um pedestal granítico lavrado pelo arquiteto Miguel Micussi, tendo sido inaugurado em 07 de agosto de 1921. O pedestal que sustenta o busto do Padre João Maria corresponde a um belo trabalho de cantaria, executado numa pedra granítica de coloração rosada. Macroscopicamente, a rocha possui textura equigranular, granulometria média e uma fraca foliação marcada pelo alinhamento dos anfibólios. Composta por quartzo, feldspato (plagioclásio e K-feldspato) e minerais máficos (biotita e anfibólio). Numa intervenção mais recentemente, a base do pedestal foi revestida com placas de uma rocha granítica, de coloração avermelhada e textura porfírica, apresentando fenocristais de K-feldspato com tamanho variando de 3 a 5 cm, imersos em uma matriz de granulometria grossa, composta por quartzo, plagioclásio, K-feldspato e biotita. O revestimento da base apresenta dois tipos de acabamento: polido e apicado.

### **Conclusões**

A região central da cidade de Natal apresenta uma grande diversidade de materiais rochosos usado na construção de seus prédios e na pavimentação de seus espaços públicos. O estudo das rochas utilizadas nos monumentos e fachadas de edifícios do Centro Histórico de Natal permite traçar uma relação entre os principais tipos de rochas empregadas nestas construções e o período histórico, econômico e social da cidade. Desta forma, de acordo com as características geológicas (composições mineralógicas, texturas e estruturas peculiares), estéticas (cores, aparência, resistência) e econômicas (custo e facilidade de obtenção), os diferentes tipos de rochas assinalam períodos de uso mais ou menos intenso daqueles materiais ao longo da evolução urbana da cidade.

Este trabalho apresenta um roteiro de visita pelo Centro Histórico de Natal, com enfoque nas rochas e suas características geológicas, utilizadas em doze pontos de destaque (monumentos, praças e logradouros) distribuídos ao longo de um roteiro geoturístico proposto para a área. O critério utilizado para a seleção destes pontos foi apresentar edificações e monumentos que representassem uma amostragem mais diversificada possível dos tipos de rochas e estilos arquitetônicos.

Os chamados “afloramentos urbanos” destacados neste trabalho, integrados aos percursos de interpretação e educação ambiental e patrimonial, permitem que as pessoas se apropriem de um conhecimento mais abrangente do meio natural, sem que seja necessário se deslocar para fora da cidade. A aquisição destas informações resulta numa participação consciente e empenhada na construção da qualidade do ambiente urbano. Além disso, na medida em que a população amplia o conhecimento da cidade através da realização de percursos que visam à interpretação e educação patrimonial com registro de diversos tipos de rochas, com diferentes características, proveniências e condições de formação, chama a atenção para a noção do tempo geológico e para as alterações que o meio ambiente sofre ao longo da evolução do Planeta.

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# The power of a dream. How the gold train rumour has turned “Poland’s ugliest town” into a popular tourist destination

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## Abstract

This paper deals with the marketing phenomenon of the Gold Train rumour: a legendary, precious Nazi transport that was reportedly carried by train from Breslau (Wrocław) towards Waldenburg (Wałbrzych) and it is said to have disappeared on its way there in 1945. In August 2015 two treasure hunters announced that they had found the train. This announcement has electrified the imagination of people worldwide. Despite a significant involvement of Polish public authorities and the hands-on efforts of the two treasure hunters, the train has so far not been excavated and its existence has not been confirmed. Nevertheless, the rumour about finding the Gold Train has had a significant marketing impact on a poor, ill-reputed town. Wałbrzych - a former stronghold of the coalmine industry in Poland - has long suffered from an increasingly bad image. Since the Gold Train rumour went viral, the town has experienced a significant increase of public interest. Tourists have found there an attractive marketing offer, instantly prepared by the town authorities, local heritage sites and private people who started selling gadgets or offering trips routes related to mysteries of the Nazi past in Wałbrzych and in the entire region. The paper analyses marketing consequences of the Gold Train rumour, taking into account the benefits already observed and the marketing prospects resulting from both finding and non-finding the train in the future. It will also be attempted to answer the question, whether or not this rumour has been an ingenious example of a guerrilla marketing campaign.

## Keywords

Nazi Gold Train; guerilla marketing, viral marketing, touristic routes

## 1. Introduction

This paper deals with the phenomenon of the Gold Train: it will describe the story of the legendary, precious transport that was reportedly carried by train from Breslau towards Waldenburg and it is said to have disappeared on its way there. It will refer to the supposed content of the train, to its post-war hunt and to the Gold Train fever that, for nearly two years, has been virally spreading all over the world. This rumour about finding the Gold Train has electrified the imagination of countless people and has had a significant marketing impact on a poor, ill-reputed town. An analysis of this marketing power of a rumour shall be the main focus and the culmination of this paper.

## 2. Historic and geographic background

The region discussed in this paper is Lower Silesia, the formerly German area that has become part of Polish territory after the WW2. The main places of this paper’s concern are Breslau/Wrocław<sup>23</sup>, Castle Fürstenstein/Książ, Freiburg in Schlesien/Świebodzice and, most importantly, Waldenburg/Wałbrzych.

Lower Silesia is the area where, during the Second World War, the Nazis were most active in terms of constructing and planning. After being for the first time seriously defeated on the Eastern Front in 1943, the Nazis started thinking of creating alternative headquarters that

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<sup>23</sup> The names of places referred to in this paper are presented in the following language format: German/Polish.

would be far away from Berlin and safe. Their choice fell on the Owl Mountains (Eulengebirge/Góry Sowie) in Lower Silesia.

An important object in these plans was the Castle Książ, a splendid residence, the history of which dates back to the 13<sup>th</sup> century (Będkowska – Karmelita, 2015). The castle was taken over by the authorities of the 3<sup>rd</sup> Reich, and it was meant to become one of Hitler's residences. A 40 meters deep shaft, a shelter and a number of tunnels were dug and a huge underground complex was created under the castle. According to some researchers (e.g. Wrzeński and Kucznir, 2014), it was supposed to serve as a factory of military equipment, a storage space for precious items and secret documents and as a research lab working on the nuclear weapon. Until now, only a part of the tunnels have been discovered, and some of them are not accessible to public due to the risk of accidents (Wrzeński and Kucznir, 2014).

This underground complex was connected with the Riese, which is the German word for Giant; this extremely ambitious construction-engineering project of Nazi Germany was conceived in order to create good conditions for strategic armaments production (Kowalski *et al.* 2009). The area selected for this purpose - the Sudetes, particularly the Owl Mountains – was indigenously German. In its geological and ethnical structure, this region seemed to be perfect for making it a new, secret centre for the Nazi rule. It was considered by the Nazis to be particularly safe and not only for its mountainous landscape. Apparently, it had never occurred to the Nazis that they could lose that area after the war. Moreover, this area was rich with uranium ore deposits, which made it a perfect place for further works on the so-called wonder weapon. Within the framework of this highly advanced project huge bunkers and tunnels were built (Kowalski *et al.* 2009).

Apart from the aforementioned strategic goals, these underground constructions were meant to serve yet another purpose. Lower Silesia had been a region with abundant cultural heritage, not only architectural, but also movable. Moreover, since this area was considered safe, the Nazi authorities decided to hide there their historical treasures that could have otherwise been lost or destroyed (Wrzeński and Urban, 2013). It is now known that such hiding places existed all over Lower Silesia. The best-known list of such hiding places was drawn up between 1942 and 1944 by Günter Grundmann, a German conservator and art historian (Kowalski *et al.* 2015). He contacted 250 arts collectors in that area asking them to provide a list of artefacts that they would like to save with priority. 160 persons answered and a few thousands of items were listed and eventually hidden in basements of churches, palaces, in mines, bunkers and tunnels etc. This encoded list was found in Wrocław after the 2<sup>nd</sup> World War and was eventually decoded. All hiding places listed by Grundmann were then visited by Polish conservators. Within these investigations, many treasures but not all were found (Kowalski *et al.*, 2015).

All objects of the Riese project, including the Fürstenstein castle, were secretly connected by an extensive, complex underground railway network.

### **3. History of the Gold Train**

The history of the Gold Train starts in Wrocław, then Breslau in 1944. The Ministry of Finance of the 3<sup>rd</sup> Reich issued an order that the entire population of Lower Silesia should “secure” their savings (Lamparska, 1995). The valuable items were first brought to the police headquarters and stored in metal boxes in its basement – a very safe place, as that basement also served as

an air-raid shelter. To keep everything secret, the SS-men also kept some war prisoners in that basement so that even guards thought they were watching on prisoners, not on the treasure. Altogether, there were 56 metal boxes - between 50 and 200 kilograms each - and a large number of smaller, wooden cases (Żakowska, 2015).

As the Second World War was nearing to its end in 1945, the Nazis, fearing the approaching Red Army, loaded to an armoured train these valuables and— supposedly - huge amounts of gold stolen during the war, as well as precious works of art originating from mostly Polish and Russian museums. According to various sources (see Wyszowski, 2015), the train was supposed to also carry industrial platinum, deposits of local banks, a part of deposits of the Central Bank of the 3<sup>rd</sup> Reich and its secret archives. Probably the most famous item that, according to some theories, could have been loaded on that train was the Amber Room, disassembled by German troops from Tsarskoye Selo near St Petersburg in 1941. Obviously this was only one of many speculations regarding the fate of the Amber Room but some of its seekers found out that one of the chambers of the Książ Castle was rearranged specifically to match the dimensions of the Amber Room (Dragan, 2009). Therefore, some assumed that this is where the precious Room was to be looked for.

Whatever the real content of the train was, that priceless transport was supposed to be taken from Breslau to Waldenburg: A train trip that nowadays takes a bit more than an hour. The train was reputedly last seen in Freiburg in Schlesien/Świebodzice, 10 kilometres away from its final destination, but it has never reached Waldenburg. Some were saying that it must have disappeared in one of the numerous railway tunnels that had been dug within the framework of the Riese project (Wyszowski, 2015).

After the 2<sup>nd</sup> World War the border between Poland and Germany has been set on the two rivers: Neisse and Oder. Thus, the entire area of Lower Silesia, including the project Riese, Breslau, Waldenburg and Castle of Fürstenstein have become part of the Polish territory. As time went by, the interest in the treasures reputedly hidden on the area abandoned hastily by the Nazis has been growing. It was assumed from the beginning that there must have been two running kilometres of treasures hidden in Lower Silesia and only 1 running kilometre has been found (Lamparska, 2006). Not only private people but also politicians were looking for German treasures after the war. For instance, in 1981, even the highest military authorities of the Peoples Republic of Poland sent special troops to Lower Silesia in order to look for treasures abandoned by the Nazis. They did find a small box filled with gold coins but it was asserted that they must have been hidden around 1740 (Krajewski, 2015).

The Gold Train of the 3<sup>rd</sup> Reich was undoubtedly one of the most mysterious plots of the Second World War, which, over decades, has evolved into a legend. The most persistent hunter of the Gold Train has been Mr Tadeusz Słowikowski, an 86 years old retired miner from Wałbrzych. He has spent half of his life looking for the train. He had first heard about it in 1948 when he got employed in one of Wałbrzych mines and made friends with an elderly German who was still working there. Then he met other witnesses, both Germans and Poles, who claimed that they had seen the train (Szałkowski, 2015). In his opinion, between the 61<sup>st</sup> and 65<sup>th</sup> kilometre of the route from Wrocław to Wałbrzych the train must have entered an underground tunnel leading to the Książ Castle. In order to convince the world about his hypothesis, Mr Słowikowski built a special model depicting railways, a tunnel and a train. Since



no authority was interested in his theory, he went ahead and, together with a friend, they were looking for the train themselves, digging for a few seasons. Then other treasure hunters followed who came with sponsors and equipment but they lacked the accuracy of Mr Słowikowski. For many years no one took his suggestions seriously (Szałkowski, 2015).

#### **4. The finding announcement**

On 18<sup>th</sup> August 2015 media reported that the local government office in Wałbrzych was visited by two men who, at the beginning, wanted to remain anonymous. They claimed they would know where the train was hidden. According to their version, the entire train was supposed to be 150 meters long, it was all mined and on its board many documents, pieces of weapon and priceless treasures were supposed to be found (Żuchowski, 2015). These men promised to reveal the train's location provided that they would get a reward amounting to 10% of the findings' value. According to the legal representative of the finders, this location would not be revealed to the public until the train becomes properly secured by respective public services.

Media soon reported that the Polish Ministry of Culture and Cultural Heritage had been aware of this find for a few weeks. Soon after an official press conference was held in the town hall of Wałbrzych during which it was officially stated that the Gold Train is hidden in a tunnel under the town. The General Conservator of the Republic of Poland stated that, basing on the geo-penetrating radar pictures he saw, he was 99% convinced of the existence of the train (Bartosz, 2015). Military, forest and municipal services as well as police were ordered to secure the area and to carry out respective investigations.

The credibility of the news was strengthened by the German nationality of one of the finders. Journalists speculated that the finders must have accessed some crucial, first hand information that were previously unknown and unavailable to the Polish train seekers. Media reported that the information about the location of the train was obtained from an old dying German man who had taken part in hiding the train and, who, on his deathbed decided to reveal his secret to these two gentlemen, together with a map of the hiding place (Żuchowski, 2015). The legal representative of the finders publicly compared the train to finding Titanic or the battleship Bismarck (Kanikowski, 2015). Even though he originally insisted that the train would be probably filled with industrial materials, soon another narrative followed indicating that in the train 300 hundreds tons of gold, diamonds and other valuables were hidden (Kryzstofiak, 2015).

As soon as the news about the Gold Train reached world media, a number of claimants reported their right to the prospective find. Among them, there were representatives of the Russian Federation claiming that their experts should be present at entering the train. They wanted to make sure that the findings are returned to Russia, in case any items or war trophies be found that originally belonged to the Soviet Union (Walton and Day, 2015). On the other hand, the World Congress of Jews announced that: "If any of these items were stolen from Jews before they were murdered, or sent to forced labour camps, every measure must be taken to return them to their owners, or their heirs" (Walton and Day, 2015). Media reported also that it might be necessary to return the train to the Federal Republic of Germany as a legal successor of the train's original owner. The General Conservator of Poland reminded of the Polish law, according to which all items found underground are part of the Polish State Treasury (Walton and Day, 2015). He emphasized that the safety of those who would find the train is

top priority and he therefore discouraged anyone from trying to make this discovery on their own, without appropriate instruments and preparations in view of any security mechanisms, for instance explosives or any kind of traps, that might have been used by the Nazis 70 years ago.

As time went by, the then Minister of Culture, the Minister of National Defence and other highest authorities started officially distancing themselves from the Gold train news (Lamparska, 2015). But the rumour had already started living its own life. Some time later the finders decided to reveal their identity: a Pole, Piotr Koper and a German, Andreas Richter started giving interviews to media (Szałkowski, 2015b). They claimed they have never intended creating such medial turmoil and blamed the “leak of documents” for that. They claimed to have determined the exact location of the train: on the 65<sup>th</sup> kilometre of the route from Wrocław to Wałbrzych, the same location that had been earlier suggested by Mr Słowikowski.

Every time the state authorities cooled down public emotions, the finders were coming up with new revelations. For instance, after they suggested that in the train a weapon prototype could be found, the army sent its engineers, sappers and chemists there. This was necessary also due to the increased interest of many amateur treasure hunters. One of them actually died at the beginning of September 2015 after having tried to enter a German tomb near Wałbrzych (Gadawa, 2015).

As time went by, the information confusion grew bigger. In the media photos of the train in a tunnel were published. Some specialists questioned them, they also questioned the authenticity of the geo-penetrating radar pictures and found too much Photoshop intervention in them. But other experts discovered some geothermal anomalies in the place where the train was supposed to be found (Lamparska, 2015a).

The finders, Mr Koper and Mr Richter, had from the beginning claimed they had necessary funds to start exploring hands-on the area on the 65<sup>th</sup> kilometre, they also confirmed to have sponsors. By April 2016, they received all the necessary permits and planned to start digging as of May. This proved to be impossible. The actual works involving heavy equipment started in August. Obviously, this has again attracted an increased attention of the public all around the world. Many people came personally to Wałbrzych to witness the digging process which was also live streamed on the finders’ website. According to media, the sponsors withdrew their support and the finders were using their own money to perform the search (Pajączek, 2016).

After 10 days of digging, nothing was found. 64 people were directly engaged in finding the train and further 35 persons collaborated indirectly. Mr Koper and Mr Richter issued a statement according to which they were digging in the right place and the train was for sure there but maybe some meters deeper or maybe some meters further. This is why, they said, an extra time would be necessary to find it, they just need to dig deeper. They claimed to have reached 55% of their goal (<http://xyz-spolkacywilna.pl>). For their failure, they said, limited permissions and their own unawareness of the geological structure of the area were to blame. They plan to resume digging in Summer 2017.

After the failed attempt to find the train, the finders offered many interviews. It is very interesting to compare their statements from this year with those issued a year ago. In Summer 2016 one could hear that the Polish finder, Mr Koper, had been once putting tiles in the house of a man who told him about the Gold train and this is how his interest in the train

started (Dobkiewicz, 2016). Step by step, Mr Koper got to know other people fascinated in the mysterious disappearance of the train. Mr Richter became part of this undertaking because he was an owner of a geo-penetrating radar. No more dying witnesses revealing their deepest secrets on their deathbed were mentioned at this stage. There were no secret German sources or maps. It was later revealed that both gentlemen had at one stage joined a Lower Silesian society of treasure seekers and Mr Tadeusz Słowikowski was their major source of information (Szałkowski, 2015). Mr Słowikowski was at some stage invited by both finders to a press conference to make their claims more credible. He then himself confirmed that it were his previous findings and his notes that led both gentlemen to the “discovery”. He said they approached him to apologise that his name had not been originally mentioned when they first announced their revelation (Szałkowski, 2015).

What kind of conclusions can be derived from the above? What is most striking in this story is that, at the end of the day, the revelations of the two gentlemen are not much different from those announced ever before by any other Gold Train seeker. Most of them would determine the probable position of the train between the 61<sup>st</sup> and 65<sup>th</sup> kilometre on the Wrocław-Wałbrzych route. Most of them would suspect that there must be an underground tunnel underneath Wałbrzych with many mysteries yet to reveal. The main difference was that these two gentlemen hired a lawyer to represent them. This seemingly minor step has been of great consequences as it has made the entire claim much more credible in the eyes of the local and national government, in the eyes of media and, last but not least, in the eyes of the general public. It is also interesting to observe how a careful rationing of information and making it sound somewhat mysterious led people to believe that a true discovery is to be expected. Their strategy was to reveal just another bit of information every time the government or any authorities in charge were either losing interest or refraining themselves from any other involvement. Any new information, for instance about weapon prototypes to be found in the train had to be verified for formal reasons. It had to be done in order to prevent any negligence, even though the authorities were more and more sceptical about this this claimed discovery. Any such enforced intervention obviously contributed to an increased media buzz.

According to a Polish journalist and explorer, Tomasz Michniewicz, the entire story sounds like a very professional work typical of the worlds’ best treasure hunters. In his opinion, two options are possible: either the two gentlemen had found the train and cleared it from the treasure before they informed the media. Or else, they simply intend to fool some naïve sponsors and the general public. Professional treasure hunters, he said, would never let the world know about the train before actually finding it (Michniewicz, 2016). Mr Michniewicz expressed this opinion before summer 2016, i.e. before the failed attempt to find the train on the 65<sup>th</sup> kilometer. This could possibly indicate that the whole action has been planned to deceive the public.

In any case, the world has become infected by the Gold Train fever. The words: train and Wałbrzych were in the news all around the globe: in Israel, Great Britain, Ukraine, Malta and even in Argentina. The news has been spreading like a virus and it has been one of the most exemplary cases of viral marketing: In case of the rumour of the Gold Train, a combination of positive emotions with surprise resulted in a massive sharing of news.

## 5. Marketing impact of the rumour

It is adequate to address at this stage the marketing impact that this Gold Train fever has had for Wałbrzych, the town, within the area of which the great search has been performed. In order to do this, it is first necessary to understand what kind of reputation this town has had in the last decades.

Although Wałbrzych takes pride in its history dating back to the medieval times, in its architecture and its picturesque surroundings, these were never the qualities that people associated with this town. Until 1990s Wałbrzych was one of the most important Polish centres for heavy industry. It was an economic booster for the entire region. A number of mines, plants and factories were located there. For employment reasons, many people were coming to settle there. The employment attractiveness of the town was the opposite of its visual attractiveness (Szałkowski, 2010).

As the economic situation worsened at the end of 1990s, the mines were closed, many people lost their jobs and there came a time of hardship and struggle. The town suffered from an increasingly bad image. The reason were the structural problems mentioned and a growing poverty which forced many people to leave. Many of those who stayed had no choice but to practice illegal coal mining by means of digging small pits in places where they expected to excavate some coal. Such bootleg mines, as they are called, have become an infamous brand mark of Wałbrzych, which, due to its scarred landscape, started to be referred to as one of the ugliest Polish towns (see Szałkowski, 2014).

The situation has begun to change in 2010. It was when the new mayor was appointed. Dr Szełemej, by profession a cardiologist, decided to give this town a brand new image. He literally started from cleaning the town, its streets, renovating public toilets, removing dirt, regularly mowing grass to keep it in order at all times. He invited local non-governmental organisations to cooperate and soon a "Strategy for the Support of Development of Wałbrzych" was drawn up (Karpiński *et al.*, 2011). The mayor decided to also invite 22 neighbouring towns and villages to collaboration. Together, as an agglomeration, they have become eligible to apply for EU funds. It is the mayor's favourite project and a very successful one. Thanks to the funds obtained, Wałbrzych has gradually been changing. The roads, previously full of holes, have been repaired, many historical houses have been restored, and the roofs were refurbished so that the town has obtained a beautiful, coherent aerial view. New bus stops have been built. There are new nurseries and kindergartens in the town and new centres for medical care (Dyląg, 2015). Many industrial buildings received a new use. Among them, the most important project was the Old Mine, which was transformed into a cultural centre. A new multimedia library has been built. New bicycle roads are being built and plans are being made to make the town energetically self-sustainable by using solar energy and biofuel. Also, the town has just launched a large-scale urban revitalisation campaign (Dyląg, 2015).

Most importantly, these changes have had a strong impact on the mentality of local people who have seen the difference. It is not that the problems disappeared, there are still many people living in poverty, many are still leaving the town, and the number of jobs available is still insufficient. Some criticise the mayor that he has not only received EU funds but also indebted the town (Komaniecka, 2015). But the town has been changing and changing in a positive way.

These changes however were visible almost only to those who either lived there or visited the town recently. For the rest of Poland, Wałbrzych kept being associated with bootleg mines, ugliness and poverty. Therefore, the announcement of finding the Gold Train was like a gift from heaven for this town. It has become an incredibly powerful marketing trigger, as it has instantly attracted attention of the entire world. Wałbrzych, a hardly pronounceable name of the town where the train is supposed to have disappeared, has become known to TV audience, newspaper readers and Internet users around the globe. Renowned media such as The Guardian, Time, Huffington Post, USA Today, CNN, BBC or die Welt have sent their journalist to Wałbrzych in order to provide a first-hand report about the soon-to-be discovery. Also the national Polish media have been very instrumental in mentioning Wałbrzych. According to Press Service Media Monitoring, within the first two weeks from the first announcement, the phrase “Gold Train from Wałbrzych” appeared 340 times in the national press, 2250 times on the Internet and nearly 1000 times on radio and television. On Facebook it appeared 14.000 times ([www.press.pl](http://www.press.pl)).

Such unexpected publicity has had a twofold effect: most of the foreign audience has heard about this town probably for the first time and in an attractive way. As for the Polish public, on the other hand, it has meant an entire rebranding of Wałbrzych. It is now considered a treasure spot rather than a poor, ugly place (see Szałkowski, 2015a). And those who have come to Wałbrzych driven by Gold train-stimulated curiosity had a chance to see it in a completely new light.

The local authorities took this unique opportunity without hesitation. Back in September 2015, only a few days after finding of the train was announced, the town, together with the Książ castle, prepared a special touristic offer: a two days stay focused on the mystery of the Gold Train. The name of this offer is “Explore wAuBrzych” where *Au* stands for the chemical symbol of gold (Szałkowski, 2015a). Two nights, meals and a number of attractions are included, such as night visit in the Castle, visiting of the town and exploring underground tunnels and chambers. The price of this offer is about 400 EUR, which is really a lot by Polish standards for a two days trip. However, it has appeared to be very popular among foreign tourists who have to book this trip many weeks in advance (Pachla, 2015). Most of them are attracted by the Gold Train but the organizers, who naturally cannot show them the train itself, take this opportunity to present to the world Wałbrzych, its heritage and its truly beautiful, picturesque surroundings. An increased inflow of tourists has also been noted in the hotels of Wałbrzych. Only in summer 2015 the number of tourists increased by 40%. In June 2016, before high season, 50% more tickets to various sites were sold as compared to the previous years (Ceglarz, 2016). The tourist themselves, previously a rarity, have become a norm and more and more languages have been heard. Also in the area of private business many initiatives have been observed and many people try to take this opportunity to make some money. On local bazaars in Wałbrzych one can easily buy imitations of gold bars. On the Internet, one can buy T-Shirts, magnets, torches and other gadgets with a graphics depicting the train (Strutyńska, 2016).

Among bigger-scale ideas, introducing the new brand of beer can be mentioned. It has been offered by the oldest Polish brewery from Lwówek Śląski, with a 800 years tradition. The promotional slogan for this beer is: The Gold Train – a beer shrouded in mystery (Mrozek, 2016). The Gold Train beer is currently available in two styles: as malt beer and porter. It is

planned to add a third style and all of them will be sold in a special triple Gold Train container. The producers of the beer say that it has been selling well in the restaurants of the Książ Castle (Mrozek, 2016). Plans are being made to offer it on the regional and even on the national market. A “Golden Vodka” is also available, flavoured with walnut, plum and with particles of gold (Szałkowski, 2016).

The Gold Train became also a theme for a marketing campaign on a national level. The Intercity Train company launched a campaign last winter. This campaign was called “The Gold Train exists”. For about 40 days 65.000 tickets were available for 200 Intercity trains for a lump sum of 29 Złoty which makes about 7 EUR per ticket, no matter how long the distance was. At the Warsaw railway station 200 stickers with Gold Train were put in various places. Whoever took as many photos of the stickers as possible, could win a gold bar in form of a train. 5 intercity locomotives were painted gold. Another gold bar was an award for a photographer who took the best picture of such gold locomotive. The obvious, indirect benefit for Wałbrzych was that the interest in this town was sustained over wintertime (<https://www.intercity.pl/zlotypociag>).

This town has received huge, positive publicity free of charge. According to the director of the municipal promotion office in Wałbrzych, if the town wanted to gain such visibility in the international media, if it decided to promote itself commercially by buying a one minute coverage in TV stations such as CNN, BBC and the like, it would have to spend 500 million PLN, about 120 million of EUR (Blicharz, 2016), an amount of money that would be unthinkable for a budget of a structurally underprivileged town like Wałbrzych. It means in other words that every citizen of Wałbrzych “earned” about 1000 EUR thanks to the train.

The Gold Train has a great marketing potential for the town of Wałbrzych, as the former reputation of a poor region with inactive mining industry and the aforementioned illegal mines is fading away. Instead, it becomes recognized as a town worth visiting due to the many mysteries it is hiding. In the course of a visit, one has a chance to also appreciate the charm of the town itself as well as its surroundings. Naturally, an increased touristic interest in Wałbrzych helps this town to develop economically and creates various opportunities for its inhabitants. They have a chance to abandon life-risking bread winning practices in favour of more dignified jobs.

## **6. Conclusions and future scenarios**

What are the future marketing plans of Wałbrzych authorities? How will they further consume the great gift they received together with the Gold Train rumour? From what has been made known to public, the city has not hired any professional marketing company. It has established its own working group to develop a marketing strategy. Its details, however, have been so far kept secret. Marketing experts agree that the promotional potential of the Gold Train rumour is high. It is based on mystery and sensation around which marketing narrative can be built. Unlike any other Polish place, they can refer to themselves as “the most mysterious town” or “the town full of riddles”. The experts also warn from a situation when there will be **no train** after all. In such case, mainstream tourists would no more be encouraged to go there. It would therefore be necessary to find ways to sustain the public interest in Wałbrzych. A careful marketing strategy is needed in order to build a positive reputation of the town and to stimulate investment attraction and tourism development. The positive effects are not just external, but also internal. For instance it could lead to building a stronger community, it could

increase the civic pride and participation. But most importantly, it should be beneficial for the local people's prosperity.

If the train is found one day, then the public interest in Wałbrzych will be practically secured. But according to the director of the Książ Castle, the region will also benefit from the whole story if the train remains unfound for the next 3-4 years (Mrozek, 2016). In such period, other qualities of Wałbrzych, its surroundings and Lower Silesia could be made better known to public. The potential is there as this region has so many secrets yet to be discovered. This is why the mysterious reputation of Lower Silesia could and perhaps should be sustained and highlighted.

The two finders may, to certain extent, weaken the marketing efforts of Wałbrzych. They spent so far about 35.000 EUR for their digging undertaking. They expressed their disappointment in lack of collaboration by the town authorities who got such publicity for free and have not helped at searching the train, neither financially nor in terms of any practical support (Szałkowski, 2016a). Therefore, they decided to reserve the rights to the name "Gold Train". Its commercial use has thus become illegal without the finders' former consent. The future will show what kind of consequences will it have for Wałbrzych. As for the finders, they already start admitting that they might be wrong, that there might have been no train after all (Lamparska, 2016). In such case, they might never see their 10% of value of the find, but they would at least benefit from the "Gold Train" name.

On the other hand, when analysing the marketing success pertinent to the Gold Train legend, one can ask a justified question: was this whole thing invented, were these two gentlemen hired to tell their story in order to attract the world's attention? Perhaps it should be considered an ingenious example of the so-called guerilla marketing, wherein unconventional, low-cost methods are used to promote a product (Prevot, 2009, Young, 2015). A similar example can be found in case of the famous Leibniz cookie – a 100 years old gold-plated brass sign, that was stolen by unidentified thieves in 2013 from the Façade of the Bahlsen company (Kary, 2013). Soon after a newspaper in Hannover received an anonymous letter. It read that the sign would be returned on condition that chocolate cookies be donated to a childrens' hospital and 1000 EUR be paid to an animal shelter. Bahlsen made a press conference. It refused to fulfill the above conditions. Instead, it donated 52.000 cookie boxes to 52 social care institutions. The sign was returned, the thieves were never found, although police and other services were engaged in chasing them. These events attracted unbelievable attention of national and international public. To give you an idea, within 2 weeks, it was mentioned almost 600 times in German press, excluding the internet and social media, while during the entire previous year, the company Bahlsen was mentioned 22 times only. The value of such publicity was estimated at the level of 1,7 million Euro, while the actual cost of donating the cookie boxes amounted to 40.000 Euro only. Some people therefore argue that the entire action was arranged by Bahlsen as a very smart guerilla marketing campaign (Kary, 2013).

It has so far never been confirmed whether or not was the Gold Train a guerrilla marketing action arranged by the authorities of Wałbrzych and secretly agreed with the two finders. However, as one of citizens of Wałbrzych stated, if the rumour of the Gold Train had not been invented by Mr Koper and Mr Richter, it should have been done by the town authorities (Ceglarz, 2016). And even if the train were never going to be found, the citizens of Wałbrzych

would not see it in completely negative colours; it can be assumed that, similarly to the phenomenon of the Loch Ness Monster, the Gold Train would never disappear completely from people's minds and imagination. Thus, the marketing potential of the rumour is very likely to be exploited for many years to come.

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# Leisure and tourism at Araripe geopark

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## Abstract

The general objective of this communication is to present the Araripe GeoPark. Specifically, the objective of this work is to present the tourism activities developed in the Ponte de Pedra geosite, by the Casa Grande Foundation and b) present the possibilities of leisure activities that can be developed in the Ponte de Pedra geosite. The Casa Grande Foundation develops several activities, highlighting here the tourism of content and the residential inns that were structured to meet the demand of the tourists. The GeoPark area is also used to practice various leisure activities, such as walking, cycling, climbing and rappelling, among others. The most developed leisure activities at the Ponte de Pedra geosite are climbing and rappelling. GeoPark Araripe promotes the sustainable development of the region and allows the establishment of an innovative, prosperous, ecological and socially responsible economy.

## Keywords

Leisure; Tourism; GeoPark.

## 1. Introduction

GeoPark Araripe is located in the south of the State of Ceará, northeastern Brazil. GeoPark Araripe was officially accepted as a member of UNESCO's worldwide GeoParks network in 2006 during the 2nd International Conference on GeoParks held in Belfast, Northern Ireland.

GeoPark Araripe is responsible for the promotion of scientific tourism or geotourism, through regular excursions to students from schools, colleges, universities and other groups of visitors. The GeoPark area is also used to practice various leisure activities, such as walking, cycling, climbing and rappelling, among others.

This work highlights the leisure and tourism activities developed at the Ponte de Pedra Geossítio, located in the municipality of Nova Olinda.

## 2. The Araripe Geopark

According to the Araripe Declaration, prepared at the 1st Latin American and Caribbean Conference of GeoPark, with support from UNESCO, held from November 17 to 19, 2010:

The Geoparks, developed under the auspices of UNESCO, constitute the new territories of the 21st century. The philosophy and vision of these territories, where conservation,

Valorization and education, both on the Geological Heritage - the memory of the land - and on tangible and intangible Cultural Heritage, are at the service of sustainable development and correspond to a need and concern of the peoples of

the continental region of Latin America And the Caribbean. (GEOPARK ARARIPE, 2012: 6).

Still according to the aforementioned declaration, sustainable development in a geopark does not mean a mass tourism bet, but represents a conscious, responsible and independent tourism. (GEOPARK, 2012)

In GeoPark Araripe, there are nine geosites, which are geological, scientific, pedagogical, economic, historical, cultural and aesthetic, among others. Geosites are spaces of environmental protection and their heritage presents rarities and riches of biodiversity of scientific value, such as rocks with records of the rupture and later separation of the continents of South America and Africa, as well as diversified fossils, with an exceptional state of preservation.

Cariri, as a territory equidistant from the capitals of the neighboring states of Ceará, such as Paraíba, Pernambuco, Piauí, Rio Grande do Norte, Alagoas, Sergipe, Bahia and the capital of Ceará itself, is common to all states in regard to the culture and influence of peoples. The region was also known as a place conducive to leisure, because it has the Chapada do Araripe and because it contains many green areas and fresh water slopes. People began to move from the great centers here, in search of leisure and commerce, as well as the inhabitants of here moved to the capitals in search of better conditions of study and work.

The territory of the GeoPark Araripe also has rich forms of expression and cultural manifestations recognized world-wide as the cabaçal band of the brothers Aniceto, the pilgrimages to the Father Cícero and the celebrations of Pau de Bandeira, mainly the one of Santo Antonio, among others.

The Geosites are as follows:

#### A) Horto Hill

The geology of Horina Hill is 3km from the city of Juazeiro do Norte. The importance of this geosite is linked to the historical-religious process that surrounds the place. Horta Hill is part of the history of Juazeiro do Norte through the figure of Father Cícero Romão Batista, political and religious leader who led the so-called "miracle of the host".

When, in 1889, he delivered the sacrament to Blessed Maria de Araujo, who was present at his Mass, according to several testimonies, the wafer in his mouth turned into blood. This supposed miracle caused a strong controversy inside the Catholic Church at the time, and both Maria de Araújo and Father Cicero were forbidden to divulge the miracle. After these sanctions, in a short time, Juazeiro do Norte attracted one of the largest popular pilgrimages in Brazil. (GEOPARK ARARIPE, 2012: 80).

Today devotion to Father Cicero continues and attracts pilgrims from all over Brazil. Colina do Horto is one of Cariri's most well-known sights. There you will find a statue of Padre Cicero, 27 meters high. There is also a path of access to the so-called Holy Sepulcher, where one of the Blessed who lived in the time of Father Cicero was buried.

Father Cícero left several ecological precepts and recommendations for the preservation of the caatinga and forest ecosystem, thus revealing a pioneer in environmental issues.

## B) Old Mission Waterfall

The Missão Velha waterfall geosite is located in Sítio Cachoeira, 3 km from the Municipality of Missão Velha. These are waterfalls, approximately 12 meters high, formed by the Rio Salgado. The waterfall is cited as a meeting point among cangaceiros, marginais that marked the

History of the Sertão in the early twentieth century, because it was one of the few places where you could find water all year round.

There are remnants of indigenous populations dating back to prehistoric times. "Kariri was a large indigenous branch which, in pre-colonial Brazil, was scattered throughout most of the Northeast." (GEOPARK, 2012: 90). For this reason, the southern region of Ceará, near the Chapada do Araripe, takes its name from the Cariri Valley.

## C) Petrified Forest of Cariri

The Petrified Forest of Cariri geosite is located 6 km from the Municipality of Old Mission. Geosite has an important paleontological value, especially for the study of paleobotany and geological evolution. Fossils of petrified trunks show that in the Jurassic Period forests and rivers existed in the region.

Over time, the remains of logs were silicified, that is, transformed into rock, but maintaining the shape of the internal structures of the old plant. Due to the preservation of these characteristics, it is now possible to identify families and genera of the species that formed the late Jurassic forests in the Cariri region. (GEOPARK, 2012: 101).

## D) Roofer

The Batateiras geosite is located in the city of Crato, administrative headquarters of the Araripe GeoPark, in the Sítio Fundão State Park area, where the Batateira River passes.

The Sítio Fundão Conservation Unit is part of the "Park" category and its basic objective is the preservation of natural ecosystems of great ecological and scenic beauty relevance, enabling scientific research and the development of environmental education and interpretation activities, recreation and leisure in contact with nature and eco-tourism. (GEOPARK, 2012: 110)

The place holds indigenous stories and legends. One of the most well-known legends concerns one of the founding myths of the city, known as the "legend of the Batateira stone". One of several versions says that the Chapada do Araripe is a piece of sea and when the rock of the Batateira rolls, the entire Cariri Valley will be flooded. "In this type of narrative there are indigenous elements which are found in the existence of 'serpents' and 'mothers of water' and enchanted forces, as well as elements of Christian narratives such as the idea of the Flood and the Apocalypse." (GEOPARK, 2012:106)

Also noticeable in this geosite is a house made of mud, that is, of beaten clay and wood, very common in Northeast Brazil. The difference is that the aforementioned house has an upper floor, being the only house registered in this model of construction in Brazil. Another building existing in this geosite is the house where the first power plant of the city of Crato, the old Hydroelectric Power Plant, erected in 1939 and now deactivated.

The Batateiras geosite is characterized by the presence of natural water sources that fertilize the Cariri Valley and that in the last decades have become beach resorts and community leisure areas.

#### E) Cariri stone

The Pedra Cariri geosite comprises an old mining area of Limestone located 3km from the Center of the Municipality of Nova Olinda.

The so-called "Cariri Stone" are limestone slabs that have been used in civil construction since the 19th century to the present day. The most common use is its application in wall coverings and sidewalks. There is also the extraction of gypsum that is exported to the entire Brazilian Northeast. "The Cariri Stone Geosite has high scientific value due to the occurrence of diverse and abundant fossils, such as insects, pterosaurs, fish and vegetables. The fossils of this region are known all over the world given the exceptional quality of preservation. "(GEOPARK ARARIPE, 2012: 117)

The fossils found in the limestone plots are referred to the Museum of paleontology of the Regional University of Cariri-URCA, in the municipality of Santana do Cariri.

#### F) Pterosa Park

The geological Park of the Pterossauros is located in the Sítio Canabrava to 2,5km of the Municipality of Santana of the Cariri, has high scientific-didactic value and is one of the main sites of fossil finds in all the Brazilian Northeast.

Pterosaurs arose at least 228 million years ago, dividing ancestry with dinosaurs. These animals are from an extinct group of winged reptiles, considered the first vertebrates capable of gliding and flying. Although rare, its earliest fossil records date back to the late Triassic. However, it was throughout the Jurassic and Cretaceous Periods that the pterosaurs had a wide geographical distribution, populating practically all the places of the planet. (GEOPARK ARARIPE, 2012: 130).

The Brazilian fossils of pterosaurs are found mainly in the geological Park Pterossauros and are known worldwide for their degree of preservation.

#### G) Middle stream

The geosítio Riacho do Meio is situated 7km from the city of Barbalha. It has three springs of crystalline water and an area of dense and humid vegetation.

In 1996 a species of endemic bird was discovered, having its habitat in the areas of slopes of Chapada do Araripe and being known like soldier-of-araripe (*Antilophia bokermanni*). Its conservation is directly linked to the preservation of the springs and riparian forests of the region.

#### H) Stone Bridge

The geosite Ponte de Pedra is located about 9 km from the city of Nova Olinda. It is represented by a natural rock formation sculpted in the sandstone, a result of erosion caused by water over the years, reminiscent of a bridge.

Near the bridge, there are archaeological remains of prehistoric populations. They are engravings and cave paintings, as well as occasional findings of ceramic remains and lithic material used by the ancient Kariri inhabitants. It is one of the places where the geological past and nature can be studied next to human history. (GEOPARK ARARIPE, 2012: 146)

The human presence in Northeast Brazil is quite old. The Chapada do Araripe valley was always a place of refuge for those who fled from the aridity of the hinterland. The Chapada do Araripe makes the Cariri Region a private territory in the state of Ceará, since, while the state is basically a sertão with a dry and hot climate, the plateau gives the region a mild climate, a climate that has attracted since pre -history, primitive human populations, such as the Kariri Indians, the first inhabitants who gave the place its name.

#### l) Pontal de Santa Cruz

The Pontal geology of Santa Cruz is located 4km from the Municipality of Santana do Cariri. Pontal da Santa Cruz is situated at an altitude of approximately 750 m at the top of the Chapada do Araripe. For tourists who visit Cariri, the Pontal geology of Santa Cruz is almost a must to enjoy the incredible sunset in the wide view that the rock formation offers. You can also enjoy local cuisine at the on-site restaurant. In the cuisine of the region of Cariri stand out the baião de dois, the meat of the sun, the paçoca, the macaxeira and the pequizada.

Recently it was announced the creation of another geosite, the Caldeirão Geossítio of Santa Cruz do Deserto, located in the district of Dom Quintino in Crato.

### **3. The Municipality of Nova Olinda-Ceará-Brazil**

The municipality of Nova Olinda is located 571km from Fortaleza, capital of the state of Ceará, and has a population of 14,256 inhabitants, according to data from the census of the Brazilian Institute of Geography and Statistics in 2010. The infrastructure for the Tourism in the region counts on airport, federal and state highways and wide hotel offer.

In the area of tourism, we intend to present the actions aimed at this sector of the Casa Grande - Memorial Foundation, located in the municipality of Nova Olinda.

#### 3.1. The Casa Grande Foundation

Cariri, as it has historically been the cradle of the culture of Ceará, led a couple of scholars from the city of Nova Olinda, Alemberg Quindins and Rosiane Limaverde in 1992 to found Casa Grande, a school to take care of culture, to teach Small, old, new stories and to prepare for the contemporary culture, which presents itself in the reality of the students.

The Casa Grande Foundation tells the story of the first inhabitants of the Cariri region, the Kariri man, in a creative and innovative way. The Casa Grande Foundation works in the former home of the family of its creators. It is presented as a museum and a school for needy children, so it is the children themselves who direct, organize and make space work.

The mission of the institution is the educational training of children and adolescents who seek the Casa Grande to play, meet and interact. The programs of memory, communication, arts and tourism are inserted into the daily life of these students naturally, forming them in cultural management and adapting them to the world of work.



The Casa Grande Foundation develops activities in the areas of education, memory, arts, communication and tourism. In actions aimed at tourism, it is worth mentioning the organization of a cooperative created with the community to meet the demand of visitors, which is nine times the urban population of the mentioned municipality.

The Casa Grande Foundation works to provide assistance to students, visitors, researchers, tourists and the general public through its Content Laboratories and Production Laboratories, aiming at the cultural, historical and educational formation of those who arrive there.

The Content Laboratories are: Gibiteca, the DVD library, the Discotheque, the Library, the Patrimonial Education and the Informatics laboratory.

The first Content Lab is the Casa Grande Gibiteca, which aims to bring literature and cinema closer together, forming readers and managers through a collection of more than 2,600 comic book titles, cataloged and classified by authors, designers and writers.

In Gibiteca, students learn to know what a comic is, how to build it, how to edit it, promote reading through the comic books, and the management of a comic book, organization, cataloging, construction and classification of comic books.

GIBITECA consists of reference works, rarities, a book about the universe of comics, drawing techniques and articulated dolls for the study of perspective, available on shelves to be read in individual booths. ([Http://www.fundacaocasagrande.org.br](http://www.fundacaocasagrande.org.br), p.06. Access on 02.02.2017)

The second Content Lab is the Casa Grande DVD library, a room with a collection of more than 1,500 DVDs containing films, drawings, musicals and documentaries, so that students can watch, organize, comment on and encourage production.

With the best of world cinema, the DVD offers on the shelves, by nationality of the directors, the films to be seen in individual booths or in the cinema. ([Http://www.fundacaocasagrande.org.br](http://www.fundacaocasagrande.org.br), p.06. Access on 02.02.2017)

The third Content Lab is the Casa Grande Discotheque, a musical museum, accessible to the listening population of Casa Grande FM radio, and to the radio students, who learn how to handle sound tables, talk on the radio, present commercials, edit and Commercial production, as well as visitors to Casa Grande have access to the collection.

The discotheque of the big house is formed by a collection of more than 1,500 CD's and VINÍ'S. Composed of rarities and the best musical quality in the world, the discoteca has been passing on to the listeners of Casa Grande FM in its daily program of content formation, a musical diversity, also giving visitors access to the collection in an individualized way through sound booths. ([Http://www.fundacaocasagrande.org.br](http://www.fundacaocasagrande.org.br), p.06. Access on 02.02.2017)

The fourth Laboratory of Content is the Library of the Great House, a room full of copies of books of children's literature for the promotion of reading, research, learning to enjoy reading and learning the habit of reading at any stage of life . The laboratory also aims at writing books, producing and editing copies.

The library of the large house has a diverse collection with a catalog of more than 2,000 LITERATURE YOUTH LITERATURE books, ranging from school research to

professional technical subjects. ([Http://www.fundacaocasagrande.org.br](http://www.fundacaocasagrande.org.br), p.06. Access on 02.02.2017)

The fifth Casa Grande Content Laboratory is Patrimonial Education, a program for the training of small students for the taste of the cultural assets of material and immaterial nature of Cariri, understanding that the region is rich in this heritage and it is necessary that the new generations From an early age, become aware of the need to know, care for, preserve, and be active social agents in the promotion of ideas and public policies of national preservation.

It is in this sense that there is in the Great House the Memorial of the Kariri Man, a space destined to the appreciation of ancient objects found in the region, such as domestic utensils of the ancient locals, cave paintings made by the Kariri Indians, old photos of Tapera, Buildings and rooms designed for the presentation of ancient sacred rituals such as the enthronement room of the Heart of Jesus and the Heart of Mary, where the ceremony of renovation of the houses was celebrated.

The Kariri Man's Memorial, as well as all other spaces of the Casa Grande, is run by children and adolescents, who are guided to take care of, to know the history of the spaces and to be hosts, valuing the history of the place and passing on the knowledge, as well as Are living examples to be followed by the local and global population.

The Casa Grande Foundation has been developing a heritage education proposal combining education and research through a dynamic and systematic training program, working to identify cultural assets of a material and immaterial nature, Cariri's archaeological and mythological sites with the objective of maintaining A database that reveals the cultural heritage and the evolution of human occupation in the Araripe Chapada in its prehistory, serving as an instrument for the application of public policies of national preservation. ([Http://www.fundacaocasagrande.org.br](http://www.fundacaocasagrande.org.br), p.06. Access on 02.02.2017)

The sixth Content Laboratory is the Casa Grande computer science center, a space designed to familiarize itself with the computer and the computer world, considering the needy population in the region, still with little access to the computer at home, and considering the need for these children to enter to

Virtual knowledge, in order to learn the computer knowledge and thus, support the actions of Casa Grande, such as complementary actions of laboratories, access to education, communication, information, research, editing and production of tasks through the digital world.

The Casa Grande Foundation also owns the Production Laboratories, which are those of Memorial, TV, Radio, Publishing and Theater.

The first Casa Grande Production Laboratory is Memorial, which manages the Memorial of the Kariri Man, in this space as well as exposing the archaeological and mythological collection found in the Araripe Chapada, presented in the form of a museum the artifacts, photographs and drawings made by the Children, this laboratory teaches the smallest knowledge of noble professions, such as museum management, receptionists, specific and deep knowledge of archeology, mythology, museology and heritage.

The second Production Laboratory is that of TV Casa Grande, a local TV, which after being experimentally aired on several occasions, was vetoed by the national telecommunications agency, ANATEL, but today it works as a studio for the production of images and audiovisual materials, Such as videos, documentaries, short films to be presented in commercials and alternative cultural spaces.

The TV Casa Grande produces weekly the documentary series "100 CANAL" that airs before the sessions of cinema and spectacles in the Theater Violet Arraes. The third Production Lab is Radio Casa Grande, a community radio called 104.9 Casa Grande FM, with a diversified musical program, airing daily genres such as forró, MPB, instrumental music, blues, jazz, and many other styles. The radio is run by children and teenagers, who learn from the beginning the correct sound technique and quality in services.

The fourth Production Laboratory is Editora Casa Grande, a place where children and adolescents are trained in the areas of art and graphic design, production and edition of newspaper, graphic material, production of comic books, valuing the making of materials with characters Regional and local histories.

The fifth Production Laboratory is the Teatro Violeta Arraes - Engenho de Artes Cênicas, which is located inside Casa Grande and is run by small apprentices. The place is beautiful, with mixtures between the modern and the old, for example, wooden benches and leather chairs made in new Olinda by the craftsman of the city Expedito Barn, and modern elements such as lighting and sound design.

The Teatro Violeta Arraes - Engenho de Artes Cênicas is a space for the training of audience and cultural managers in the areas of direction of shows, sound design, lighting, scenery and roadie. With a program open to the public, this space exhibits weekly shows in the areas of music, dance, film and theater. ([Http://www.fundacaocasagrande.org.br](http://www.fundacaocasagrande.org.br), p.06. Access on 02.02.2017)

The Casa Grande Foundation also counts on elements that contribute to all the cultural, historical and educational work that has been developing in the region, which are the lectures, shows, courses and consulting services offered by Casa Grande, with the objective of To empower more and more students, researchers, visitors and locals.

### 3.1.1. Tourism in the Casa Grande Foundation

In continuity with the actions pronounced by the Foundation Casa Grande, it presents the proposal of Content Tourism, that is, in the virtual page of the foundation there is an invitation destined to the world community, appreciator of new educational and cultural experiences, to come to know the Casa Foundation Grande, the Content and Production Laboratories, the richness of the fauna and flora surrounding the place, the Chapada do Araripe, the people that make up the Region of Cariri. Obviously the situations did not happen without obstacles, the problems appeared and were the focus of collective discussions, including with the students, interested party in the process, and voice listened very carefully. For example, the lack of accommodation for the students who came from many places, and their families, who also wanted to know the organization, as well as researchers and people interested in spending some time experiencing the structure and functioning of the Casa Grande. Hence the idea of welcoming these people to the families of the local students in their homes, making their

homes an extension of the Casa Grande foundation, and thus appearing a new phenomenon, a type of local tourism, innovative, cozy, creative, modern And Community legislation. Thus, the co-operative of parents and friends of the Casa Grande (Coopagran) was created.

According to Coriolano (2014: 12), "There are two movements of alternative community tourism: one of residents and the other of tourists." Tourism in the Casa Grande Foundation fits into the first example because it involves the community and people excluded from conventional tourism .

One of the functions of the said cooperative is to offer through lodging Breakfasts Domiciliares for those who come to visit the Casa Grande Foundation. They are suites that are located in the backyards of the parents house of the children of the Casa Grande. Each suite has a double or single bed or bunk beds, bathroom, bed and bath sets, minibar, TV and video and stereo. In the daily are included sleep, breakfast, lunch and dinner. The cooperative offers forty beds in the urban area of the city of Nova Olinda and four beds in the rural area. Tourists can enjoy the hospitality and hospitality of the locals, enjoy typical local foods, listen to local stories, legends, and participate in traditional festivals.

Home-based caterers, home-cooked food, warmth and conviviality with residents. Routes emphasize the value of culture and the sustainability of nature and the local culture. Distributed income and currency expansion circulating in small places visited by tourists lead to the satisfaction of host residents, as well as well-received tourists, indicators of community tourism. (CORIOLANO, 2014: 14)

From the Tourism of Content implanted by the Casa Grande foundation, the city of Nova Olinda needed to be restructured to receive the tourist, an example was the leather goods store of Mr. Expedito Barn, which handcrafted the leather in the form of bags and Sandals, making your store an attractive addition for the tourist who can carry souvenirs typical of the region to their places of origin.

Also the grocery stores and restaurants of the city needed to restructure to receive the tourist with property and offer articles compatible with the demand that is asked them.

In addition to the city of Nova Olinda, neighboring cities were also suitable to participate in the tourist process implemented by the Casa Grande. The city of Santana do Cariri, where there is the museum of paleontology and archeology of the Region of Cariri, and the Pontal restaurant of Santa Cruz, located at the top of a tip of the chapada, where it is possible to have a view of the valley and the Chapada do Araripe And taste great typical food. The city of Assaré, with good restaurants and the museum of Dr. autodidact and sertanejo poet Patativa do Assaré. The city of Exú, in the neighboring state of Pernambuco, with the open-air museum of the singer and composer of the Forró and Baião Northeastern rhythm, Luís Gonzaga. The cities of Crato and Barbalha, with their sugarcane museums, tell the story of the time of the slaves and sugarcane mills in the region. And the cities that own the archaeological geosites of the region, form a specific tourist chain of content.

The city of Juazeiro do Norte adds to this context of content tourism, religious tourism, by the figure of Father Cicero. Commercial tourism, rural tourism, gastronomic tourism and other specific species of tourism, make the Region of Cariri a tourist complex given to various tastes and tourists.

#### **4. Leisure in the Stone Bridge Geosite**

In all spaces of the Araripe GeoPark there is an enormous potential for leisure activities due to geological and cultural aspects as well as due to the natural and natural beauty.

It is intended here to present the leisure activities developed in the Ponte de Pedra geosite, specifically climbing and rappel.

According to Elias and Dunning (1985), leisure activities are a means to produce a controlled "uncontrolled" emotions of pleasant emotions, as well as to allow the public to experience strong emotions.

The leisure activity that takes place in this geosite is associated with a whole tourist dynamic, since there is a tourist guide accompanying these activities. At the site of climbing and abseiling, the guide presents explanations on various aspects related to geosite, such as geological, historical, mythological, folkloric, among others.

The groups are formed through calls posted on social networks by companies specialized in this service of the region itself.

The most sought-after location for these activities is known as Pedra do Castelo, near the so-called stone bridge, which gives its name to the geosite. The place offers a panoramic view of the region from its viewpoint and makes the participants want to record in photos all the beauty of that moment.

The stone of the castle is a rocky formation of compacted sandstone that allows a rise (climbing) of approximately eight meters and a descent (abseiling) of approximately twenty-five meters. Personal protective equipment is used for the safety of the participants.

#### **Conclusions**

GeoPark Araripe promotes the sustainable development of the region and allows the establishment of an innovative, creative, prosperous, ecological and socially responsible economy. Tourism developed by the Casa Grande Foundation favors social inclusion, prioritizing the generation of work for residents, as well as community participation through decentralized and associative planning. The leisure activity carried out in the Ponte de Pedra geosite promotes the region's appreciation and allows the participant to experience a moment of pleasure, safely, through climbing and rappel activities.

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# Estudo comparativo de paisagens culturais marítimas da Galiza. Os centros históricos de Baiona, Combarro e Muros (Espanha) <sup>24</sup>

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## Resumo

Os centros históricos das cidades configuram uma categoria fundamental dentro dos ativos patrimoniais, e são espaços simbólicos que permitem diferenciar e identificar as cidades. Todos os valores históricos, artísticos e arquitetónicos que coexistem nos centros históricos, bem como suas identidades culturais, são fatores de atratividade de pessoas e capitais. Nos casos em que estes centros se localizam na zona costeira, o seu perfil histórico mistura-se com as tradições marítimas, tendo como resultado espaços com dinâmicas muito próprias. Sobretudo numa altura em que as atividades marítimas estão a perder a sua relevância em muitos territórios, é fundamental promover a multifuncionalidade de forma a garantir a sua sustentabilidade económica e demográfica. Dada a necessidade de conhecer as realidades que afetam estes centros propomos uma metodologia multidisciplinar capaz de captar o seu estado em diferentes âmbitos, a partir da realização de três estudos de caso na Comunidade Autónoma da Galiza (Espanha): Baiona, Combarro e Muros. Através da análise de dados secundários de fontes oficiais analisamos as necessidades e potencialidades destes três centros históricos costeiros, ilustrativos de três realidades distintas de equilíbrio entre o turismo, a atividade humana e económica. Como resultado teremos uma metodologia de análise inovadora e transferível para outros territórios, bem como os resultados originados por três modelos diferentes de integração do turismo num centro histórico marítimo. Terminamos o estudo elaborando propostas de atuação adaptadas às necessidades de cada tipologia, e definimos os caminhos comuns para a sustentabilidade da multifuncionalidade desses centros históricos.

## Palavras-chave:

Centros Históricos; Vilas Costeiras; Turismo Cultural; Identidade Cultural, Paisagem urbana

## 1. Introdução

A comunidade internacional revela uma crescente preocupação em relação à proteção do património histórico: convenções, cartas e declarações fixaram critérios e atuações, e introduziram aspetos novos e úteis para a proteção e gestão do Património Cultural que também se vinculam às normativas a nível estatal. Ao mesmo tempo, o conceito de paisagem está cada vez mais sujeito a instrumentos jurídicos, como por exemplo, a Convenção Europeia da Paisagem que pretende criar uma ligação entre as paisagens do passado e as do presente: “a paisagem contribui para a formação das culturas locais e é uma componente fundamental

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do património natural e cultural europeu, que contribui para o bem-estar dos seres humanos e para a consolidação da identidade Europeia”.

Os centros históricos enfrentam hoje desafios pelos quais os símbolos do passado devem conviver com as necessidades e os problemas do presente, através uma gestão sustentável futura. Esses produtos histórico-culturais, com as suas dinâmicas de identidade, caracterizam uma paisagem urbana. A sua riqueza integra um património monumental, urbanístico, arquitetura popular, paisagem, museus, manifestações religiosas, eventos culturais e artesanato (Troitiño Vinuesa, 2002). A paisagem urbana contém uma organização do espaço por parte das sociedades, que manifestam os seus valores materiais e imateriais para adaptar o seu uso e estrutura espacial às mudanças da sociedade, revelando relações de poder (Nogué e Vicente, 2004; Nogué, 2007). Desta forma, a arquitetura e, em geral, o património transmitemos o nosso passado (Ruskin, 1989; Leontidou, 1993). Se sabemos “ouvir estas vozes” poderíamos estabelecer um diálogo entre o nosso presente e o nosso passado que o produziu e redescobrir a identidade original (Ballart Hernández, 2006). Assim, é necessário ter em conta de que forma o património cultural é um recurso estratégico para uma leitura económica da cultura (Ferreiro, 1998). A aposta pela multifuncionalidade é importante para assegurar a sustentabilidade das dinâmicas económicas e demográficas dos espaços, mas também para melhorar a sua capacidade para atrair visitantes. O desenvolvimento destes espaços e a promoção do seu potencial turístico são muitas vezes prejudicados pela falta de informação atualizada e precisa acerca do seu estado físico e socioeconómico.

Nesta investigação analisa-se um tipo de centros históricos, que se podem chamar de “centros histórico-costeiros” dada a sua localização geográfica e as suas características funcionais e históricas. Pretende-se contribuir para o debate comparando os três casos de estudo na Comunidade Autónoma da Galiza. Baiona, Combarro e Muros apresentam três cenários distintos no que se refere às dinâmicas sociodemográficas, apesar da sua “identidade marinheira”, e que enfrentam um momento no que as atividades tradicionais ligadas ao mar perdem o seu peso. Desta forma, pretende-se explorar como esse fator comum determina a sua vida urbana e a sua paisagem, tendo em conta uma visão de futuro. Assim mesmo, o estudo estrutura-se em seis partes. Primeiro realizaremos uma breve revisão teórica com o objetivo de nos aproximarmos aos conceitos e funções dos centros históricos, fazendo referência às características dos espaços costeiros e às grandes diferenças existentes nesta categoria. Segue-se a metodologia de investigação e posteriormente a análise dos casos de estudo feita a partir de dados quantitativos em função de indicadores relacionados com a demografia, parque habitacional, economia e património. Apresentaremos uma análise comparativa entre os casos de estudo, evocando os pontos fortes, debilidades e riscos que enfrenta, acompanhada por uma proposta de atuação.

## **2. Revisão de literatura**

### **2.1. Centro histórico: breve aproximação teórica ao conceito e funções**

Segundo a Convenção da *United Nations Educational, Scientific and Cultural Organization* (UNESCO) sobre a Proteção do Património Mundial, Cultural e Natural do ano 1972, os critérios que manifestam o valor simbólico e histórico do património são:

i) Fornecer um testemunho único, ou pelo menos excepcional, sobre uma tradição cultural ou uma civilização viva ou desaparecida;

ii) Ser um exemplo eminentemente representativo de um tipo de construção ou de um conjunto arquitetónico ou tecnológico, ou de paisagem que ilustre um ou vários períodos significativos da história humana;

iii) Ser um exemplo destacado de formas tradicionais de assentamento humano ou de utilização da terra ou do mar. Devem ser formas representativas de uma cultura (ou de várias culturas) ou de interação do homem com o meio, sobretudo quando este se tornou vulnerável devido ao impacto provocado pelas mudanças irreversíveis;

iv) Estar direta ou materialmente associado a acontecimentos ou tradições vivas, ideias, crenças ou obras artísticas e literárias que tenham uma importância universal excepcional.

Atualmente o conjunto histórico representa uma categoria fundamental dentro dos bens que compõem o Património (Mudarra, 1994). Como também sugerem os critérios da UNESCO, o fator do tempo é importante, pelo que o conceito de “centro histórico” reenvia a categorias histórico-culturais (Troitiño Vinuesa, 1996), dando prioridade a fatores históricos, culturais, económicos, sociais e simbólicos (Álvarez Mora, 1980; Troitiño, 1992). Espaço histórico por excelência, peça fundamental da paisagem urbana e da memória urbana e manifestação das diferentes formações sociais e culturais, o seu papel mede-se segundo as funções, a entidade demográfica ou a entidade económica (Troitiño, 1992). Os centros históricos devem ser realidades urbanas vivas, dinâmicas e multifuncionais. Outro indicador de bem-estar dos centros históricos é o seu dinamismo, e neste contexto Troitiño Vinuesa (1996, 2003) afirma que para interpretar esta dinâmica é necessário realizar uma quádrupla contextualização 1) Temporal: situar a conjuntura atual no marco dos ciclos das transformações urbanas; 2) Espacial: evidenciar a singularidade de cada núcleo para compreender a heterogeneidade da sua estrutura interna; 3) Funcional: compreender as interdependências e evidenciar a multifuncionalidade da cidade histórica; 4) Cultural: evidenciar as formas como a nossa sociedade interpreta e valora os centros históricos, considerar a sua revalorização simbólica e a sua mitificação.

Nesse espaço, a simbologia reside em fatores materiais e imateriais. Se por um lado, o artigo 15 da lei Espanhola do Património define um Conjunto Histórico como a agrupação de bens imóveis que formam uma unidade de assentamento, condicionada por uma estrutura física representativa da evolução de uma comunidade humana, por ser testemunho da sua cultura ou constituir um valor de uso e construir uma coletividade por outro lado está a crescer o interesse pela preservação do património imaterial de festas e tradições populares. De facto, a herança histórica está representada por um conjunto inventariado de monumentos e edifícios significativos e por um meio ambiente que testemunha a identidade histórica e cultural através da relação que se produz entre os seus componentes: “Por meio ambiente entende-se uma série de elementos gerados, que são os seus valores históricos e culturais e por componentes dinâmicas, que são os funcionais e sociais que se foram incorporando à cidade” (Brandis del Río, 1999: 155). A centralidade simbólica e cultural de um centro histórico não deriva de uma realidade física, já que o elemento significativo (e ainda mais nos de pequena dimensão) é o enraizamento no imaginário de quem vive dentro ou na periferia: a identidade.

## 2.2. Áreas costeiras, características dos espaços marítimos e atividades

Desde que o termo paisagem cultural marítima foi cunhado, no princípio dos anos 90 por C. Westerdahl, se relacionou com o aproveitamento económico do espaço marítimo através de



uma grande diversidade de atividades tais como a pesca, a caça ou a navegação, entre outras coisas. Esta definição foi-se completando e modificando posteriormente para incluir entre os componentes da paisagem cultural marítimo não apenas as características físicas, mas também elementos como os sistemas de crenças, aspetos meio ambientais e históricos tais como mitos, folclore, topónimos, lendas e conhecimento local especializado que reforçam a identidade comunitária e o sentido de pertença a um lugar (Ducan, 2011). As dimensões culturais, sociais e económicas, geralmente integradas no termo de património cultural marítimo, marcam cada vez mais os aspetos costeiros. Contribuem para dar uma nova riqueza a estes territórios, atualmente em reconversão, vinculada às emoções, à memória e à satisfação estética que as heranças marítimas proporcionam aos habitantes, e de um modo mais amplo aos visitantes destas comunidades (Péron, 2009). Dentro destas áreas costeiras, merece atenção especial o caso do conjunto de centros históricos, onde as atividades económicas vinculadas ao mar tiveram um peso crucial na transformação destas vilas e onde o seu rico património cultural marítimo se considera uma das forças nas que é necessário basear as suas estratégias locais de desenvolvimento sustentável.

Nos últimos anos, estes pequenos centros históricos costeiros têm estado integrados em áreas maiores para as quais foram definidas estratégias de desenvolvimento com um âmbito local, e que contaram com o financiamento público europeu, estatal e regional para realizar intervenções no território. Entre os objetivos destas estratégias locais encontra-se a intenção de reforçar as sinergias entre os setores pesqueiro e turístico, aproveitando o património cultural marítimo como recurso. Assim, apareceram numerosas iniciativas promovidas por um lado por empresas privadas relacionadas com o turismo cultural e o ecoturismo, e por outro, por organismos públicos e associações que organizam jornadas e rotas gastronómicas, exposições relacionadas com o passado marinho destas localidades, e que também empreendem ações de recuperação dos elementos patrimoniais relacionados com o trabalho no mar. Estes projetos aproveitam interesses comuns entre os diferentes setores económicos, e desta forma aportam dinamismo à economia do mar, permitindo que os habitantes destes pequenos centros contribuam para explorar as suas habilidades profissionais e os seus conhecimentos pesqueiros, e que se mantenham vivas as redes sociais vinculadas à atividade pesqueira (Morgan et al., 2014). Desta forma, contribui-se para evitar os excessos derivados do desenvolvimento do setor turístico nos conjuntos históricos, onde existe o perigo de que a cultura marítima seja manipulada para satisfazer os requerimentos da indústria turística (Martindale, 2014).

### **3. Metodologia**

Através da aplicação dos avanços da investigação sobre centros históricos., numa análise de casos de estudo comparativa, o presente trabalho recorre às diferenças e semelhanças entre três casos distintos para propor atuações de valorização deste tipo de espaços. O facto de possuírem um centro histórico e serem povos costeiros galegos é o elemento comum a estes três casos, a forma como equilibram as suas funções económicas com o seu património e paisagem cultural difere entre eles.

O primeiro passo para analisar as dinâmicas do centro histórico é proceder à sua delimitação. Recorreu-se por isso à representação gráfica oficial presente na documentação do *Planeamento de Protección do Conxunto Histórico Artístico* de cada centro, e disponibilizados

na página *Sistema de Información de Ordenación do Territorio e urbanismo de Galicia (SIOTUGA) da Xunta de Galicia*. A partir de uma análise visual destes documentos e utilizando uma ferramenta GIS, digitalizou-se a delimitação do centro histórico de cada caso. A antiguidade destes documentos oficiais leva a que haja desajustes entre os mesmos e atual realidade morfológica dos espaços. Para ultrapassar esta limitação sobrepôs-se a informação oficial à atual estrutura dos centros, obtendo assim uma delimitação o mais fidedigna possível. De forma a conhecer a realidade social, económica e física dos centros históricos, procedeu-se à recolha de dados estatísticos secundários, tendo como base preferencial o *Instituto Nacional de Estadística de España* e o *Instituto Galego de Estatística*. Recolheram-se dados relativos à demografia, à atividade económica e ao parque habitacional. De forma a conseguir isolar a análise da realidade do centro histórico os dados foram recolhidos à escala mais pormenorizada possível, que são as secções *censais*. Em relação aos bens patrimoniais e aos dados relativos à hotelaria, recolheram-se a partir da base de dados de *Turgalicia*.

Dado que a delimitação das secções *censais* não coincide com a delimitação dos centros históricos, implementamos um método inédito denominado "*Métodos dos Portais*". Este método consiste em considerar que uma secção *censal* é representativa do centro histórico quando 33% dos edifícios do centro histórico se encontra dentro dessa mesma secção. Este método permitiu-nos fazer um levantamento da realidade dos centros históricos isolando-os dos restantes espaços das cidades. Em particular, os dados da atividade económica foram disponibilizadas pelo IGE "*Directorio de empresas e unidades locais (Ano 2014). Empresas con actividade en Galicia segundo actividade principal e titularidade (CNAE 2009)*". A partir da morada fiscal destas atividades foi possível identificar as que exercem atividades nas ruas do centro histórico, e auferir a vitalidade da atividade económica destes espaços.

#### **4. Casos de estudo: Muros, Combarro e Baiona**

Em virtude da sua costa extensa (1.295 Kms<sup>2</sup>), da sua morfologia muito própria e da riqueza das suas águas, a Galiza tem um elevado número de assentamentos humanos que estão diretamente vinculados a diferentes atividades relacionadas com o mar: à pesca, ao transporte de mercadorias, construção naval, e mais recentemente ao turismo de sol e praia. A grande parte destas vilas sofreram processos de transformação urbana que em alguns casos levou à destruição dos seus patrimónios históricos. Contudo, nos três casos selecionados nesta investigação, existe um centro histórico reconhecido e protegido, com dinâmicas económicas e sociais muito próprias. Muros, Combarro e Baiona situam-se nas Rias Baixas galegas (nas rias de Muros, Pontevedra e Vigo respetivamente), tal como se representa na Figura 1. Muros e Baiona são sedes de municípios com 8.960 e 12.072 habitantes a nível municipal respetivamente, e Combarro é uma freguesia do município de Poio cujo número de habitantes é de 1.869.



Figura 1 - Mapa casos de estudo: Baiona, Combarro e Muros.

Fonte: Autoria própria

Tal como se pode observar no Figura 2, em todos os municípios de estudo o setor dos serviços é o que tem um maior peso na economia dos três casos de estudo, sendo de assinalar que no caso de Muros o peso do setor da Agricultura e Pesca se mantém destacado (concentra 14% dos inscritos na segurança social). De forma a compreender a realidade associada a cada um dos casos, enunciamos os principais elementos de caracterização dos três.

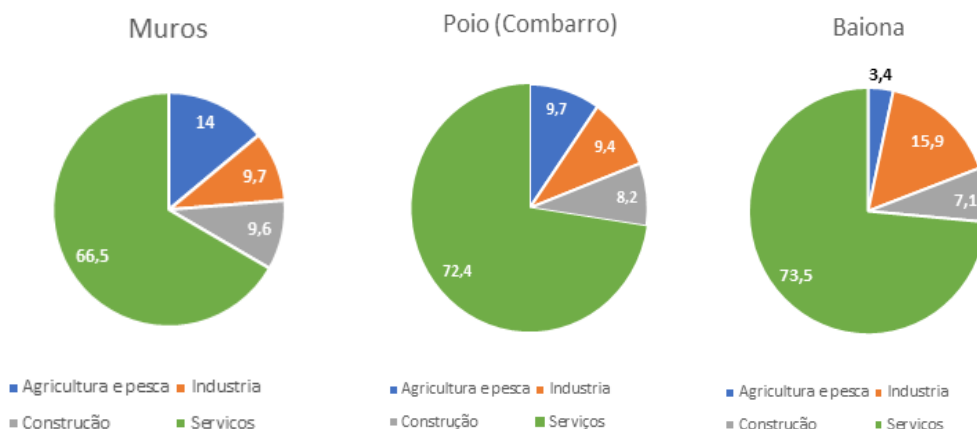


Figura 2 - Inscritos na Segurança Social por setor económico em Muros, Poio e Baiona.

Fonte: Autoria própria a partir dos dados do INE

#### 4.1. Muros

Muros foi declarado Conjunto Histórico Artístico em virtude do Decreto 1774/1970, ainda que esta declaração não incorporava nenhuma delimitação precisa do conjunto histórico protegido. Posteriormente, em maio de 2008, foi aprovado o *Plan Especial de Protección do Casco Histórico*. O âmbito do *Plan Especial* abrange um espaço declarado *Ben de Interesse Cultural (BIC)*, conformado pela totalidade da vila histórica de Muros, o *Castelo-Murallas* de Muros (também declaradas BIC e protegidas desde 1994), e o seu território periférico de extrato rural com uma extensão superficial de 20,43 Ha.

Muros possui um destacado legado medieval, apreciável tanto no seu traçado urbano como na sua arquitetura. A vila histórica apresenta uma fachada litoral caracterizada por casas antigas

maioritariamente com arcadas, e uma zona interior, considerada tradicionalmente principal desde do ponto de vista socioeconómico, e que hoje passa por uma forte crise e perda de centralidade a favor dos bairros mais próximos ao mar e às atividades portuárias. Também se destaca a arquitetura industrial relacionada com o tradicional peso da indústria conserveira da vila, com numerosos exemplos de antigas fábricas de salga e de conservas, hoje sem atividade. Em alguns casos, estas instalações – especialmente aquelas que têm uma localização mais central – têm sido recuperadas para a cidadania e são sede de vários serviços municipais e de numerosas atividades culturais e desportivas, ao mesmo tempo que funcionam como recurso turístico e jogam um papel de reforço da identidade marítima da vila. O porto é um importante foco de atividade e de atração turística do conjunto, e supõe um dos principais elementos caraterísticos da vila.



Figura 3: Centro histórico de Muros. *Praza da Pescadería vella*

Fonte: *Autoria própria*

#### 4.1.1. Área e População

O concelho de Muros está na beira norte da Ria de Muros e Noia. Com uma superfície de 72,9km<sup>2</sup>, com uma topografia escarpada na maior parte do seu território, o que tem uma forte incidência na distribuição da população. O conjunto histórico de Muros situa-se sobre uma encosta que desce em direção ao mar, e tem 2.452 habitantes (2015), que representa o 27,3% do total do município, tendo vindo a registar perdas de população constantes nas últimas décadas. A idade média da população residente na Vila de Muros (47,4 anos) é superior à média da Galiza e da província da Corunha, que são de 45,9 e 46,2 anos respetivamente. Na análise por intervalos de idade é de notar que no centro histórico as pessoas com mais de 64 anos representam 26% do total, 4 pontos percentuais abaixo da média municipal. A população estrangeira tem muito pouco peso no conjunto histórico de Muros, onde não chega a representar 1% da população, e a sua presença está associada à terceirização da atividade do centro, e a chegada de estrangeiros para trabalhar nas atividades vinculadas à pesca e à aquicultura.

#### 4.1.2. Caracterização do parque habitacional

O centro histórico de Muros apresenta uma percentagem de residência desocupadas de 21%, com diferenças entre as duas secções que compõe o centro. Os bairros da *Cerca*, de *San Xosé*,

de *San Pedro e San Roque* têm as mais baixas percentagens de residências desocupadas no município, situando-se à volta dos 14%. Também são estes bairros os que apresentam uma menor presença de residências secundárias, que no conjunto da vila se concentram no bairro da *Axesta* e nos bairros sul da *Praza do Concello*. É de ressaltar que nos últimos anos cresceu em todo o município o número de residências utilizadas como secundárias, fundamentalmente devido ao desenvolvimento turístico.

#### 4.1.3. Caracterização económica

O setor terciário é o que tem um maior peso na economia de Muros, mas existem notáveis diferenças territoriais dentro do âmbito municipal. As atividades pesqueiras continuam a ter um peso importante, em termos de produção e de emprego. O porto de Muros está especializado fundamentalmente na pesca artesanal e litoral. Também têm uma grande relevância as atividades de cultivo e apanha de bivalves e aquicultura do mexilhão. Por outro lado, ainda se mantêm as atividades agropecuárias orientadas ao autoconsumo e as explorações de horta. Mas é o turismo e as atividades associadas que nos últimos anos funcionam como motor económico da vila, fundamentalmente no período de verão. Assim, o centro histórico apresenta uma fachada litoral especializada em atividades económicas comerciais, artesanais e de serviço, dirigidas a residentes e visitantes, e uns percursos urbanos mais interiores com atividades e usos de caráter mais privado.

Em relação à oferta de hoteleira oficial no concelho de Muros, no total existem 15 estabelecimentos (2 hotéis e 13 pensões) que representam dois terços dos estabelecimentos de alojamento do concelho e que oferecem uma capacidade total de 400 camas. No concelho não existe uma oferta de alojamento das categorias mais altas, e a dimensão média dos estabelecimentos é muito baixa, com uma média de 21 lugares. No centro histórico a oferta de alojamento regulado limita-se a um hotel de 2 estrelas e que tem apenas 22 lugares. A oferta complementa-se com 3 pensões. Já na restauração, há uma ampla oferta que se localiza principalmente nas ruas do conjunto histórico, em concreto na fachada litoral e na *Praza da Pescadería Vella*.

#### 4.1.4. Património

No *Plan Especial de Protección* inclui-se um catálogo de edifícios classificados em quatro níveis, segundo a sua qualidade arquitetónica e valor histórico. Destacam-se os restos que se conservam da muralha medieval, e que têm a categoria de BIC. Entre as construções de maior relevância encontra-se a Casa da Torre, de planta quadrada, que era parte da muralha medieval, e que está localizada perto da Praza do Concelho. No tecido urbano do conjunto histórico identificam-se várias áreas em função das suas características morfológicas. Por um lado, o recinto intramuros caracteriza-se por conservar peças arquitetónicas de grande qualidade e valor histórico. Por outro lado, o traçado viário histórico, que corresponde à formação urbana que surgiu sobre o *Camiño Real* e os bairros da *Axesta*, do *Carme* e de *San Pedro*. Uma destas vias, a *rúa Castelao*, no antigo bairro de pescadores, tem casas com galerias sobre arcadas que constituem uma das imagens mais emblemáticas do centro histórico. Em relação ao património intangível, são as festas de caráter religioso que têm a maior importância na vila, muitas delas vinculadas a devoções marítimas. É, contudo, também importante destacar as celebrações que têm lugar na vila relacionadas com a exaltação da

gastronomia local, fundamentalmente vinculada aos produtos do mar, que constituem um elemento de identidade e destacam-se como recurso turístico.

#### 4.1.5. Resultados de Muros

Após a análise das variáveis demográficas identificamos que o centro histórico regista, ao longo das últimas décadas, uma intensa perda de população, um aumento dos índices de envelhecimento a níveis preocupantes e uns índices de dependência global (57,9) e de idosos elevados (40,5), ainda que menos desfavoráveis que os do conjunto municipal, do 63,4 e 47,5 respetivamente. Uma das necessidades mais urgentes em relação à proteção do centro histórico é completar o processo de reabilitação do conjunto de casas que fazem parte do âmbito do plano especial de proteção. Em Muros ainda existem, inclusive nas ruas da frente marítima, edifícios degradados e em más condições de conservação. Com o objetivo de proteger o património edificado, de evitar a perda de população no centro, e de manter a atividade económica no mesmo, é necessário adotar medidas que favoreçam a recuperação destes edifícios abandonados. Relativamente ao aproveitamento turístico do município e do seu centro histórico, está condicionado por uma série de debilidades que podem enumerar-se em quatro aspetos fundamentais: 1: Uma oferta de alojamento de baixa categoria, pelo que é necessário dotar de uma oferta com um nível mais alto, para conseguir uma melhoria global da qualidade do destino turístico, e um avanço deste tipo de alojamentos em relação ao modelo predominante de segundas residências e aluguer temporal de apartamentos; 2. Uma baixa qualificação profissional, tanto nos serviços de alojamento como de restauração; 3. Uma circulação rodoviária nos limites do centro, que atualmente está congestionada na época alta, e que juntamente com os problemas de estacionamento provoca tensões entre os turistas e a população residente; 4- Uma significativa presença da oferta turística não regulada.

#### 4.2. Combarro

O conjunto histórico de Combarro foi declarado Bem de Interesse Cultural na categoria de Conjunto Histórico Artístico e Pitoresco de carácter nacional no Decreto 3394/1972 de 30 de novembro. A sua proteção está contemplada no *Plan Especial de Protección do Conxunto Histórico de Combarro*, aprovado no dia 25/09/01, BOP 09/11/01. O conjunto histórico ocupa 7 ha 2859,468 m<sup>2</sup>.

No ano de 1948 houve uma proposta da Comissão Central de Monumentos para a declaração do conjunto de interesse pitoresco, formulada pelo arquiteto Francisco Pons-Sorolla. Foi nessa época quando começou a deterioração urbanística e, provavelmente, a proposta surgiu de um movimento de intelectuais da zona a favor da proteção da identidade de Combarro (Mesía López, 2012). Já nos anos 40 denunciava-se a situação da vila pelo uso indevido de materiais e técnicas construtivas dissonantes com o conjunto.



Figura 4 - Fachada marítima de Combarro

Fonte: Autoria Própria

A proposta permaneceu no esquecimento durante 24 anos, e só no ano de 1951 é que o Concelho de Poio solicitou a sua incorporação e simultânea delimitação da zona à *Dirección Xeral de Belas Artes*. Como indica Vallejo Pousada no ano de 1995 foram elaboradas umas “*Normas que rexerán nas edificacións situadas no conxunto artístico e pintoresco de Combarro*” que delimitavam o conxunto e declaravam a tutela do Estado sobre o conxunto histórico e, por tanto, submetido à legislação patrimonial vigente (*Lei da Presidencia do Patrimonio Artístico Nacional, 1933, derogada em 1985*). Os elementos identitários desse pequeno centro histórico são o seu vínculo com a vida marítima e a vida tradicional. O mar é o elemento distintivo da imagem peculiar de Combarro, junto à maior agrupación de espigueiros da Galiza, que datam da mesma época da formação da vila, e a sua conexão com as residências e espaços públicos. É uma imagem urbana muito vinculada à arquitetura popular, que ao mesmo tempo relata o passado e as vivências dos seus habitantes.

#### 4.2.1. Área e População

No conxunto histórico de Combarro vivem 1.869 pessoas. Nesse núcleo vive 11,1% da população do concelho de Poio. Em Combarro, a população adulta representa o grupo de idade mais significativo: 61,21% da população total. De facto, a idade média é de 43,3 anos, algo mais elevada que a média municipal, que está nos 41,9 anos. A população idosa está formada por 19,9% do total; pelo que a percentagem de pessoas idosas que vivem no conxunto histórico de Combarro supera o valor municipal de 17,4%. O grupo de idade com menor presença no conxunto histórico é a menor de 15 anos, formada por 18,8% da população total. Essas diferenças estão refletidas nos índices demográficos. No que se refere aos índices de dependência de Combarro, o índice global é de 52,8% enquanto o índice de dependência juvenil é de 22,3% frente ao 23,1% do município. O índice de dependência de idosos é de 30,5% sendo o valor municipal mais baixo: 26,1%. O índice juvenil é de 85,5%, mais baixo do que 101,4% de todo o município de Poio. A população estrangeira tem uma representação muito baixa com 2,1%, ainda que em todo o concelho de Poio seja de 3%

#### 4.2.2. Caracterização do parque habitacional

A nível municipal (Poio), das 9.380 residências, mais de metade (63,97 %) são residências principais, seguidas das residências desocupadas com 20,7% e as residências secundárias com

15,19%. No caso concreto do centro histórico de Combarro, a maior parte das 1.065 residências estão desocupadas (44,13 %). Trata-se de um dado que chama a atenção neste conjunto, no qual só 41,3% são residências principais e 14,4% são residências secundárias.

#### 4.2.3. Caracterização económica

Das 385 sociedades pequenas e microempresas do concelho de Poio, existem oficialmente apenas três com sede no centro histórico de Combarro. Distinguimos três tipos de atividade: indústria e alimentação, pequeno comércio e serviços de comidas e bebidas. Em relação à capacidade de alojamento, o concelho de Poio conta com um total de 1.712 camas, repartidas entre diferentes tipos de alojamento regulado (23 hotéis, 7 pensões e 4 instalações de turismo rural). No conjunto histórico de Combarro, a oferta hoteleira fica reduzida a um estabelecimento de turismo rural no qual existem apenas 2 camas. Em relação à oferta de restauração, no conjunto histórico de Combarro encontram-se 8 dos 47 restaurantes do concelho de Poio, com um total de 476 lugares.

#### 4.2.4. Património

Os monumentos de Combarro estão classificados segundo três tipos: arquitetura religiosa, civil e a ponte de *Ramallosa*. No primeiro caso, encontramos a capela paroquial de San Roque. A arquitetura civil está representada sobretudo pelo número de casas, emblemas da arquitetura popular galega, que fazem de Combarro um exemplo único. Guardam as tipologias arquitetura popular galega, que fazem de Combarro um exemplo único. Guardam as tipologias arquitetónicas tradicionais. Após a edificação de uma primeira fila de edifícios, na linha de costa, as casas foram edificando-se até dar lugar a um núcleo compacto. A disposição estabelecia-se em duas cotas, para que desde todas as vivendas se pudesse ver o mar, pois os seus habitantes tinham a dupla condição de marinheiros e agricultores. O conjunto histórico contém mais de 60 espigueiros, que são os elementos patrimoniais mais atrativos em termos de recurso turístico (Mesía López, 2012) e sete cruzeiros. Relativamente ao património intangível de Combarro contém duas festas de carácter religioso, e ambas se celebram no mês de setembro e estão vinculadas a figuras femininas: *Festas das Dores* e a *Festa da Virxe da Graza*.

#### 4.2.5. Resultados Combarro

Desde o ponto de vista demográfico, Combarro apresenta um envelhecimento populacional. A isso soma-se um elevado número de residências desocupadas e a falta de equipamentos e serviços. A sua função residencial é reduzida a favor de uma sazonalidade turística, que também não parece assegurar uma adequada oferta hoteleira de qualidade. O estímulo à oferta de alojamento acarreta prós e contras: se por um lado poderia ser uma forma de aproveitar as residências desocupadas, apostando por fórmulas de apartamentos turísticos ou hotéis de charme, por outro lado fazia falta um controlo desse desenvolvimento para garantir a proteção do património. Estas debilidades contribuem para a progressiva degradação do estado de conservação dos elementos patrimoniais já que faltam medidas de proteção dos elementos patrimoniais, que ao mesmo tempo sofrem um mau uso. A imagem urbana desta vila marítima está a ser substituída por um excessivo peso do turismo de excursão, caracterizada por um consumo massivo do espaço reduzido. As estas situações juntam-se outros problemas como a falta de regulação do comércio no centro histórico, o elevado



número de residências desocupadas, com a conseqüente percepção de abandono deste centro, o aumento da oferta turística informal, e como resultado global a deterioração ambiental

#### 4.3. Baiona

Baiona é uma vila costeira situada na área Metropolitana de Vigo, e conta com uma superfície total de 34,26km<sup>2</sup>. Dispõe de quase quatro quilómetros de praias, o que faz desta vila um dos principais destinos de turismo de “sol e praia” da Galiza. Teve no passado um importante porto de pesca, e conta hoje com um porto desportivo de relevo. Para além das suas características físicas favoráveis à prática de turismo durante os meses de verão, Baiona detém uma importante vertente cultural. Assim, o antigo Centro Histórico de Baiona foi declarado e delimitado pelo Decreto 48/1993, de 25 de fevereiro pelo que se declara *Bem de Interesse Cultural* com a categoria de conjunto histórico, pela *Consellería de Cultura e Deporte*. Esta distinção é dada pelo seu desenvolvimento histórico, pela qualidade do seu traçado urbano, a integração da sua arquitetura e pela existência de edifícios relevantes e de interesse tais como os solares e locais religiosos que abarcam diversas épocas desde a Idade Média. A sua proteção está contemplada no *Plan Especial de Protección do Conxunto Histórico* e a superfície delimitada é de 16ha 527.1120m<sup>2</sup>. É importante referir que entre os anos 1997 e 2000 a vila foi alvo de um *Plan de Excelencia Turística*, cujos objetivos gerais eram melhorar o meio urbano e natural do município; ampliar e melhorar a oferta complementária; valorizar os recursos turísticos e criar novos produtos, além de sensibilizar e implicar a população e os agentes locais numa cultura de qualidade (Beas, L., 2012).



Figura 5: Centro Histórico de Baiona

Fonte: Autoria Própria

A paisagem urbana do seu centro histórico viveu importantes transformações desde finais do século XIX, de caráter expansivo. O progresso económico favoreceu a aparição de novas construções e transformações tanto no interior das residências como nas suas fachadas. No entanto, a massa edificada do conjunto histórico apresenta atualmente, e em geral, bastante uniformidade. A crescente importância do turismo nos anos 1970, que está historicamente ligado ao turismo de classes altas, teve um impacto forte no Centro Histórico de Baiona, principalmente nos usos do solo que foram modificados para dar resposta às necessidades turísticas (hotéis, restauração, cafetarias, etc.) No limite do centro histórico cresce a cidade moderna feita à base de novos materiais, edifícios com vários andares, muitos deles solo

ocupados durante os meses de verão. É por isso notório o contraste existente entre a escala da nova edificação de Baiona, com uma ocupação e altura excessivas em relação ao restante Centro histórico, que tem uma escala menor e mais adaptada ao terreno.

#### 4.3.1. Caracterização demográfica

O concelho de Baiona tem uma população total de 12.072 habitantes (2015) e uma significativa percentagem da mesma reside no centro histórico, cerca de 25%, sendo que o centro ocupa aproximadamente 30% da área total do município. Relativamente à estrutura da população por grandes grupos etários podemos verificar que o centro histórico de Baiona não apresenta sinais preocupantes de envelhecimento ou despovoamento: 20,7% da população tem mais de 65 anos, e 15,1% é menor do que 20 anos. Esta realidade está também refletida nos índices de dependência, já que o global regista o valor de 44,7% na primeira secção e de 45,4% na segunda, e o índice de dependência juvenil é de 29,9% e 26% respetivamente. A idade média dos habitantes do centro histórico é mais alta do que do município, e está inclusivamente acima das freguesias mais rurais do concelho, sendo de 45 anos, mais alto que a média municipal que é de 43 anos. Atendendo à percentagem de população estrangeira que reside no centro histórico, este valor é menor que a média municipal, e regista 2,1%.

#### 4.3.2. Caracterização do parque habitacional

Baiona contém um total de 8.565 residências. Pode verificar-se que no centro histórico se concentra cerca de 24,4% do total das residências do município de Baiona. Na primeira secção regista-se uma percentagem de vivendas desocupadas muito acima daquela registrada no Município - um 30,6% frente a um 12,5% a nível municipal – valor este que é também superior ao registado na Galiza e na província de Pontevedra. No caso da segunda secção, este valor é mais baixo, registado apenas um 6,9% de residências desocupadas. A estes dados junta-se o facto da segunda secção registar uma percentagem de residências secundárias de quase 50%, enquanto na primeira secção este valor é mais baixo, representando 27,1% do total das residências, sendo que a média do município é de 39,5%.

#### 4.3.3. Caracterização Económica

A importância da atividade turística em Baiona determina a configuração da atividade económica existente no seu centro histórico. Das 258 sociedades existentes no município, 46 estão localizadas no centro histórico. Pode verificar-se o elevado peso dos negócios relacionados com a restauração, já que a grande parte das empresas situadas no centro dedica-se a serviços relacionados com a venda de bebidas e comidas. A segunda atividade com maior peso neste espaço é o pequeno comércio com 8 sociedades registadas. Estes dados, juntamente com a informação anteriormente apresentada, parecem indicar uma dependência das dinâmicas económicas deste centro da atividade turística. Há um total de 29 alojamentos oficiais no município de Baiona, dos quais 7 estão dentro do centro histórico, com uma capacidade total de 2.800 camas no total do concelho e de 193 dentro do núcleo protegido. É importante referir que Baiona conta também com um Parador Nacional- Conde de Gondomar – Situado na Península de Monte Boi, localizado junto ao centro histórico. No entanto dentro do centro não se regista nenhum hotel de quatro ou de cinco estrelas. Em relação aos restaurantes e cafetarias, atividades associadas à dinâmica turística, regista-se um total de 1.101 lugares, e cerca de 17% localiza-se dentro do centro histórico.

#### 4.3.4. Património

O conjunto histórico de Baiona tem um valor intrínseco derivado do seu próprio desenvolvimento histórico que deu lugar a um tecido urbano com um traçado de interesse. Constitui também um importante exemplar de arquitetura religiosa dentro do qual se destacam o edifício de transição entre o românico e o gótico, *Antigua Colegiata de Santa María, a Iglesia de Santa Liberata* do século XVII e *Convento de las Madres Dominicas* do século XVIII. Baiona guarda também importantes exemplares da arquitetura civil da região, com importantes passos e casas nobres monumentais tais como Casa de Mendoza ou a Casa dos Correa (onde atualmente está situada a *Casa do Concello*). Vinculado ao seu valor patrimonial está também o facto de Baiona ser considerado o primeiro porto da Europa que recebeu a notícia da chegada à América, no ano de 1493, quando a caravela Pinta atracou neste mesmo porto. Existe hoje um pequeno museu que alberga uma réplica da caravela. Em relação ao património imaterial, a Festa da Arribada é o momento mais importante do ano, no qual se comemora a chegada da Caravela Pinta, e comemora-se normalmente no mês de março e inclui uma feira medieval no centro histórico.

#### 4.3.5. Resultados de Baiona

O centro histórico de Baiona enfrenta desafios que estão fortemente relacionados com a gestão das suas funções turística e residencial. Dado o elevado número de residências desocupadas, é fundamental adotar medidas de regeneração do parque habitacional através do estímulo às suas funções residenciais e económicas. As possíveis linhas de atuação têm que contribuir para aumentar a multifuncionalidade do centro, e diminuir a sua dependência do turismo relacionado com “sol e praia”. Este centro tem a enorme mais-valia de se encontrar num bom estado de conservação, e manter uma estrutura original e característica. Dadas as características da Vila de Baiona no âmbito do património cultural e natural, existe um enorme potencial no desenvolvimento de segmentos de turismo complementares ao “sol e praia”. Aproveitando contínuo aumento da importância do turismo cultural e do turismo de natureza, Baiona poderá aproveitar a já consolidada imagem de destino turístico para desenvolver outros produtos que melhorarão a sua competitividade e contribuirão para diminuir a sazonalidade da atividade turística. Neste contexto, o centro histórico é um recurso estratégico fundamental, pois é o lugar onde a história, a gastronomia, a cultura e a tradição de Baiona confluem. Outra vertente necessária para potenciar a dinamização do centro histórico é a criação de redes de cooperação com outros territórios cujas características possam ser complementares.

### **5. Análise comparativa dos e resultados e propostas de atuação**

Os três casos de estudo abordados registam grandes diferenças, que vão desde as diferenças de dinâmicas demográficas e económicas, a sua relação com o mar e finalmente com diferentes graus de desenvolvimento turístico, tal como é descrito nas anteriores secções e evidente nas seguintes figuras. Tal como podemos observar na Figura 6, a relevância do centro histórico em termos de percentagem de área ocupada e de residentes é significativamente diferente entre os três casos. Enquanto em Muros o Centro Histórico ocupa apenas 3% da área total do município, mas alberga apenas 27% dos residentes, em Combarro ocupa 16% de território e representa 11% dos residentes no município de Poio, em Baiona o Centro Histórico ocupa 5,65% do território e aqui reside aqui 25% da sua população.

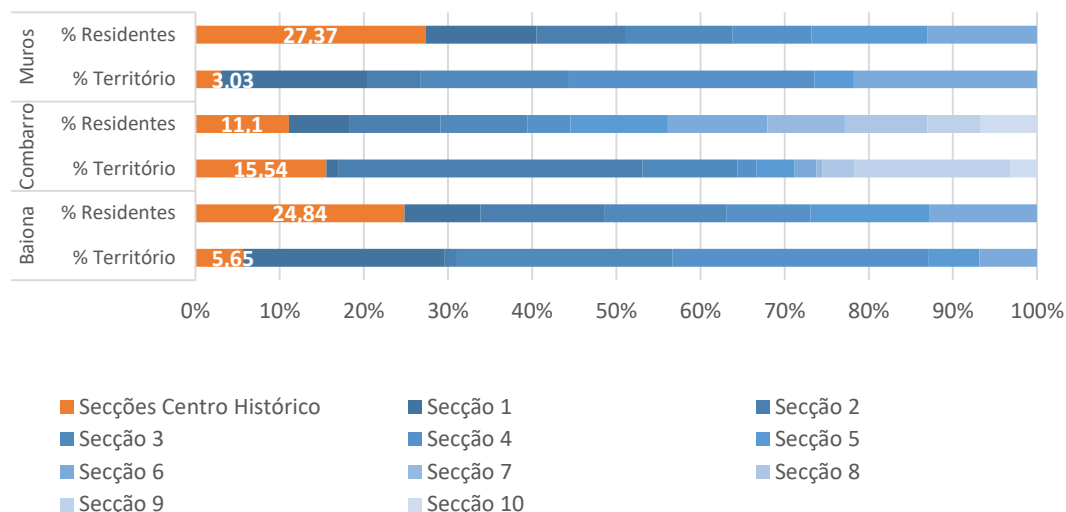


Figura 6 – Distribuição de residentes e da área de território de Muros, Combarro e Baiona  
 Fonte: Autoria própria

As diferenças entre os três centros históricos são também evidentes nas características do seu parque habitacional, tal como podemos observar na Figura 7: Muros é entre os casos analisados o centro histórico onde existem mais residências principais, que representam 59% do total das residências, seguindo-se as residências secundárias que atingem o 41% e as residências vazias atingem o 20%; em Combarro a maior parte das residências estão desocupadas, 44%, cerca de 41% são residências principais e 15% são residências secundárias; em Baiona, 42% das residências são principais, contudo as residências secundárias são também muito representativas, com um peso de 38%, e as residências desocupadas representam 20% do parque habitacional do centro histórico.

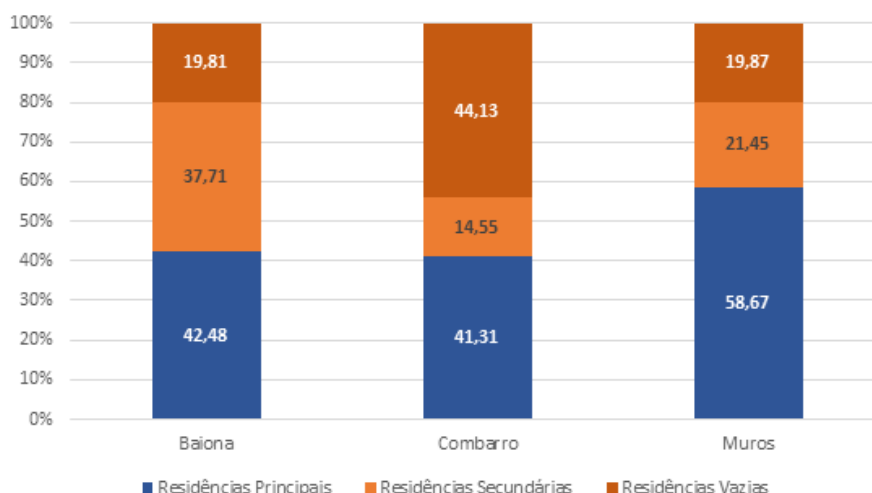


Figura 7 – Percentagem das residências por tipo de ocupação no parque habitacional de Baiona, Combarro e Muros  
 Fonte: Autoria própria

Em relação à atividade comercial dos centros históricos, tal como se pode observar na Figura 8, Baiona possui um dinamismo económico bem mais destacado, onde o pequeno comércio e os serviços de comidas e bebidas assumem a maior importância. Neste município, mais de

metade das micro e pequenas empresas está localizada dentro do centro histórico, precisamente 52%, enquanto em Muros este indicador tem o valor de 25% e em Combarro de apenas 1%.

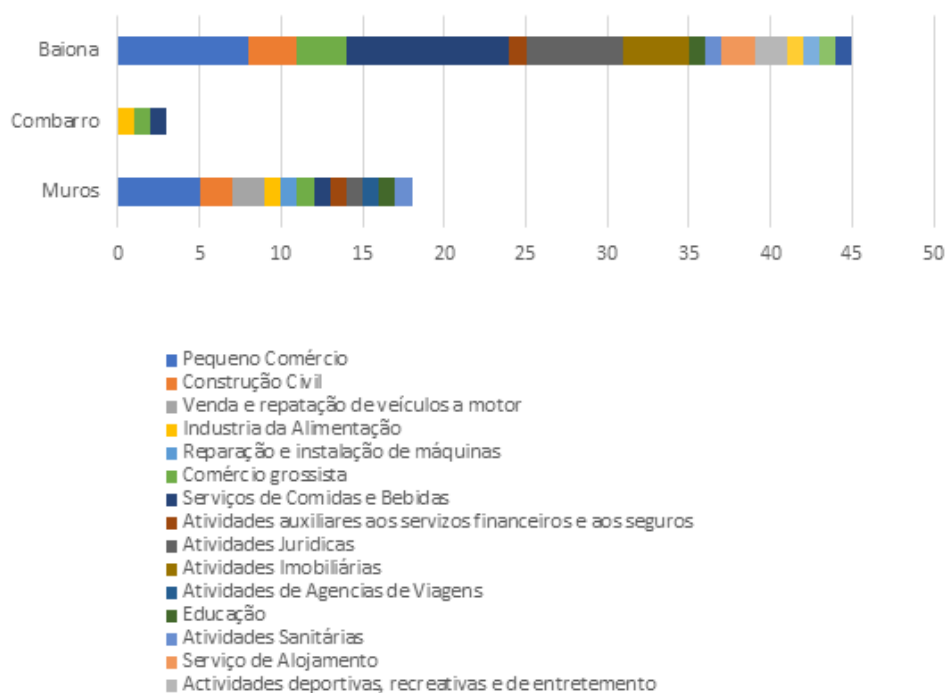


Figura 8 – Número de empresas por tipo nos centros históricos de Baiona, Combarro e Muros  
 Fonte: Autoria própria

Perante estes dados é necessário refletir sobre as pautas de atuação necessárias para a dinamização económica e preservação dos centros históricos-costeiros. Em primeiro lugar, é necessário ter em consideração que uma adequada planificação estratégica requer a análise dos processos de mudança e dos problemas que afetam atualmente os centros históricos de forma a dar resposta às necessidades. Isto possibilita um balanço das funções históricas destes espaços, para que se implemente uma planificação de dinamização que respeite o passado. Revitalizar, redistribuir, reestruturar ou renovar o património de um centro histórico são tarefas que exigem um profundo conhecimento da identidade do mesmo para entender as atividades económicas compatíveis com o respeito pelas suas características e com a dinamização urbana. Qualquer intervenção no centro histórico, a partir das diferentes perspetivas, requer uma visão integradora, que permita dar resposta a diferentes problemas (Campesino, 1989). Neste contexto as funcionalidades turística e cultural são emergentes e o desenvolvimento das suas potencialidades deve ter em consideração o valor estratégico e económico do património cultural. Em Baiona houve um *Plan de Excelencia Turistica*, em Muros está-se a preparar um *Plan Estratégico de Turismo de Geodestino Ría de Muros-Noia*, sendo à data inexistente este tipo de planificação em Combarro. A evolução e atual estado dos três casos de estudo demonstram a importância deste tipo de instrumentos de planificação, a fixação de medidas de regulamentação de comércio, e um seguimento do mesmo.

Adicionalmente, os dados das figuras anteriores evidenciam três estados de dinamização económica e social do centro histórico distintos e aos quais corresponde um diferente nível de

desenvolvimento turístico. No caso de Baiona, cujas dinâmicas estão fortemente vinculadas ao seu potencial turístico “sol e praia”, é evidente a importância que o centro histórico assume como núcleo funcional do município. Neste centro histórico-costeiro, os principais problemas estão relacionados com a sazonalidade destas dinâmicas e com excessiva especialização das atividades económicas no âmbito turístico. No caso de Muros, é perceptível que o seu centro histórico mantém uma função económica e residencial destacável, contudo a sua capacidade hoteleira muito débil, o que condiciona o desenvolvimento do turismo que se apresenta como uma boa oportunidade económica perante uma perda do peso das atividades pesqueiras. O centro histórico de Combarro demonstra sinais mais preocupantes, pois regista pouca atividade comercial e claros problemas no parque habitacional, com 44% das residências desocupadas. Deduzimos que Combarro tem dinâmicas turísticas, contudo os visitantes são na sua maioria excursionistas, e este centro histórico acaba por funcionar como complemento de outros produtos turísticos geograficamente próximos, como por exemplo Pontevedra. Neste caso urge criar as condições para que os visitantes permaneçam mais tempo neste espaço, aumentando a oferta hoteleira, e criando mais conteúdos de visita.

Apesar das diferenças descritas, todos os centros históricos analisados devem iniciar ou continuar com a dinamização comercial e residencial, seria por isso importante favorecer ou reforçar a colaboração e o associativismo entre comerciantes, para que possam ter um papel ativo na promoção do espaço. Neste contexto seria também importante reproduzir roteiros comerciais que permitam dar um impulso ao tecido empresarial da zona através da recuperação de ofícios. A recriação de ofícios tradicionais, e a promoção de produtos locais, é importante não apenas para a criação de valor económico a partir da diferenciação, como também para estimular o sentimento de identidade da população. O envolvimento de outros agentes locais é fundamental para uma dinamização económica e social dos centros históricos, e por isso considera-se fundamental a colaboração entre as administrações locais e o *SUG (Sistema Universitário Gallego)*, de forma a envolver a Universidade, ou outras entidades de formação, a partir de convênios e acordos. Isto permitiria dar vida ao conjunto histórico nos meses menos turísticos, trabalhar num plano de dinamização social para assegurar a presença de usuários nestes espaços, não só de turistas como também de profissionais e estudantes. É fundamental a dinamização de iniciativas didáticas e sociais que valorizem a identidade marítima destes espaços

A dinamização do conjunto histórico tem que passar pelo conhecimento e resposta às necessidades e expectativas da população local, que em primeiro lugar integram o principal grupo de usuários do espaço e em segundo lugar são os melhores conhecedores da realidade destes espaços. Assim, considera-se também fundamental a adoção de um Plano de Conservação e Restauro do conjunto histórico para tutelar os elementos patrimoniais participativo, que inclua ações de sensibilização do património dirigidas à população local que é o principal grupo de usuários. Nestas tarefas os cidadãos deveriam ser os atores principais da mudança, para que um projeto futuro seja consensual.

Como já se referiu, nos últimos anos consolidou-se uma nova abordagem de ação territorial baseada em alianças e relações entre entidades, desta forma propõe-se a criação de uma marca “conjuntos históricos marítimos” onde se podem incluir todos os pequenos centros históricos costeiros com figuras de proteção. Um exemplo anterior de uma iniciativa semelhante é o Projeto INTERREG III- Atlante do ano de 2003, que reunia cidades atlânticas

Património da Humanidade. Graças a este projeto conseguiu-se valorizar o papel dinamizador do património como fator identitário de união, de dinamizador da vida social e económica (Ayuntamiento de Lugo, 2005). Para os presentes casos de estudo, propõe-se retomar a ideia para contextualizá-la a pequenos centros históricos marítimos, aglutinados por vários fatores. Entre as diferentes iniciativas possíveis, no contexto de uma marca de conjuntos históricos marítimos, poderia desenvolver-se uma rota turística baseada na importância destes espaços na história galega ou no desenvolvimento comum de atividades tradicionais ligadas ao mar. Nesta linha poderia criar-se novos produtos, fomentando a descentralização da procura turística e apostando tanto no desenvolvimento do turismo cultural, como também de outros nichos de mercado como o turismo gastronómico e etnográfico, vinculados à valorização do património material e imaterial. Esta medida, já algo desenvolvida em Baiona, é transferível aos casos de Muros e Combarro. A promoção conjunta de valores culturais do património deve valorizar a sua identidade marítima e poderia assegurar um aproveitamento mútuo e o desenvolvimento de uma rede de trabalho.

## **6. Conclusões**

A proteção, recuperação e dinamização do conjunto histórico deve ser uma constante nas políticas de gestão e dinamização urbana. Para uma dinamização adequada aos centros históricos é necessário entender os mesmos como núcleos do centro urbano, sensibilizando todas as agentes territoriais relativamente à sua importância e ao seu valor simbólico, para além do seu valor material. Desta forma, o bom funcionamento do centro histórico baseia-se na capacidade de responder às necessidades das sociedades que o vivem, por isso planificar a sua dinamização requer uma implementação de medidas de proteção e conservação que comprometam agentes públicos e privados. Ambas - planificação e gestão - devem guiar-se pela centralidade do património cultural, paisagem e recursos com prioridade. É necessário planificar com uma visão integral e de harmonia com a paisagem histórica na qual se integram objeto e monumentos antigos, elementos ambientais e sentimentais (Rodríguez Neila, 1994). Adicionalmente, a planificação deve basear-se num estudo do estado demográfico, económico e funcional do centro histórico, e identificar as principais necessidades de atuação. Posteriormente as estratégias devem ser acompanhadas de um controlo contínuo da planificação.

As propostas feitas neste estudo têm como objetivo transversal dar resposta percentagem de residências desocupadas nos centros históricos estudados, que ainda que registem percentagens diferentes, atingem níveis elevados em todos os casos. Tanto as atividades comerciais como a criação de novas empresas ou dotação de determinados espaços para o desenvolvimento atividades académicas ou de investigação, deveriam ocupar o património edificado existente, respeitando sempre os critérios de conservação e integridade.

Cada um dos três casos de estudo mostra uma evolução própria, mas em todos eles se notam os impactos de uma sazonalidade que os converte uma parte do ano em núcleos vazios, dominados por uma paisagem urbana onde as portas fechadas e as ruas vazias são elementos de destaque. Desta forma, do ponto de vista turístico é fundamental uma diversificação da oferta dos núcleos costeiros com centros históricos, para que não esteja centrada apenas no turismo de "sol e praia", e que haja uma maior aposta no turismo cultural. Os três casos de estudo, apesar de apresentarem diferentes perfis, são espaços que guardam elementos

característicos da cultura galega e importantes reflexos da sua história. Para além do património edificado, com inúmeros exemplares de arquitetura religiosa e civil galega, estas vilas mantêm vivas manifestações das antigas atividades económicas ligadas ao mar, algumas delas ainda existentes. Assim, incidindo no valor patrimonial e identitário do centro histórico, estão reunidas as condições para que estas três vilas desenvolvam produtos turísticos conjuntos intensivos em informação e experiências culturais (p.ex. gastronomia). Ainda que os três casos apresentam níveis de desenvolvimento turístico diferentes, sendo Baiona o destino mais consolidado, identificam-se possibilidades de cooperação entre destinos que se encontram geograficamente próximos e com paisagens culturais singulares e cujas características são adequadas a responder às necessidades de turistas que procuram cada vez mais ter contacto com a cultura local. Os três casos aqui apresentados são exemplos da preservação da autenticidade de um passado semelhante, e cujo aproveitamento económico por via do turismo se apresenta como uma solução. É assim fundamental que a Administração local contribua para a descentralização da procura turística, tanto temporal como espacial, e aposte no desenvolvimento do turismo cultural, gastronómico e etnográfico, vinculado à valorização do património material e imaterial originário do século XV, a Época dos Descobrimentos e com a cultura e história galega vinculadas ao mar.

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# **Ethnotourism: (re) invention of the culture or appreciation of the indigenous culture? An analysis of the tourist route of the native brazilians from the Paresi tribe (MT) - Brazil**

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## **Abstract**

In the last few years, the practice of ethnotourism has been implemented as an economic alternative in Brazilian territory. Mato Grosso stands out in this context with the creation of the Pareci Route, formed by the Wazare, Quatro Cachoeiras and Salto do Utiariti tribe villages; fruit of the partnership between the Economic Development Department of the State and the Culture and Tourism Department of Campo Novo dos Parecis. The route allows the tourist to get to know the culture of this people through dance presentations, mythical tales, archery games, head football, manufacturing of the ball (made of mangaba sap) used in the games, teaching how to build their traditional houses and the sale of handicrafts. It also allows the practice of tourism in a natural setting through adventure tourism, in which the visitor interacts with the natural environment. The present study discusses at which point the ethnicity has been actually lived by the ethnic group, contributing to its cultural appreciation, or if it has just been reinvented as a product for tourists, an economic alternative for survival of these groups. Having considered this, we understand that the Pareci Route, called by the local tourism market the “Pareci Circuit”, enables the tourist contact with nature and the culture of the people who live there – in different territorialities and temporalities experienced by these peoples in modern society. It also inserts them into the dynamics of modern society, through ethnotourism as a mean of sociocultural and economic survival.

## **Keywords**

Ethnotourism; Culture; Ethnicity; Tourist Product; Economic Alternative.

## **1. Introduction**

In its conjuncture, Mato Grosso has a significant diversity of natural and cultural resources. Both resources are essential to the formation of tourist ventures. The Wazare, Quatro Cachoeiras and Salto do Utiariti tribe villages of the Paresi People are in the tourist micro-region called Nascente Platina Amazônica, which includes the cities of Campo Novo dos Parecis, Barra do Bugres, Nova Olímpia, Sapezal and Tangará da Serra. The geographic location where the ethnic group Paresi-Halíti has lived since time immemorial, has as its existing territories the Chapada dos Parecis (Parecis Plateau), southwest of the Mato Grosso State (Brazil), encompassing the cities of Campo Novo dos Parecis, Tangará da Serra, Diamantino and Pontes de Lacerda, as can be seen on figure 1.

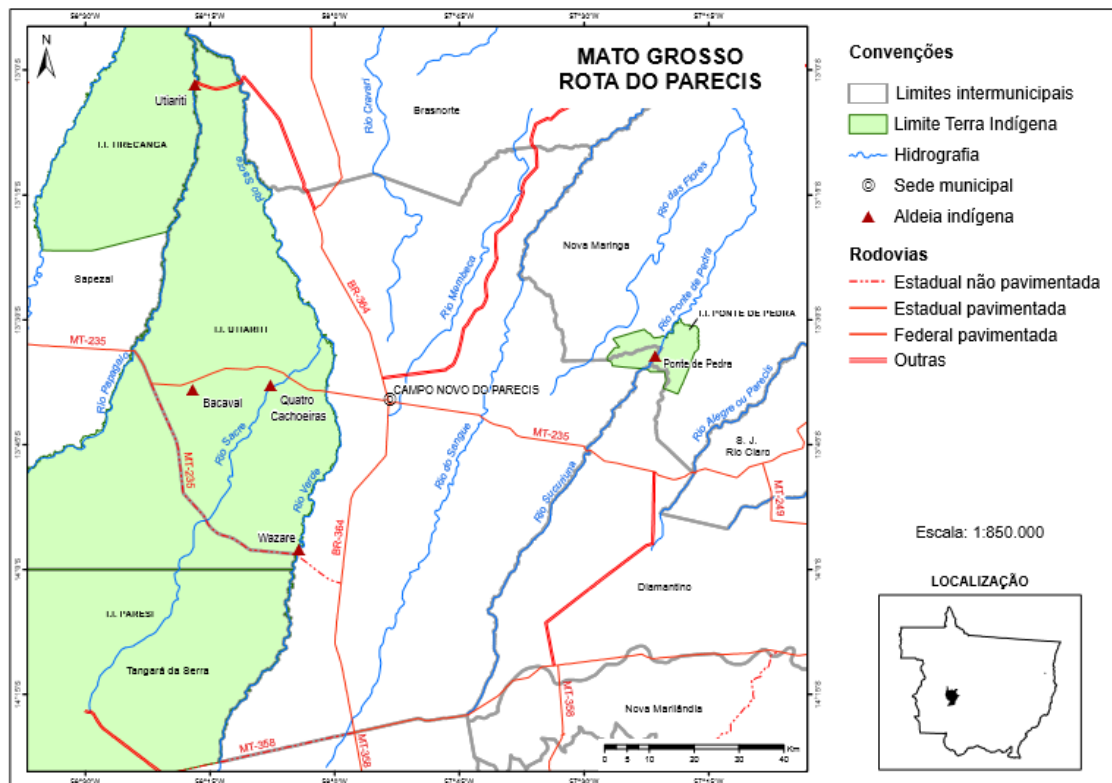


Figure 1 - Geography Localization

Source: Rejane Gusmão

In the context of tourism, when we think of the Paresi territory as a tourist micro-region, we understand that it is a space that involves a local cultural identity, a precondition that strengthens its tourism venture. Originally, the Paresi People were formed of five subgroups: Kaxíni, Waimaré, Kozárini, Warére and Kawali. Currently, in a much reduced number, only the subgroups of the Kozárini, Waimaré and Kaxíni are left; with distinctive dialects, they inhabit contiguous territories, but with well-defined borders.

The Paresi have, in their myth of origin, the representation of their identity and territoriality in the Chapada dos Parecis (Parecis Plateau). The territoriality, in this work, is understood as a manifestation of a set of practices and their symbolic and material expressions, which are able to guarantee the ownership and permanence of a given territory by a social group. In this regard, the myth of origin of the Paresi group expresses its process of material ownership of the area, as well as the subjective quality of the Paresi-Halíti group, based on images, representations and projects. As Santos reasons (2002:10):

O território não é apenas o conjunto dos sistemas naturais e de sistemas de coisas superpostas. O território tem que ser entendido como o território usado, não o território em si. O território usado é o chão mais a identidade. A identidade é o sentimento de pertencer àquilo que nos pertence. O território é o fundamento do trabalho, o lugar da resistência, das trocas materiais e espirituais e do exercício da vida.<sup>25</sup>

<sup>25</sup> The territory is not only the set of natural systems and systems of overlaid things. The territory must be understood as the used territory, not the territory per se. The used territory is the ground plus the identity. The identity is the feeling of belonging to what belong to us. The territory is the foundation of the work, the place of resistance, the spiritual and material exchanges and the exercise of life. (SANTOS,2002:10, our translation)

The myth of origin of the Paresi-Halíti People, gathered by the German anthropologist Max Schmidt, says that a group of siblings (full-siblings) left the earth's interior, and sprouted through the cracks, at the existing rock crevices in the *Sakuriu winã* river, that the *imoti* (non-native, "civilized") call Ponte de Pedra or Sucuruína, a tributary of the Arinos. As they left the rocks, they discovered the world and its rivers, birds, existing trees, which, however, did not yet have a name.

According to the myth, Wazare, the eldest of the siblings, guided the exit of the others, placing each one in their own territories: the headwaters of the Três Jacus river, for instance, was called *Malate winã* (*malate*: jacucaca), and it was given to his brother Zakálo, who was married to the same woman of Zalóya; they became the ancestors of the Wáimare. The headwaters of the Lagoa Rasa (*Natukwá*), called *Kalana winã* (*kalana*: buritirana), as well as the headwaters of the *Aihanazã*, the Água Verde river, were also given to Zakálo. Now, the headwaters of the Varzearia, called *Kanóti winã*, was given to his brother Zalóya. From Sangue river (*Zutihali winã*) to the headwaters of the *Wazolohatiá* or *Wazuliatíá* (Terrapin Creek), Wazare gave to his brother Zawlore, ancestor of the subgroup Kaxíniti, as well as the *Ahozá winã* (Wolf Headwaters) and the *Tolomare sewe* (Crimson-crested Woodpecker Headwaters), in the Paresi river (*Kawi inazá*), tributary of the Arinos. This is the mythical boundary of the territory of the descendants of the ancestor Kaxíniti (Machado, 2000). From these relations between the groups of brothers and sisters, who emerged from within the earth, the Paresi subgroups had also come forth, as well as the configuration of territorial borders of this group.

The Paresi-Halíti territoriality, guided by the myth, has been known by the *imoti* (white people) since the 16<sup>th</sup> century. According to the story, the *bandeirantes preadores* (pioneers/slavers) reached the so-called "Reino dos Parecis" (Parecis Kingdom) in search of a labor force to work in the mines, fields, and as guides in the expansion to the west. Over the years, ethnographic studies have recorded the power of this myth in regard to the preservation of the ethnic boundaries of the Halíti people, nurturing the conscience of a territory and a sociocultural universe, always kept and shared (Machado, 2002). This sociocultural universe is used, in the current century, to attract tourists to these locations, as history and culture that involve a people are attractions that feed a tourist destination.

Until the beginning of the 20<sup>th</sup> century, the Paresi traditional territorial configuration extended from the right bank of the Juruena river to near the left bank of the Arinos river, in the northeast of Mato Grosso. This territory was also differentiated among the subgroups: Waimare, which occupied the areas further north; Kozárini, in the areas further south; and Kaxíniti, in the locations further east.

The contact of the Paresi with non-native groups (*imoti*) intensified with the arrival of Cândido Rondon and the Strategic Telegraph Commission of Mato Grosso. Later, with the Religious Missionaries, the conflicts intensified, interfering in their territorial and sociocultural organization. The rupture and the conflicts among these peoples occurred with the arrival of Rondon in the Paresi territory as he installed the first telegraph station, "Ponte de Pedra", near the *Sakuriu winã* river (Paresi mythical place of origin), and in the lands of the native Brazilians living north of the "Pareci" station. In regard to this, Machado (1994:34) draws attention to the fact that the strategic and military venture of Rondon contributed significantly to the decrease of their territory and population:

No início do século XX, Rondon cortou o território Paresi com o objetivo de implantar as linhas telegráficas para comunicar Mato Grosso e Amazônia. Esta travessia em seu território trouxe consequências em vários níveis para os Paresi – desde seu envolvimento como trabalhadores das linhas e posteriormente na sua manutenção, modificação da localização das aldeias, introdução de novos hábitos, de novas necessidades e mesmo difusão de epidemias.<sup>26</sup>

The other rupture was through the entry of the Religious Missionaries in the indigenous territory, who began to impose “new customs” and social patterns, establishing that ethnic groups (who were sometimes enemies) shared space together, the banning of speaking their native language and the premature estrangement of children from their families. The activity of the Santa Terezinha of Utiariti Jesuit Mission was significant until 1970, when it was decommissioned, leaving its marks in the local landscape through its ruins. Currently, with the decommissioning of the Utiariti Mission, this space is now a territory of the Nhambiquaras, once enemies of the Paresi, who charge taxes for visits to the ruins, without being part of the tourist route created by the Paresi People.

Among the indigenous groups, the territorial borders are not established by physical landmarks built in the territory, but by symbolic landmarks and/or elements that are part of the natural landscape and serve as a reference of territorial and existential borders. Whatever the agreement is, these borders are respected and passed down through the generations. A noted and interesting fact is that the entry in the territory of others for visits is only possible with the authorization of the latter, which has the overriding power and control of this space; i.e., when a tourist visits the Paresi territory, the explanation concerning the origin of the people and the border of their lands is reinforced by the myth of origin, through a narrative that involves Ponte de Pedra - and the designation of the areas that should be occupied by each subgroup, made by Wazare, when men came out from the rock and formed this people.

The concept of territorial demarcation for this group occurred with the coming of the non-natives and was intensified in the 1960s with the opening of highway BR-364, enabling the territorialization of the capital, mediated by the expansion of the high-tech and scientifically-based agricultural frontier, and the (de) territorialization of this group.

The high-tech and scientifically-based agricultural frontier, has imposed a new spatial and economic order for these groups, which are lead to adopt new socio-spatial practices as a mean to guarantee their cultural and economic survival: through the leasing of their lands to soy producers, for which they receive royalties for the construction of Small Hydroelectric Plants (SHP) in their lands, and/or the conversion of their territory (physical-existential) into a tourism venture. We may infer from that that there is a shift from the look of this group, from the established historical relations among people towards the territory, which is turned into an economic and power source.

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<sup>26</sup> In the beginning of the 20<sup>th</sup> century, Rondon cut through the Paresi territory, aiming to install telegraph lines in order to connect Mato Grosso to the Amazon Region. This crossing into their territory brought consequences to the Paresi at various levels: from their involvement with workers of the telegraph lines - and later for their maintenance - to the modification of the tribes' location, introduction of new habits, new needs and even the spread of diseases. (MACHADO,1994:34, our translation)

In the case of the Pareci tourist route, which comprises the Wazare, Quatro Cachoeiras and Utiariti tribe villages, the tailored tourist activity includes tours that encompass cultural and natural modes, with a complementarity of attractions that helps with the promotion of the route. It is crucial to highlight that the difference between a tourist route<sup>1</sup> and a tourist itinerary<sup>2</sup> is tied to spatiality: within the “Pareci Circuit” there can be various itineraries, and they can have diverse conjunctures. In this context, understanding their space and particularities contributes to their planning regarding specific products, in a coherent and responsible manner.

## **2. The (re) invention of the territory for tourism activities: the birth of the Wazare tribe village and the construction of the Pareci Ethnotourist Route**

The myth of origin of the Paresi People points to Wazare as the first character to emerge from the earth, who named rivers and established the place where the brothers should live. Personifying the myth of his ancestor, Chief Roni Valter Azoynaice Pareci created the Wazare tribe village for the purposes of tourism in 2011, reinforcing the myth through a territorial organization committed to the development of ethnotourism. The location of the created tribe village leaves no doubt: by the banks of the Verde river (*Aihanazã*), a land that - according to mythology - was destined to Zakálo; as well as the choosing of 33 residents who would go to this new community.

The idea of Chief Roni in creating a tribe village oriented towards tourist endeavors is due to the fact that the traditional group of his tribe (his grandparents) didn't want the implementation of this model in their lands, fearing that the *modus vivendi* of their people could be transformed in a tourist product. The proposal is based on the premise that the implementation of tourism will promote a greater interaction between the *Halíti* (native Brazilian) and the *imoti* (non-native) helping the tribal villages in their economic development; while at the same time, encouraging the strengthening of the cultural traditions of the Paresi Peoples.

Em contato com *imutis* (não índios), a aculturação é um caminho natural para a maioria das tribos indígenas, com isso o esquecimento das próprias tradições torna-se uma mera questão de tempo, e a inserção do turismo na aldeia é também uma forma de resgatar a cultura do nosso povo. [...] Sentimos essa necessidade que os não índios têm em conhecer um pouco mais da nossa cultura, por isso decidimos criar a Wazare especificamente voltada ao turismo.<sup>27</sup>

The Wazare tribe village, located by the banks of the Verde river, was created with the aim of implementing ethnotourism, enabling the tourist to get close to the Paresi-Halíti culture. In doing this they promote presentations of traditional dances, singing, mythical tales narratives, body painting, practice traditional games, and sell handicrafts.

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<sup>27</sup> In contact with the *imoti* (non-native), acculturation is a natural path to the majority of the indigenous tribes, and the forgetting of their own traditions is just a matter of time; so the addition of tourism in the tribe is also a way of rescuing the culture of our people. [...] We feel this need for the non-natives to know a little more of our culture; this is why we have decided to create the Wazare tribe village, specifically oriented to tourism. (CHIEF RONI, our translation)





Image 2 : Hati - a dwelling hut of the Paresi People.

Source: Wagner Augusto



Image 3: Hati - low entrance door: symbol of respect to the host. Source: Wagner Augusto

Augusto

The tribe village was built in a circular clearing, reproducing the standard typical dwelling place of the Paresi People. It is formed by big huts in an oval style, with two very low doors. The entrances to the huts, “hati”, were built toward the sunrise (meaning life) and their exit facing the sunset (death), of a low height, demanding the visitor to bow in order to enter the hut, as a symbol of respect to the host. The dwelling hut has a mythical meaning for this people; for instance, in its interior are buried the dead and their belongings.

In addition to the cultural attractions, the tour includes many other activities like boat riding, river swims and tubing.

The other tribe village that is part of the “Pareci Circuit” is called Quatro Cachoeiras. Located on the banks of the Sacre river, it is represented by one of the most traditional chiefs of the Paresi-Halíti People, Chief Narciso Kazaizase. The tribe village has 98 inhabitants and it is where the annual Cultural Festival and the Pareci Indian Games occur. In a reverse process of what happened to the Wazare tribe village, tourism here has been implemented with the community’s consent and occurs in its original territory. Having around 100 people, the tribe village is formed by many descendants of Narciso - daughters, grandchildren and great-grandchildren - who live in the *hatis*, as well as in wooden and brick houses, which surround a central area, which is the space for festivities, rituals, head football practice and socializing. There, even though evidence of consumerism are present in their daily lives - in the middle of the “hati” (dwelling huts), constructions made of brick can be seen - we can still note the *modus vivendi* of this people through their socio-spatial organization, or by the preservation of the use of their native language (the *aruák*).

Tourists can get to know the culture of this people by the (re)presentations of dances, mythical tales narratives, archery games, head football, manufacturing of the ball used in the games, teaching how to build their traditional houses and sale of handicrafts; as well as by going on hikes that lead to lookouts which enable the viewing of four waterfalls, all arranged in harmony in the landscape. However, the most interesting fact experienced here is the moment when the native Brazilian children dress up and play “native Brazilians”, taking off their ornaments and clothing, which characterize them before the tourist’s eyes, and assume the

human condition of being a native Brazilian by their cultural practices, like swimming in the river. As the visitors observe and take pictures, the native Brazilian adolescents jump from the top of the rocks and dive into the river, facing the currents to reach calm water, highlighting the strong link of the Pareci with the water and nature.

In the Wazare tribe village, created for tourists, as well as in the Quatro Cachoeiras tribe village, the touristification of the place occurs in order to attend to the tourists through the construction of spaces destined to receive them, performing simulations of cultural rituals, and the sale of handicrafts. We agree with Almeida (1998) when he realizes that the tourist place is an invention “for and of tourism, an invention engendered within an expectation fed by fantasy, by the search for action, nostalgia and exoticism”.



Image 4 – Native Brazilian in traditional dress by the banks of the Sacre river - Quatro Cachoeiras Tribe Village. *Source: Zuleika Arruda*



Image 5 – Pareci Children: swimming in the river. Quatro Cachoeiras Tribe Village. *Source: Zuleika Arruda*

Nonetheless, while the Wazare tribe village is a place for tourists, created to be a stage for representations and images for tourists, the Quatro Cachoeiras Tribe Village characterizes itself as a hybrid space, marked by the daily dynamics of the living and existential space of this social group and of the representations of their culture for tourists. It also includes a differentiated scale in the form of organization and commercialization of indigenous handicrafts and cultural manifestations, since that the products and prices have been created within the logic of the capitalist market.

The Salto do Utariti tribe village, also part of the tourist Pareci Route and lead by the Chief Orivaldo Koremazokae, is located by the banks of the Papagaio river. In their territory there are records of Marechal Rondon’s passage (1907 to 1915), as well as of the Jesuit Missions (between 1940 and 1970); and as an example, it is the Pareci group that suffered most with the impact of the “acculturation”. It was in this territory, during the first half of last century, from 1906 to 1945, that the Marechal Cândido Rondon came through and installed the telegraph line.



Image 6: Utiariti Tribe Village  
Source: Zuleika Arruda



Image 7: Utiariti Tribe Village - Wooden and brick houses  
Source: Zuleika Arruda

The *modus vivendi* that prevails is one of a contemporary society, represented by the alteration of the standard housing (a predominance of wooden houses), by consumption patterns, and the insertion of contemporary economic activities through the use of their lands for the planting of soybeans. An interesting fact, which has been analyzed, is that in the speech given by Chief Orivaldo Koremazokae, he emphasizes that his group represents the “contemporary native Brazilians” and that the “native Brazilians of the past and their original culture” can be seen in the Wazare tribe village, created for this end.

The participation of this community in the tourist route occurs through the commercialization of the natural attractions available in their territory. The existing natural potential, for instance, the Salto do Utiariti waterfall, with its 98 meters of height – a sacred place for the native Brazilian with its historical and mythical value -, has converted itself into a product for adventure tourism. In this tribe village, the commercialization of the handicrafts has not been developed to any great extent, emphasizing more the natural resources than the cultural ones, and beginning to model new territorialities and identities though the practice of nature tourism.

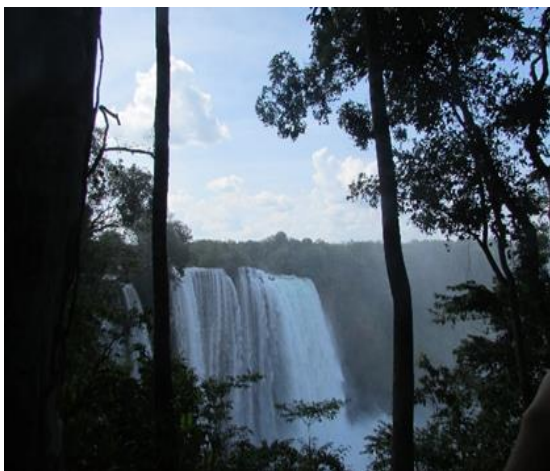


Image 10 : Salto Utiariti waterfall  
Source: Zuleika Arruda

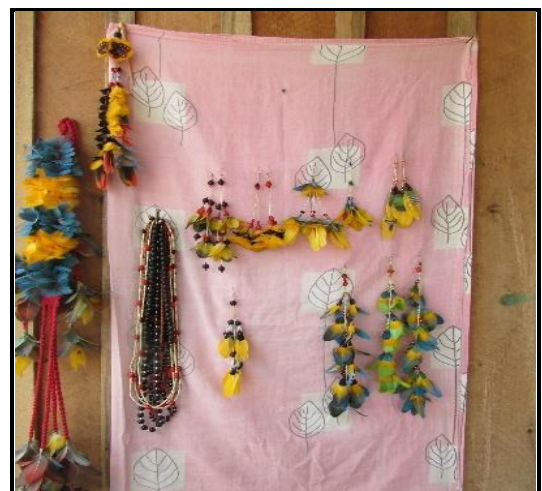


Image 9: Handicrafts of Utiariti Tribe  
Source: Zuleika Arruda

Although they present different temporalities and territorialities, the Wazare, Quatro Cachoeiras and Salto do Utiariti tribal villages are part of the “Pareci Circuit”, created in partnership with the Economic Development Department of the State and the Culture and Tourism Department of Campo Novo dos Parecis, the tourist *trade* and some native Brazilian leaders, focusing the practice of ethnotourism as an economic alternative for these peoples.

[...] grande expectativa gira em torno do aproveitamento ecoturístico das aldeias indígenas da região. São no total 2.826 quilômetros quadrados de áreas protegidas, formando as reservas de Bacaval, Seringal, Bacaiuval e Sacre II [...] A atual administração municipal quer adotar o ecoturismo como política econômica, voltada especialmente para a sobrevivência das populações indígenas. Campo Novo do Parecis tem uma nação indígena predominante na região: os Pareci, totalizando 202 índios em quatro aldeias locais. Os povos vivem em perfeita harmonia com a população da cidade. O turismo indígena em suas áreas é uma das alternativas econômicas para melhorarem a sua qualidade de vida e alimentação mantendo suas tradições dentro de um etnodesenvolvimento sustentável. O turismo indígena já está em fase de estudos pela Prefeitura e órgãos públicos ligados à questão indígena. Suas áreas estão totalmente conservadas e possuem inúmeros atrativos turísticos (CAMPO NOVO DO PARECIS: GUIA TURÍSTICO, 2015)<sup>28</sup>

The commercialization of tourism in these territories happens through the partnership with CNP Tourism, a tourist agency responsible for the scheduling of the community and organization of the tours and other activities undertaken in the indigenous territory, such as “bike riding in nature”, educational visits, etc. The company sells tourism packages and passes part of the profit on to the visited community, the latter being responsible for the reception of tourists.

Being indigenous territory, visits are only allowed with authorization of the National Indian Foundation (FUNAI) and compliance with some visitation norms, such as the prohibition of removing any material from indigenous lands, taking and publishing of images without prior authorization, and disclosing techniques or traditional indigenous knowledge. It is also forbidden for the visitors to drink alcohol on indigenous lands, fishing, hunting or performing any activity linked to extractivism.

Even though Normative Instruction No. 03/2015, ordered by the president of the National Indian Foundation (FUNAI), which establishes norms and guidelines concerning visitation activities for tourism on indigenous lands, ethnotourism or indigenous tourism - as a mode of

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<sup>28</sup> [...] great expectations revolve around the ecotourism performance of the tribal villages of the region. They total 2.826 kilometers of protected areas, forming the reserves of Bacaval, Seringal, Bacaiuval e Sacre II [...] The current municipal administration wants to adopt ecotourism as an economic policy, especially oriented to the survival of the indigenous populations. Campo Novo dos Parecis has a predominant indigenous population in the region: the Parecis, totalling 202 native Brazilians in four tribe villages. The peoples live in perfect harmony with the population of the city. Indigenous tourism in their areas is one of the economic alternatives to better their quality of life and food supply, keeping their traditions within sustainable ethnodevelopment. Indigenous tourism is already in the study phase at the City Council and public bodies associated with indigenous matters. Their areas are totally protected and have various tourist attractions (CAMPO NOVO DOS PARECIS: TRAVEL GUIDE, 2015, our translation)

tourism managed by the native Brazilians - is not yet recognized by specific public policies in definite terms, and under the condition of a segment of Brazilian tourism, it does not have any regulations either (BRASIL, 2004). Concerning ethnotourism, Brazilian legislation, through Decree No. 7.747, on 05/06/2012, establishes that we should:

Apoiar iniciativas indígenas sustentáveis de etnoturismo e de ecoturismo, respeitada a decisão da comunidade e a diversidade dos povos indígenas, promovendo-se, quando couber, estudos prévios, diagnósticos de impactos socioambientais e a capacitação das comunidades indígenas para a gestão dessas atividades.<sup>29</sup>

The implantation of tourism in the Paresi-Halíti Indigenous Reserve represents a “hope” and an economic alternative to the problems that these people face, due to capitalist expansion in rural areas, such as in agribusiness. The existential territories of survival of the Paresi are being swallowed by the “dragon called agribusiness”, where species of plants and animals are disappearing and rivers are being polluted by pesticides. Together with these natural resources, the subsistence base of these peoples has been exhausted.

In the face of the potential of the existing natural attractions in their territory (around 80% of the “Pareci Circuit” attractions are inside the indigenous reserves), as well as the cultural singularity of this people, the tangible and intangible cultural heritage is transformed and (re)defined to enter in the circuit of products, turning it into the raw material for a competitive and marketable tourist product.

The commercialization of the indigenous image and culture occurs with the invention of customs not belonging to the traditional culture - fruit of the capitalist dynamics that always demands new products for the market in which it works - and with the touristification of the place, which introduces an infrastructure that mischaracterize the inhabited environment by the tribal community. The community reinvents itself, forming an artificial population as it has been modified or (re)defined to attend to the demands of tourism.

The “(re) signification” and/or “(re) invention” (HOBBSAWM e RANGER, 2006) of a reality or desirable practices of the local community - involved in the cultural process, under the eyes of the cultural consumer, in this case, the tourist - aims to revitalize, reproduce, and turn it into a mischaracterized, faked, and over the years forgotten context.

### **3. Ethnotourism: (re) invention of the culture, appreciation of the indigenous culture or economic alternative?**

Tourism in indigenous lands, despite being an activity still in its regulation phase, has awakened the interest of some indigenous communities, as well as that of tourism operators and companies, which see it as a promising segment to obtain profit. From the main social agents, the native Brazilians, the process is controversial, as some indigenous representatives urge caution in the standardization and implementation of the tourist activities in their

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<sup>29</sup> Support sustainable indigenous ethnotourism initiatives and ecotourism, respecting the community’s decision and the diversity of indigenous peoples, promoting, when it is fitting, prior studies, diagnostics of socioenvironmental impacts, and the empowerment of these indigenous communities for managing these activities. (BRAZIL, 2004, our translation).

territories. On the other hand, there is a clamor from other leaderships, who see tourism as an alternative of economic and cultural survival for their people.

Tourism in indigenous land or ethnotourism, when planned, represents an important fomenting tool of social inclusion of the indigenous populations through the development of sustainable economic activities, encouraging the fight for appreciation of the culture and the indigenous identity's self-affirmation. According to the United Nations (1986), indigenous peoples and nations are:

[...] aquelas que, contando com uma continuidade histórica das sociedades, anterior à invasão e à colonização em seu territórios, consideram a si mesmas distintas de outros setores da sociedade, e estão decididas a conservar, a desenvolver e a transmitir às gerações futuras seus territórios ancestrais e sua identidade étnica, como base de sua experiência continuada como povos, em conformidade com seus próprios padrões culturais, instituições sociais e sistemas jurídicos.<sup>30</sup>

During the process of Brazilian territorial formation, these peoples who were stripped of their lands, excluded and marginalized in Brazilian society, are currently, in search of recognition and awareness of their role in national society by fighting for their rights and identity. The “primitive, barbarian and savage” stigma, acquired by these peoples throughout Brazilian history, and which in turn, marginalized them in society, nowadays turns it into a valuable product through the tourism activities. The native Brazilians came to be considered and perceived as peoples who bear traditional and cultural knowledge, as well as models of the subject of a harmonious relation between man and nature.

Tourism interest values the *modus vivendi* of the native Brazilians, their social organization, customs, traditions and beliefs, as well as the natural attractions of the place where they live, occupy and explore, for they present a great scenic beauty and unique landscape. The appreciation of this culture, conceived by the market as “exotic”, responds to the construction of a modern social notion that searches to reveal a culture considered “autochthonous”. This culture, permeated by cultural and environmental values, and myths that are not part of contemporary society, becomes precious raw material for the creation of a marketable and competitive tourist product at an international level. In search of attending the expectations of this market niche, both the tourism trade and the native Brazilians, prepare the territory for tourism and/or (re) signify the culture to attend the prevalent capitalist logic.

Thus, traditional culture becomes cultural capital, needed for the legalization of the right of access to land, for the acquisition of institutional support that attends to the immediate needs of these communities, as well as an economic alternative through the insertion of tourism in their territory. New territorialities start being built as a result of an overvaluation of the cultural space to the detriment of the daily living space by the inhabitants, by the spectacularization of the culture and traditions, whose timing of festivities is not done

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<sup>30</sup> [...] those that, taking into account a historical continuity of the societies, prior to the invasion and colonization of their territories, consider themselves distinct from other societal sectors, and are determined to preserve, develop and transmit to future generations their ancestral territories and ethnic identity, based on their continued experience as peoples, according to their own cultural patterns, social institutions and judicial systems.( UNITED NATIONS, 1986, our translation)

according to their daily or cultural practices, but previously scheduled to attend the demands of tourism.

The time that prevails is the one commanded by the capitalist logic of tourism, where the daily practices of these groups are frozen to give place to a new temporality demanded by the tourism activity, i.e., the community begins to live a (re)invented temporality of going back in time by performing cultural practices of their ancestors. In search of the appreciation of the indigenous cultural authenticity built in the imagination of the contemporary society, it's (re) created a mythical scenery to the representation of the cultural practices in which the native Brazilians become actors in their own culture, as in the case of the Wazare and Quatro Cahoeiras tribe villages.

On one hand, the tourists turn into mere spectators of the standardized cultural performance presented by the native Brazilians, characterized by the standardized clothing and costumes used by different ethnicities, differentiated in the tribal villages only by color; making clear the cultural uniformity and loss of originality marked by the production and existence of an exotic and attractive outfit before the eyes of the tourist.

On the other hand, in the experience lived by the Utiariti tribe village, which is part of the Pareci Ethnotourist Route - where the population does not dress like their ancestors or as imagined by the visitors (like thongs, collars, body paintings, etc.), nor do they have a schedule of representation of cultural manifestations, but live a typically modern lifestyle -, there was a notable manifestation of disappointment; as the expectations of the visitors was to find a stereotypical version of the indigenous *modus vivendi* sold by the media and/or built in the social imagination throughout the history of our country.

Ethnicity that has been (re)built by the indigenous peoples becomes the place from where identities emerge, which are capable of enabling participation and interaction with tourism, being the result of the orchestrated relations in the context of globalization.

Through globalization, the process of cultural construction becomes increasingly broader, suffering influences from all parts of the world, whether through communication media, interaction between the subjects, or tourism, among others (ORTIZ, 2000); since in the dynamic evolution of people, traditional cultures are not static or stagnant in time, and these peoples, as well as in all society, are in constant change, joining the development of world trends, without disregarding their identity, traditional values and ethnic otherness.

Therefore, following the trends of globalized capitalism, a process of (de) territorialization and (re) territorialization, as well as of (re) construction of the ethnicity now occurs in these social groups, where some cultural traits become common to different cultures, leading them to a fragmentation of identity. However, these cultural traits do not mischaracterize a culture, but rather, start being a part of it, ending up by becoming characteristic and unique. It is important to consider that the (de) territorialization is not restricted only to the exclusion of the access to land as a means of (re)production and subsistence, but it also reaches out at a cultural and symbolic level, i.e., it occurs in the loss of territorial references of their cultures that are fundamental to their ethnic affirmation, as well as to the construction of a differentiated multicultural milestone in the much-vaunted globalized world.



Image 10: Singing and dances “zero” and “sulano” - Quatro Cachoeira Tribe Village.  
 Source: Wagner Augusto



Image 11: Native Brazilians in typical clothing - Wazare Tribe Village.  
 Source: SEDTUR

Ethnotourism starts using ethnicity, searching a set of symbols in the past that are updated in the present; its ideological perspectives work by allowing a local identity, for instance, the Paresi one. The (re) construction of this ethnicity and the changes that have occurred join a produced stereotypical image regarding these peoples, of which the market takes over to turn it into a product, and which the native Brazilians transform into cultural capital to insert themselves in this society that has always excluded them: the capitalist one.

### Conclusions

We understand that ethnotourism can potentialize the rescue and appreciation of culture, without necessarily spectacularizing the authenticity of these peoples' culture, but contributing to its (re) insertion into the work market by the maintenance of its traditional trades, for instance, handicrafts, and helping communities to maintain themselves in a sustainable manner through the tourism-generated income.

The trading of these handicraft products can become an embryo of economic autonomy, as these groups are taking control of their sales, once controlled by the entrepreneurs of the tourism sector that, many times, channeled the profits to themselves, with little participation of the native Brazilians. In this respect, tourism can be a fomenting way of social inclusion of the indigenous populations, for income generation; they can then minimize the impacts and control their resources in a sustainable manner.

The danger of the spectacularization of the culture through indigenous presentations, destined for tourists, resides in the possibility of it not improving the sociocultural conditions of the community, or (re) producing the exploitation pattern of these peoples by the creation of packages and services arranged and commercialized by tourism agencies, whose sole aim is



the obtaining of profit through the commercialization of these peoples' culture and/or the monopolizing and controlling of this market niche.

(Re)production and reinvention are also means developed by the native Brazilians to revitalize, make known and even "commercialize" their culture, as in the tourist attractions that foment the *tourism in indigenous territories*. From this point it is possible, in sequence, to understand the ways that are found to promote the maintenance of the cultural traditions. On the other hand, if the ethnicity is (re)invented for tourism purposes through the spectacularization of the culture, it can also contribute to the recuperation of the collective memory of this social group, as well as provide the knowledge and the appreciation of the cultural heritage by younger generations.

In this context, the participatory planning with tourism purposes in these territories, should prioritize the respect and care regarding the sociocultural values of these groups, comprehending their territorialities and the level of relationship with capitalist society, aiming for the non-mischaracterization of the culture and making them the effective protagonists of economic projects of a sustainable character in their territories; i.e., that tourism contributes in an effective manner to the management of the natural resources and ensures to these peoples quality of life, as well as economic and political autonomy.

The tourist route called by the local tourism market the "Pareci Circuit" enables tourists to have contact with nature through ecotourism and different territorialities and temporalities experienced by these peoples in contemporary society. And far from having a romantic look toward these social groups, thinking they would be out of reach of the claws of capitalism, exploited and marginalized, we can infer that they, realizing and capturing the dynamics of contemporary capitalist society, insert themselves into this logic through ethnotourism, as a mean of economic and sociocultural survival.

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# Museus e paisagens culturais. Controvérsias da turistificação dos espaços

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## Resumo

Em 2012, a cidade do Rio de Janeiro foi inscrita na categoria Paisagem Cultural, na Lista do Patrimônio Mundial da Unesco. O registro indica que sítios de valor misto excepcional devem ser objeto de processo contínuo de conservação, posto que são locais de interesse universal. Entretanto, algumas controvérsias podem ser identificadas a respeito da paisagem cultural carioca oficializada, como a exclusão das representações das favelas que compõem a formação socioespacial da cidade. Como a paisagem cultural é um processo dinâmico de sobreposição de tempos e espaços, a paisagem cultural do Rio também se modifica, na medida em que a cidade passa por processos de reestruturação. O Projeto de Revitalização Porto Maravilha possibilitou a conformação de uma área propícia a receber novos investimentos, sobretudo do setor turístico. A criação de empreendimentos culturais na região portuária, tais como o Museu do Amanhã e o Museu de Arte do Rio, representou importante centralidade urbana, atraindo grande quantidade de turistas. Este artigo reflete acerca das controvérsias da criação de novos museus inseridos em processos de “urbanização turística”, que corroboram para a formação de paisagens culturais esteticamente homogêneas e turistificadas, chamadas de “paisagismo cultural”.

## Palavras chave

Museus; Paisagem Cultural; Turistificação; Paisagismo Cultural.

## 1. Introdução

Este artigo é parte dos trabalhos realizados pelo Núcleo de Estudos e Pesquisas sobre Turismo e Museus, uma das linhas de atuação do Grupo de Pesquisa Turismo, Cultura e Sociedade (T-Cult), vinculado ao Programa de Pós-Graduação Stricto Sensu em Turismo da Universidade Federal Fluminense (PPGTUR/UFF). Entre as temáticas desenvolvidas pelo Núcleo, encontram-se a qualificação dos museus para o turismo, os processos de turistificação dos museus, a hospitalidade em museus, a gestão de museus para o turismo, e a relação entre os museus, o território e as paisagens culturais.

Para tanto, tem-se adotado o pressuposto da antropologia simétrica de Bruno Latour (2000), para quem as controvérsias funcionam como porta de entrada, por onde se pode começar um estudo, partindo de um momento oportuno. Considera-se que a realização do Grupo de Trabalho Território, Rotas Turísticas e Paisagens Culturais, no 5º Congresso Unesco Unitwin – Turismo, Cultura e Desenvolvimento colaborou para que pudessem ser destacadas questões acerca dos processos de requalificação das cidades que conformam territórios turísticos, em que os museus desempenham papel fundamental de atração de público turista e de outras categorias de visitantes.

Em consonância com as temáticas propostas pelo Comitê Internacional de Museus (ICOM), e adotadas pelo Instituto Brasileiro de Museus (IBRAM) em comemoração ao Dia Internacional de Museus, em 2016 e 2017 – cujos temas foram respectivamente “Museus e Paisagens

Culturais” e “Museus e Histórias Controversas: dizer o indizível em museus” – foi possível adotar uma perspectiva crítica a respeito de novos museus e paisagens culturais atrelados aos processos de turistificação, que fazem emergir controvérsias, no que se refere à interação dos museus com o espaço em que estão inseridos, e às diferenças entre o que se considera paisagem cultural e “paisagismo cultural”<sup>31</sup>.

Adota-se como objeto de estudo a Cidade do Rio de Janeiro, levando-se em consideração o título de Paisagem Cultural do Patrimônio Mundial, por ela recebido, em 2012, da Unesco – Organização das Nações Unidas para a Educação, a Ciência e a Cultura; as transformações pelas quais a cidade passou no decorrer dos séculos XIX e XX; e a recente reestruturação da região portuária da cidade, que vem-se apresentando como preponderante espaço turístico, e onde os museus desempenham papel de destaque. Por fim, são mapeadas algumas controvérsias que podem colaborar para se pensar criticamente a relação entre o turismo e os museus, na conformação da paisagem ou de um paisagismo cultural na cidade.

## **2. Rio de Janeiro: Paisagem Cultural do Patrimônio Mundial**

A Unesco contém 88 localidades inscritas na categoria Paisagem Cultural na Lista do Patrimônio Mundial, entre as quais, o Brasil figura com o “Conjunto Moderno da Pampulha”, registrado em julho de 2016, e com as paisagens culturais cariocas<sup>32</sup>, inscritas em julho de 2012 (<http://whc.unesco.org/en/culturallandscape/>). Esta categoria vem sendo reconhecida pela Organização desde 1992 e é atribuída aos sítios de valor cultural e natural e às interações criativas e significativas entre o homem e o ambiente natural.

A candidatura do Rio, aprovada pela Organização no Comitê do Patrimônio Mundial, reunido em São Petersburgo, na Rússia, na data anteriormente citada, propõe como temática o valor patrimonial da formação das sociabilidades cariocas, que se criaram em meio a configuração geográfica da cidade. O dossiê de candidatura elaborado, intitulado “Rio de Janeiro: Paisagens Cariocas entre a Montanha e o Mar”,

...considera que paisagens culturais urbanas se caracterizam pela complexidade de elementos naturais e antropológicos. No caso do Rio de Janeiro, a diversidade do sítio natural em que a cidade cresceu teria produzido uma variedade de paisagens culturais, em que a relação entre a montanha e o mar foi fator preponderante. A cidade e as sociabilidades foram constituídas entre estes dois elementos naturais, conformando e conformada por eles, em tempos históricos distintos. (Magalhães, 2013: 11).

Dos critérios adotados na delimitação da Paisagem Cultural do Patrimônio Mundial, no Rio, foram considerados: as paisagens inovadoras que representam o intercâmbio entre ideias científicas, o ambiente e o *design*, que marcam uma fusão criativa entre natureza e cultura; assim como, as paisagens que desde meados do século XIX disseminam uma imagem de grande reconhecimento mundial: a concepção do Rio de Janeiro como uma das cidades mais belas do mundo (<http://whc.unesco.org/en/list/1100>).

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<sup>31</sup> “[...] A paisagem cultural, ao passar pelo processo de turistificação, que irá envolver a transformação de uma localidade em um destino turístico, não deve resumir-se a uma maquiagem ou adorno, que tornem apenas o espaço belo e atrativo, tal como num “paisagismo” alienado dos processos socioculturais e socioambientais.” (GODOY, 2016).

<sup>32</sup> O uso do termo carioca é empregado quando se faz referência àquele ou àquilo com origem na cidade do Rio de Janeiro.

Neste sentido, foram entendidas como Paisagens Culturais, as zonas tampão e de amortecimento, conforme a Figura 1, abaixo: Setor 1 - Floresta da Tijuca (A) e Pretos Forros e Covanca (B); Setor 2 - Pedra Bonita e Pedra da Gávea (C); Setor 3 - Serra da Carioca (D) e Jardim Botânico (E); e Setor 4 - Entrada da Baía de Guanabara e Parque do Flamengo (F), Fortes de Niterói (G), Monumento Natural Pão de Açúcar (H) e Praia de Copacabana (I). As zonas A, B, C e D enquadram o Parque Nacional da Tijuca.

As regiões elencadas foram consideradas significativas, pois representam a paisagem cultural urbana, em que a natureza se relaciona com elementos materiais e imateriais da cultura, conformando espaços (Santos, 2008) de valor excepcional. Estão incluídos lugares mundialmente renomados, reconhecidos no mercado turístico internacional, como por exemplo: o Pão de Açúcar, o Morro do Corcovado e a estátua do Cristo Redentor, e o calçadão da Praia de Copacabana. Também foram consideradas as manifestações culturais características da cidade, tais como o surgimento do samba, da bossa nova e dos principais times de futebol carioca – Flamengo, Vasco da Gama, Fluminense e Botafogo – considerado uma paixão nacional (Ribeiro, 2016).

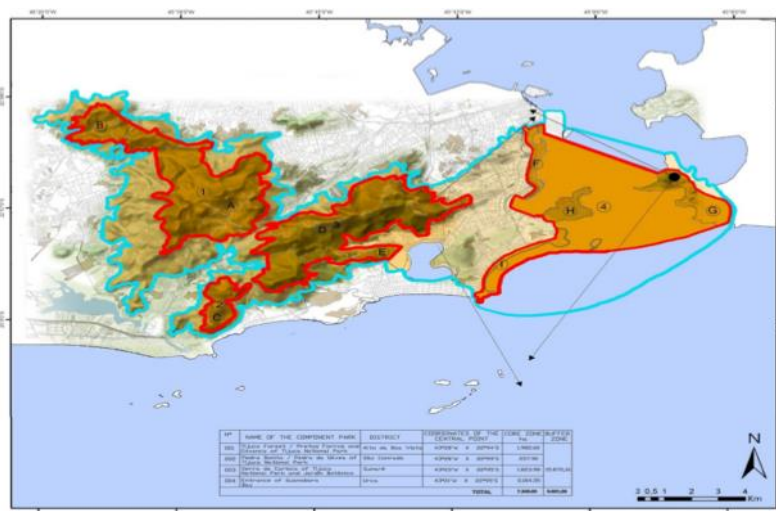


Figura 1 – Mapa do Sítio.

Fonte: [http://portal.iphan.gov.br/uploads/ckfinder/arquivos/Plano\\_de\\_Gestao\\_versao\\_ingles\\_candidatura\\_RIO\\_2014.pdf](http://portal.iphan.gov.br/uploads/ckfinder/arquivos/Plano_de_Gestao_versao_ingles_candidatura_RIO_2014.pdf).

O Plano de Gestão, anexo ao Dossiê “Rio de Janeiro: Paisagens Cariocas entre a Montanha e o Mar”, faz menção a locais de alcance na linha visual, embora se encontrem fora do mapa das zonas delimitadas: a Praça XV de Novembro, o Mosteiro de São Bento e o Morro da Conceição, localizados na região central da cidade ([http://portal.iphan.gov.br/uploads/ckfinder/arquivos/Plano\\_de\\_Gestao\\_versao\\_ingles\\_candidatura\\_RIO\\_2014.pdf](http://portal.iphan.gov.br/uploads/ckfinder/arquivos/Plano_de_Gestao_versao_ingles_candidatura_RIO_2014.pdf)). Vale ressaltar que, na época da candidatura, o centro da cidade, em especial a zona portuária, passava por processos de remodelação, dentre os quais o Projeto de Revitalização Porto Maravilha (Figura 2), na região supracitada. A inscrição desta área da cidade no Dossiê impossibilitaria a quase total remodelação do sítio. A área demarcada em amarelo, na Figura 2, representa uma parte da região não contemplada no Plano de Gestão na Figura 1 (área superior da imagem, na localidade entre a Baía de Guanabara e as imediações da linha azul).



Figura 2 – Área de Especial Interesse Urbanístico (AEIU) da Região Portuária do Rio de Janeiro.

Fonte: <http://portomaravilha.com.br/portomaravilha>.

A candidatura de cidades como o Rio de Janeiro à categoria Paisagem Cultural na Unesco é considerada relevante, pois não representa apenas uma chancela ou título de beleza. De acordo com Ribeiro (2016), a inscrição na Lista do Patrimônio Mundial da Humanidade firma um compromisso de conservação e preservação para o desenvolvimento sustentável, que deve atender às diretrizes estabelecidas pelo Comitê da Organização. Além disso, os Estados-parte, com bens inscritos na Lista do Patrimônio Mundial, podem contar, salvo as devidas limitações, com auxílio do Fundo do Patrimônio Mundial para ações de preparação, conservação e preservação dos bens patrimoniais.

(<http://www.unesco.org/new/pt/brasil/cultura/world-heritage/heritage-legacy-from-past-to-the-future/>).

Todavia, não se pode deixar de considerar a relevância do título de Paisagem Cultural do Patrimônio Mundial para a atratividade turística de destinos, tal como a rubrica de ser uma das Sete Maravilhas do Mundo Moderno, em que se encontra o Cristo Redentor, do Rio de Janeiro. Deve-se refletir sobre até que ponto estas chancelas não corroboram também para a formação de paisagens turstificadas (Godoy, 2016), por meio de projetos de modernização e requalificação da cidade.

### 2.1. Mapeando controvérsias da Paisagem Cultural Carioca

Pode-se considerar que a Paisagem Cultural do Patrimônio Mundial no Rio espelha, em certo sentido, a formação e transformação da cidade nos últimos 450 anos. A modernização, estetização e higienização (Tomé, 2008; 2013), referentes aos séculos XIX e XX, fizeram do Rio de Janeiro, na época capital do Brasil, a vitrine nacional.

Embora necessária, a reestruturação da cidade contou não apenas com o aterramento de áreas alagadiças, a criação de redes de abastecimento de água e o desenvolvimento dos transportes. Houve a construção de novos e grandes bulevares, parques e avenidas – que como indica Tomé (2008), deram ares europeus à cidade –, a efetivação da modernidade na Paris dos Trópicos (ou Cidade Maravilhosa, como veio a ser conhecida) se deu por meio do desmonte do Morro do Castelo<sup>33</sup>.

<sup>33</sup>Sítio histórico em que a cidade do Rio de Janeiro se fundara. Era um local de construções antigas, feias e deterioradas, aonde viviam desocupados, prostitutas e malandros. Embora sua localização impedisse a circulação de ar – representando o seu desmonte uma questão de saúde pública – o morro incomodava, sobretudo, a elite carioca que já não queria um espaço de terreiros de macumba, prostíbulos e pessoas carentes, próximo à área mais

Segundo o antropólogo brasileiro Antonio Risério (2012), o processo de urbanização no Brasil esteve, em grande medida, atrelado à concepção de transformação da sociedade brasileira. A utopia de que a reestruturação do espaço urbano significaria um instrumento de mudança social: um ideário que marca, sobretudo, o urbanismo modernista do século XX. Os projetos de urbanização das cidades buscavam, por meio do embelezamento e higienização do espaço urbano, modificar a estrutura social do país.

Contudo, “... a construção de uma utopia urbana nunca implicou, necessariamente, transformação social e cultural” (Risério, 2012: 293). Para o autor, o que se obteve como resposta, como se vê no caso do Rio, foi a intensificação de um processo de segregação socioespacial – *apartheid* social – com o desmonte do Morro do Castelo e derrubada dos cortiços na região central da cidade. Desse modo, cresceram não apenas o número de moradores na favela, mas também a quantidade de favelas do Rio de Janeiro.

A paisagem cultural, que se formou segundo essa dinâmica, enfatiza os contrastes entre a Cidade Maravilhosa e a formação das favelas nas sinuosidades da topografia carioca. É neste sentido que se considera que as Paisagens Culturais do Patrimônio Mundial no Rio espelham, em certa medida, o processo de modernização da cidade, posto que, em sua candidatura, também exclui a formação das favelas da categoria Paisagem Cultural. Este é um ponto controverso, uma vez que se propõe englobar as sociabilidades conformadas entre a montanha e o mar. Magalhães (2013) aponta que o Rio de Janeiro optou por excluir as favelas, mesmo após a indicação do Comitê da Unesco acerca da possibilidade de inclusão.

Outro ponto que, embora positivo se torna controverso, é a publicação da Unesco em parceria com a Editora Brasileira acerca das Paisagens Culturais Cariocas. O livro, com autoria de Rafael W. Ribeiro, publicado em 2016, carrega título similar à candidatura do Rio à Paisagem Cultural do Patrimônio Mundial: “Rio de Janeiro – paisagens entre a montanha e o mar”. No texto que apresenta<sup>34</sup> a obra, tem-se:

No início do século XXI, a cidade do Rio de Janeiro iniciou a organização para sediar grandes eventos internacionais: os Jogos Mundiais Militares em 2011, a Jornada Mundial da Juventude em 2013, a Copa do Mundo de Futebol da Fifa em 2014 e, em 2016, os Jogos Olímpicos e Paralímpicos. Esses eventos são reveladores de um desejo de se firmar como uma metrópole contemporânea e uma cidade mundial. Para esse objetivo, a cidade se transforma.

Na região portuária, um intenso programa de requalificação urbana transforma uma gigantesca área rica em história e manifestações culturais, onde torres envidraçadas vão surgindo aos poucos, convivendo com um importante patrimônio cultural. Um novo sistema de transporte procura dar sustentação a novas e mais eficientes formas de circulação e de integração urbana. Vias elevadas para carros são derrubadas, e novos bulevares de pedestres procuram devolver partes da cidade à escala dos cidadãos, e assim transformam sua paisagem e a forma de se relacionar com ela.

Pois é exatamente essa paisagem que confere o caráter único à cidade. Se o Rio de Janeiro, como várias outras cidades do mundo, deseja um processo de

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valorizada da cidade, a Avenida Rio Branco. (TOMÉ, 2008).

<sup>34</sup>A abertura do livro é de autoria de Pedro Fernandes Saad da Editora Brasileira.



modernização, também precisa garantir e exaltar sua paisagem, que lhe confere identidade e é o seu maior capital. (Ribeiro, 2016: 50)

Positivamente, esta passagem parece demonstrar a concepção de paisagem cultural como categoria de estudo da geografia cultural, percorrendo acerca de sítios além da inscrição como Paisagem Cultural do Patrimônio Mundial. Ao publicar esta obra em parceria, a Unesco reconhece que as paisagens culturais compõem processos dinâmicos de sobreposição de tempos e espaços, considerando sítios fora da Paisagem Cultural Carioca “oficializada”.

Contudo, há um apelo do Rio como metrópole contemporânea que estabelece diálogos diretos com os interesses do turismo, em especial, com a realização dos megaeventos – esportivos e religioso – citados no trecho. A cidade, então, transforma-se para atender às demandas externas e se colocar mais atrativa, não apenas para sediar eventos, mas também para receber novos investimentos. Assim, a paisagem cultural é “seu maior capital”.

Ao falar do processo de transformação da paisagem no tempo, Ribeiro (2016: 60) comenta que

... no início do século XXI, a área portuária mais uma vez é alvo de um dos maiores projetos de requalificação urbana da cidade, o chamado Porto Maravilha. Com a vista para o mar fechada por um grande viaduto construído nos anos 1960, sua implosão e seu desmanche marcam a volta da valorização da relação dessa parte da cidade com o mar. Projeto de requalificação dividido em várias vertentes, o Porto Maravilha tem como objetivo trazer novamente a população para aquela área, pela instalação de novos equipamentos culturais, como museus, pela construção de bulevares para pedestres, e também pela atração de empreendimentos de edifícios corporativos e residenciais. (Ribeiro, 2016: 60).

Mais uma vez a região portuária é apontada como uma importante paisagem cultural para a cidade, lugar de novas sociabilidades marcadas pela ocupação do espaço urbano por parte da população para usufruir dos novos museus e bulevares. O potencial da região para atrair novos investimentos – relativos aos setores imobiliário e corporativo – também é mencionado.

O Projeto de Revitalização Porto Maravilha, no contexto dos megaeventos que foram sediados pela cidade, inseriu novos agentes sociais – sobretudo a figura do turista<sup>35</sup> – na região portuária, que até então passava por processo de obsolescência. De acordo com Ferreira (2014), a desvalorização e requalificação das regiões portuárias se apresenta como um fenômeno das cidades contemporâneas, conformando-se em sítios propícios para a criação de espaços culturais, investimentos turísticos e imobiliários. A reformulação desses sítios urbanos acompanha, muitas vezes, uma promoção da cidade (*city marketing*) como cartão-postal, espaço ideal para bons investimentos (Ferreira, 2014).

Ao se relacionar com as cidades, o turismo cria territórios e territorialidades – territórios sem turismo; turismo sem território; e territórios turísticos (Fratucci, 2000). No caso do Porto

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<sup>35</sup>Cabe ponderar que na região portuária está localizado o Píer Mauá, local de embarque e desembarque de turistas que viajam em cruzeiros. Contudo, devido ao relativo abandono da região até tempos recentes, os turistas não circulavam livremente pelo sítio. Após a requalificação da área, exercícios de observação realizados por pesquisadores e alunos de iniciação científica do Núcleo de Estudos e Pesquisas sobre Turismo e Museus vinculado ao Grupo de Pesquisa Turismo, Cultura e Sociedade (T-Cult) mostram que é recorrente a saída de turistas do Pier que se encaminham para os museus, na maioria das vezes, já com os ingressos comprados.

Maravilha, formou-se uma paisagem cultural urbana propícia à adequação de um espaço turístico, a ser apropriado e consumido para e pelo turismo.

Cabe refletir de que modo o turismo colabora com a criação da paisagem da cidade, conformando espaços esteticamente homogêneos ou enfatizando as singularidades locais, o que dialoga com os conceitos de paisagismo cultural (Godoy: 2016) e de paisagem cultural (Caetano e Bezi, 2011), abordados a seguir.

### **3. A “revitalização” da região portuária do Rio de Janeiro: turismo e museus conformando paisagens ou paisagismos culturais?**

A paisagem cultural é o encontro entre o ambiente físico – a paisagem natural intocada – e a ação do homem, que na sua relação com o espaço vivido, a ele agrega valores, sentidos e significados, refletindo uma ética e estética social. De acordo com Caetano e Bezi (2011), a paisagem cultural faz referência ao espaço geográfico em que estão presentes as escolhas e mudanças realizadas pelo homem enquanto integrante de uma comunidade cultural. Tais escolhas estão atreladas às ideologias, aos valores e convenções.

A leitura da paisagem cultural de uma cidade implica reconhecer os códigos culturais materiais e imateriais que a compõem. Trata-se da paisagem natural, dos objetos inseridos artificialmente no espaço, dos sons, dos aromas, da circulação de pessoas e suas vestimentas, do conjunto de crenças e manifestações culturais que permeiam as relações e interações entre o homem e o ambiente, e do sentimento que desperta nas pessoas. (Caetano e Bezi, 2011). Ler uma paisagem cultural é apreender a transformação de uma cultura, percebendo as mudanças que ocorreram no espaço no decorrer do tempo e os jogos de interesses que a elas se relacionam.

O Projeto de Revitalização Porto Maravilha, que engloba a área entre as Avenidas Rodrigues Alves, Rio Branco, Presidente Vargas, Francisco Bicalho e Brasil – importantes avenidas construídas à época do impulso modernizador da cidade, no século XX – possibilitou a constituição de um território turístico. Dentre suas principais potencialidades estão a cercania do circuito histórico cultural da cidade, a localização à porta do Pôr Mauá – por onde embarcam e desembarcam os turistas de cruzeiro –, a implementação do Veículo Leve sobre Trilhos (VLT), que liga o sítio ao Aeroporto Santos Dumont também no centro da cidade, a inauguração do Aquário do Rio e a criação do Museu do Amanhã e do Museu de Arte do Rio (MAR), atrativos turísticos de maior visibilidade na região portuária, sobrepondo, inclusive, a “redescoberta” de locais de valor histórico relacionados à história da escravidão negra no Brasil.

A nova paisagem cultural do Rio – sobretudo no que se refere a criação do Museu do Amanhã (Figuras 3 e 4) e do MAR (Figura 5 e 6) que desempenham uma função de intervenção âncora na cidade – reforça uma proposta de cidade empreendedora que, para Ferreira (2014: 235), estaria em consonância com as aspirações de personagens políticos do Rio, que veem “esses grandes projetos arquitetônicos de grande monumentalidade como alavancadores de investimentos”



Figura 3 - Imagem do Museu do Amanhã, na Praça Mauá, na zona portuária do Rio de Janeiro.  
 Fonte: Ribeiro, 2016.



Figura 4 - Imagem do Museu do Amanhã, na Praça Mauá, na zona portuária do Rio de Janeiro.  
 Fonte: Ribeiro, 2016.



Figura 5 - Museu de Arte do Rio, na Praça Mauá, na zona portuária do Rio de Janeiro.  
 Fonte: <http://visit.rio/>



Figura 6 - Museu de Arte do Rio (sinalizado em vermelho) visto da entrada do Museu do Amanhã.  
 Fonte: <http://visit.rio/>

A criação de novos museus nas cidades está atrelada, na maior parte das vezes, às dinâmicas do turismo, visando principalmente à atração de público e à invenção de outras estéticas paisagísticas. Desse modo, incrementam os destinos turísticos, atendem às demandas do mercado, e, por meio da “urbanização turística”, constroem paisagens turistificadas – “acepção que envolve a ideia de artificialismo e superficialidade, aderida a uma visão estritamente mercadológica”. (Godoy, 2016: <https://www.revistamuseu.com.br/site/br/artigos/18-de-maio/18-maio-2016/238-paisagem-turistificada-os-museus-a-servico-de-um-paisagismo-cultural.html>).

Segundo Dominique Polout (2013), os museus desempenham papel fundamental no ordenamento do território, representando uma centralidade urbana. Conformam, portanto, uma paisagem cultural – simbiose entre natureza e cultura –, atuando em processos de reconfiguração do espaço, de sua forma, função e estrutura (Santos, 1992; Godoy, 2016).

Godoy (2016), ao tratar da paisagem cultural, considera que os espaços apropriados pelo e para o turismo tendem a homogeneizar os aspectos da paisagem, anulando diferenças. Nesse sentido, adota-se estética voltada para a cultura e para o turismo como mercadorias. A crítica não considera as cidades ou destinos turísticos como locais que deveriam permanecer cristalizados, congelados no tempo, fiéis a uma estética ou tradição considerada autêntica,

mas problematiza a “turistificação da paisagem, que vise exclusivamente a atrair cada vez mais turistas”. (Godoy, 2016: <https://www.revistamuseu.com.br/site/br/artigos/18-de-maio/18-maio-2016/238-paisagem-turistificada-os-museus-a-servico-de-um-paisagismo-cultural.html>).

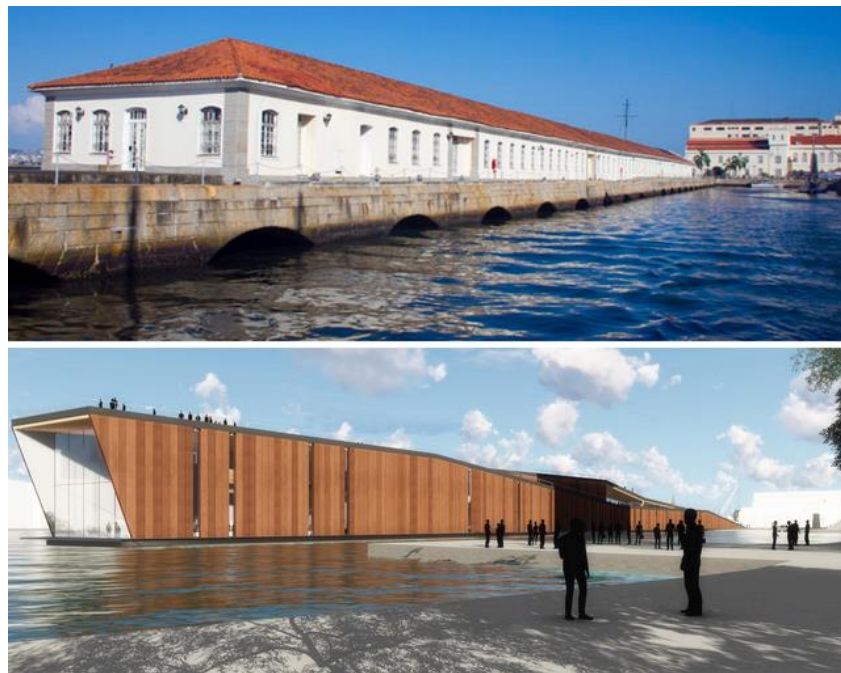


Figura 7 – Atual prédio do Centro Cultural da Marinha (margem superior) e o futuro Museu Marítimo (margem inferior).

Fonte :<http://blogs.oglobo.globo.com/ancelmo/post/marinha-explica-predio-que-dara-lugar-novo-museu-nao-e-historico-mas-de-1996.html>

O recente lançamento do projeto do primeiro Museu Marítimo do Brasil (Figura 7), a ser implementado aonde hoje é o Centro Cultural da Marinha, vizinho à Praça Mauá – em que se localizam o Museu do Amanhã, o Museu de Arte do Rio e o Píer – é exemplo de como a turistificação dos espaços pode levar a processos de homogeneização estética, conformando paisagens turstificadas. Questionada sobre o valor patrimonial do prédio existente no local, que deve ser revestido em aço cortén de coloração acobreada – lembrando a aparência de um navio –, a Marinha alega que o prédio, embora tenha sido construído para se assemelhar à Cordoaria Nacional de Lisboa, é considerado no jargão patrimonial um “falso histórico”. Segundo a nota da Marinha, o projeto visa harmonizar a arquitetura do prédio do Centro Cultural da Marinha, datado de 1996, à estética do Porto Maravilha, de modo a se integrar à paisagem cultural portuária. Durante as Olimpíadas no Rio de Janeiro o Centro Cultural recebeu 97 mil pessoas e vem recebendo uma média de 16 mil visitantes mensais desde então. (<http://blogs.oglobo.globo.com/ancelmo/post/marinha-explica-predio-que-dara-lugar-novo-museu-nao-e-historico-mas-de-1996.html>).

É preciso refletir de que maneira os novos empreendimentos, que visam a gerar e a atender demanda turística crescente, dialogam com o restante da cidade e demais espaços culturais. O site Visit.rio – marca oficial de turismo, que vem sendo adotada por cidades como Londres e Lisboa – indica a possibilidade de roteiros culturais em diferentes localidades da cidade, mas muitos dos espaços que são apresentados como “redescobertos”, na sinopse da página sempre existiram e, embora representassem alto valor patrimonial para o Brasil, permaneciam

esquecidos e desvalorizados. Quais narrativas representam estes espaços e tempos sobrepostos que compõem a paisagem cultural do Porto Maravilha?

Embora as cidades possam maquiar aspectos socioculturais e socioambientais de sua paisagem cultural – dinâmica de turistificação dos espaços da cidade, que envolve a ideia de artificialismo e superficialidade, aderida a uma visão estritamente mercadológica, ao qual Godoy chama paisagismo cultural – o turista contemporâneo vem, segundo Fratucci (2000), buscando novas formas de interação com os destinos que visita, estabelecendo as relações e interrelações sociais no espaço e com as pessoas que nele vivem, conformando, assim, lugares turísticos. Esse, por exemplo, é o contexto no qual as favelas vêm aparecendo como importantes atrativos turísticos das cidades.

Cabe refletir acerca de qual tipo de turismo se pretende oferecer. Se a máxima do turismo é a de que a cidade boa para o turista é a cidade boa para a comunidade local, é preciso repensar as lógicas de homogeneização dos espaços que presam pelo paisagismo cultural de paisagens turistificadas. Igualmente buscar questionar a serviço de quem, de quais interesses sociopolíticos servem os processos de transformação e reprodução cultural dos sítios urbanos, e, mais especificamente, os museus.

### **Conclusões**

A Cidade do Rio de Janeiro passou por intervenções marcadas pelo impulso de modernização, estetização e higienização, nos séculos XIX e XX, que lançaram sobre o Rio e sobre o Brasil os olhares curiosos do turismo. Buscava-se um turismo que admirasse as belezas naturais e monumentais da paisagem urbana construída – orla, avenidas, jardins, parques, monumentos, museus –, um espaço turístico localizado, que chancelasse a cidade como um centro cosmopolita da modernidade: a cidade do futuro.

Como mencionado, parte da paisagem cultural da cidade, que compõe o que se considera Cidade Maravilhosa, teve sua candidatura à categoria de Paisagem Cultural do Patrimônio Mundial aceita em 2012 pelo Comitê da Unesco. Algumas controvérsias foram identificadas na medida em que as favelas, que são parte integrante da constituição socioespacial da cidade, não foram inseridas na categoria. Além disso, em publicação recente da Unesco em parceria com a Editora Brasileira, ganha ênfase a região portuária da cidade quase totalmente remodelada nos últimos oito anos atendendo a uma lógica de cidade empreendedora.

Como os processos de transformação no território não cessaram de acontecer, e a paisagem cultural é dinâmica, conformaram-se novos espaços de sociabilidade na cidade. Atendendo a diferentes interesses, o Projeto de Revitalização Porto Maravilha reestruturou e refuncionalizou a região portuária do Rio. Os novos museus criados neste contexto desempenham um papel de destaque conformando uma nova centralidade urbana, um espaço propício para novos investimentos, em especial, o turismo.

Contudo, a criação dos novos museus, quando inseridos em dinâmicas mercadológicas que visam a atrair maiores quantidades de turistas, pode corroborar para a formação de paisagens turistificadas, de um paisagismo cultural. Neste sentido, a paisagem urbana passa por processos de homogeneização estética, maquiando aspectos socioculturais e socioambientais locais.

Em meados do século XX, o Rio de Janeiro tentava se projetar como cidade do futuro. No início do século XXI, o ideal ainda permanece presente, pensando o Amanhã com base em iniciativas monumentais, que se sobrepõem a patrimônios culturais que merecem reconhecimento internacional.

Se a paisagem cultural das cidades responde a ideologias, valores e convenções que permeiam as lógicas de relação com o espaço, incentiva-se problematizar a que interesses servem as iniciativas de reestruturação e refuncionalização das cidades.

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# **Process and stakes in the touristification of a mountain in difficulty. Argan Biosphere Reserve Heritage in High Western Atlas of Morocco**

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## **Abstract**

The main aim of this research is the comprehension of the process of touristification of rural areas pertaining to a mountain in difficulty in Biosphere Reserve as Human Heritage. Under objectives are two: (1) To analyze the interventions at various levels (by the top and bottom) in rural areas where the actors try to answer a socio-economic crisis by the development of the tourist activity; (2) To confront the various solutions suggested for this development, of which the concept of the tourist Host country, with the reality of ground. In the final, we wondered about the various factors intervening in the process of touristification by privileging the assumption according to which the touristification of a place or a space is not based obligatorily on the however rich potential. This touristification must much with the play of the actors and the glance carried by the tourist who in the final analysis contributes largely to the invention of a tourist destination. The fact of exceeding the factor potentialities and of holding a great place with the play of the actors also made it possible to show that the potentialities of area alone cannot always be at the base of a structuring of a "tourist project area". The choice of tourism in Ida-ou-tanane (part of Western High Atlas of Morocco) finds its justification in the crisis situation which the area saw. Along the contribution of the Geography to the comprehension of the rural tourist area of the High Atlas Mountain made profitable the tools of the area analysis.

## **Keywords**

Rural heritage; Biosphere reserve; area's actors; process of touristification.

## **Introduction**

The development of rural tourism is part of the overall process of tourism development. This process is increasingly referred to as "touristification". But the literature also mentions other term like "tourism management". According to various authors, "Touristification" is the process by which a tourist area is built. It may also correspond to the process of appropriation of space by tourism ". Its most prominent manifestation is the progressive occupation of space through accommodation and equipment. But also, the increasing polarization of flows in space and time and socio-economic consequences to the host environment.

In some cases, the term is used to emphasize the negative effects of tourism on the receptive populations and environment. "Touristification" means in these cases the excessive share granted to tourist activity. Finally, according to Dewailly (2005), "tourism" implies spontaneous and unplanned tourism development. In this case, he objects to "tourism management" which would designate a process of planned voluntarist tourist development.

In Morocco, the growing development of tourism activities in rural areas, particularly in cultural heritage sites, has triggered a great interest in the socio-economic impact of this activity on communities and Territories. Stakeholders are interested as an income generating activity and an alternative for sustainable development in traditional rural production systems. The evolution of the number of arrivals has generated significant revenues for local populations. They quickly adapted to this new activity and developed the tourist offer. This

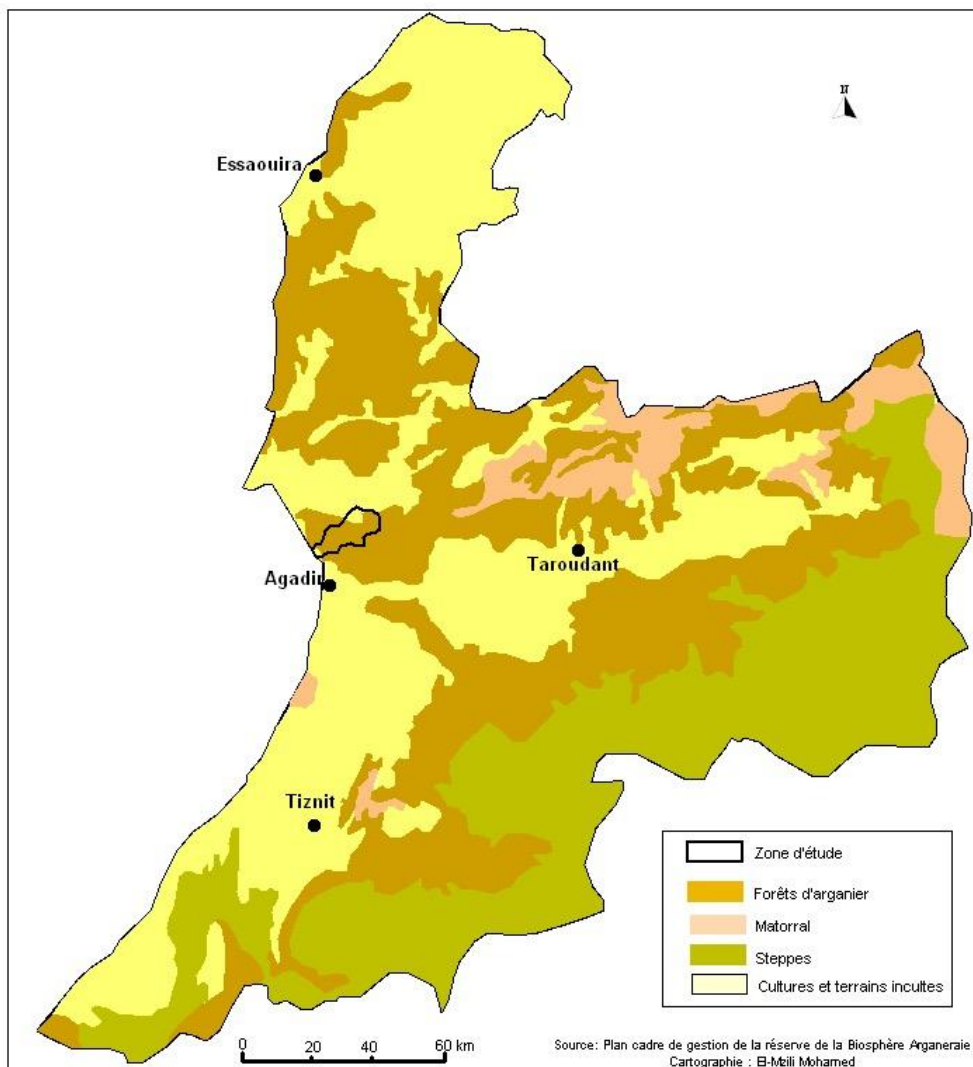


movement of transformation and introduction of new practices in rural areas has sparked what is now called the "touristification" process of rural area.

#### I- The heritage potential between the challenge of preserving and developing tourism

##### 1- The Biosphere, a natural and socially fragile identity heritage

The southern side of the Western High Atlas lies in the heart of the Arganeraie Biosphere Reserve (MAB Morocco, UNESCO 1998) (map 1). This situation gives it ecological and environmental specificities enabling it to adhere to the various programs for the conservation and development of this endemic Argan ecosystem of South Morocco. The peculiarity of this species is enhanced by its fruit which gives rise to a popular oil. The argan oil which has a flavour finely appreciated by gourmets and innumerable virtues. But it must be emphasized that this tree is threatened with degradation with a regressive forest area of 800000 ha and a very variable density of 20 to 30 trees per hectare. This area does not end up shrinking without real decisions being made to face this decline.



Map 1 - Location of the study area in the Biosphere Reserve in South-West of Morocco

The biogeographic and climatic situation places this zone in one of the most complex natural and environmental regions of the Moroccan territory. It is influenced by arid and semi-arid

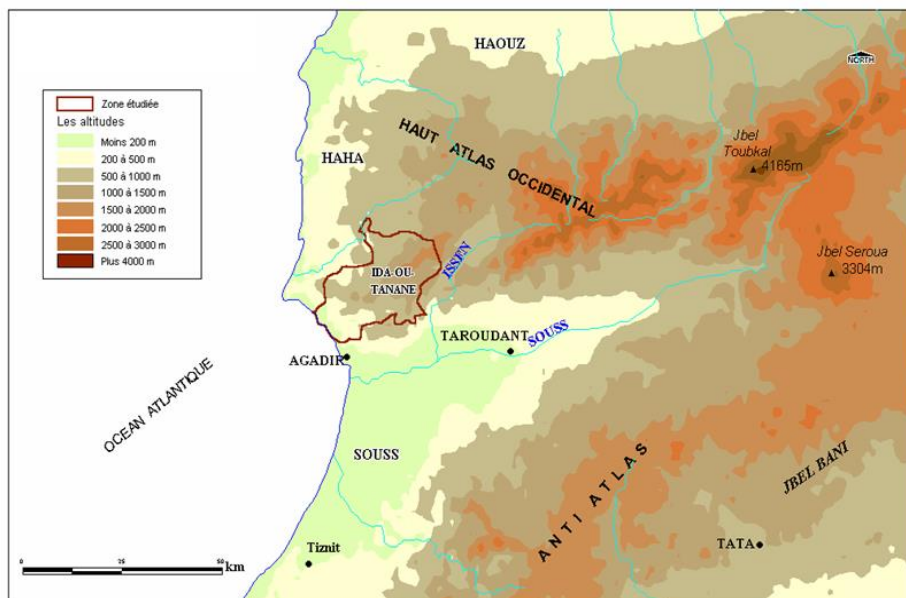
climate, and unfavourable conditions of the physical environment. The physical substructure is dominated by eroded folds marked by a discontinuity of soil and a complex hydrological system. With heavy pressure on the argan tree, a program for the conservation and development of this forest was launched in 1995 in which actions to develop tourism activities.

The community identity of local population seems to be torn between an ancestral history and a traditional culture, also the influence of the colonial period and the successive administrative divisions. Moreover, the location of this region in the sphere of the Argan area places it in a fragile and particular environment.

## 2- A mountain in crisis and dependent on the proximity of the tourist resort of Agadir

Located at the end of the Western High Atlas and dominated by the “*Ida-ou-tanane*” tribe, this study’s area is part of the northern mountainous margins of the Souss (map 2). It’s influenced by Agadir’s touristic resort area. The relief resulting from the folds which formed the Atlasic mountain is relatively ventilated. Faulty anticlines giving rise to ridges sometimes exceeding 1000 m alternate with valleys and basins drained by “*Oueds*” (rivers) descending towards the plain of Souss. The width of some basins like that of Argana facilitates the communications with the city of Agadir.

But more than its dependence on the seaside resort of Agadir, it is the specificity and fragility of the “*Ida-ou-tanane*” ecosystem that attract attention of tourists. Indeed, a highly rural country, *Ida-ou-tanane* suffers from a rarity of surface water in valley. Which traditionally allows only a few winter cereal crops and, incidentally, almond and olive orchards, irrigated or No. All associated with a goats grazing.



Map 2 - Location of *Ida-ou-tanane* area in the High Atlas

But the current landscape is the result of a historical process that has transformed production structures. The process of evolution of the productive system in this mountain area has undergone changes at several levels. To response to the growing needs, a process of clearing and exploiting the forest is beginning to develop on slopes and high altitudes. In addition to excessive overgrazing, Grazing range yields are becoming increasingly low. As a result, the

rural exodus is accelerating. Moreover, economic situation depends largely on emigration. Finally, the productive system suffers in reaction to two elements: a demographic imbalance and constraints of the natural area.

Faced with this crisis situation, the proximity of Agadir, as touristic resort, raises hopes. The analysis of the situation of "Ida-ou-tanane" area is to be placed in a national context marked by the debates on the necessity to base the development of the rural area on the diversification of the resources other than agriculture. And by encouraging new activities but which are currently reduced to tourism alone. But the advent of tourism, as a new activity, poses socio-territory questions. It presupposes a new organization of territories relations, especially between the region of "Ida-ou-tanane" as a back territory of the tourist resort of Agadir.

The complexity of the issue stems from a double situation: located near of Agadir and at the same time characterized by its socio-economic marginalization and natural degradation. Spontaneously assaulted by tourists staying in Agadir and programmed by the authorities to be part of a national plan of development of rural tourism, the region of Ida-ou-tanane, will interact with this new activity. The effects of this new activity are tangible, but this activity also poses structural and organizational problems. What are the causes and effects?

II- The initiation of traditional production system transformations process

1- From traditional farming to tourism?

The emergence of tourism in the rural area of Ida-ou-tanane raises different questions about the future of agricultural activity and the new changes that the local production system will have to undergo. This system which depends largely on the physical environment, is also linked to social structures and traditional values. To the continuity of agriculture and grazing crisis and migration process, the tourist area of Ida-ou-tanane is witnessing a gradual transition from a traditional agro-pastoral economy to a system based on more Tertiary activities and fewer production activities. Prior to the arrival of tourism, farmers' spending and savings depended on the complementarity between the agricultural and pastoral components, which were supported by irregular transfers of emigration or seasonal work.

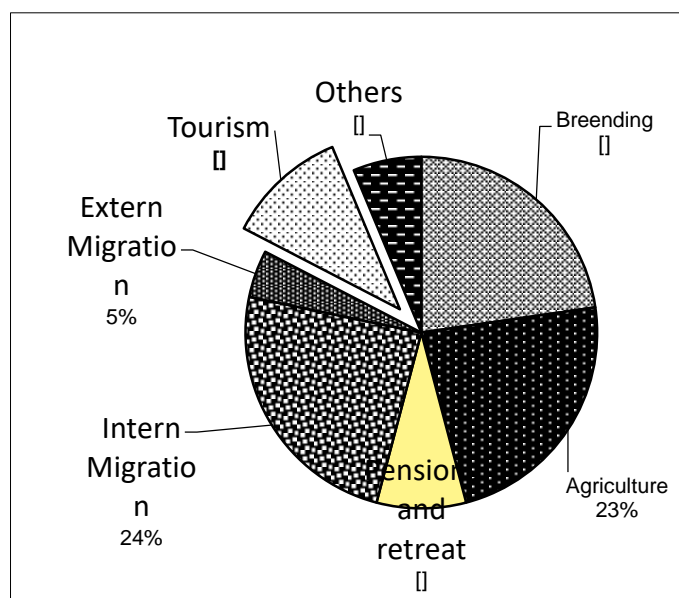


Chart 1 - Rate of tourism activity in the economy of households

Due to the decline in agricultural crops, livestock was the only way to overcome the crisis period, in addition to emigration transfers, in some cases (chart 1). According to our investigations, more than two thirds of the local population used the sale of livestock, especially goats, to meet the needs and times of crises. This situation has never alerted the farmers, both farmers and pastors, who have adopted a defensive strategy against these hazards and above look for alternatives to these traditional components of the productive system. The chart below illustrates this relative diversity of incomes but mainly based on agriculture and livestock and external resources such as emigration or pensions and retirees.

With the arrival of tourism, a new source of income appears. Among the sample of 54 households affected by our survey, this activity now provides 11% of the income. Because of the late arrival of this activity among the populations, this percentage is quite high.

However, attention must be drawn to a disturbing aspect of this development. The development of tourism within this production system is based on the stability and sustainability of the agricultural and pastoral components that depend on the stability of the peasants themselves. Indeed, the stability of the peasants is the great guarantee for the success of the process of “putting tourism” in the area of Ida-ou-tanane. In addition to the sustainability of supply in terms of natural potential, the human component is one of the pillars of this success. The peasants are the leaders of this development and the real receptive of this type of tourism especially in terms of accommodation and discovery of the socio-cultural offer (map 3).

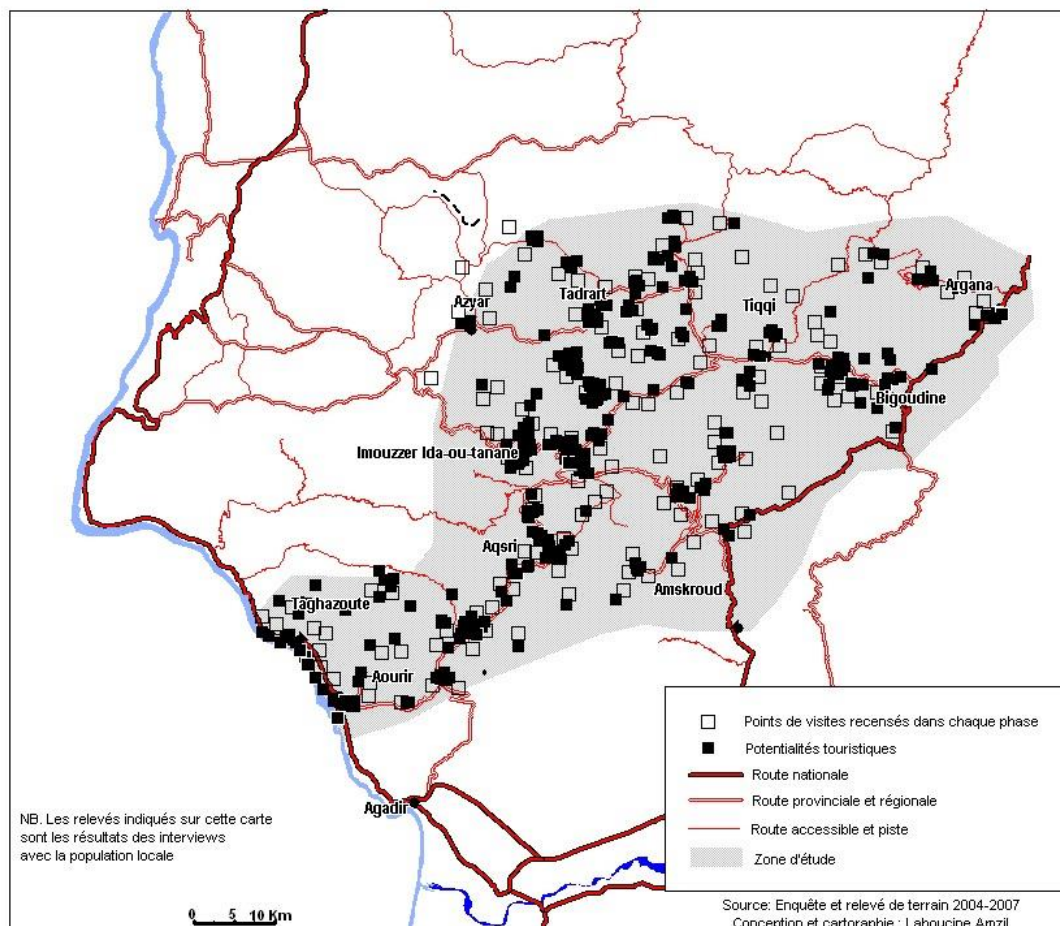
If the Ida-ou-tanane crisis does not reverse, the emergence and development of tourism in this region are threatened by the disappearance of the pillars of this new activity, which are peasants and peasant life. The additional revenues generated by tourism are reflected among investments in cities and the migration of family members, which is an element of destabilization.

## 2- Reproduction of the traditional elite’s conflicts through tourism

The evolution of tourism activity in a context marked by both the proliferation of local ONG’s movement, which is active in local development and the strengthening the role of elected representatives, has created a new dynamic to the participation of individuals in local socio-political life and governance. Belonging to the old notabilities of the traditional system who have been marginalized, following the new ways of managing the local policy’s, these families are going to accept the arrival of tourism regain their places in the system of local governance. This former traditional notability is revitalized and becomes the interlocutors. And as a result, same conflicts have appeared again but this time on the political and in community affairs. These new notables from the tourist industry profit from their economic power and their relations to become politicians and to become the elite of the society.

Two of these families illustrate these socio-political trajectories. The first family’s father was one of the notables of the region. This family very early invested in the tourist activity and this from the beginning of the 80s realizing the first hotel in Imouzzer village. It has extensive agricultural land and a large flock of livestock. His status as a notable has enabled him to play a role in the political life of the region. The second family’s head of household is a former emigre in France. It has little agricultural land and livestock in relation to the first family and lives mainly with the transfers and savings of the emigre who has been retired since the early

1990s. This second family is also involved in the tourism entrepreneurship in Taghrat village in the late 1980s. She owns a small hotel and restaurant in Taghrat. These investments, and following the development of their tourism projects, the conflicts of interest that once had other pretexts reappeared. Competition in the tourism entrepreneurship appears to be the ideal pretext for reviving the "war of interests" on several fronts. This "war" moved very quickly behind the scenes and meetings of the communal councils through the candidatures and then the election of a member of the two families in the communal councils of Aqsri and Imouzer. Everything is therefore a pretext for conflicts between the two families and their allies. Whether in the communal council, irrigation water, decisions relating to the establishment of the tourism projects, Tourists to the services provided by the two families. The two clans dispute in particular the least decision-making role in the management of tourism territory of Ida-ou-tanane area They are members in the executive offices of the development associations, position themselves for the reception of official hosts and commissions to evaluate projects for creating lodges or labelling tourist circuit. They are also actively present at all the meetings and workshops organized about tourism development. Finally, although it is a modern activity involving different behaviours and relationships, tourism reproduces the same relational patterns that governed traditional society previously.



Map 3: Distribution and intensification of tourism activities

### 3- Socio-economic changes and abandonment of agro-pastoral activity

Experiments have shown that the socio-economic conditions of receptive societies change as tourism activity develops. As was many case in Morocco lake: in the High Atlas of Marrakech, in the Ayt Bouguemmez valley, in the M 'Goun, in the oases of Drâa and in the Todgha valley. From the moment tourists arrive in the Tighermt and the Ksours of Mgoun and the lower Drâa, local populations adopt new strategies to create favourable socio-economic conditions for the development of tourism. Similarly, families are engaged in a process of socio-economic change that is clearly visible in terms of lifestyle, everyday practices, the state of housing and new social ambitions.

These changes seem to have reached the country of Ida-ou-tanane through the many people who want to build rural lodgings, or young people who spend their time selling local products along the roads frequented by tourists or those which play the role of false guides in tourist sites. The increase in the number of people carrying tourism projects coincides with the decline in work opportunities in the city and the increase in the number of visitors to the Ida-ou-tanane region. Tourist transport and accommodation appear to be the two areas of employment most appreciated by young people in the region. This is due to the increase in the number of public transport operators, now 178 and mostly illegal, who are also trying to venture into the tourist transport.

Table 1 - Importance of the number of people carrying tourism projects in Ida-ou-tanane

| Types of tourism Project                                 | Nb. Of people with projects | %     |
|--|-----------------------------|-------|
| Bed and Breakfast Projects                               | 4                           | 6,90  |
| Rural house construction Project                         | 13                          | 22,41 |
| Project to acquire a shop for the sale of local products | 27                          | 46,55 |
| Travel agency Project                                    | 19                          | 8,62  |
| Cooperative Projects for Local Crafts                    | 2                           | 3,45  |
| Restaurants Project                                      | 7                           | 12,07 |
| Total  | 58                          | 100   |

These changes are also reflected in the early abandonment of agricultural activity and the orientation towards tourism or tourism-related activities (table 1). It is a question of several individuals and of some families who have abandoned the breeding and working of the land to devote themselves to this new activity. The number of abandonments of agro-pastoral activity will increase as tourism activity gains ground at the expense of agricultural activity. Although there are other factors besides tourism.

#### Conclusion

The economic system inherited from the past has difficulty resisting major economic and social changes, especially with the arrival of tourists and the progressive development of tourism activity. These changes are reflected in the emergence of a new economy where agriculture

and livestock farming have been marginalized and are no longer able to satisfy the growing needs of local populations in addition to those of tourists. These needs require investments for their acquisition, hence the obligation to change the old ways of life which were based on non-monetarized exchanges of products and services. Trade has become the main component of the new economy. It is in this environment that the local population have tried to diversify their sources of income, through the services rendered to tourists such as catering, accommodation, guidance and animation. The economy of Ida-ou-tanane has been brutally opened to the market economy. And this economic opening is accompanied by socio-cultural changes.

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# Revitalization and popular use in an historical and touristic area. A case study of the Sólón de Lucena Park, João Pessoa, Brazil.

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## Abstract

The city of João Pessoa is located in the Northeastern region of Brazil, and is the capital of the state of Paraíba. It has around 800 000 (eight hundred thousand) inhabitants, but only four urban parks, in which the Sólón de Lucena Park, the object of this study, is the one with greatest circulation of people. This natural lake is located in the historical part of the city and for many years limited its growth to the east direction, coastal side. In 1910, the sanitation of the waters of the lake transformed it from a limit position in the city to a central location, also geographically. Nowadays the Sólón de Lucena Park is a convergence point in the city of João Pessoa, where there are many commercial, residential and service buildings in its proximities, also being an area with bus stops for most of the bus lines of the city. It is a post card of the city, due to its beauty, attracting both locals and tourists. Recently a revitalization proposal was implemented, and although it was widely criticized, it seems to have pleased many people too. The project handed over in 2016 changed the local traffic, created cycle ways, an area for physical activities, and a park for children, changed bars and public lavatories, amongst other actions. This article seeks to reveal popular activities that go beyond those proposed by the municipal authority and accepted by the population. What is noticed in a more practical view is a much greater diversity of uses and appropriations than what was suggested.

## Keywords:

Revitalization; tourism; social practices.

## 1. The city as a living place

Public places are the true stage for every common event in a society. It is in a square, a street, a beach and in other environments that are not private property and do not require specific behaviours like closed public areas, such as government offices, where people can live the city. The free urban public area is the true ‘heart’ of the cities, and it is there where the diversity and life of cities pulsate, or should pulsate.

The buildings, the streets, squares, public places and areas of the city are filled with the history of everything that has happened there and are part of the population’s memory. The link of the population and its mores, history and roots, transits through, no doubt, the valorisation that this population gives or not to the buildings which compose its own environment. Biase (2006) demonstrates that the townspeople do not live only in their houses but in the city, and furthermore states, “the street is the neighbourhood. The street is the space for movement, but also the space where you can stay, observe, wonder, kill time, flirt, fall in love, break up...”

It is in the urban space that people have contact with others that are not necessarily part of their social circle of friends or family. The squares, parks and streets are places for heterogeneity, the adequate space to meet different people. In addition, as in urban societies, cultural, social and ideological distancing is diverse. This diversity is perceived in spaces of coexistence in the cities as a reflex of the society itself.



If society itself is reflected in public spaces, it is revealed that its problems and conflicts also appear in the city itself. The dynamics of society are reflected in urban areas. We live in cities that are increasingly divided into homogeneous groups. These groups live the city in their own way, with their habits and doings whose sets of behaviour we call social practices.

According to Lefebvre, social practices are inscribed in the space of cities. There they can be perceived, they happen, Society reproduces its (social) relations of production and consumption in the physical space of cities. In this way, social practices can be observed, mapped, studied in complexity by "reading" this space, because they are "written" in it. The urban space shows itself as a representation of its relations of work, production and consumption, with its nuances and ramifications: spaces for work, leisure, consumption, education, whose essential character is to contain a dialectic at first sight paradoxical, but which reveals at a closer look the forms of coexistence, domination and power (LEFEBVRE, 2008b).

This fragmented character belongs to the society that is sometimes confused and is sometimes deliberately confused in its own signs and symbols by, for example, creating and consuming places of leisure, it "forgets" all the logic of work that happens "behind the scenes" so that the rest or relaxation of a parcel of the privileged can take place. The architectural and urban space is disjointed and shattered, but under a fictitious coherence. This is the paradoxical character of being together and separate. (LEFEBRE, 2008a)

The social space, that is, the space of social practices is not simply a part of the urban soil, but it is linked to a whole conjuncture of merchandise that is proper to this society. That has as a characteristic feature to be marked by social inequalities, of access to service and consumption goods and that presents itself in a dissociated way, but occupying the same places. These differences of access are often reflected with differences in visibility, attention to needs and promotion of appropriate policies.

The social space is a political instrument intentionally manipulated. We have an instrumental space that allows both to impose a certain cohesion, sometimes through violence, and to dissimulate the contradictions of reality, under an apparent rational and objective coherence. Here cohesion and coherence mean an intended, projected, but not always obtained, regulation (LEFEBVRE, 2008).

The contradictions which we have indicated happen in the society, in which the object of study of this article is located, as well as in many other societies. We live in a world, in which 54%<sup>36</sup> of the world population live in cities. In Brazil this number rises to 84%<sup>37</sup> of the population. The city is the place of habitat and interaction for many people. It takes a closer look to observe the contradictions and situations of conflicts that are often not seen at first glance in urban spaces of leisure, consumption and tourism that are apparently coherent. It is necessary to know the city, its spaces and population.

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<sup>36</sup> Percentage of the world population living in urban areas, according to the 2014 edition of the "World Urbanization Prospects" report produced by United Nations Population Division of the Department of Economic and Social Affairs (DESA).

<sup>37</sup> Percentage of the Brazilian population living in an urban situation, according to the last Demographic Census conducted in 2010 by IBGE (Brazilian Institute of Geography and Statistics).

## 2. The city of João Pessoa, capital of Paraíba

João Pessoa, a coastal city, is located in the northeastern region of Brazil. Being the capital of the state of Paraíba (Figure 1) it houses the main administrative and institutional functions of the state, so of all the cities in Paraíba, João Pessoa is the best served by institutions of education, research and health. It has an area of 211,475 km<sup>2</sup> (two hundred and eleven thousand four hundred and seventy five square kilometres) and a population of approximately 800 000 (eight hundred thousand) inhabitants. (IBGE, 2017)



Figure 1 – Maps of Brazil, state of Paraíba and city of João Pessoa.

Source: Maps available on Wikipedia [internet] and UFPB [internet], edited by the author.

João Pessoa, is the third oldest city in Brazil. Founded on August 5, 1585 under the name of “Nossa Senhora das Neves”, it was born in a port on the banks of the Sanhauá River, Port of Capim, without ever having been a town or a village, and this happened due to the fact of its strategic geographical position. Its foundation was determined by the board of the Royal Estate, a Captaincy of the Portuguese Crown (AGUIAR, OCTÁVIO, 1985). Its history and urban evolution are fields of research for several authors whose ideas are synthesized and presented here.

The city was divided into high and low according to its topography. In the lower part, known as Varadouro, was the Port of Capim and much of the commerce. In the upper part, known as Upper Town, were the main buildings, such as churches, convents, public administration buildings and the homes of wealthier families. The rugged topography and the spontaneous growth of the primitive nucleus caused the land occupation to proceed in a disordered way, defining an irregular road system characterized by narrow streets, without continuity (AGUIAR, 2002).

Until the 1910s, the lake of the Sólton of Lucena Park did not allow the growth of the city towards the coast, so, until the flooded areas were treated, the city was contained between the Sanhauá River and the lake, neither expanding to the east nor to the south. Later growth occurred in a more orderly manner in the areas of regular topography, determining, in the periphery of the primitive centre, a more uniform road system than the original one. Thus, after being for more than three centuries practically restricted to its original nucleus, the city

advanced east towards the beaches, in a growing process of urbanization that extends to the present day (MACHADO, 2005).

The Lake, popular name of the Sólón de Lucena Park, is an area that for many years constituted an obstacle to the expansion of the city towards the east. The marshy waters, present in the old cartographic records of the city, were originally located in a site that belonged to the Catholic religious order of the Jesuits, responsible for the catechesis of the Indigenous people and of great importance in the colonization of Brazil. It was known for the variety of fruit trees and bamboos, and for the wild animals, amongst them the 'Irerê', a type of widgeon that ended up giving its name to the space at the time as "Lagoa dos Irerês" (the Irerê Lake). (MACHADO, 2005)

It is believed that the waters of the lake served to supply the population, since a considerable number of roads linking this area to the city were observed on the map of 1637 (Figure 2). However, this service probably ceased with the installation of waterspouts and fountains later on. In the survey conducted in 1855, what is observed is an empty urban area where today is the Sólón de Lucena Park (Figure 3). At that time, a wood and a large house occupied the area, and the lands would have been passed to the property of the Portuguese merchant Vitorino Pereira Maia, and was designated as an unhealthy place and a focus of malaria (EGYPTO, 2002).

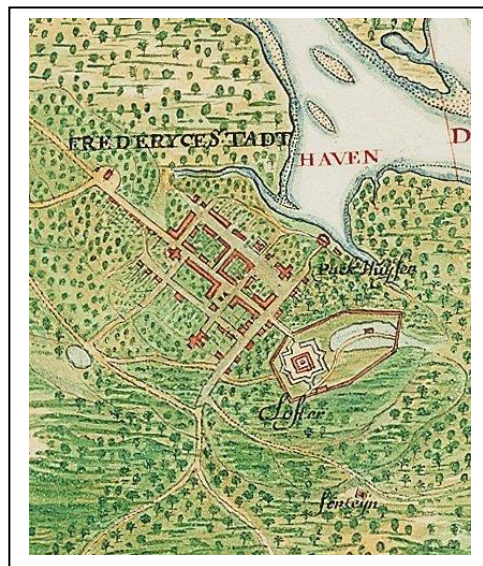


Figure 2 – Image of the city of João Pessoa in 1637, at the time called Frederica.

Source: Jan van Brosterhuisen, in *Teresinha de Paulina* [internet].

In 1913, under the administration of Governor Castro Pinto, an important period of urban expansion took place, with the construction, by engineer Saturnino de Brito, of a project for the city's sewage system, whose third district consisted of the "Lake basin", the main expansion zone of the city. With this action, the area that previously set the limit, took centre position in the city (MACHADO, 2006).

With the improvement process, that included street lighting, sanitation of the floodwaters and more efficient public transportation system, in the early twentieth century, the urban network, which had until then been centralized, expanded. The connection between the city and the beach provided decentralization and the activation of new travel flows, as well as new centralities. This process was configured after the opening and paving of Epitácio Pessoa

Avenue (Figure 4), which occurred between 1940 and 1952, when families with higher purchasing power gradually moved their places of residence toward the seafront. The centre saw a reduction in its residential character of the more affluent families and consolidated its mainly institutional and commercial activities (AGUIAR, OCTÁVIO, 1985).

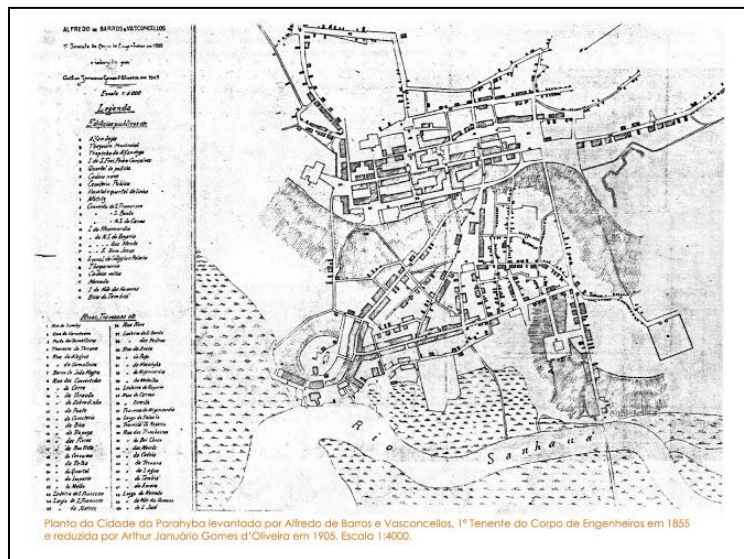


Figure 3 – Plan of the city in 1855, at the time called Parahyba.

Source: João Pessoa Histórica [internet].

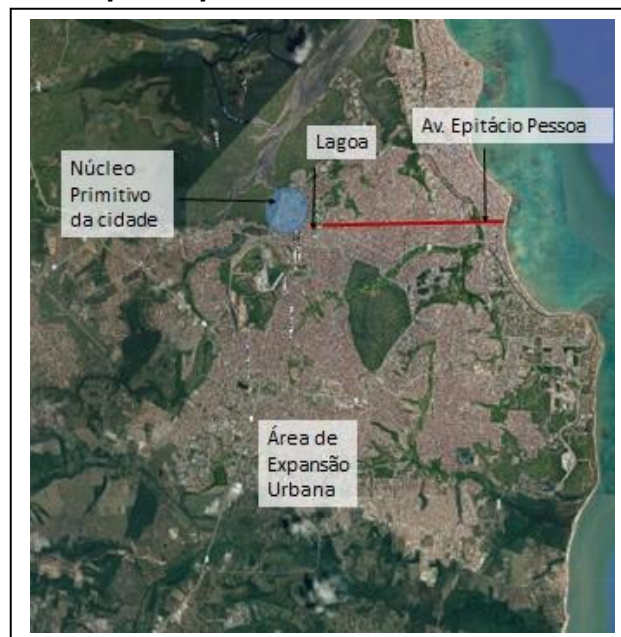


Figure 4 – Recent aerial view of the city of João Pessoa.

Source: Google [internet], edited by the author.

The city grew and still grows to the south with new neighbourhoods and housing estates. New transport technologies, the improvement of public transport and the popularization of the use of private cars allowed greater distances to be travelled in a relatively short time. However, this urban expansion combined with great real estate speculation led to great spatial distinctions in the location of the homes of the richest or poorest people. However, although there are commerce and services in the neighbourhoods that serve the people satisfactorily

there, the Centre maintains its political, administrative, historical, commercial and religious importance.

From the point of view of the valorisation of the city centre, it was only after 1987, with the Brazil / Spain International Cooperation agreement, that the construction of the image of a historic centre of João Pessoa began. This agreement centred on the elaboration and execution of a project of revitalization of the old centre of the city. During the 1990s, other redevelopment and revitalization projects were created for the area, such as: 'Oficina-Escola' (School Workshop), 'Folia Cidadã' Project, *Acehrvo* (collection) and the Permanent Commission for the Revitalization of the historic centre of João Pessoa. Since then the architectonic and urbanistic set of the primitive nucleus of the city has begun to be recognized internally and externally as an area of tourist interest (SCOCUGLIA, 2004).

### 2.1. João Pessoa – Touristic Aspects

Today tourism is one of the great incentives for the economy of cities. Even in the face of large-scale economic crises, much capital is invested around consumer goods and services related to the tourist flow. In this way, it is natural for public and private investors to appreciate the inflow of capital that will move various sectors and attract investment. However, it is necessary to reflect on the strategic actions used to achieve these goals.

When observing the tourist attractions of João Pessoa, two points predominantly stand out: its history and its nature. The story, always told in the same way, emphasizes the age of the city compared to other Brazilian cities, highlighting some historical buildings such as the Church of San Francisco, while nature is highlighted by the beaches with warm and calm waters.

The places that receive the most visibility are the historic centre and seafront. The urban beaches suitable for bathing the whole year, with great emphasis on the beaches of Tambaú and Cabo Branco, are pointed out as a great attraction to people because they can be enjoyed in various ways, through contact with nature, physical activities but also with the presence of bars and restaurants. Another touristic attraction is the historic centre, Antenor Navarro Square, with its colourful and revitalized houses, and the first religious buildings, followed by other properties located within the perimeter of the revitalization project of the historic centre of João Pessoa.

The Sólón de Lucena Park appears as a space that unites the two strands mentioned here: history and nature. Although it has undergone a very recent and previously mentioned revitalization process and the proposed changes which are under test by the users, are still the subject of heated discussions among different groups, it is a traditional location in the city, of deep meaning and importance.

### 3. The Sólón de Lucena Park.

The Sólón de Lucena Park, locally known as the Lake, or Sólón de Lucena Park Lake, is one of the most popular places in the city and it is where the theme of this research is revealed. This area has 150 490 (one hundred and fifty thousand four hundred and ninety) square meters, whose central area is occupied by a large lake (Figure 5).



Figure 5 – Solón de Lucena Park, December 2016.

*Source: Ana Maria Klüppel Pereira.*

Between 1920 and 1924 (Figure 6), the waterlogged area was urbanized, much of the wood and scrub was devastated and waters were sanitised. The intended urban expansion became possible. The 'Irerê Lake' was then named Sólón de Lucena Park, by the decree Law 110, of September 27, 1924, a tribute to the state government (MACHADO, 2006).



Figure 6 – Aerial photograph of Sólón de Lucena Park, 1928.

*Source: Stukert.*

In the years following, after each new operation, there were new additions for improvements and beautification of the area. Imperial palm trees were planted around the lake, as were other plant species in the perimeter of the park (Figure 7 and Figure 8). A Casino was built, which is today a restaurant, as well as an illuminated water fountain. In 1945, mansions and palaces were built in the surrounding space, and the lake became a place of conviviality for the high society of the time. EGYPTO (2002) and PAULINO (2010).



Figure 7 – Sólón de Lucena Park in 1936.

Source: Stukert.



Figure 8 –Partial view of the lake of Sólón de Lucena Park in 1950.

Source: Stukert.

With the opening of Epitácio Pessoa Avenue and the definitive expansion of the city to the east, the Lake was gradually changing its residential character and in 1970, avenues crossed the area connecting the centre of the city with other areas. The traffic became more and more intense, and the lake became less and less accessible to the population, whether due to the difficulty of access or the cases of drowning by accident or suicide, which also became part of the memory of the place. PAULINO (2010).

On August 26, 1980, the park was protected by State Decree No. 8,653. Over the last 30 years, some projects have been proposed for the area, and the last ones to be executed appeared as occasional interventions in equipment and landscaping.

Traditionally referred to as one of the most beautiful images of João Pessoa, the Lake won a competition in 2007, organized by TV Cabo Branco, an affiliate of Brazil's largest television

network, Rede Globo, and was chosen by viewers as the " Postcard " of the city, or in other words, its main symbol. Which only reinforces its importance to the city. (PAULINO, 2010)

In mid-2016, the last and most radical project for the Lake of the last 50 years was completed. Traffic was diverted to the area outside the park and all equipment, from snack bars, toilets and paving was redone. Sports equipment and playgrounds were also installed. Such action, widely promoted by the local media, received fierce criticism, but also a great acceptance by the population, lacking public parks.

The new Lake received a wide variety of uses that were previously not possible, but also had a series of activities controlled by the park administration. In order to promote "family use", the sale of alcoholic beverages and cigarettes in local snack bars was forbidden, as well as the presence of street vendors and homeless people, among other actions to control the space. In order to understand the dynamics of its use, appropriation, social practices and the regulation of the space of the Sólón de Lucena Park, it was necessary to be in the park for long hours.

#### **4. Research Methodology**

For the analysis of the Sólón de Lucena Park, the method of Urban Ethnography was used as a field research guide. A method in which the researcher is aware of an attitude of exteriorization that, even if immersed in the universe to be deciphered, allows itself to be impregnated by experience without giving up its conceptual baggage (MAGNANI, 2009).

The ethnographic methodology takes place because it is preceded and prepared for by the "continued presence in the field and an attitude of lively attention". The attention given to events and fragments that can be arranged as a whole and which allow the codes to be deciphered. Based on the understanding that ethnography is a method of work proper to anthropology, this "encompasses strategies of contact and insertion in the field, conditions for both continued practice and ethnographic experience which lead to the final writing." The conditions for its full exercise are the linking of theoretical choices with the techniques employed, in the case of this research: participant observation, dense description and image registration (MAGNANI, 2009).

Nine exploratory visits were carried out to map the activities developed in the park, as well as 25 hours of participant observation, distributed over 10 days. On these occasions anonymity, blending in with the passers-by, and full insertion in the place were sought in order to be able to mix, observe and absorb the ethnographic experience.

#### **5. The social practices found**

Since the last requalification, the activities promoted by the municipal authority for the Sólón de Lucena Park are linked to the practice of sports, health and quality of life, as well as to a tourist and family use of space (Figure 9), emphasizing issues such as security and offering leisure options. In the analysis of the material, we observed which social practices were stimulated by the park's administration and which took place spontaneously.



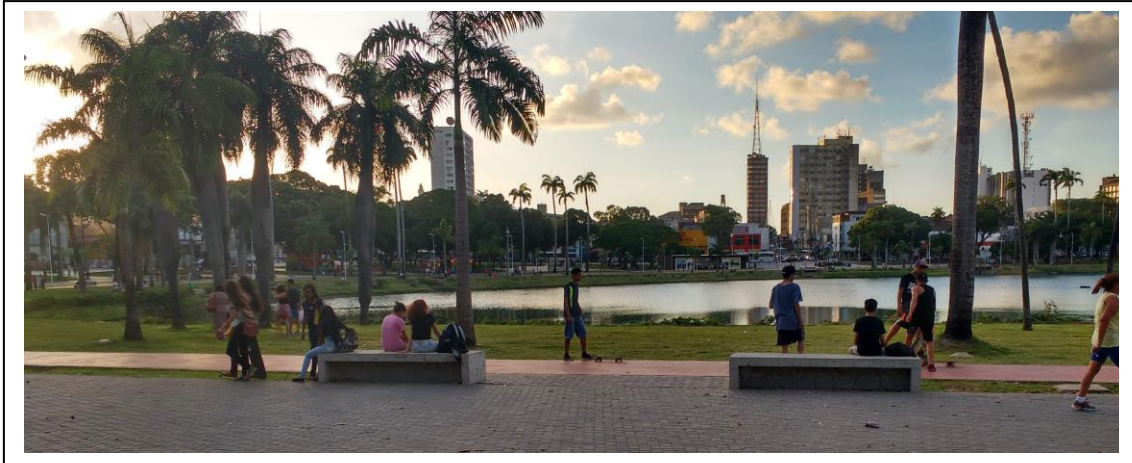


Figure 9 – Sólón de Lucena Park in December, 2016.

Source: Ana Maria Klüppel Pereira.

In terms of safety, the park counts on supervisors, municipal guards and fire fighters. They are responsible for controlling the use of all spaces and to prevent urban violence, which deeply interferes negatively in the use of urban public areas throughout the country. It has been observed that for this purpose certain spontaneous practices are restricted, for example, it is forbidden to enter the waters of the lake.

The sale of products inside the Sólón de Lucena Park is quite controlled. There are 12 snack bars and a restaurant in full operation and these are the only marketing points in the park. There is no souvenir or art and crafts shops. The permanence of street vendors is not allowed in the park, only their passage. Therefore, it was observed that many sellers transit in a purposely-slow way, trying to sell as they cross the park (Figure 10). Other times you may notice food vendors holding small, manual displays to guarantee free transit. Consequently, on the sidewalk opposite the park, sellers accumulate in such a way as to hinder the passage of pedestrians.



Figure 10 –Simultaneous presence of street vendor, police officer and homeless, December 2016.

Source: Ana Maria Klüppel Pereira.

There were many events mapped out in the park, some happen spontaneously and have no repercussion whatsoever in the media, as is the case of teenage meetings called "rolezinho", a popular local expression that means 'short distance fast stroll'. This event happens every week, lasts approximately one hour and thirty minutes, and attracts hundreds of young people from the lower strata who use the space of the park to stroll, date, talk, meet, etc. On these occasions a certain degree of tension between adolescents and police (Figure 11), mainly because it is common to observe adolescents making use of alcoholic beverages and cigarettes, whose sales are prohibited in the whole area of the park, although by Brazilian legislation the use is allowed for those over 18 years of age.



Figure 11 – Tension between adolescents and police in “Rolezinho”, December 2016.

Source: Ana Maria Klüppel Pereira.

In the category of scheduled events (Figure 12), we observe the event called ‘sunset in the park’, which consists of the presentation of music on Fridays at the time the sun is setting, or showing films in an open-air cinema. A striking feature is that all activities offered are free, and while the park is situated in a middle-class neighbourhood, many are favoured with leisure options.



Figure 12 – Scheduled events organized by TV Globo, December 2016.

Source: Ana Maria Klüppel Pereira.

The encouragement of the practice of sports, family activities and health care, favours certain uses, but it does not prevent other forms of appropriation (Figure 13). In the space, there is

gym equipment, playgrounds, cycling paths, walking paths, skating rink and spaces with toilets and snack bars. Large lawns, inviting shade and benches make it possible to use the park at any time of the day and on every day of the year.



Figure 13 –Political manifestations, December 2016.

Source: Ana Maria Klüppel Pereira.

### Conclusions

The Sólón de Lucena Park synthesizes the social practices of the city of João Pessoa. From the point of view of the image of the city, it is in line with the actions that the municipal authority seeks to emphasize for the promotion of tourism. The park houses at the same time history, quality of life, health and well-being, safety and contact with nature.

Since it is a historical area, the richness of organized events supersedes that of other superficial practices which are promoted. Both disasters and disappointments, and the most valuable memories are part of the place and end up guaranteeing the population the sense of belonging that we observe in the place. Both in the Park itself and in its immediate surroundings, the population lives, circulates, commercializes its products informally and manifests, in a spontaneous or organized way, its political demands and its cultural and religious diversity.

The control and surveillance offered on the spot, as well as the visibility that certain events receive in comparison to the lack of divulgation of so many others, the stimulated and forbidden activities only strengthen and help the understanding of this society that so often exposes its dualities and contradictions in the public space.

However, it is precisely from these multiple facets of society that one can perceive that urban space is alive and pulsating. People do not only live in cities, they live the cities. Moreover, this is also possible to observe living the Sólón de Lucena Park.

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# Património cultural, turismo e desenvolvimento local em Moçambique

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## Resumo

Se durante muito tempo, a cultura foi considerada segmento marginal para o turismo em Moçambique, ela é vista hoje como um segmento privilegiado. A este propósito basta referir que o então Ministério do Turismo passou a Ministério da Cultura e Turismo. Assim, uma reflexão sobre aspectos culturais e turismo afigura-se pertinente e actual. Este artigo tem por fim desenvolver uma reflexão sobre a relação entre património cultural, turismo e comunidade local em Moçambique. Para alcançar tal objectivo foi feita uma revisão bibliográfica e documental sobre os assuntos que serviram de referência e suporte para ler e interpretar o turismo cultural em Moçambique. Trata-se de uma abordagem que tem como espaço de observação Moçambique, um dos países mais pobres do mundo, que vê no turismo uma alternativa ou mesmo um motor de desenvolvimento, acreditando possuir potencial para tal: uma longa costa, um clima favorável, uma biodiversidade interessante e igualmente um mosaico cultural, aspectos que podem interessar aos turistas. Ora, o património cultural, é visto assim, como mais um produto a ser colocado no circuito comercial, de modo a que participe no desenvolvimento (local). Com efeito, os resultados, permitiram perceber que o turismo em geral e a valorização do património cultural, obedecem a lógicas impostas e por isso externas ao lugar e para serem consumidas por turistas, indivíduos estranhos ao lugar, o que, para além de limitar o processo de apropriação dos processos por parte das comunidades, contribui para a sua “artificialização” ou perda de autenticidade.

## Palavras-chave

Património Cultural; Turismo; Desenvolvimento Local.

## Introdução

No decurso dos últimos decénios, sobretudo a partir do último quartel do século passado, o turismo internacional tornou-se numa das primeiras actividades económicas do mundo, tornando-se determinante em alguns países. Como sublinhou AMALOU (2001:97), *“o desenvolvimento da observação e da pesquisa mostra bem, que a quase totalidade das regiões e das populações mundiais está exposta ao fenómeno turístico, claro que em níveis variáveis”*.

Um aspecto interessante da expansão reside no facto de os movimentos turísticos, fenómeno privilegiado dos países desenvolvidos, estar a orientar-se, cada vez mais, para os países em desenvolvimento. Com efeito, Da Silva (2007) citando dados da OMT, refere que o Continente Africano conheceu, em 2005, o crescimento mundial mais forte, estimado em cerca de 10%. No entanto, mantém-se como um “parente pobre do turismo mundial”, com chegadas internacionais e receitas resultantes que representam apenas cerca de 4% do total mundial. Esta progressão atinge de forma desigual as diferentes regiões africanas, com a África Subsaariana a destacar-se, com mais de 13%. Entre os países que conheceram resultados particularmente fortes destacam-se Quénia (+31%) e Moçambique (+37%). Estes dados ilustram a importância crescente do turismo.

Por isso, para muitos responsáveis políticos e económicos, o sector de turismo parece vital, tanto mais que sentem o apoio de organismos internacionais “...estamos em face de um factor activo de integração (EU) ou um instrumento de paz (NU, OMT)” (Beaujeu-Garnier e Gamblin, 1993, 7). Ademais, desde 1999 que a OMT não cessa de promover o turismo como instrumento de luta contra a pobreza nos países menos avançados.

Moçambique, não constitui excepção. A criação do Ministério do Turismo, a formulação de políticas para o sector e a indicação de áreas prioritárias para o desenvolvimento da actividade são evidências que revelam bem o engajamento do Governo de Moçambique, a confiança que tem no sector e na expectativa que tem na participação do mesmo no desenvolvimento, primeiro das áreas onde ele se instala e depois de Moçambique em geral.

O potencial para o desenvolvimento do turismo em Moçambique é interessante e diversificado. Os principais documentos oficiais destacam as matérias naturais: a costa com mais de 2500 km de extensão, praias com areias brancas, clima favorável, parques e reservas. Os elementos culturais, embora sejam referidos na documentação, aparecem como elementos complementares, inerentes aos diferentes destinos e mesmo sem constituírem recursos de turismo nem fazerem parte da motivação principal dos turistas que vêm à Moçambique, eles estão presentes no turismo indo mais ou menos a reboque. Assim, mesmo, sem ser de forma intencional, o turismo ao incorporar elementos culturais (tangíveis e intangíveis) participa no desenvolvimento local.

Assim, constitui pretensão deste trabalho reflectir sobre a relação entre património cultural, o turismo e o desenvolvimento local. Mais precisamente sobre como a população se beneficia do património cultural através da sua valorização pelo turismo, uma vez que, embora, a componente cultural não constitua um móbil privilegiado das viagens, parece inevitável o contacto com o património material e imaterial do destino turístico.

Para o desenvolvimento desta reflexão apoiou-se numa revisão bibliográfica e documental sobre os assuntos que serviram de referência e suporte para ler e interpretar a relação entre o património cultural, turismo e comunidades locais em Moçambique.

### **Aportes teóricos breves**

#### Sobre o Património e Património Cultural

Etimologicamente Património vem do latim *patrimoniu*, significando herança paterna ou de bens da família (Barbosa, 2001). O conceito evoluiu, saindo da esfera doméstica ou da família e foi estendido para o domínio público. O património é de direito público da comunidade ou da nação no qual está inserido. A evolução não se ficou por aí tendo passado para o mundo, para toda a humanidade.

A este propósito convém referir a Convenção do Património Mundial da UNESCO que, em 1972, definiu como: “conjunto de edificações separadas ou conectados, os quais, por sua arquitectura, homogeneidade ou localização na paisagem, sejam de relevância universal do ponto de vista histórico, da arte ou da ciência” (Barbosa, 2001:70)

Acrescente-se que o significado de património cultural não se restringe aos bens tangíveis mas igualmente aos intangíveis “ não só as manifestações artísticas, mas todo o fazer humano, e não só aquilo que representa a cultura das classes mais abastadas, mas também o que representa a cultura dos menos favorecidos” (Barreto, 2000: 11).

Pellegrini (1993) denomina de *meio ambiente artificial*, como resultado da soma dos produtos do sentir, pensar e do agir humanos, as variadas peças de valor etnológico, arquivos, colecções bibliográficas, peças significativas para o estudo da arqueologia de um povo ou de uma época, entre outros afins (Pellegrini, 1993: 92).

Enfim, quando se fala de património cultural refere-se ao conjunto de tudo que tem significado, aquilo que tem sentido social, não importando se esse património é algo materializado (visível) ou simplesmente manifestações da cultura que se apresentam através do cidadão comum (Araripe, 2004: 113).

Sobre os usos do património, ARARIPE (2004) refere: “ As contradições no uso do património – um espaço de disputa política, económica e simbólica – ficam a cargo do sector privado, do Estado e dos movimentos sociais. A iniciativa privada trata do património enquanto instância possibilitadora de ganhos económicos (...): em especial o sector imobiliário e o turístico. O Estado, ao mesmo tempo em que valoriza o património como elemento integrador de nacionalidade, vem se utilizando apenas dos factos e acções históricas que se ligam aos bens patrimoniais para construir um imaginário social (Araripe, 2004: 120).

DA SILVA (2000) refere que nem todos os vestígios do passado podem ser considerados património. Já que não é só o legado que se herda, mas o legado que, através de uma selecção consciente, um grupo significativo da população deseja legar ao futuro. Ou seja, existe uma escolha cultural subjacente à vontade de legar o património cultural a gerações futuras.

Da Silva (2000) refere ainda que a noção de posse é implícita no conceito de património, o que nos remete à suposição de que estamos perante algo de valor. Valor que os seres humanos atribuem ao legado do passado, valor no sentido do apreço individual ou social atribuído aos bens materiais numa dada circunstância histórica e conforme o quadro de referência de então.

“Neste sentido, património é uma construção social, já que se trata de uma idealização construída. Assim, aquilo que é ou não património, depende do que, para um determinado colectivo humano e num determinado lapso de tempo, se considera digno de ser legado as gerações futuras. Trata-se de um processo simbólico de legitimação social e cultural de determinados objectos que conferem a um grupo um sentimento colectivo de identidade” (Da Silva, 2000: 218-219).

Segundo a legislação moçambicana, património cultural é definido como “conjunto de bens materiais e imateriais criados e integrados pelo Povo moçambicano ao longo da sua história, com relevância para a definição da identidade cultural moçambicana (lei 10/88, de 22 de Dezembro).

#### Sobre o Turismo

Antes de mais, convém que precisemos o sentido acordado ao conceito de turismo. Falar de turismo é falar de populações e de lugares (Pierce, 1993).

Falar de populações, é falar, por um lado dos turistas individualmente ou em grupos, por outro lado de todos os intervenientes no processo, isto é, todos aqueles que tornam a viagem possível (transportadores, agentes de viagem, trabalhadores dos hotéis...) e, enfim, todas as pessoas com as quais os turistas entram em contacto directa ou indirectamente.

Falar de lugares, é esquematicamente, considerar: os lugares de partida, onde se encontra o aparelho que deve assegurar a mobilização e organizar a partida de turistas; os lugares de destino a serem visitados, ou seja o lugar das práticas turísticas, onde estão as infra-estruturas de recepção e os serviços de acolhimento e, naturalmente, o espaço entre estes dois lugares, que constitui a área ou o espaço de percurso ou de ligação.



Para Duhamel e Sacareau (1998), o turismo é uma actividade humana, fundada no deslocamento “isto é, literalmente uma mudança de lugar e, por “extensão geográfica” uma mudança “d’habiter”. Isto significa que ser turista e fazer o turismo implica deixar temporariamente o lugar de vida habitual para ir viver num outro lugar situado fora da esfera da sua vida quotidiana. “A deslocação opera uma descontinuidade que permite um outro modo de habitar dedicado à recreação” (Equipe MIT, 1997)

O turismo supõe, portanto, deslocação e estadia. A estadia de um turista deve ser de no mínimo 24 horas no lugar de visita e não deve exceder um certo tempo, para além do qual o individuo perde a sua categoria de turista, pois a deslocação será então assimilada a uma mudança de residência, o que toca um outro domínio, o das migrações. Actualmente a duração dos vistos de turismo varia até um máximo de 6 a um ano.

“O turismo é igualmente uma forma de lazer, no entanto, a noção de deslocação permite distinguir o lazer relevante do sector turístico. Considerando o espaço de acolhimento, as actividades turísticas constituem um facto de pessoas exteriores à zona.” (Dehoorne, 1996, 9)

Sobre o desenvolvimento local

Segundo FIEVET (2002: 42), desenvolvimento local «não é mais que um efeito de moda ». O mesmo autor acrescenta que « o nível local tornou-se em pouco tempo, num contexto de mundialização, o laboratório que se ocupa da recuperação da identidade cultural e garantia da qualidade de vida dos cidadãos».

O conceito de desenvolvimento local remete-nos às duas palavras que o formam: desenvolvimento e local, pois constituem os pontos de partida e chegada na procura de compreensão do seu conteúdo.

Em sentido global, o termo desenvolvimento cobre um campo que faz referência, de um lado a uma abordagem quantitativa: crescimento, extensão, expansão; por outro lado a uma acepção qualitativa: melhoria, progresso; teleológica, o que remete ao pressuposto de um futuro, a uma predisposição ideal do objecto em desenvolvimento: a busca de uma plenitude. Geralmente essas acepções, longe de serem contraditórias, sobrepõem-se (Policarpo, 1999).

Crescimento aparece como central na noção de desenvolvimento: não há desenvolvimento sem crescimento. Existem autores que preferem falar de mudanças no lugar de desenvolvimento.

O desenvolvimento deve ser perspectivado no sentido da qualidade e não apenas no sentido da quantidade. Assim, a noção de desenvolvimento distingue-se de crescimento pela integração de aspectos de bem-estar não imediatamente económica.

Em definitivo, para FIEVET (2002), o que conta é o Homem, para o qual devemos construir um amanhã, que esteja à sua dimensão. O Homem, o humano, deve continuar a constituir a *medida de todas as coisas*. Portanto, o autor apresenta-nos uma noção de desenvolvimento centrada no homem e na qualidade de vida.

Local pode ser entendido como modo privilegiado através do qual se apropria do território, a partir do qual se constrói o mundo. O local se constitui por redes de relações construídas pela experiência individual e colectiva.

O local é sobretudo o « lugar onde habitamos », onde vivemos. Mas por habitar, é preciso entender um gesto mais largo que habitação, que a simples residência. Habitar inclui, pois, toda a gestão e melhoramentos que o homem realiza para se inserir na natureza : estradas, escolas, fabrica, comércio, habitação propriamente dita, numa palavra tudo que contribui para se viver, todos os equipamentos que permitem a vida em comunidade. Habitar vai implicar, por fim, o respeito do lugar e do ambiente que nos rodeia. Pode-se considerar local como espaço de vida quotidiano que conduz a uma apropriação, ao desenvolvimento de um sentimento de pertença.

Convém acrescentar que até aos anos 80, as teorias sobre o desenvolvimento estavam ancoradas seja na intervenção do Estado, seja no Mercado como principal agente promotor de um desenvolvimento de cima para baixo. O protagonismo cabia assim, ora ao Estado ora ao Mercado (Soares e Muls, 2007).

Já o desenvolvimento local, envolvendo três grupos de actores (a sociedade civil organizada, o poder público local e o tecido empresarial) é um processo de baixo para cima.

A necessidade do desenvolvimento local surge para dar uma função aos territórios, afirmando a singularidade de cada local. Assim, o que está em jogo no desenvolvimento local é a possibilidade de que a diversidade de acções seja considerada como uma forma de garantir a participação social por meio de suas organizações e entidades.

Decorrentes disso, o desenvolvimento de uma localidade deve ter um claro componente endógeno, não só em relação ao papel dos actores sociais, mas também em relação às potencialidades locais (Soares e Muls, 2007: 53)

Nunes e Albino (2008) reforçam a ideia, acrescentando:

O desenvolvimento local opera-se com a participação comunitária. Ele deverá nascer do diagnóstico da realidade social, procurando responder às expectativas e colmatar as necessidades mais prementes dos grupos. Um processo sustentado nos recursos endógenos do território e partilhado pela comunidade. Uma aposta na educação permanente geradora de um desenvolvimento cultural, social e económico (Nunes e Albino, 2008: 52).

### **Generalidades sobre Moçambique, nosso espaço de observação**

Moçambique, país em Desenvolvimento, antiga colónia portuguesa, com cerca de 800 000 km<sup>2</sup> localiza-se na chamada região da Africa Austral, sendo banhada numa extensão de cerca de 2500 km pelo oceano Indico. Este facto confere-lhe alguns privilégios, o principal dos quais, o facto de servir de porta de entrada para os países do interior sem contacto imediato com o mar.

Moçambique soube tirar proveito desta posição geográfica, da qual resultou o desenvolvimento de infra-estruturas ferro-portuárias, passando a possuir assim, três portos de importância regional, designadamente, de Maputo, da Beira e de Nacala.

Localizando-se na região intertropical, tropical é o tipo de clima dominante, com algumas *nuances* resultantes de particularidades geográficas como a altitude ou a continentalidade. Assim, com algumas diferenças regionais, as temperaturas médias mensais situam-se

geralmente acima dos 24°C, sendo o elemento diferenciador a quantidade e o modo de distribuição das chuvas.

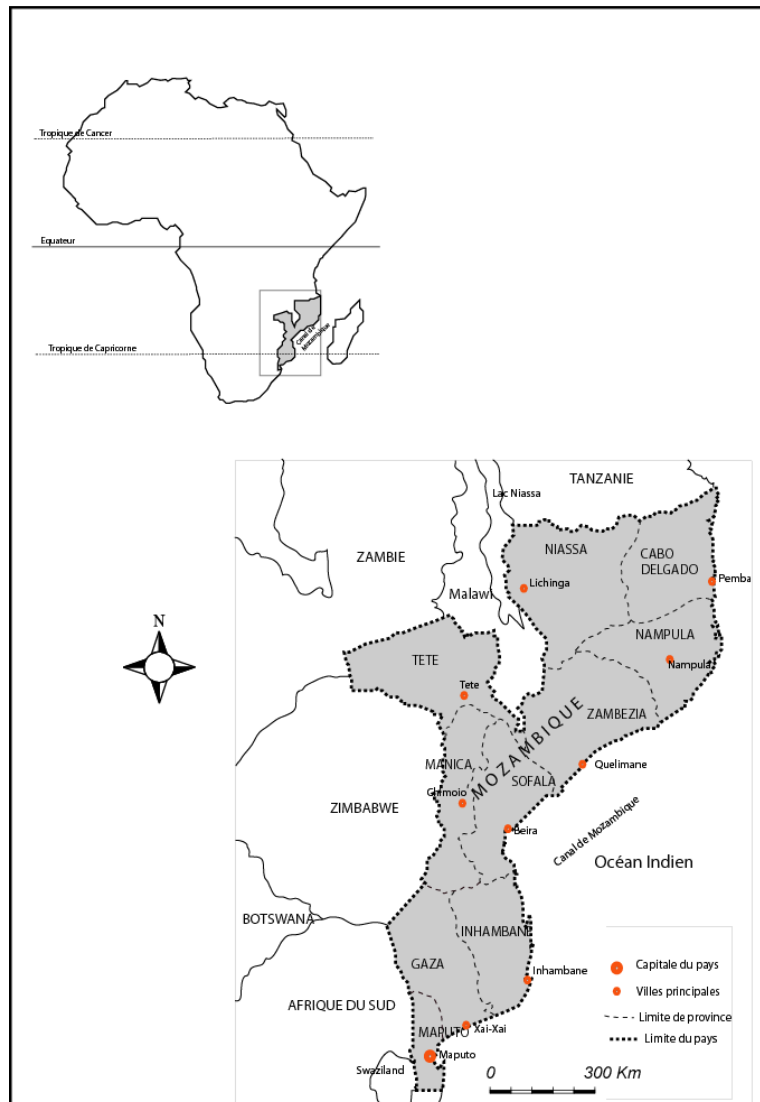


Figura 1. Localização Geográfica de Moçambique

Fonte, Da Silva (2007)

Do ponto de vista da morfologia, constata-se a existência do relevo disposto em escadaria, degradando-se do interior para a costa e do Norte para Sul.

A localização geográfica, associada às características morfológicas e climáticas asseguram a existência de uma grande diversidade biológica, constituída por uma fauna e flora muito diversificada. Assim, Moçambique conta com uma rede de áreas de conservação, entre parques nacionais, reservas nacionais e coutadas de caça. Além disso conta com alguns parques transfronteiriços, mais importante dos quais o parque transfronteiriço do Limpopo

Este espaço, suporta uma população de cerca de 25 milhões de habitantes, dos mais de 50% do sexo feminino. Trata-se de uma população maioritariamente jovem, que se encontra muito dispersa pelo território (31 h/km<sup>2</sup>), vivendo a maioria nas zonas rurais (cerca de 70%) (INSTITUTO NACIONAL DE ESTATISTICAS, INE 2014).

Administrativamente, Moçambique é constituído por 10 províncias, mais a capital, Maputo que tem estatuto de província (Figura 1)

A economia de Moçambique é assegurada sobretudo pela exploração de seus recursos naturais e por uma agricultura desenvolvida essencialmente em moldes artesanais. Outra fonte a não ser negligenciada é o das infra-estruturas ferro-portuárias.

As condições de vida em geral, ainda são bastante precárias, com níveis de pobreza ainda elevados. O nível de analfabetismo ronda 50% (INE, 2014).

### **Evolução do Turismo em Moçambique**

Há uns anos, o turismo tornou-se um elemento preponderante da política de desenvolvimento de Moçambique. O registo de mais de 37% de crescimento em 2005 não vem que confirmar o interesse acordado ao turismo. A actividade suscita grande esperança no seio deste território em situação difícil, ela continua, no entanto pesado de consequências para o espaço em causa, agindo tanto no plano espacial como humano. “O turismo transforma as relações existentes, ele age sobre a paisagem, economia e sociedade.” (Dehoorne, 1996, 82).

Moçambique, país em desenvolvimento, classificado entre os países mais pobres possui potencialidades económicas interessantes. O turismo internacional jogando o papel de motor de desenvolvimento interessa pelos seus aportes económicos e sociais, nomeadamente os mais evidentes e mais directos: criação de emprego, a possibilidade para os habitantes fazerem crescer as suas rendas e nível de vida, pelos ganhos secundários sobre os outros sectores. Segundo os discursos governamentais, o turismo deve permitir uma melhoria do bem-estar da população do país em geral e sobretudo da população dos espaços em causa.

Trata-se de um turismo essencialmente de proximidade, já que o grosso dos fluxos é proveniente dos países vizinhos, especialmente da África do Sul, de onde, aliás, é proveniente o grosso dos investimentos no sector.

#### **Histórico Breve**

Uma actividade turística mais ou menos intensa marcou o passado de Moçambique, mais precisamente o período colonial. Nos anos 50 foram criados os primeiros centros de informação e turismo e em 1962, estabeleceram-se as primeiras 18 zonas turísticas, que foram acrescidas para 26 no ano de 1972 (Guambe, 2007).

Dados disponíveis indicam um fluxo anual médio de cerca de 200 000 entradas entre 1962 e 1971, em proveniência sobretudo dos países vizinhos, nomeadamente África do Sul e Rodésia do Sul (actual Zimbabué) e igualmente de Portugal, país colonizador (Da Silva, 2007).

Depois da independência nacional, em 1975, a orientação política inibiu o desenvolvimento turístico. O turismo era visto como uma actividade de elite, o que se opunha aos princípios ideológicos, pois ele representava um risco de “poluição capitalista”. A essas mudanças juntou-se a guerra civil desencadeada alguns anos depois da Independência, provocando a degradação e a destruição de muitas infra-estruturas.

A partir dos anos 90, com o fim da guerra e as novas orientações do governo, Moçambique aparece nas média internacionais como um país destruído pela guerra, virgem e ávido para o desenvolvimento, um exemplo de transição pacífica para a democracia. Esta imagem atraiu a

atenção dos países vizinhos, particularmente sobretudo sul-africanos e portugueses residentes na África do Sul, mas igualmente Moçambicanos que viviam no estrangeiro (Da Silva, 2007).

No início desta fase, os visitantes provenientes da África do Sul vinham por sua própria iniciativa. Era o tempo em que “Moçambique era para os que chegassem em primeiro lugar”, “os terrenos são bom mercado, é só fazer o pedido”. Tratava-se de aventureiros que procuravam as melhores oportunidades: tectar a agricultura, o comércio. A maior parte encontrava no turismo um negócio mais seguro, com a instalação de bares, de restaurantes, de estacoes turísticas nas praias. Assim, começa a instalação espontânea e desordenada de pequenos hotéis, campings sem controlo e sem condições mínimas de segurança. O título de propriedade era geralmente acordado não por uma autoridade competente mas por uma cadeia de funcionários, cada um deles dando uma mãozinha, para se fazer obter a concessão de terreno (Da Silva, 2007).

Neste processo sem organização, nem intervenção das autoridades oficiais, os investidores eram aparentemente os únicos beneficiários, o que faz vir ao de cima a questão do lugar e da validade do turismo para o desenvolvimento do país. Pode-se considerar este período como um momento de desenvolvimento espontâneo e, por consequência, desorganizado do turismo.

A ocupação do espaço realizou-se sem o mínimo de planificação, obedecendo à única lei do proveito imediato, prevalecendo a logica económica. Nesse quadro de implantações desordenadas, fruto da ausência de planificação, conflitos diversos emergiram entre os estrangeiros e os locais, acompanhados de efeitos sobre as paisagens e sobre o ambiente em geral, o que ameaça o desenvolvimento do próprio turismo.

Os efeitos desse processo tiveram, no entanto, o mérito de atrair a atenção das autoridades competentes sobre o papel e a importância do turismo, pois a amplitude da retomada da actividade foi significativa: se em 1995, a frequência era estimada a cerca de 160 000 turistas, Moçambique registou dois anos depois cerca de 300 000 turistas (INE, 1999) e em 2001 atingiu 400 000 (MITUR, 2002). No mesmo período, a capacidade de alojamento passou de 7500 a 8500 para atingir cerca de 12 200 camas em 2001 (MITUR, 2002).

Dados mais recentes revelam que o país contou com 1,9 milhões de visitantes em 2013 para um total de cerca de 39000 camas (Ministério da Cultura e Turismo, 2015).

Assim, definiu-se o turismo como sector para maximizar a entrada de divisas e geração de empregos, bem como reforço do desenvolvimento regional e de distribuição dos respectivos benefícios por todas as zonas do país, e principalmente como instrumento de projecção da imagem prestigiosa de Moçambique no exterior (Ministério do Turismo, 2003).

Em 2003, foi aprovada a Política Nacional de Turismo, através da resolução nº 4 de 4 Abril do mesmo ano. Esse instrumento jurídico serve de base legal para orientar o sector de Turismo na República de Moçambique. Para operacionalização dos preceitos plasmado no Plano Nacional de Turismo, aprovou-se em 12 de Abril de 2004, o Plano Estratégico para o Desenvolvimento de Turismo em Moçambique (2004-2013), estando já em vigor o novo plano, também com mesmo período de validade.

Com a criação do Ministério de Turismo, Política Nacional de Turismo e de Planos Estratégicos para o Desenvolvimento do Turismo em Moçambique, registaram-se avanços significativos no

turismo nacional. Contudo, para além da condição económica desfavorável para construção de infra-estruturas, precisa-se aprimorar questões organizacionais, de forma a tornar as dificuldades em oportunidade.

#### Cultura no turismo Moçambicano

Operadores turísticos internacionais entrevistados revelam como áreas preferenciais de Moçambique para a promoção em seus mercados essencialmente destinos ligados a praias como Vilanculos, Bazaruto, Inhambane, Pemba, Quirimbas e Ponta do Ouro. No que respeita a experiências de Natureza terrestre, apenas Gorongosa foi referida (Ministério da Cultura e Turismo, 2015).

Este facto revela, pelo menos não explicitamente, que não existe interesse dos operadores em relação ao património construído ou aos aspectos culturais em geral. No entanto, considerando que quando se fala de turismo refere-se a lugares e sobretudo a pessoas, então significa que os elementos culturais de uns e de outros estão sempre presentes. Por isso, ao enumerarem os lugares, destacando as componentes naturais, implicitamente se referem aos homens e consequentemente à componente cultural, mesmo que não sejam esses os motivos principais das viagens.

Vou-me socorrer a este propósito, na seguinte definição de cultura:

“A cultura define-se como sendo o conjunto complexo de maneiras de ser, estar, comportar-se e relacionar-se desde o nascimento até à morte passando pelos rituais que marcam os principais momentos do processo de integração social e da socialização. “ (Politica Cultural de Moçambique e Estratégia de sua implementação)

Cultura deve, assim, ser entendida como a totalidade do modo e do estilo de vida de um povo ou comunidade.

Documentos oficiais de Moçambique como Politica do Turismo, Estratégias de sua Implementação, Plano estratégico para o desenvolvimento do turismo entre outra documentação avulsa, referem “*mosaico cultural único com reflexo da fusão Africana-Portuguesa-Asiática-Árabe*” como característica potencial para o desenvolvimento de um turismo cultural.

Os mesmos documentos referem como recursos turísticos culturais: a Ilha de Moçambique, património cultural Mundial pela UNESCO desde 1991, a *Timbila* e o *Nhau –Gule Wankulu* declaradas obras primas do património cultural da humanidade; o mapico, o tufo, o xigubo, a marrabenta e outras expressões como o artesanato, a gastronomia e outras constituem recursos culturais emblemáticos.

Ora, de facto não se está em face de recursos turísticos pois os mesmos ainda não foram colocados ao serviço do turismo, constituem apenas elementos complementares, ou se quisermos a “decoração” ou um adereço, já que estes, pelo menos por enquanto, não constituem propriamente matéria-prima do turismo.

No entanto, assiste-se a um interesse expresso de se incrementar o turismo cultural, ao serem propostas acções de promoção e de divulgação do nosso património cultural através de

festivais e eventos culturais como exposições de arte e artesanato e feiras gastronómicas, procura-se, simultaneamente contribuir para o fortalecimento das identidades culturais e para o desenvolvimento económico e social das comunidades locais.

Apontando-se como locais de maior potencial para o turismo cultural a cidade de Maputo, e a Ilha de Moçambique, por se tratar de lugares com maior concentração de obras e monumentos, reactualizando a história de Moçambique colonial.



Figura 2. Catedral de Maputo, um traço importante da presença colonial portuguesa em Moçambique

Fonte: autor, 2007

Aliás, o casamento da Cultura e Turismo, do qual resultou o Ministério da Cultura e Turismo, não vem que confirmar a pretensão do poder público em usar o turismo como elemento que vem valorizar o património cultural.

Com efeito, tal como refere Barreto (2000)

“A busca dos elementos característicos e diferenciais de cada cultura aparece como uma necessidade de mercado, a cultura autóctone é matéria-prima para a criação de um produto turístico comercializável e competitivo internacionalmente” (Barreto, 2000: 47).

Assim, parece que fica claro, que em Moçambique, se espera que a cultura local seja atractiva para o mercado turístico.

Ademais, reforçando esta ideia, De Carvalho e Nóbrega (2012) referindo Wainberg reconhecem o turismo principalmente como uma experiência comunicacional directa entre turistas e população local, classificando a actividade como a “indústria da diferença”.

Por isso, ao atribuir à cultura local, tangível e intangível, um papel integrante do produto turístico, espera-se que o mesmo seja competitivo, opondo-se a cultura globalizante.

Aspectos da cultura moçambicana mesmo não sendo privilegiados pelos operadores turísticos sempre estiveram disponíveis como manifestações locais dos quais o turismo se beneficia. Ademais, se considerarmos por exemplo, o artesanato, os artesãos sempre procuraram tirar benefícios da actividade turística a partir do interesse que as suas obras despertavam nos

turistas. Por isso, a estratégia encontrada foi a de se fixarem na proximidade dos locais de alojamento dos visitantes.



Figura 3. Produtos do artesanato moçambicano em madeira, dispostos ao longo de uma artéria frequentada por visitantes

Fonte: autor, 2007

Embora ainda em pequeno número, de forma tímida já aparecem alguns restaurantes que oferecem pratos típicos da gastronomia local e nacional. Do mesmo modo que, nos períodos de pico do turismo se organizam feiras e festivais de divulgação de danças e música moçambicana.

A protecção do património cultural em Moçambique é regido por dispositivos legais entre os quais: a lei N° 10/88 de 22 de Dezembro sobre Protecção do Património Cultural, a lei 13/2008 de 25 de Fevereiro que visa proteger, preservar e valorizar o Património da Luta de Libertação Nacional. Além disso esse processo de protecção era igualmente orientado, por convenções internacionais, da Unesco que Moçambique é signatário. Entre estas podem apontar-se as convenções sobre a protecção do Património Mundial, cultural e Natural, de 1972 e a Convenção sobre a Protecção do Património Intangível de 2003 (Macamo,2012).

No âmbito da implementação da legislação de protecção do património cultural, em 1991, a Ilha de Moçambique foi classificada como património Cultural Mundial pela Unesco.

Na sequência da mesma legislação, em 2008 com vista a valorização da luta de libertação nacional e dos heróis moçambicanos, foram classificados como património cultural, sucessivamente: os locais históricos de Matchedje, Chilembene e Nwadahane, respectivamente, berço da luta armada de libertação de Moçambique e Terra Natal de Samora Machel, primeiro presidente de Moçambique independente e de Eduardo Mondlane, fundador da Frelimo, frente de Libertação de Moçambique (Macamo, 2012).

Em Moçambique, historicamente, a cultura funcionou para o povo moçambicano como veículo de reafirmação da identidade moçambicana e de protesto contra a dominação colonial, tendo



sido componente importante da luta de libertação nacional, em virtude da sua relação intrínseca com o despertar da consciência nacionalista (Omar e Sandeville Júnior, 2014).

Após a independência nacional, afirmou-se que a valorização da cultura seria a condição fundamental para a consolidação da unidade nacional e de identidade individual e de grupo (Omar e Sandeville Júnior, 2014).

Assim, é suposto que se espera que os que propõe os elementos a serem patrimonializados tenham em consideração os diferentes sectores que constituem a sociedade, de modo a que todos se sintam parte do património. Pois, “património cultural” deve ser visto como um conjunto de bens reconhecidos pela sociedade através de símbolos que representam essa produção do passado, que no caso de Moçambique vem marcado pela opulência da dominação colonial em oposição com a precaridade de condições de vida da população (Omar e Sandeville Júnior, 2014).

Funari e Pelegrini (2009) citados por Omar e Sandeville Júnior (2004) referem que o património só tem sentido quando reconhecido pela comunidade, que o compreende como parte do passado que se deseja transmitir como legado para as gerações vindouras.

#### **Património Cultural, Turismo e desenvolvimento local em Moçambique: desafios e riscos**

Em Moçambique, embora o contexto actual não seja muito favorável, o turismo encontra-se em franco desenvolvimento, sobretudo a partir da abertura do país ao mercado global, onde se verificou um forte crescimento de investimentos no sector que se traduziram no aumento da capacidade de alojamento e de fluxos de turistas. Por exemplo, o número de quartos disponíveis aumentou de 2001 a 2013 em mais de 26000 unidade ou seja um crescimento anual médio de cerca de 10%. Em resposta a este crescimento da capacidade de alojamento, no mesmo período, o número de turistas passou de cerca de 400 000 para 1,9 milhões, ou seja um aumento de cerca de 1,5 milhões de turistas.

No entanto, considerando que se trata de uma actividade vulnerável, por se sujeitar fortemente à influência do ambiente externo. É assim que a instabilidade política e a crise económica que o país está a atravessar, aliadas à crise económica mundial, tem implicações negativas no turismo em Moçambique, através da redução de fluxos de visitantes e na redução de investimentos no sector.

Ora, ao falar-se de participação do turismo no desenvolvimento em geral e do desenvolvimento local em particular deve-se ter em conta de um lado as necessidades do desenvolvimento do turismo e de outro lado, as características locais. O quadro em que o turismo se desenvolve, constitui condição fundamental para a compreensão do nível de participação da comunidade. Ao falar-se do quadro, quer-se referir ao contexto que integra não apenas aspectos físicos naturais mais igualmente socioeconómicos, desde os infra-estruturais como, rede viária, abastecimento de água e energia, tratamento de resíduos sólidos, sistemas de transporte e comunicações, acesso aos serviços de saúde e educação, actividades económicas, entre outros aspectos. Em Moçambique, todos esses elementos enumerados são problemáticos: há carência de transportes, os transportes públicos funcionam mal, as estradas são de baixa qualidade, uma percentagem importante da população não tem acesso à água potável e a energia de qualidade... ou seja a maioria da população vive ainda em condições muito precárias, tem ainda muita necessidade de coisas básicas.

Assim, as questões que se colocam são as seguintes: Quais as ligações entre as actividades da população e a actividades turística? Qual a capacidade de resposta local às necessidades de turismo?

Procurando responder às questões diria: considerando o quadro e as condições de vida da maioria da população, das actividades que desenvolve e da capacidade produtiva das mesmas, as ligações reais e potenciais com o turismo são muito limitadas. Senão vejamos, com os actuais níveis de produção e de produtividade a incapacidade de satisfazer as necessidades locais e nacionais é manifesta, sendo por isso, necessário recorrer-se à importação. Ora, assim sendo, constata-se que a capacidade de resposta as necessidades do turismo em Moçambique, são muito limitadas.

Virando-nos agora especificamente para a cultura e o património cultural, parece-nos não haver nenhuma dúvida sobre a utilidade e importância do património cultural para a actividade turística, quando se observa o aumento de fluxos turísticos para Moçambique que, embora sejam movidos por outras motivações que não as culturais, os turistas acabam sempre por se interessar em conhecer o legado cultural dos destinos turísticos.

As sociedades frequentemente buscam construir sua identidade, definir seus parâmetros de pertencimento, recorrendo ao passado, sendo estes elementos que o tornam diferentes de outras sociedades, constituindo esse diferencial factor de atracção.

É através da história da vida das comunidades de um determinado lugar, e de gerações anteriores que, são procuradas as ligações entre o presente e o passado (Omar e Sandeville Júnior, 2014). Portanto, as sociedades contemporâneas desenvolveram formas institucionais para guardar as suas histórias, suas memórias, seu património. Essa institucionalização dá-se em monumentos históricos, de modo que essa guarda não é uma condição natural, mas representa escolhas, ou seja, são construções sociais.

O acto de conservar assenta, assim, em escolhas e decisões complexas.

“O legado cultural, assim transformado em produto para o consumo, perde o seu significado. A cultura deixa de ser importante por si mesma e passa a ser importante por suas implicações económicas. A história não é importante porque mostra as raízes, mas porque traz dinheiro” (Barreto, 2000: 48).

Com efeito, a partir do momento em que o legado cultural entra para o circuito comercial, transforma-se em “mercadoria”, ou seja num bem ou serviço comercializável, arriscando-se a perder a sua originalidade e a ganhar novos significados. Este facto pode ser ilustrado através de algumas cerimónias, entre as quais o *Gwaza Muthini*. Uma cerimónia que evoca a resistência anticolonial que resultou na célebre batalha de Marracuene de 1895 que opôs os guerreiros do Império de Gaza comandados por Ngungunhane ao exército colonial português. Segundo os participantes, do *Gwaza Muthini* mantém-se apenas na designação, pois, tecnicamente, já é uma festa como outra qualquer, desde que passou a ser colocada no circuito comercial.

Sem dúvida, que a ocorrência de eventos culturais desta natureza, constitui oportunidade de negócios para a população dos locais onde os mesmo ocorrem, já que podem expor os resultados de suas actividades (artesanato, gastronomia, etc.).

Outro aspecto que convém referir prende-se com o facto o processo de patrimonialização, ser imposto, ou seja não haver participação dos grupos interessados. Como acontece, com os monumentos eleitos como património cultural que por não serem apropriados pelas comunidades, os mesmos correm o risco de serem destruídos ou sujeitarem a outros usos.

Em relação à Ilha de Moçambique, Património Mundial da Humanidade da UNESCO, Omar e Júnior (2014) referem

“Apesar da contínua divulgação da importância da preservação do património cultural no país e da criação de instrumentos legais, a realidade mostra-se marcada pela desigualdade com que os aspectos culturais são tratados e pela ausência de participação da população na definição do que é importante a ser preservado.” (Omar e Sandeville Júnior, 2014: 9)

Situação que não contribui em nada para a preservação, pois há falta de sentimento de pertença, uma das condições necessárias para a constituição de um património. Neste caso a pergunta que se coloca é conservar o quê? E para quê?

Para terminar, convém referir o facto de, durante muito tempo se ter procurado negar uma parte da história do país, em especial, o período colonial, através de discursos inflamados dos primeiros anos do pós-independência, com termos fortes como “escangalhar o Sistema colonial”, “destruir os vestígios do colonialismo”. Entre os diferentes resultados podem enumerar-se a retirada de algumas estátuas de “heróis portugueses” das praças, a transformação de igrejas em casas de cultura entre outros aspectos. Ora, esses aspectos todos provavelmente tenham contribuído para a construção (ou desconstrução) da identidade Moçambicana.

Por isso, para a compreensão do relacionamento entre os Moçambicanos e os monumentos herdados do período colonial, deve-se ter presente a relação entre os europeus e os africanos, a discriminação a que estes últimos foram sujeitos, enfim, de todo processo de exploração colonial, cujas marcas ainda são visíveis. Este facto justifica a existência da percepção que a conservação/preservação do património tangível é uma decisão externa, ou que visa servir interesses externos. Visão que se estende ao próprio turismo, já que no caso Moçambicano, em muitas regiões, turismo significa “bóer” que é como é designada os sul-africanos brancos que, como já se referiu constituem a maioria dos turistas que visitam Moçambique (Da Silva, 2007).

### **Considerações Final**

Em Moçambique a preocupação com a valorização e conseqüente preservação do património cultural é relativamente recente, tal como acontece com a actividade turística. Por isso, se existem ganhos para a comunidade local, estes ainda são muito insipientes e limitados.

O facto de não existir um sentimento de pertencimento da população em relação ao património construído torna o processo de conservação e preservação, um desafio, já que aqueles não se identificam com os mesmos, atribuindo-lhes outros significados.

O turismo em geral e o segmento cultural em particular, tem ainda uma participação pouco visível no desenvolvimento local, pois, dado o baixo estágio de desenvolvimento de Moçambique, a capacidade de resposta as necessidades do turismo é muito limitada.

A colocação da cultura ao serviço do turismo, pode contribuir para a perda de autenticidade da mesma ou para a sua artificialização, pois, emergem os “produtores de cultura” que a reproduzem a partir do modo como a vêem, o que, muitas vezes não corresponde à realidade.

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# Os "novos" velhos portos: espaços de metamorfose para o capital imobiliário e para o turismo.

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## Resumo

Há um cenário que confere cada vez maior centralidade as áreas urbanas, que parecem ser constantemente reestruturadas para dar conta dos interesses das corporações econômicas e dão fôlego para que o sistema continue se reproduzindo. Entre as estratégias despontam os projetos de revitalização urbana, que não visam apenas a recuperação de áreas deterioradas, mas viabilizam um conjunto de intervenções voltadas para transformação desses espaços em áreas atrativas para o capital. E para que isso tenha êxito há uma necessidade constante de transformar tais pontos da cidade em grifes, o que requer também um tratamento para torná-las “espetacularizadas” e voltadas para a atividade turística. Nesse contexto os antigos portos adquirem importância, uma vez que se estendem por extensas áreas, próximas ao centro das cidades e, na maior parte das vezes se constituíram em espaços degradados, apartados da economia dos serviços, que caracteriza essas áreas centrais. O artigo pretende entender essa modificação no uso das áreas portuárias, enquanto espaços que privilegiam um poderoso conjunto de agentes econômicos e como se destacam no tecido urbano. Foi realizada uma revisão teórica que recorreu a autores de diversos campos de conhecimento, adicionalmente foram feitas consultas a documentos oficiais de planejamento de diversos portos no mundo, a fim de identificar suas estratégias no contexto dos projetos de revitalização; houve ainda a utilização de relatórios da Global Property Guide, que analisa os mercados imobiliários de grandes cidades, com a finalidade de verificar o impacto desses grandes projetos no mercado imobiliário, sobretudo na valorização fundiária das suas proximidades.

## Palavras-chave

portos; revitalização; capitalismo global; mercado imobiliário.

## 1. Introdução

O papel das cidades no modo de produção capitalista tem se mostrado cada vez mais ampliado. Na atualidade, mais do que nunca as cidades se colocam como portadoras de todos os interesses que envolvem os principais agentes da moderna economia capitalista.

Esse é um cenário que confere cada vez maior centralidade as áreas urbanas, que parecem ser constantemente reestruturadas para dar conta dos interesses das corporações econômicas e dão fôlego para que o sistema continue se reproduzindo.

Mas isso não ocorre sem um ônus para tais espaços, considerando que muitas dessas mudanças se fazem a custa da destruição de grandes áreas para dar lugar às “novidades” que o sistema impõe. Nesse sentido, pensar o papel das cidades no contexto da globalização requer uma perspectiva que sai do lugar e caminha, de fato em direção ao global. O sistema e seus atores hegemônicos demandam, de forma crescente, respostas das cidades.

Essas respostas são dadas nas formas de estratégias que manifestam no espaço urbano, todo o jogo contraditório que envolve a economia internacionalizada. A aceleração dos fluxos, de

capitais e informação, reestrutura o espaço da produção global, e compete as grandes cidades continuar no comando, desde que adaptadas às necessidades e ao modelo que se impõe.

Mesmo que sejam paradoxais as respostas dadas, cada vez mais se orientam por um discurso de “competitividade, que reforça a competição entre cidades, o que por sua vez decorre dos recursos estratégicos que cada uma delas lança mão para se manter. Assim, são formatados planos, os quais são indutores de novas políticas públicas, embora muitas vezes, não considerem em nada as especificidades. Na verdade, fazem parte de um “pacote” de ações ditas inovadoras que se propõem a manter a atratividade dessas cidades.

Como importantes recursos despontam os projetos de revitalização urbana, mas que não são apenas recuperação de áreas deterioradas, mas sim um conjunto de intervenções voltadas para transformação desses espaços em áreas atrativas para o capital. E para que isso tenha êxito há uma necessidade constante de transformar tais pontos da cidade em grifes, o que requer também um tratamento para torná-las “espetacularizadas”.

Nesse contexto os portos adquirem grande importância, uma vez que se estendem por extensas áreas, próximas ao centro das cidades e, na maior parte das vezes se constituem em espaços degradados, completamente apartados da economia dos serviços, que caracteriza essas áreas centrais. Reúnem, portanto, todas as “condições” necessárias para os projetos de revitalização urbana nos modelos que o moderno empresariamento urbano deseja.

Portanto, esse artigo pretende, de forma breve, pontuar aspectos relevantes no entendimento dessa modificação no uso das áreas portuárias, entendendo-as na perspectiva de espaços que privilegiam um poderoso conjunto de agentes econômicos e como essas áreas se destacam no tecido urbano, tornando-se verdadeiras grifes espaciais, em face da sua espetacularização.

Para fundamentar o debate foi necessária uma revisão teórica que recorreu a autores de áreas do conhecimento diverso, adicionalmente foram feitas consultas a documentos oficiais de planejamento de diversos portos ao redor do mundo, disponíveis nos seus ambientes virtuais, a fim de identificar suas estratégias de operação e competição no contexto dos projetos de revitalização de grande expressividade; houve ainda a utilização de relatórios da *Global Property Guide*, que analisa os mercados imobiliários de grandes cidades, com a finalidade de verificar o impacto desses grandes projetos no mercado imobiliário, sobretudo na valorização fundiária das terras próximas a eles.

A análise dos dados associados ao debate teórico permitiu a estruturação do artigo, que após as considerações iniciais, percorre o caminho do diálogo com autores diversos que contribuem para esclarecer a natureza da questão, e no momento subsequente o trabalho envereda pela discussão das particularidades e similaridades que marcam tais projetos, procurando evidenciar pontos convergentes que são de grande importância para as cidades que abrigam essas iniciativas, e verificando os impactos desses projetos no mercado de imóveis de algumas dessas cidades, para então chegar as considerações finais, que possuem um caráter mais de provocação, considerando que o tema ainda merece aprofundamento e ampliação.

## **2. Breve debate conceitual de orientação**

Compreender a cidade no contexto da globalização passa necessariamente por entender também seus fragmentos que se “espetacularizam”. Ressalte-se que no artigo o conceito de espetacularização substitui o de “embelezamento urbano” amplamente estudado, como uma

forma de evidenciar as áreas objeto de projetos de revitalização como parte de uma estratégia de integrar as cidades em um circuito de competição pela atração de investimentos e torna-las áreas onde o capital internacional se reproduz não só pelo uso, mas também pelas significações que tais frações adquirem no contexto local e internacional. Portanto, são pontos de conectividade entre agentes econômicos que operam em escala mundial, as populações locais e os viajantes que farão uso desses locais, de forma compartilhada. Nesse sentido Edward Soja oferece uma contribuição ao dizer:

O processo de internacionalização criou outro conjunto de paradoxos, pois implica um estender-se para fora, do urbano para o global, e um estender-se para dentro, do global para o local urbano. Isso deu um, novo sentido a noção de “cidade-mundo”, como uma condensação urbana da divisão internacional reestruturada do trabalho [...] (Soja, 1993: 228).

Esse entendimento como uma via de duas mãos que conecta as cidades ao processo de globalização leva esses centros urbanos a internalizarem signos e comportamentos que corroboram para o fortalecimento desse novo momento do modo de produção capitalista. Ao se tornarem um espaço síntese da reestruturação produtiva, as cidades impõem a si mesmas, a partir das forças hegemônicas e do discurso da competitividade, um conjunto de modificações nos seus tecidos urbanos que visam tão somente fazer com que elas não fiquem pelo meio do caminho nessa maratona que a globalização imprime. David Harvey pontua bem esse cenário quando diz:

[...] o resultado é um turbilhão estimulante, ainda que destrutivo, de inovações culturais, políticas, de produção e consumo de base urbana. Nesse instante, podemos identificar uma conexão vital, se bem que subterrânea, entre a ascensão do empreendedorismo urbano e a inclinação pós-moderna para o projeto de fragmentos urbanos em vez do planejamento urbano abrangente, para a efemeridade e o ecletismo da moda e do estilo em vez da busca de valores duradouros, para a citação e a ficção em vez da invenção e da função, e, finalmente, para o meio em vez da mensagem para a imagem em da substância [...] (Harvey, 2005: 181).

Assim, as mudanças no espaço urbano, passam a ser uma constante, e por que não dizer, quase uma necessidade, para sua manutenção nesse competitivo cenário, bem como passam a depender das estratégias que cada uma delas lança mão para se manter atrativa para os grandes agentes econômicos. Assim, o recurso de reconstruir extensas áreas que marcou meados do século passado, na contemporaneidade passa por uma hibridização. Isso quer dizer que os projetos de revitalização urbana, que incorporam esse caráter de espetacularização, passam a utilizar inovações que mesclam o passado e o presente, em uma arquitetura denominada de pós-moderna.

Na realidade a preocupação não é de situar o projeto nessa ou naquela escola, ou caracterizá-lo com traços específicos, mas de torná-lo um empreendimento viável, sobretudo para os grandes agentes econômicos e despertar nas populações locais o desejo pelo consumo daquele “novo” espaço. Nesse aspecto Busquets (1996) assinala três tipologias dessas intervenções: a) as áreas industriais decadentes; b) as áreas portuárias; e c) áreas adjacentes aos caminhos ferroviários. Trata-se de uma primeira mirada que não se encerra nessas



características, mas já serve como um ponto de partida para entender os projetos de maior envergadura, sobretudo nas cidades americanas e europeias. Nesse sentido Fernanda Sanchez citando Henry Lefebvre afirma que esse é o: “[...] o chamado “urbanismo de vendas” que concebe e realiza o espaço para o mercado, participa também deste movimento de transformação do espaço em valor de troca [...]” (Lefebvre apud Sanchez, 2003: 47).

Daí alguns desses projetos se constituírem como verdadeiros enclaves nas áreas onde se instalam. Isso não ocorre somente pelo “negocio” que se constituem, mas por uma característica que une praticamente todos eles, a semelhança de suas estruturas, que os torna parte de uma verdadeira linha de produção, que marca a revitalização urbana na atualidade. Sobre tal aspecto Fernanda Sanchez oferece uma relevante contribuição para o entendimento, ao comentar:

As novas formas de ação no espaço vêm criando nas cidades os chamados “espaços de renovação” que são cada vez mais homogêneos no mundo todo, pois são moldados a partir de valores culturais e hábitos de consumo do espaço, tornado dominantes na escala mundo. Essa tendência, em termos de experiência urbana, tem levado a uma homogeneização, a uma “pasteurização” dos espaços. (Sanchez, 2003: 47)

Os projetos de revitalização que transformam extensas áreas urbanas são uma das muitas estratégias e respostas que o sistema capitalista dá aos incorporadores imobiliários e outros grandes agentes econômicos. Mas não emerge descontextualizado de um discurso que o justifique, pois como se verifica nas palavras de Del Rio a situação das áreas centrais se caracterizava assim:

Após a II Guerra Mundial e até o último cartel do século XX, as metrópoles do mundo inteiro viveram um intenso crescimento econômico de matriz fordista – produção e consumo massificado – onde o ideal positivista e a lógica racional-tecnista do modernismo orientavam políticas urbanas equivocadas, numa renovação indiscriminada da cidade existente. Projetos arrasa-quarteirão substituíam a riqueza físico-espacial e a pluralidade socio-cultural das áreas centrais tradicionais, já desvalorizadas e esvaziadas de suas funções originais, com ambientes frios, monofuncionais e simplistas, e uma arquitetura distanciada de lastros históricos e dos valores da população. (Del Rio, 2001: 14).

Portanto, o cenário físico das áreas centrais já não era muito agradável e as estratégias de recuperar tais locais também não encontravam acolhida nas populações dessas cidades, uma vez que tais intervenções se mostravam cada vez mais portentosas e distantes daquilo que poderiam conferir um ambiente mais acolhedor e humanizado.

Os projetos além de se caracterizarem por “substituições” em larga escala de extensas áreas degradadas, para dar lugar a infraestruturas e construções que não dialogavam com a história das cidades, tampouco se prestavam a trazê-las de volta a vida. São intervenções que acentuam a lógica funcionalista das cidades, sobretudo das metrópoles, voltadas à reprodução do sistema como um todo, fortemente orientadas pelo setor de serviços.

O cenário de reestruturação produtiva em escala mundial impacta sobremaneira o espaço das grandes cidades, em face da acelerada desindustrialização, revelando algumas

transformações, sobretudo nas suas áreas centrais. Isso leva ao surgimento de extensas áreas subutilizadas que ficaram a margem da vida econômica e social das metrópoles e que receberam nomes diversos, tais como: “vazios urbanos, terrenos vagos, *wastelands*, *brownfields* ou *terrain vague* conforme a diferenciação da nomenclatura” (Leite, 2005).

A internacionalização da economia e o novo ambiente de negócios marcado pela emergência de novos setores produtivos, sobretudo, aqueles relacionados ao trabalho pensante, além da hegemonização das grandes corporações, induz a uma nova forma de apropriação do espaço urbano. Assim, os espaços “ociosos” das cidades despontam como objetos de desejo de grandes agentes, que neles identificam novas formas de reprodução adaptadas ao modelo globalizante dos espaços urbanos metropolitanos. Nesse sentido é importante registrar a contribuição de Vicente del Rio, quando diz:

[...] o modelo de revitalização urbana do urbanismo contemporâneo [...] permite a gestão da cidade segundo uma lógica neoliberal, cuja prática urbanística passa a ser fragmentada e dispersa, de acordo com as oportunidades, as vantagens competitivas e as respostas de um mercado consumidor cada vez mais globalizado, embora de expressões localizadas como, por exemplo, na instituição de espacialidades propícias para novos polos financeiros e imobiliários transnacionais, ou de intenso turismo cultural-recreativo. (Del Rio, 2001: 14)

Se em um primeiro momento, as iniciativas de revitalização urbana se mostraram limitadas a alguns segmentos econômicos e se manifestaram pontuais no tecido urbano, na atualidade há uma considerável diversificação de negócios que se instalam nesses locais, e agora eles se ocupam grandes extensões. Isso é resultante da superação do modelo experimental em que os projetos se davam de forma fragmentada, e eram conduzidos pelo poder público, para um modelo empresarial, que implanta uma lógica de gestão privada, a qual perpassa a concepção e se estende até o funcionamento dos empreendimentos participantes do projeto.

Muitos dessas intervenções são componentes de planos estratégicos para determinadas cidades, sobretudo, as metrópoles mundiais, que vem se orientando por essa forma de gestão no sentido de fortalecer sua competitividade e atrair capital. Rose Compans (1999) discute com propriedade tais características e aponta alguns recursos tais cidades se utilizam, as quais são denominadas de “imperativos” para a manutenção dessas posições privilegiadas seriam eles: a) a construção de redes de comunicação modernas; b) a criação de distritos financeiros; c) a modernização e/ou construção de infraestrutura de transportes; e d) provisão residencial destinada às classes mais abastadas.

Além dessas provisões materiais, há duas importantes estratégias mencionadas pela autora, a primeira seria o Marketing Urbano que segundo a autora segue a mesma lógica do marketing empresarial e deve se apoiar não somente nas estruturas mencionadas no parágrafo anterior, mas nas “competências e qualidades sociais específicas” (Compans, 1999: 109). Adicionalmente a autora pontua a importância das trocas existentes entre essas cidades no que se refere a projetos urbanos e boas práticas, o que as tornam “pontas de lança” no sistema capitalista, uma vez que seus recursos para competir sempre serão mais inovadores que as demais.

Como se verifica nas palavras de Compans (1999) as trocas de experiências bem sucedidas passam a ser uma constante entre as cidades globais. Nesse sentido, os projetos de

revitalização despontam como um modelo de atração para novos agentes econômicos e diversificação do ambiente de negócios dessas metrópoles. Assim, o poder público de algumas dessas cidades aceita a revitalização como parte um novo modelo de desenvolvimento urbano conectado ao movimento de globalização baseado nos exemplos de cidades norte-americanas e europeias, pioneiras nesses projetos, como Boston, Baltimore e São Francisco (EUA); Londres e Glasgow (Grã-Bretanha), Barcelona e Bilbao (Espanha), Berlin e Hamburgo (Alemanha), Genova (Itália), entre outras.

O caráter empresarial demandou inclusive novos arranjos institucionais, com a criação de companhias que se tornaram incorporadoras, construtoras e administradoras desses projetos, a exemplo da *Boston Redevelopment Authority*; da *Charles Center – Inner Harbor Management*, de Baltimore; da *London Docklands Development Corporation*; além da *Corporación de Antiguo Puerto Madero S.A.*, administradora do empreendimento de Buenos Aires.

Da parte do poder público houve a mobilização no sentido de promover alterações na legislação urbanística e instituir pacotes com incentivos diversos, além é claro, de dotar e/ou melhorar a infraestrutura existente no entorno da área do projeto. Nesse sentido Compans destaca:

No intuito de atrair investidores, os governos locais norte-americanos ampliaram os incentivos fiscais ao setor imobiliário, ofereceram contrapartidas em terrenos, infraestruturas e regras mais flexíveis para viabilizar empreendimentos nas *Entreprise Zones* e se lançaram na formação de “parcerias” com empresas privadas para a promoção de projetos de renovação urbana. A forma privilegiada de “parceria público-privado” neste período foi a de agências de desenvolvimento. Elas obtinham financiamentos mediante contrato, escolhiam terrenos apropriados aos novos empreendimentos, definiam programas financeiros, obras de infraestrutura e vantagens a serem acordadas com os investidores, além de negociar contrapartidas, como a melhoria dos transportes públicos, a manutenção do nível de emprego, a formação profissional dos trabalhadores ou ações concernentes à preservação do meio ambiente. (Compans, 2004:31)

Assim, o centro das cidades só se constitui em um espaço único do ponto de vista político administrativo, mas nos seus usos constitui-se em um mosaico que manifesta os sinais de decadência e abandono, em face da importância que possuem para a vida urbana. Nesse sentido, os portos cada vez mais foram se distanciando dessa relação com seu entorno imediato, para estabelecer conexões com pontos distantes nos territórios nacionais e mesmo com outras nações, dependendo da magnitude de suas operações. As palavras de Vicente del Rio dão o tom da questão:

[...] os modernos e gigantescos navios de carga, a containerização e a especialização do movimento portuário, as dificuldades de acomodar as novas logísticas portuárias às limitadas instalações e espaços das áreas centrais e a difícil acessibilidade dos meios de transportes de apoio – rodovias e ferrovias – foram fatores fundamentais para seu esvaziamento [...] (Del Rio, 2001:16).

Assim, o distanciamento seria inevitável e a lógica da relação passa a ser antagônica, uma vez que o porto opera a partir de sua lógica e a parte central da cidade muitas vezes não tira

nenhuma vantagem de sua presença. Pelo contrário, a convivência da economia do terciário que é a marca das metrópoles passa a ser fortemente afetada pelos portos, tornando-os um ônus que as cidades já não desejam mais.

Nesse sentido, a reaproximação das antigas e degradadas áreas portuárias nas grandes cidades, com a vida urbana contemporânea passa necessariamente por uma requalificação desses espaços e dos seus entornos imediatos. São esses aspectos relativos a espetacularização das áreas portuárias e seus reflexos no tecido urbano que pretende-se discutir na secção seguinte do artigo.

### **3. Áreas portuárias como espaços a serviços do sistema em diferentes momentos**

Ao iniciar essa parte do artigo é importante refletir sobre esse movimento de surgimento das cidades em torno dos portos, do papel desempenhado pelos mesmos no passado, tanto para o desenvolvimento dessas áreas urbanas, e até das regiões e países.

No primeiro momento essas instalações portuárias possuíam uma relação estreita com as cidades onde se localizavam, e estas as percebiam como parte do tecido urbano e de sua vida cotidiana, até porque dependiam fortemente dos produtos que por ali transitavam. Sob tal aspecto é relevante entender que:

A navegação e, conseqüentemente, os locais para abrigar as embarcações contam muito da história da humanidade. Assim, pensar sobre a evolução dos portos e das relações que os mesmos estabelecem com suas hinterlândias e entre si, enquanto portas de integração com terras distantes é sempre um exercício de associação com o sistema de técnicas [...] (Rocha Neto e Cravidão, 2014: 28).

Com o advento da industrialização e certa autonomia das grandes cidades, essa dependência se acentua consideravelmente e o porto continua se mantendo como uma infraestrutura necessária e hegemônica nas áreas centrais, reforçando o caráter de pontos para o escoamento da produção nacional, bem como da entrada de bens vindos de terras distantes.

Já no período da globalização que acentua as trocas internacionais, mas no espaço das cidades há uma evidente transição da economia metropolitana para o setor de serviços. Dessa forma, se estabelece um conflito de uso territorial entre as características da economia terciária e os grandes portos, que passa a operar em escala cada vez mais ampliada e necessitar de extensas áreas para isso. Nesse sentido:

[...] os portos transformam-se em pontos nodais das redes logísticas, exigindo contudo a incorporação de uma série de inovações, organizacionais ou físicas, que envolvem a logística. No caso específico dos portos, transformados em centros da cadeia logística, observamos a incorporação de novas tecnologias ligadas ao transporte, manuseio e processamento de informação das cargas acondicionadas em contêineres – transporte porta-a-porta. Mudam a posição dos portos na cadeia de transportes, sua organização espacial e as relações capital-trabalho na orla portuária mundial. (Rodrigues, 2007: 128)

Esse padrão de operação resulta em uma relação que começa a se tensionar e que adquire contornos dramáticos, com o fortalecimento da economia dos serviços, sobretudo nas grandes cidades. O porto passa a ser considerado como algo indesejável, por aspectos diversos, que

vão desde o trânsito de veículos pesados, a poluição, a interferência na paisagem, entre outros que negam visualmente aquilo que se deseja para área central das cidades.

Adicionalmente, a economia internacionalizada vai demandando um trabalho intensivo por parte dessas instalações, levando-as ao isolamento espacial reforçando a pouca preocupação com seu entorno. Alguns portos se tornam especializados, outros se configuram como portos industriais abrigando dentro de seus limites diversas plantas produtivas, o que leva a uma ruptura definitiva com as áreas centrais das cidades.

Assim, os portos embora fisicamente se localizem próximos aos centros das cidades, estão muito distantes daquilo que a economia urbana deseja para essas áreas centrais, uma vez que ocupam amplos espaços que poderiam dar lugar ao terciário moderno e reproduzir capitais voltados para o setor de serviços.

A saída encontrada não se dá por acaso, ela ocorre em um contexto de internacionalização da economia, como já mencionado, que utiliza tais espaços degradados com a finalidade de “reincorporá-los” ao tecido urbano, através da sua inclusão a economia do terciário moderno, através de corporações imobiliárias.

Dessa forma, as *waterfronts*, ou linhas de água, que margeiam extensas áreas portuárias tornam-se locais com amplas potencialidades para investimentos, por parte de uma gama de agentes, que vão desde os incorporadores imobiliários, aos grupos de hotelaria e alimentação, passando pelas empresas de lazer e diversão, sem considerar outros segmentos de menor expressão, mas que sempre se fazem presentes nesses projetos. Nesse sentido, a contribuição de Viegas citado por Vicente Del Rio é de grande importância:

Nos últimos anos, com o fenômeno mundial de revalorização das áreas de frente de água, as alterações nas relações entre o indivíduo e o seu tempo de lazer, o crescimento do turismo cultural e temático, e a tendência à construção de fragmentos qualificados de cidade, destacaram as áreas portuárias por suas potencialidades paisagísticas, lúdicas, logísticas e imobiliárias, bem como pela “revalorização mediática do seu capital simbólico (Viegas et ali, 1995: 11)

Aquilo que o autor pontua, é parte das argumentações que levaram a difusão desses “modelos” de revitalização de áreas portuárias a se difundir pelo mundo. Por se constituírem em frações “qualificadas” da cidade, como dito por Viegas, é natural que elas apresentem distinções do restante do tecido urbano, principalmente, naquilo que se refere ao valor da terra e passem a se constituir em áreas de atração para moradores locais e viajantes.

Embora sejam muitas as ações convergentes para viabilizar tais projetos, que impactam em diversas dimensões, desde a social, ambiental, urbanística, econômica, cultural, institucional, o destaque dado à questão fundiária revela-se como um ponto de conectividade entre todas elas, visto que a valorização do solo em face da revitalização modifica toda a estrutura territorial antes existente. A análise de Lungo demonstra tal situação:

[...] os grandes projetos tendem a promover rupturas na dinâmica imobiliária e na formação dos preços fundiários, as formas de envolvimento estatal na sua formulação, operação ou gestão também sofrem descontinuidade. A intervenção do Estado vai muito além de uma participação financeira e é decisiva ao produzir exceções ou renúncias fiscais ou urbanísticas que oferecem ao grande projeto um

espaço legal formatado segundo suas necessidades. É aqui, talvez, em que mais se aplica a flexibilidade, elemento central dos novos modelos de planejamento. Assim, pela sua própria natureza e dinâmica, os grandes projetos urbanos supõem e dependem do que poderia chamar de urbanismo ad hoc: o Estado atua menos como regulador e representante de interesses coletivos da cidade e mais como ‘facilitador’ do projeto (Lungo, 2004: 45).

Em todos os grandes projetos de revitalização de grande expressão mundial, o poder público atuou da mesma forma e forma, que poderia ser resumida em: a) modernização da infraestrutura existente; b) ações legais para diferenciar o espaço do projeto, com a finalidade de torná-lo atrativo para investidores; c) facilitação para modelagens de novos arranjos institucionais com vistas à gestão do projeto; e d) forte apoio nas estratégias de marketing voltadas para investidores e público.

Essas ações sintetizam uma análise de Vainer e Lima Junior que detalha aspectos relevantes dos grandes projetos urbanos e se desdobra em outros aspectos, denominados pelos autores de rupturas, as quais se dariam nas seguintes dimensões: a) Institucionais, através da implantação e desenvolvimento de novos tipos de arranjos administrativos e legais, cuja marca tem sido a parceria público-privada, mas que pode se apresentar de formas variadas; b) Urbanísticas, uma vez que são constituídos espaços que introduzem monumentalidade e/ou qualidades particulares, descontinuidades na malha e paisagem urbana pré-existent; c) Legais pela criação de regras ad hoc que geram descontinuidades no espaço legal da cidade; d) Imobiliárias e fundiária, pela sua capacidade de alterar os “fatores externos” que intervêm na determinação dos preços da terra e na conformação e distribuição espacial dos modos de uso do solo; e) Políticas, ao instaurar ou reconfigurar coalizões políticas que disputam legitimidades e hegemonia do espaço urbano; f) Simbólicas, ao produzir novas representações e imagens da cidade; e g) Escalares, ao introduzir novas relações entre as esferas local, nacional e internacional, tanto do ponto de vista financeiro-econômico quanto do ponto de vista cultural. E os autores arrematam dizendo que:

Em síntese, os grandes projetos urbanos desencadeiam rupturas nos espaços físico e social, em suas múltiplas dimensões, e contribuem para a consolidação de mudanças na dinâmica socioespacial, caracterizadas por reconfigurações escalares e efeitos de desenvolvimento desigual na escala local [...] (Vainer e Lima Júnior, 2012: 16).

Se essas dimensões fossem utilizadas para analisar cada um dos grandes projetos de revitalização urbana em áreas portuárias, pouca coisa os diferenciaria do ponto de vista das grandes estratégias, uma vez que o “modelo” aparenta ser um pacote fechado de iniciativas, e a margem de flexibilidade e adaptação é residual. Assim, a proposta da seção seguinte do artigo é exatamente evidenciar esse conjunto de iniciativas em sua forma “fechada”, que confere pouca singularidade a cada um dos portos onde tais projetos foram implementados.

#### **4. O modelo de espetacularização de áreas portuárias: pontos de convergência**

Uma forma de iniciar a análise não é ir exatamente ao encontro da primeira dimensão discutida por Vainer e Lima Junior (2012), mas destacar o caráter de espetacularização que cada um dos projetos teve e assim identificar seus pontos convergentes.

Do ponto de vista cronológico alguns projetos já vinham se estruturando desde os anos 1950 do século passado, embora o caso de Barcelona tenha adquirido relevo mundial lançado luzes para outras áreas portuárias. Ressalte-se que a cidade espanhola tem sido utilizada por áreas diversas do conhecimento como um caso a ser estudado, e que a matizes de análise, hoje em dia, se mostram bastante diversificadas, tanto naquilo que de fato poderiam ser consideradas intervenções urbanísticas bem sucedidas, como aquelas iniciativas vistas apenas na perspectiva do marketing urbano, que visam consolidar a capital catalã no circuito das cidades mundiais mais competitivas.

O projeto de revitalização no porto de Barcelona continua a coexistir com os terminais que operam o transporte de cargas, embora afastados por alguns quilômetros. Sua apartação se dá em face do tratamento urbanístico e do regramento legal adaptado aos novos negócios que ali se instalam e ao espaço de consumo e deleite dos visitantes, no que é denominado de *Port Vell*, uma vez que essa porção do porto, de fato é a mais antiga.



Figura 1 – Vista panorâmica do Porto de Barcelona

Fonte: sitio eletrônico do Porto de Barcelona

A espetacularização do porto catalão se dá pela presença de grandes edificações modernas e outras antigas que foram modernizadas para atender a novos usos. A grandiosidade não é somente algo que marca a extensão do projeto de Barcelona, mas isso se faz presente nas construções que misturam funcionalidade, opulência e traços arquitetônicos bastante complexos.

Essa visibilidade do projeto de Barcelona pode ser resultante da presença dessas construções grandiosas, que possibilitam ver o porto com diferentes espaços âncoras, o que acentua seu caráter de espetacularização. Outro aspecto que distingue o porto da principal cidade catalã é sua implantação de uma só vez, ao contrário da maior parte dos demais projetos de revitalização pelo mundo que foram modulados.

No caso específico de Barcelona, a extensão do porto revitalizado abriga o Museu de Arte da Catalunha, o Museu Marítimo, dois grandes hotéis, um Shopping que concentra grande número de lojas e restaurantes, o Clube de Natação, uma marina esportiva, um grande prédio de escritórios, a estação de passageiros dos cruzeiros marítimos, uma feira aberta e dois

grandes mercados, isso sem falar em outras instalações menores. Abaixo é possível ter uma panorâmica da área objeto do projeto de revitalização da cidade de Barcelona.

O caso de Barcelona se diferencia de outros projetos que possuíam âncoras únicas como focos da intervenção, a exemplo de Boston, onde o elemento central foi o *New England Aquarium*; no projeto de Sidney, na Austrália, no qual o Teatro da Opera se configurou no centro da revitalização portuária; ou mesmo em Bilbao, na Espanha, onde o Museu Guggenheim adquiriu maior visibilidade frente a todo restante da intervenção. Nesses casos a espetacularização se dá a partir de um empreendimento ancora que “ordena” o restante do projeto, seguindo muitas vezes a lógica de sua manutenção com elemento central.

Ao retomar a análise a partir das dimensões consideradas por Vainer e Lima Junior (2012), o primeiro ponto que os autores destacam como elementos de rupturas e que estão presentes em todos os grandes projetos urbanos é a questão institucional. E de fato é perceptível que os arranjos organizacionais, amparados por normas urbanísticas e de gestão adaptadas a tais áreas são uma constante, poderia se falar em “normas de exceção”, uma vez que são viabilizadoras dos empreendimentos, e mesmo fazendo parte do tecido urbano, sempre adquirem um tratamento bastante diferenciado.

A trajetória dos projetos de revitalização em áreas portuárias aponta para um mesmo modelo, que separa formalmente a unidade de gestão dos projetos, das companhias de docas, que operam o porto. Algumas são transformadas em subsidiárias, outras se tornam independentes, mas o fato que as caracteriza de forma geral, é o desenvolvimento de uma cultura empresarial, voltada para lucratividade e inovação constante na gestão do projeto. Alguns exemplos podem ser dados aqui a título de afirmação dessa inferência tais como: a) a *Boston Redevelopment Authority*, uma companhia criada exclusivamente para conduzir todo o projeto de revitalização da cidade norte-americana do mesmo nome; b) *Catellus Development*, empresa privada que faz a gestão do projeto de Mission Bay, em San Francisco; c) a *Corporación Puerto Madero*, empresa privada que conduz o projeto na capital portenha; d) a *Port Vell*, subsidiária do Porto de Barcelona, que cuida da área revitalizada da capital catalã; e) a *London Docklands Development Corporation*, da capital inglesa; e f) a *Harbour Foreshores*, uma sociedade de economia mista que faz a gestão do projeto na cidade de Sidney, Austrália.

Esses são apenas alguns arranjos institucionais, dos muitos que poderiam ser elencados aqui. Cabe assim entender que, embora situados nas áreas portuárias, tais projetos se “desincorporam” delas do ponto de vista funcional para se incorporarem a economia urbana do setor terciário moderno. De um lado, essa desincompatibilização se dá de fato e de direito, pois parte dos instrumentos legais que são aprovados para viabilizar os projetos de revitalização retiram qualquer remota possibilidade delas retornarem ao uso operacional; de outro lado, se incorporam-se ao terciário moderno, pois há também um conjunto de normas que possibilita novos usos dessas áreas, estabelecendo gabaritação, padronização para as novas construções. Nesse sentido:

*Los proyectos del puerto de Barcelona se enmarcan en situaciones excepcionales respecto al marco legal de cualquier actuación urbanística. En un primer lugar, como se ha indicado, su emplazamiento dentro de suelo portuario y no de suelo urbano lo exime de las obligaciones normativas para su desarrollo, lo que le*



*permite insertarse sin las restricciones urbanísticas que se exigen en el centro histórico. (Gomez, 2015: 23)*

O segundo aspecto destacado por Lima Junior e Vainer, se refere aos aspectos urbanísticos e os autores ressaltam a monumentalidade, mas também as intervenções, do poder público, que viabilizam tais projetos. Nesse sentido, alguns documentos oficiais e artigos acadêmicos relatam alguns desses casos e apontam para obras que reestruturam extensas zonas urbanas, a exemplo de Barcelona, que enterrou uma via inteira, bem como a linha férrea, permitindo a integração do *waterfront* com a cidade; em San Francisco o polemico anel viário de dois andares deu espaço a calçadas; na cidade de Boston foi demolida a *Expressway* e decidiu-se pela sua construção subterrânea, liberando a superfície para parques e novas construções.

A terceira dimensão considerada pelos autores refere-se aos aspectos fundiários decorrentes da implantação desses grandes projetos de revitalização, de forma geral os estudiosos do tema sinalizam para esse efeito “valorização” em face das novas funções assumidas pelas áreas, bem como pela paisagem que se transforma, incorporando o “moderno”, através da arquitetura do espetáculo. Naturalmente que cada cidade tem suas especificidades, quanto ao mercado de terras, mas a alta dos imóveis em áreas revitalizadas e no seu entorno constitui-se em uma característica que une todos eles, conforme se verifica na tabela abaixo que mostra algumas dessas cidades.

Tabela 1 – Valor médio de alugueis em cidades com projetos de revitalização

| <b>Cidade</b> | <b>Aluguel médio nas áreas revitalizadas (U\$)</b> | <b>Aluguel médio no restante da cidade (U\$)</b> |
|---------------|--|--|
| Barcelona     | 2.600  | 900  |
| Lisboa        | 1.400  | 1.100  |
| Londres       | 10.000   | 3.000  |
| Capetown      | 3.000  | 1.900  |
| Buenos Aires  | 2.500  | 1.100  |
| Miami         | 4.000  | 2.000  |
| Nova York     | 12.000   | 3.000  |

Fonte: Relatórios do *Global Property Guide*.

Além dos dados coletados, quando são analisados estudos de caso específicos, o relato do processo de valorização fundiária sempre é algo destacado tanto em documentos oficiais como em artigos científicos. Em seu artigo que discute os portos de Boston e Baltimore, Leite (2011), destaca que, os projetos da prefeitura e a recuperação dos prédios históricos do antigo mercado conquistaram a confiança e o interesse dos investidores, fazendo com que o preço dos imóveis em seu entorno subisse bem mais do que no resto da área central. E continua mencionando Frieden e Sagalyn (1990) que estudaram o caso específico de Boston, de 1970 a 76, quando o *Market Place* ainda estava sendo projetado e construído, e constataram que em um raio de 5 quarteirões a partir do shopping, os preços dos imóveis se valorizaram em 13%, enquanto que no resto da área central a queda era de aproximadamente 16%. Os estudiosos estimaram que, com sua complementação, o *Market Place* tenha valorizado o preço do solo de 20 a 25% e o valor do aluguel de salas de 5 a 15% acima do resto da área central, demonstrando seu papel fundamental como catalisador para o reaquecimento do mercado imobiliário.

Essa valorização leva ao processo de gentrificação, muito bem discutido por Neil Smith, uma vez que leva de volta elites para áreas degradadas através de um processo indutor

meticulosamente planejado que viabiliza uma ocupação marcada pela intensa mercantilização, seja para moradia, seja para serviços de uso cotidiano, conforme se verifica no fragmento abaixo, que trata do projeto de revitalização do Porto de Xangai:

Produzido em conjunto entre a Sasaki Associates (companhia americana de paisagismo e arquitetura), Shui On Land (uma incorporadora chinesa), interessados locais e o governo, o plano busca transformar a ilha em um dos maiores distritos de inovação da China [...] Procurando atrair uma “classe criativa” para morar e trabalhar na área, usos mistos do solo incluíram bairros residenciais com instalações de pesquisa e desenvolvimento (como campi corporativos, escolas de negócios e comércio, incubadoras industriais e centros de convenção). Amenidades urbanas (como varejo, restaurantes, entretenimento, museus e teatros) serão integradas aos antigos armazéns, estaleiros, gruas e pórticos, para preservar o conjunto estético industrial, adaptando-o aos novos usos sem apagar a memória cultural do local [...]. (Ivins, 2013: 16)

Observa-se um fator que potencializa essa ocupação e conseqüentemente impacta no valor da terra, que são os projetos de grandes escritórios mundiais de arquitetura, o que torna essas áreas verdadeiras “grifes” dentro do espaço urbano, um bom exemplo disso é a área revitalizada do Porto de Aarhus, na Dinamarca, conforme se verifica na figura 2.



Figura 2 – Visão das unidades habitacionais do Porto de Aarhus, na Dinamarca.

Fonte: Sítio eletrônico do Porto de Aarhus

Além desses empreendimentos imobiliários, existe outro conjunto de ícones presentes nos projetos de revitalização que reforçam seu caráter espetacular e se relacionam a duas dimensões discutidas pelos autores, a simbólica e a escalar, a exemplo do *New Englad Aquarium*, de Boston, que replicou sua expertise em instalações semelhantes nas cidades de Baltimore, Osaka (Japão) e Lisboa (Expo 98) ou mesmo do Museu Guggenheim, em Bilbao. Seja em escala fordista, seja com “peça” única esses empreendimentos âncoras conferem visibilidade aos projetos em face dos traços arquitetônicos, que espetacularizam seu entorno,



custas das populações desalojadas e deslocadas sob a poeira de demolições especulativas, sem falar nos water front desenhados sob medida para os suspeitos de sempre, etc. (Arantes, 2012: 8).

Esse é um aspecto que se associa com a dimensão política discutida por Vainer e Lima Junior, uma vez que as coalizões que se formam em torno desses projetos de revitalização, atuam para coloca-los prioritariamente nas agendas dos governos. Suas estratégias são bastante sofisticadas e se baseiam na racionalidade que preserva seus interesses, e, aparentemente, também parece resguardar os do poder público e se preocupar com a coletividade. Dessa forma:

Esse “pacote” é avaliado como a coleção de troféus (*trophy collection*) do prefeito municipal, que, apoiado pelas elites políticas e econômicas locais, apresenta um conjunto de obras monumentais que atesta seu comprometimento, trabalho e visão de futuro para a cidade, composto por: hotéis renovados e/ou de grande porte, shopping centres, centros de convenções, áreas históricas preservadas, estádios esportivos, aquários, torres de escritórios, áreas portuárias recuperadas e convertidas para novos usos, etc. Dessa forma, tem-se o que Harvey (1996) classifica como a criação de espaços urbanos “padrões” em ampla gama de cidades ao redor do mundo. Muitos elementos desse “pacote” são implantados com o objetivo de se tornarem grandes atrações turísticas da cidade, chamadas pela literatura analítica de atrações principais (*flagship attractions*). (Kholer, 2014: 96)

O apelo da “recuperação” paisagística e socioeconômica dessas áreas está no centro das estratégias. Claro que isso requer um novo desenho institucional, em que o capital privado toma pra si, “livrando” o poder público do ônus de pensar estrategicamente as cidades. Adicionalmente, o portfólio de oportunidades e investimentos, com a consequente geração de postos de trabalho sempre colabora para uma aceitação massificada de tais projetos, por parte da população local, com raras vozes que se levantam contrariamente.

Nesse sentido, atuam incorporadoras imobiliárias nacionais e até mundiais, escritórios de arquitetura de expressão internacional, corporações interessadas em adquirir glebas das áreas revitalizadas, fundos de pensão e imobiliários, empreiteiras, entre outros agentes. Naturalmente que na disputa pelo espaço esse grupo se hegemonizará e fará prevalecer seus interesses, frente ao restante da população local, tonando essas áreas altamente rentáveis e excludentes para moradia.

Assim, aquilo que Jonh Kingdon (1995) denomina de “janela de oportunidades” na agenda de governos está sempre aberta em face não somente da competitividade territorial que é inerente ao período da globalização, como também pelo numero crescente de grandes eventos, desportivos, científicos, econômicos e culturais, que reforçam a “necessidade” dessas áreas urbanas construírem imagens positivas para o mundo. Nesse aspecto: Vandenberghe conclui: “A externalização da disputa doméstica e a formação de coalizões transnacionais duráveis que possam pressionar os Estados e as organizações internacionais são os mais fortes sinais de que uma fusão de políticas nacionais, internacionais e transnacionais tem tomado lugar.” (Vandenberghe, 2011: 96).

A dimensão anterior também se interconecta com o aspecto da escala estudado por Vainer e Lima Junior, considerando que a construção dessa imagem de inovação, muitas vezes necessita de um reconhecimento da relevância do projeto por parte das populações locais, o que neutraliza boa parte da resistência que poderia surgir ao longo de sua implantação, apesar de já existirem ações, conforme mencionado anteriormente.

É como se a população acreditasse que de alguma forma aquilo lhe trará algum benefício individual, inclusive econômico, em face dos impactos de alguns desses projetos se estenderem por muitos quilômetros além das suas áreas. A figura abaixo procura mostrar o alcance dos efeitos do Projeto Docklands em Londres e permite verificar que a área específica que esta hachurada é bem menor do que aquela assinalada como extensão beneficiada dos empreendimentos.

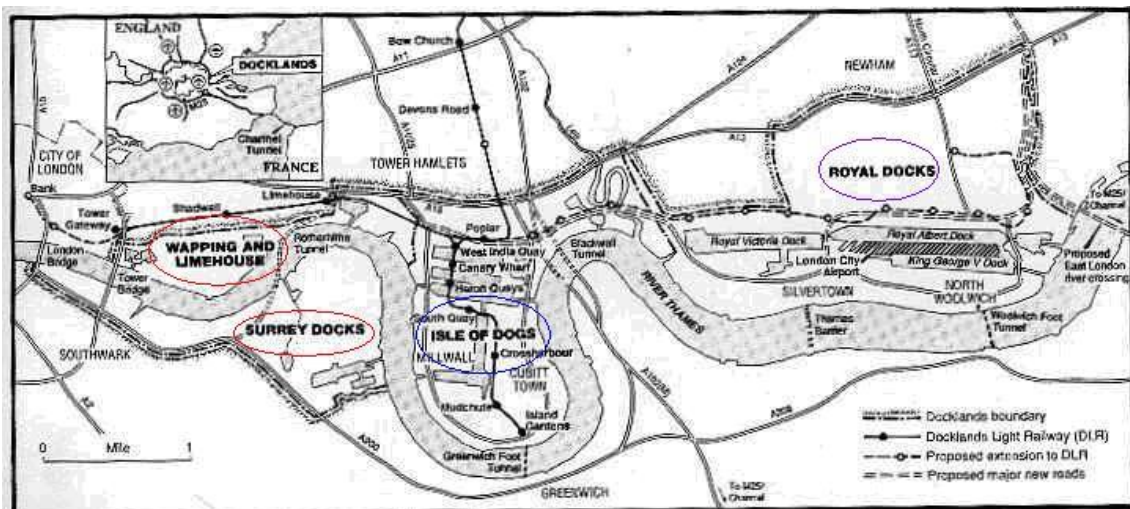


Figura 4 – Área impactada pelo Projeto Docklands, de Londres.

Fonte: Sítio eletrônico da London Docklands Development Corporation.

Além disso, as campanhas publicitárias e o espaço que esses projetos adquirem na mídia, inclusive mundial, corroboram para esse efeito “consenso” em torno dos projetos de revitalização. As peças publicitárias levadas à *mídia mass*, de forma geral, incluem não só os apelos paisagísticos, trazidos pela espetacularização dos projetos, mas, sobretudo trazem argumentos relacionados ao desenvolvimento e a inovação, que passam a ser vistos como algo que identifica a cidade.

### 5. Considerações Finais

A dinâmica do capitalismo, primeiro conferiu um espaço privilegiado as cidades na sua estruturação e sobrevivência, mas isso não foi algo que não impusesse um custo as áreas urbanas. Elas têm que responder a todo o momento, aquilo que lhes é demandado pelos agentes econômicos e pelo mercado de consumo. Nesse sentido, elas se tornam um reflexo da destruição e reconstrução constantes que o sistema impõe a fim de superar suas contradições e crises.

Portanto, o espaço urbano se constitui em um espelho das respostas que as cidades necessitam dar ao modo de produção e, assim, se configuram em um mosaico complexo que acumula nos seus limites tempos, funções, formas e processos, muitas vezes ininteligíveis para um leigo, mas que no fundo se constitui em uma rede.

Nesse espaço reticular, aquilo que teve determinado uso no passado e possuía importância para a vida urbana, pode já não ser tão relevante nem tampouco manter essa proximidade com a sociedade local, esse é o caso das áreas portuárias. A reaproximação possibilitada pela reconversão de uso, mas, sobretudo, pela incorporação dos portos das *waterfronts* a economia dos serviços, passa a ser uma constante em boa parte das metrópoles mundiais.

As estratégias de reconversão, em sua maioria, estão ancoradas em projetos de revitalização de extensas áreas degradadas, em geral localizadas no centro dessas cidades. Embora possuam algumas especificidades, há um traço de união entre todas elas, a transformação dessas áreas em símbolos das cidades e a incorporação da espetacularização dos projetos, que pode estar relacionado a um único empreendimento em torno do qual gira todo o restante ou então essas marcas de monumentalidade podem estender-se por toda área revitalizada.

O artigo procurou analisar a partir de uma metodologia desenvolvida por Lima Junior e Vainer, aspectos que reforçam o caráter fordista desses projetos, mostrando que na sua essência as particularidades ficam apenas no nível da aparência, mas que a essência do processo se dá de forma semelhante entre todos eles.

Constatou-se, portanto, que desde a sua concepção, tais projetos se inserem em uma estratégia maior de “vender” as cidades em um competitivo mercado que as torna produto, e que essas iniciativas constituem-se em um diferencial que constrói uma imagem positiva não só do poder público local e sua capacidade de resolver problemas urbanos de grande magnitude, como também de uma cidade “aberta” aos investidores e grandes corporações que atuam na economia globalizada.

Adicionalmente essas respostas do poder público, ultrapassam o planejamento, e se desdobram em uma nova forma de regular a terra urbana, conferido a tais áreas um tratamento de “exceção”, reforçado pelos investimentos públicos de infraestrutura, que procuram viabilizar o empreendimento. Muitas vezes isso requer um novo arranjo institucional que altera completamente a natureza da relação entre o poder público e as populações locais, e novas formas de gestão desses espaços se estabelecem privatizando áreas que anteriormente eram públicas.

Há ainda que se considerar o fato dessas áreas responderem a contento ao capital imobiliário, uma vez que na maior parte delas há um vigoroso processo de valorização fundiária, que transforma seus arredores, pela exclusão daqueles que não podem pagar para ali se instalarem, bem como pelo novo padrão de moradia que se estabelece, em geral só acessível às classes mais abastadas. Tornam-se, portanto, áreas de grande interesse para os agentes imobiliários, que nelas encontram formas de reproduzir-se de forma ampliada e diferenciada a partir das inovações trazidas pelos projetos.

Por fim, há uma questão simbólica que perpassa todas as dimensões anteriores, e reforça os projetos como úteis e importantes para as cidades, que é sua espetacularização. Esse traço constitui-se no ponto de convergência aparente, mas que possui singularidades interessantes de serem observadas. Para a população a espetacularização é a negação do espaço degradado, que traz de volta o sentimento de bem estar no local e abre possibilidades ao seu uso, mesmo que isso apresente um custo e que seja efêmero. Para os grandes agentes econômicos, a transformação dos projetos de revitalização em espetáculo, traduz-se na possibilidade ilimitada de auferir ganhos, uma vez que a reestruturação das formas e funções sempre foi um

indutor de valor das paisagens, quando se constrói um discurso de positividade. Para o poder público, a espetacularização desses projetos constitui-se em uma nova forma de atuar que incorpora princípios de gestão privada e confere uma imagem positiva, visto introduz o fator inovação na administração da cidade. Portanto, o amalgama dos projetos de revitalização em áreas portuárias é exatamente o seu caráter de espetáculo, capaz de transformar espaços, sentimentos e relações.

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# From Territorial Identity to Territorial Branding: Tourism-led Revitalization of Minor Historic Towns in Reggio Calabria

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## Abstract

Reggio Calabria in Southern Italy boasts many well-preserved minor<sup>38</sup> historic towns (MHTs) of Greek origins. These MHTs are characterized by a strong territorial identity with small-sized centers, often isolated from urban basins. However, these MHTs suffer from continuing degradation due to depopulation and stagnating local socio-economic development (LSED). This article, grounded on an asset-based endogenous approach and system-based relational approach to tourism development, maintains that tourism development is an effective tool to revitalize these towns while promoting LSED. It therefore attempts to explore a tourism-led revitalization model for MHTs where territorial identity and territorial branding are respectively fundamental assets and means. To this end, the research first investigates the constituents of territorial identity, the existing problems that the territorial identity is facing, territorial branding approaches and practices in the MHTs in relation to the two approaches to tourism development. By carrying out case studies of Pentadattilo, Riace and Belmonte, the research then analyzes how urban regeneration can contribute to territorial identity, which improves the tourist attractiveness of the MHTs. This article concludes that territorial branding and value-adding of territorial identity, promoted by regenerative interventions, help improve tourism quality and diversify tourism offer, which, in turn, results in the revitalization of the MHTs.

## Keywords

Tourism; Territorial Identity; Territorial Branding; Minor Historic Towns (MHTs); Revitalization.

## 1. Introduction

Rural and peri-urban areas worldwide are not immune from impacts of urbanization. Urbanization, on the one hand, facilitates rural modernization, and on the other hand, triggers various problems ranging from environmental and landscape degradation, and depopulation to community exclusion. These negative transformations, hardly arguable, have undermined local socio-economic development (LSED) in rural and peri-urban areas. In facing these particular issues, different approaches have emerged to stimulate LSED in rural and peri-urban areas. Among these approaches, rural tourism is utilized, yet tends to encounter obstacles. A common problem found is “the absence of a rural tourism policy, which has the effect of marginalizing small-scale providers from regional and national promotional efforts” (McCool, 2015a: 7). In contrast, tourism activities in rural areas have been criticized as “insensitive to indigenous community cultural norms and values, in other cases as producing low quality jobs, and in still others leading to unacceptable environmental impacts” (*ibid*). To mitigate negative externalities tourism may bring about in rural and peri-urban areas, an endogenous approach, centered on local capital and assets, starts to emerge. Cawley, for example, applies a model of integrated

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<sup>38</sup> “Minor” refers to their small sized centers, a connotative attribute to signify territorial entities that do not meet requirements of large and medium cities, but still go in an integrated manner intended by their territory (Lauria, 2009).

rural tourism (IRT) as a way of adding value locally. In this model, producers are encouraged to change their role from mere cultivators to conservators of the countryside, while seeking supplementary source of income through the adaptation of land, labor, and capital to new uses, such as tourism (Cawley, 2010). Agro-tourism best describes this place-based value-adding process, which demands a reorientation of agricultural output markets and diversification of the rural economy by adding value to the local nature and landscape and all kinds of other local resources (Cristóvão *et al.*, 1994).

In addition to an endogenous focus on capital and assets, there is also a relational approach that pays increasing attention to the linkage between a certain locality and its external environment. Deeming the external environment as contention, complex, uncertain and changing, McCool (2015a, 2015b), advocates a new mental model of sustainable tourism (MMST). This mental model, guided by “systems thinking”, is expected to respond to the need to reframe the role of sustainable tourism in economic development and make communities more resilient and vibrant in a turbulent and changing environment (McCool, 2015a). “Systems thinking” involves considering relationships across time, space and function (McCool, 2015b), therefore holistically conceptualizing tourism as one component of a social-ecological system (Shakia, 2015). Collaboration is supportive of “systems thinking”, since it brings out a greater integration between rural tourism and other economic sectors, thus leading to collaborative innovation (Bramwell and Lane, 2000).

Would the aforementioned two approaches to tourism development contribute to the revitalization of minor historic towns<sup>39</sup> (MHTs) in rural and peri-urban areas of the province of Reggio Calabria (hereinafter referred to as Reggio Calabria) in Southern Italy? The rationale for such a question lies in the fact that these MHTs, often isolated from the urban basins, cover extended areas, but are sparsely inhabited, economically stagnating, and physically degrading. To answer this question, the research first looks into how tourism can be promoted by adding value to territorial identity and undertaking territorial branding, through which socio-cultural capital is mobilized, while generating socio-economic benefits to boost local development. Then, the research discusses urban regeneration approaches and practices in the MHTs. Based on case studies of Pentadattilo, Riace and Belmonte, it analyzes how urban regeneration facilitates territorial branding and promotes territorial identity, therefore increasing the attractiveness of tourism.

## **2. Tourism in Minor Historic Towns (MHTs)**

The MHTs in Reggio Calabria enjoy unique territorial identity characteristics of originality, diversity and richness, be it material and immaterial cultural heritage or landscapes. Their territorial identity, in essence, is their inherent assets and source of attractiveness, therefore they are able to fuel tourism-led local socio-economic development on the condition that there be a value-adding process in place.

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<sup>39</sup> The phenomenon of “minor historical center” (cities with fewer than 10,000 inhabitants) concerns, in fact, more than six thousand of the 8,100 Italian municipalities, of which just over 5,800 have a population of less than 5,000 inhabitants, about 3,600 less than 2,000, nearly 2,000 less than 1,000, and more than eight hundred less than 500. In Calabria Region, of its 420 municipalities a little less than 400 are minor historic towns (Lauria, 2009).

## 2.1. Territorial Identity as Assets

Mostly of Greek origins, the MHTs in the province of Reggio Calabria in Southern Italy manifest unique and distinct territorial identity. Territorial identity is often believed to be a contributing factor of local development, since it influences local evolutionary processes, while shaping the potential of endogenous development of territories and enhancing territorial cohesion (Lee *et al.*, 2005; Ray, 2006; Veneri, 2011; Orduna Allegrini, 2012). However, the definition/understanding of territorial identity tends to be subjective. According to Banini and Pollice (2015), territorial identity is a dynamic, open and participatory social process, gaining its shape from the institutional, economic and organizational environment (Vázquez-Barquero, 2003), which marks the “social construction”<sup>40</sup> of the territory (2015: 5). While Roca *et al.* (2016) stress the natural, economic, societal and cultural features of territorial identity, Camagni (2006) argues that social capital and cultural heritage are determinants of territorial identity. Veneri (2011) maintains that territorial identity has four main components: social capital, socio-cultural identity, spatial organization of activities and governance structure. This research pays special attention to the territorial identity that the MHTs in Reggio Calabria demonstrate, in considering territorial identity, as a totality of the material and the immaterial that encompasses cultural heritage (both material and immaterial), landscapes, language, environment and climate, peculiar agricultural products, and humanity (territorial temperament and *zeitgeist* for example). All of these are constituents of the social and cultural capital and natural resource of the MHTs. Territorial identity, in this sense, refers to all forms of capital and assets that can be mobilized to catalyze local socio-economic development.

Although boasting a strong, highly potential territorial identity, such as unique landscape, tangible and intangible heritage, living traditions and rituals, peculiar agricultural products, etc., the MHTs are faced with many problems (Figures 1, 2), such as abandonment, depopulation, degrading built environment and lagging facilities and services.



Figure 1 - Abandoned houses in Pentedattilo.  
Source: Ou Yapeng (2016)



Figure 2 - The abandoned Palazzo del Giudice in Belmonte Calabro.  
Source: Ou Yapeng (2016)

<sup>40</sup> See the Concept Note of the 3<sup>rd</sup> World Forum of Local Economic Development (2015).

Amaro (2009) reckons that the abandonment in MHTs is due to a lack of investment attention or economic processes, which leads to a “traumatic” result. Indeed, this territorial trauma largely results from drastic economic change that has interrupted an ancient culture deeply-rooted in the land, following mass migration and displacement along the coastal areas. As for the political-economic environment in Calabria Region, Reggio Calabria offers a representative picture: it has long been heavily dependent on public transfers, while undergoing fragmentation of the urban social structure. Both factors explain “the absence of strong local actors and the protracted subordination of local elites to exogenous agency, i.e. choices and actions determined outside the region” (Barillà, 2013: 256).

Taking into account the characteristics of the MHTs’ endogenous territorial identity and exogenous political-economic conditions, the authors maintain that the asset-based endogenous approach and system-based relational approach can serve as guiding principles to formulate and operate tourism activities so as to lever LSED. However, it is worth noting that the functionality of the two approaches depends largely on whether proactive territorial branding practices are in place so as to add value to the territorial identity.

## 2.2. Territorial Branding as a Value-adding Tool

Currently, competitiveness remains a keyword in the European Union Rural Development Policy (RDP), which can be seen from the objectives of the ongoing rural development programs for the period 2014-2020<sup>41</sup> and previous period 2007-2013<sup>42</sup>. RDP also stresses the importance of achieving a balanced territorial development of rural economies and communities (2014-2020), enhancing the quality of life in rural areas and promoting diversification of economic activities (2007-2013) (European Commission, 2011). Rural areas are therefore conceptualized as “multifunctional spaces” that satisfy purposes of recreation, environmental, landscape protection, and economic development. This vital shift leads to an emerging *modello delle reti ecologiche*<sup>43</sup> (ecological networks model) in response to a *modello agricolo produttivista* (productivist agricultural model) in crisis (Presidency of the Council of Ministers, 2016).

Given that rural and peri-urban areas tend to possess “limited, hyper-mobile financial, human or cultural resource” (Ashworth *et al.*, 2014: 4), territorial branding (also termed as place branding) is indispensable for them to become or remain competitive. Indeed, territorial branding is a booster of competitiveness, helping places “fight in the increasingly intense arena of interplace competition” (*ibid*). Besides, territorial branding can provide strategic guidance for place development, a basis for stakeholder cooperation, solutions to practical/functional place-related problems, and opportunities to maximize positive place experience to consumers (residents, visitors, investors, etc.) (*ibid*). In addition, territorial branding can foster innovation, “a collective/interactive process, which cannot take place outside a highly and systemic dimension that favors it” (Bagautdinova, 2012: 181). It therefore can be seen that territorial

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<sup>41</sup> Foster the competitiveness of agriculture; ensure the sustainable management of natural resources, and support action over the climate; achieve a balanced territorial development of rural economies and communities, including the creation and maintenance of employment.

<sup>42</sup> Increasing the competitiveness of the agricultural and forestry sector; improving the environment and countryside through support for land management; enhancing the quality of life in rural areas and promoting diversification of economic activities.

<sup>43</sup> The ecological networks model is deemed as capable of putting biodiversity and landscape at the center of land planning and management (Presidency of the Council of Ministers, 2016).

branding has both endogenous and exogenous nature: it needs to be based on a place's assets and capital while addressing its problems; and, at the meantime, it needs to have a "systems thinking" mindset. This nature suggests its capability to support the asset-based endogenous approach and system-based relational approach to tourism development.

According to Bagautdinova (2012), the result of territorial branding in facilitating tourism-led development practices is determined by the value of territory, the level of activism of its community, integrated offer of structures, services and goods for different categories of tourists, and the accessibility to the territory and its excellences. The authors, however, maintain that the effectiveness of territorial branding depends on whether the territorial identity is fully mobilized through a value-adding process.

Presently, the MHTs in Reggio Calabria are undergoing various territorial branding practices predominantly with an endogenous approach, while exogenous approach is an emerging tool. Endogenous territorial branding is aimed at adding value to the MHTs' cultural assets and natural resources, with a pronounced focus on their material and immaterial cultural heritage, as well as agricultural products. Folkloric festivals serve as an important medium for this kind of territorial branding. One good place-based practice is the *Paeleariza*, an ethno-cultural-musical festival which takes place annually in the Grecanic areas (*aree grecaniche*) of Reggio Calabria and began in 1997. *Paeleariza* always takes place in public spaces (squares, streets, historic buildings, theatrical and entertainment areas) of numerous historic towns/villages of Municipalities of the Grecanic areas, such as Bova, Cardeto, Condofuri, San Lorenzo, Africo, Roghudi, Palizzi, etc. It uses minimal staging to take full advantage of urban spaces, squares, facades of historic buildings or the surrounding landscapes, which are all integral elements of the open air setting. Indeed, the soul of the festival lies in a seamless integration between the content and cultural and environmental containers, and between the material and the immaterial. Over the years, by adding value to the territorial identity, *Paeleariza* has never stopped innovation. For example, in the 2015 edition, it created the summer school of Calabrian Greek (*lingua grecanica*) organized by the *Associazione Scuola Estiva di Lingua Greka di Calabria* located in Bova Marina. Today, this festival has already become a business card of ethno-cultural tourism of the whole area, distinguishing itself for its ability to keep alive the folklore of its territory while innovating the traditional representations of territorial identity and adapting to changing times. In 2011, *Paeleariza* was nominated by the Italian Ministry of Tourism as "Heritage of Italy" for its dedication to cultural events that contribute to enhancing the image of Italy and generating new tourism. There are various *sagra* festivals dedicated to promoting local gastronomic specialties while aiming at visitors and tourists.

During the territorial branding process, community-led institutions, such as *pro loco*, cultural associations and inter-community networks play a significant role. *Pro loco* (Latin phrase which means "in favor of the place") are grass-roots organizations dedicated to promoting local tourism. Different from publicly financed organizations such as the *Azienda di Promozione Turistica* (Agency of Tourism Promotion) or the *Ufficio di Informazione e Accoglienza Turistica* (Office of Tourist Information and Reception), *pro loco* are non-profit entities. By means of adding value to the territorial identity, they are aimed at triggering tourism-related activities and improving the quality of life for the local population. For this purpose, *pro loco*, when developing tourism activities, attach great importance to typical enogastronomic products and local handicrafts, folkloric traditions, cultural and landscape heritage, etc. In doing so, *pro loco*

help form a “double beneficial effect”, namely, the initiatives meant to improve physical conditions of the place and the living conditions of local population coincide with the initiatives that lay the necessary foundation for a quality tourism.

According to Shakia (2015), bridging social capital has a positive impact on tourism-led local development, namely, extra-community networks is considered as a growth booster. The existence of social capital within destination communities can promote the sustainability of tourism development. Considered a contributing factor to the building of bridging social capital, exogenous territorial branding approach starts to gain popularity in recent years. Often in the form of extra-community networks and/or public-private partnerships, territorial branding in this case is aimed at facilitating inter-territorial exchange and collaboration. For example, the private agency *Parco Culturale della Calabria Greca*<sup>44,45</sup> (Cultural Park of the Greek Calabria), dedicated to the promotion of sustainable tourism, constructs a network involving about 20 tourism operators, 8 cultural associations located in different towns and villages in the Greek Calabria, and the Academy of Fine Arts of Reggio Calabria. In this sense, it is clear that the agency adopts a concept based on “systems thinking”, a broad idea of territoriality, which includes the entire Greek Calabria.

Despite the above-mentioned territorial branding approaches and activities, a considerable portion of the MHTs’ highly potential territorial identity remains with idle assets. More work needs to be done to add value to their unique landscapes, tangible and intangible heritage, peculiar agricultural products, etc. In the following part, the authors discuss how urban regeneration practices can help mobilize the idle assets while increasing the tourism attractiveness of the MHTs.

### **3. Urban Regeneration in Minor Historic Towns (MHTs)**

Given the degrading built environment even the formation of “ghost towns” following continuous depopulation in the MHTs, urban regeneration proves to be a badly needed tool to revitalize them by promoting their territorial identity and territorial branding process. Through continuous regeneration, the MHTs can heighten their tourist attractiveness, which demands the coincidence of economic and cultural activities in civic design since the two are mutually impacting (Dix, 1995). A common goal of urban regeneration is “a lasting improvement in the economic, physical, social and environmental condition of an area that has been subject to change” (Roberts and Sykes, 2000: 296). For this goal, various urban regeneration approaches have been experimented in the MHTs in Reggio Calabria. In the coming section, the research carries out three case studies demonstrating different regeneration methods: the reuse and repurpose approach in Pentedattilo, the social constructivist approach in Riace, and the beautification approach in Belmonte Calabro<sup>46</sup>.

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<sup>44</sup> Greek Calabria (Calabria Greca) refers to a strip of territory of about 500 km<sup>2</sup> that ranges from the Aspromonte mountains down to the Ionian Sea. This territory of Calabria is “Greek” because of its Greek legacy. Until today, the Calabrian dialect of Greek, or Greek-Bovesian, is still spoken by the elders from ancient Greek towns and villages such as Galliciano, Bova, Condofuri, Roghudi, etc.

<sup>45</sup> The activities of the Park are mainly in relation to sustainable tourism in Greek Calabria, cultural laboratories, multimedia library, and tourist information and reception.

<sup>46</sup> Different from Pentedattilo and Riace which are located in the province of Reggio Calabria, Calabria, Belmonte Calabro is located in the province of Cosenza, Calabria.

### 3.1. Reuse and Repurpose in Pentedattilo

The most common regeneration practice is reuse and repurpose characteristic of functional adaptation and diversification. Recycling existing assets and tourism-led development can give an impetus for improving the infrastructure and sustainability of a place (Parlewar and Fukukawa, 2006). In Pentedattilo (Figure 3), which became completely uninhabited in the mid-1960s, a long course of preventative and interventional preservation since the 1980s initiated by young people and associations has prevented the village from continuing degrading. Today, tourism plays a pivotal role in the revitalization of the “ghost village”, adding value to its regenerated physical fabric. The reuse and repurpose of its architectural heritage is mainly aimed at promoting local artisan products. This not only helps maintain the integrity of its built environment, but also creates a synergy between the economy and the culture, and between the material and immaterial of the territorial identity. Many of its abandoned houses were restored and repurposed as artisan laboratories and shops, most of which are operated by grass-roots associations. All handicrafts bear strong territorial identities. There is a laboratory dedicated to artisan products, both traditional and innovative, based on bergamot orange<sup>47</sup>. Another laboratory of wooden handicrafts proves to be highly innovative, in that it serves as a multi-functional space: artisan and pedagogic laboratory, ethnographic museum and tourism information (Figure 4). In addition to reuse and repurpose, cultural activities also help revitalize the town. The two most influential ones are the *Paleariza* Festival every summer and the Pentedattilo Film Festival, an international short film festival between August and September.



Figure 3 - Panorama of Pentedattilo.

Source: Ou Yapeng (2016)



Figure 4 - The *Laboratorio Artigianale del Legno* in Pentedattilo, a multifunctional laboratory serving as artisan and pedagogic laboratory, ethnographic museum and tourism information.

Source: Ou Yapeng (2016)

<sup>47</sup> Bergamot orange is a cultural symbol of Reggio Calabria. Its production mostly is limited to the Ionian Sea coastal areas of Reggio Calabria.



### 3.2. Social Constructivism in Riace

The regeneration of Riace, instead, takes a social constructivist approach for its advocacy of social inclusion and social justice. Fifteen years ago, the medieval village was almost reduced to a “ghost town” due to continuous migration of the local population. Since 2004, through public and community collaboration, Riace has been a pioneer in Calabria to host refugees, a quite “revolutionary” action at that time. Then with the entry into force of the Regional Law No. 18/2009 for the welcome and integration of political refugees, more and more partially abandoned towns, among which Caulonia, Stignano and Acquaformosa, also started to repopulate themselves by resettling refugees and immigrants. The strong presence of refugees and immigrants has turned into an opportunity for the recovering of portions of the abandoned historic towns through their repopulation (Russo, 2014). In Riace, with public funding, refugees are offered the abandoned houses and training. A variety of artisan workshops were opened to refugees where they can gain professional skills, earn a wage and learn trades that are disappearing locally. The handicrafts are then sold to tourists. This Riace Model of regeneration has not only helped to solve the problem of degrading built environment of the town due to derelict buildings, but also rebuild both the town’s population and economy. In this case, social inclusion and social cohesion has transformed into bridging social capital and added value to the territorial identity while promoting local socio-economic development, hence making Riace a more livable and attractive place.

### 3.3. Beautification in Belmonte Calabro

Beautification is also a common regenerative practice, as Belmonte Calabro illustrates. For several decades, like numerous MHTs in Calabria, Belmonte Calabro has seen a general phenomenon of population decline, leaving the town increasingly empty. The town’s economy, besides the traditional primary sector linked to agriculture, depends to a large extent on seaside tourism on the nearby coast of the Tyrrhenian Sea in summer time.



Figure 5 - Painted stairways in Belmonte Calabro.  
Source: Ou Yapeng (2016)



Figure 6 - Painted stairways in Belmonte Calabro.  
Source: Ou Yapeng (2016)

This triggers a series of regeneration interventions to revitalize the town and increase its tourist attractiveness. There has been reuse and repurpose of abandoned buildings, and recently, beautification of the historic center. Major interventions are mural and stairway paintings (Figures 5, 6), green infrastructures, as well as public furnishings. The regeneration also involves the promotion of local immaterial heritage. The local association “Belmonte in Rete”, for example, organizes workshops, among many other scientific and cultural activities, where students and residents can learn about handicraft makings, such as traditional weaving.

As the cases of Belmonte, Pentetattilo, and Riace illustrate, endogenous urban regeneration of the MHTs in Calabria proves to be an effective tool to support territorial branding, making these towns and villages more attractive tourist destinations.

#### **4. Conclusions**

The minor historic towns (MHTs) in Reggio Calabria, often isolated from the urban basins, are in fact extended areas but sparsely inhabited, economically stagnating, and physically degrading. Although they boast unique and distinct territorial identities composed of material and immaterial cultural heritage, landscape, peculiar agricultural products, etc., the MHTs have seen a slow local socio-economic development (LSED). To address this development issue, the research has come up with a tourism-led revitalization model for the MHTs where territorial identity and territorial branding are respectively fundamental assets and means. Given the characteristics of the MHTs’ endogenous territorial identity and exogenous political-economic conditions, tourism development led by the asset-based endogenous approach and system-based relational approach are effective tools to revitalize these towns while leveraging LSED.

Abandonment, depopulation, degrading built environment and lagging facilities and services in MHTs as well as the unfavorable exogenous political-economic conditions altogether are undermining the territorial identity, bringing obstacles to tourism development and LSED. In response, various territorial branding practices with predominantly endogenous approach have been undertaken to promote the value-adding process of the territorial identity, transforming idle assets into active boosters of local tourist attractiveness. Endogenous urban regeneration practices characteristic of reuse and repurpose, social constructivism and beautification have contributed to the territorial branding and value-adding of the territorial identity, making the MHTs more attractive to tourists. All in all, territorial branding accompanied by value-adding of territorial identity, facilitated by regenerative interventions, helps improve the quality of tourism and diversify tourism offers, which in turn results in the revitalization of the MHTs and generates socio-economic benefits for the local population.

Due to space limitation, the paper did not discuss in depth the exogenous territorial branding practices in the MHTs of Reggio Calabria. Besides, taking into account the need of financial instruments to make any LSED initiatives socio-economically viable and sustainable, it would be desirable that the future research, on the one hand, integrate the mixed model proposed in the current research with civic crowd-funding mechanism managed by the local community to help implement LSED initiatives based on local assets. On the other hand, it would be desirable to propose for the entire province of Reggio Calabria a regional development paradigm driven by tourism-led revitalization of the MHTs. Such a paradigm, with the LSED of the MHTs

integrated into the Metropolitan City strategy<sup>48</sup>, will help foster a synergy between urban development and rural and peri-urban development in Reggio Calabria.

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<sup>48</sup> The Italian Law No. 56/2014, the "Delrio Law", listed Reggio Calabria as a metropolitan city (*città metropolitana*), operative since 2015. As an administrative division, a metropolitan city is composed of a large core city and the smaller surrounding cities that are closely related to it in terms of economic activities, public services, cultural relations and territorial features.

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# Potencialidades da comunicação para as agroindústrias da rota turística e gastronômica de Santa Maria – Silveira Martins, RS, Brasil

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## Resumo

Este trabalho busca investigar os usos, as tipologias e a importância dada aos instrumentos de comunicação na divulgação das agroindústrias que fazem parte da Rota Turística e Gastronômica de Santa Maria–Silveira Martins, localizada na 4ª Colônia de Imigração Italiana, na região central do estado do Rio Grande do Sul (RS), Brasil. Para o desenvolvimento socioeconômico da 4ª Colônia, a literatura aponta como fundamental a utilização dos instrumentos de comunicação para aperfeiçoar o processo de divulgação e fortalecimento dos projetos turísticos regionais. Realizamos um estudo in loco das práticas de comunicação na Rota Turística, com o mapeamento das agroindústrias atuantes no percurso e a seleção de três estabelecimentos do município de Silveira Martins para constituírem a amostra e análise. Utilizou-se uma abordagem metodológica qualitativa, de caráter exploratório e descritivo, com entrevistas em profundidade. O resultado apontou que os responsáveis pelas agroindústrias reconhecem a importância da Rota Gastronômica, que desejam continuar inseridos nela pelo potencial de visibilidade, mas apontam uma estagnação das ações por parte do poder público e de iniciativas privadas. Entendem a importância da comunicação para o sucesso do empreendimento, entretanto, revelam pouco investimento em comunicação, apostando no tradicional "boca-a-boca" e na fidelidade de clientes conquistada pela qualidade dos produtos coloniais oferecidos. Acredita-se que a discussão proposta neste trabalho pode provocar impactos econômicos e sociais importantes, ao apontar a necessidade de serem desenvolvidos programas de comunicação em vários níveis e em longo prazo, viabilizar a integração da Rota Gastronômica de maneira mais atrativa e eficaz na oferta turística regional.

## Palavras-chave

Turismo; Comunicação; Agroindústrias; Rota Turística e Gastronômica de Santa Maria e Silveira Martins, RS.

## Introdução

O turismo é uma atividade que tem se desenvolvido cada vez mais, sendo frequentemente destacado como uma estratégia potencial de desenvolvimento local e regional de comunidades, por ser uma atividade que produz bens e serviços. A atividade estreita laços e mantém uma troca cultural, quando bem estruturado.

A criação de uma rota turística, auxilia na interação, organização dos atrativos, equipamentos, serviços turísticos e infraestrutura de apoio ao turismo, resultando na consolidação da imagem de uma localidade e de seus serviços interligados ao turismo propiciando o desenvolvimento da atividade turística, que deve ser amplamente divulgada para ter sucesso.

A transformação dos espaços rurais em produtos turísticos com ofertas diversificadas dentro do segmento, assim como as atividades agroindustriais que são tidas como um atrativo e/ou

serviço prestado dentro deste produto turístico é planejada para provocar aos turistas sensações de prazer ou desfrute pré-programados destas atividades que irão ser ofertadas.

A comunicação, nesse contexto, tem um papel crucial, sendo a partir dela que o empreendedor irá despertar sensações e o interesse do turista. Com uma utilização correta dos canais de comunicação disponíveis, vai estabelecer uma ligação entre a oferta e a procura, sendo este um dos pontos-chaves para o desenvolvimento do turismo no espaço rural.

Nos segmentos turísticos, a comunicação atua como uma estratégia para influenciar ou informar o turista na tomada da decisão. A informação transmitida por meio das áreas de marketing, distribuição e coordenação das mídias de comunicação desempenha um papel de grande importância para a disseminação e a propagação de informações dos produtos, para a venda e oferta de turismo nos diversos segmentos.

Quanto ao turismo rural, as agroindústrias que atuam dentro de uma Rota Turística trabalham o processo de comunicação trabalha a relação entre o visitante e o visitado. Sendo possível, com a utilização de variados canais de comunicação buscar e atrair aos seus empreendimentos o público e também, por meio desses mesmos instrumentos, divulgar seus serviços e/ou produtos, tanto como divulgar a região e seus atrativos.

Neste sentido, este artigo apresenta a partir do mapeamento de três agroindústrias do município de Silveira Martins pertencentes a Rota Turística e Gastronômica de Santa Maria – Silveira Martins uma discussão que busca compreender como estes estabelecimentos trabalham a comunicação e de que forma estão inseridas na Rota Turística e Gastronômica de Santa Maria – Silveira Martins, verificando a percepção dos gestores das agroindústrias quanto à importância da utilização da comunicação na divulgação de seus produtos e serviços.

O método de abordagem utilizado foi qualitativo com entrevistas em profundidade que possibilitam uma maior interação entre o entrevistado e o entrevistador, proporcionando uma maior interação e entendimento mais adequado além de deixar brechas para que o entrevistado sinta-se mais a vontade sendo possível explorar mais profundamente os temas questionados, proporcionando uma riqueza dos relatos investigados.

A fase de coleta de dados se dividiu em duas etapas. A primeira etapa realizada em outubro de 2014, onde se obteve se um contato indireto (email, telefone, redes sociais), com os proprietários dos estabelecimentos para marcar uma provável data para as entrevistas, a partir deste primeiro contato expôs-se quais eram os objetivos da entrevista. A segunda etapa consistiu em aplicar os questionários aos responsáveis pelos estabelecimentos, totalizando três estabelecimentos: Agroindústria Michelin, Moro Produtos Coloniais e Loro Produtos Coloniais, mapeados na Rota Turística e Gastronômica de Santa Maria – Silveira Martins, esta etapa ocorreu novembro de 2014, com o objetivo de buscar as respostas com uma maior riqueza de detalhes possíveis sobre o objeto da pesquisa.

Além dos dados obtidos através da pesquisa de campo buscaram-se dados junto a outras fontes, tais como documentos, relatórios técnico-científicos, folders entre outros. Após concluirmos o levantamento das informações junto aos empreendedores partiu-se para a análise e interpretação das mesmas. Dessa forma, organizaram se primeiramente os dados obtidos através das entrevistas semi-estruturadas. Como houve registro das entrevistas com gravador, cada uma com uma duração média de cinquenta minutos, as gravações foram

transcritas. As transcrições facilitaram a categorização das informações e a identificação de elementos necessários para a análise.

### **I. Breve discussão: turismo e agroindústria familiar**

As atividades turísticas aparecem nitidamente já no século XVII, afirmando-se no século XIX, estendendo suas raízes pela história. Certas formas de turismo existem desde as antigas civilizações, mas foi a partir da Segunda Guerra Mundial que o setor evoluiu como consequência das relações entre a produtividade empresarial, o aumento do poder de compra das pessoas e o bem-estar, como sequência da necessária reestruturação da paz mundial (Ruschmann, 1997).

A partir das transformações agrícolas e industriais acontecidas na Grã-Bretanha, que elevaram a renda de parte da população, que a alta classe média passou a desfrutar da luxuosa atividade de viajar, que passou a fazer parte da vida dos mais abastados, como forma de fugir do cotidiano (Rodrigues, 1985).

Modernamente, o turismo é compreendido como um fenômeno interdisciplinar que contempla todas as dinâmicas relacionadas ao processo social, econômico, cultural e político da sociedade. De acordo com Lage e Milone (2000) o turismo é uma atividade socioeconômica, uma vez que gera a produção de bens e serviços, visando à satisfação de diversas necessidades básicas e secundárias do homem. Acontece por “uma manifestação voluntária decorrente da mudança ou deslocamento humano temporário” que envolve “elementos como o transporte, o alojamento, a alimentação e, dependendo da motivação o entretenimento (lazer, atrações)” (Lage e Milone, 2000:26).

Para De La Torre (2001), o turismo é um fenômeno social, que se caracteriza pelo deslocamento voluntário e temporário de pessoas ou de grupos, com o objetivo de recreação, descanso, cultura ou saúde, que saem do seu local de residência para outro, onde não realizam atividades lucrativas nem remuneradas, promovendo inter-relações de natureza social, econômica e ou cultural.

Segundo Andrade (1992:38), pela própria estrutura do fenômeno turístico, a conceituação mais próxima do ideal seria a que define o turismo como o “complexo de atividades relacionadas aos deslocamentos, transportes, alojamentos, alimentação, circulação de produtos típicos, atividades relacionadas aos movimentos culturais, visitas, lazer e entretenimento”.

Diante do exposto, percebe-se que o turismo é uma atividade agregadora de valor, é uma forma de estreitar laços e manter uma troca cultural, que quando bem estruturado impulsiona o desenvolvimento das localidades transformadas em um destino. Para que uma atividade turística desperte o interesse do público é necessário planejamento, divulgação dos atrativos e estruturação dos equipamentos e serviços, com toda a infraestrutura necessária, propiciando uma troca de experiências entre o visitado e o visitante. Dessa forma, o turismo é um vetor de desenvolvimento, podendo provocar o crescimento na economia, sendo um “bem” ao ser consumido que chama a atenção dos poderes públicos e privado que investem na sua organização.

No que se refere à atividade agroindustrial, destaca-se que esta é muito presente no meio rural como uma alternativa econômica que pode compor uma forte oferta turística no



segmento de turismo rural, utilizando a mão de obra familiar e a produção, além de ser consumida pela família, pode gerar uma renda complementar.

A agroindústria familiar rural destaca-se como uma alternativa na busca de novos espaços de mercado, ampliando a diversidade de produtos e a diferenciação dos produtos por meio da transformação dentro da propriedade. Sua implantação é considerada uma alternativa eficaz como política de desenvolvimento rural (Nichele e Waquil, 2011). Sobre essa atividade, Mior (apud Diesel et al. 2008: 2) acrescenta que “a família rural produz, processa e/ou transforma parte de sua produção agrícola e/ou pecuária, visando, sobretudo, à produção de valor de troca que se realiza na comercialização”.

Nessa perspectiva, Wanderley (apud Picolotto, 2006:97) complementa que “a agricultura familiar deve ser entendida como aquela em que a família, ao mesmo tempo em que é proprietária dos meios de produção, assume o trabalho no estabelecimento produtivo”.

A agroindústria trás um grande fortalecimento da renda familiar, valorizando os recursos naturais, as riquezas étnicas, culturais e as potencialidades locais, além de promover a geração de trabalho, para os produtores e comunidade local. Os principais clientes desse ramo de atividade são consumidores da cidade e turistas, pois os produtos e a diversidade local atraem o público para o meio rural para passeios a para conhecer como é a vida no campo, proporcionando uma troca de experiências entre o visitado e o visitante.

Assim, o turismo é capaz de fornecer novas alternativas para o meio rural, promovendo o crescimento econômico local e também dos habitantes do local, reestruturando suas relações com um novo território, o território turístico. Com ele, surgem novas oportunidades como o turismo rural, o agroturismo e o ecoturismo, sendo o objetivo destas atividades valorizar a vida no campo e as relações do homem com a natureza. Nessa perspectiva, identifica-se uma relação entre o turismo rural e viabilização das agroindústrias, que atrai o turista rural, cujo interesse é o produto diferenciado ofertado neste segmento, sendo a produção artesanal dos produtos e a visita na unidade da produção, diferenciais importantes.

Segundo Tulik (2003) explica, o agroturismo tem o seu desenvolvimento integrado a uma propriedade rural em atividade, organizada e gerida pela unidade familiar, com a presença do proprietário. Essas peculiaridades pressupõem “o contato direto do turista com o meio rural, alojamento na propriedade e possibilidade de participar das atividades rotineiras” (Tulik, 2003: 39).

A produção agroindustrial faz-se presente no modo de vida das famílias que residem no meio rural e que buscam nessa atividade uma alternativa que possa lhes auferir uma renda suplementar à da agricultura. Essas práticas passaram a receber um maior incentivo dos setores públicos no Brasil, com a oferta de programas de políticas de legalização e padronização dos produtos, atendendo às normas legais para que pudessem atuar no mercado. Assim, se faz presente uma nova fonte de renda para as famílias que promove o crescimento econômico do espaço rural, onde paralelamente, pode ser inserido um atrativo turístico com a troca de experiências entre a comunidade local e o turista, integrando-o ao meio.

## **II. O contexto regional: a Região da Quarta Colônia de Imigração Italiana e a Rota Turística e Gastronômica de Santa Maria – Silveira Martins**

A Rota Turística e Gastronômica de Santa Maria – Silveira Martins foi criada de forma conjunta pelo poder público de Santa Maria e Silveira Martins, para resgatar e valorizar o caminho percorrido pelos imigrantes italianos que chegaram ao Brasil em 1887 e habitaram a região. A iniciativa teve por objetivo ofertar uma alternativa de renda para as famílias descendentes desses italianos, com a venda de produtos rurais, além de preservar a cultura por meio do artesanato e da gastronomia valorizando as potencialidades naturais, históricas e culturais para o desenvolvimento da região, agregando valor aos produtos e aumentando a renda dos proprietários rurais, gerando empregos e oportunidade para a localidade, priorizando a sustentabilidade.

A Rota Turística pode ser conhecida durante todo o ano, porém algumas programações têm datas definidas (Figura 1).

Conforme Correia (2005:58) uma a rota é a “descrição de um caminho [...], especificando os lugares [...] e propondo uma série de atividades e serviços”.

As rotas proporcionam aos visitantes uma interação direta com a cultura local, “a rota é uma criação de um conjunto de atividades e atrações que incentivam a cooperação entre diferentes áreas e servem de veículo para estimular o desenvolvimento econômico através do turismo” (Briedenhann e Wickens, 2004).

Berlo (1999) destaca o estudo da comunicação como a procura de todos os meios disponíveis para a persuasão. Sendo a comunicação o meio em que temos para atuarmos uns sobre os outros, alterando as relações originais, visando produzirmos mensagens, projetamos previamente o resultado que desejamos que o receptor desempenhasse, que dê certas respostas, que acredite em algo.

As rotas turísticas proporcionam aos visitantes uma interação direta com a cultura local. De acordo com a UNESCO (Organização das Nações Unidas para a Educação, a Ciência e a Cultura), “as rotas turísticas, têm a função de promover o conhecimento entre diversas civilizações, culturas e religiões, mostrando suas interrelações e influências recíprocas, conceito este que denominou de rotas de diálogo” (Schulter, 2006:74).

A criação de rotas ajudam na integração e organização dos atrativos turísticos, equipamentos e serviços, resultando na consolidação dos produtos da região. Fazem parte dessas estruturas organizacionais indivíduos que estão comprometidos com o planejamento, gestão, comercialização e a promoção turística. O desenvolvimento acontece por meio de cultura associativa, que oferece a complementaridade e a integração entre os distintos empreendimentos turísticos.

A Rota Turística e Gastronômica inicia-se a partir do distrito de Arroio Grande, Município de Santa Maria e termina em Silveira Martins, tendo como objetivo resgatar e preservar a cultura por meio da gastronomia. Conforme Gimenes (2010: 198) “a gastronomia pode constituir uma experiência turística”. A partir disso, cabe ressaltar que a gastronomia esboça-se a partir das origens de um povo, estando intrinsecamente ligada às raízes culturais dos colonizadores de uma região.



Figura 1 - Rota Turística Gastronômica Santa Maria – Silveira Martins

Fonte: [www.rotaseroteiros.com.br](http://www.rotaseroteiros.com.br)

Ramos e Fernández (2004: 64), sobre as rotas, explicam que estas se organizam associadas a determinado tipo de atividade industrial, que lhes atribuem determinadas características, temáticas e que podem indicar o seu nome.

As rotas se organizam em torno de um tipo de atividade industrial que caracteriza a rota e outorga seu nome. A rota deve oferecer a quem a ele recorre uma série de prazeres e atividades relacionados com os elementos distintivos da mesma. Deve apresentar uma imagem integral a partir da complementaridade entre locais, serviços, atrativos e linguagem comunicacional.

A Rota se encaixa no segmento de turismo rural, representando uma alternativa de renda para os produtores rurais que podem comercializar seus produtos a partir da valorização da cultura local. As rotas gastronômicas, ou rotas alimentares representam a combinação da gastronomia local/regional combinada com os atrativos ambientais, históricos e culturais de uma região (Lindner, 2007). Assim tem-se que,

No início do ano de 2005 foi firmado um protocolo de intenções entre os dois municípios que integram a Rota Gastronômica, a partir da constatação que havia naquela região, uma oferta diversificada de atrativos tanto naturais quanto culturais que inicialmente se encontravam desarticulados. Havia também uma demanda de turistas do município de Santa Maria que se deslocavam até Silveira Martins, os produtos turísticos da Rota foram organizados em cima de ofertas já existentes, pois a maioria dos empreendimentos pertencentes à rota já existiam ou já ofereciam e comercializavam produtos antes mesmo da inserção e consolidação dela.

Lindner (2007) explica que a Rota Turística e Gastronômica Santa Maria–Silveira Martins foi pensada para ser um produto turístico, desenvolvido com a união de ambos dos setores públicos dos municípios envolvidos, tendo como objetivo de impulsionar o Turismo na região central do Rio Grande do Sul, Santa Maria e Silveira Martins.

A criação da Rota teve o apoio dos órgãos públicos e financiamento da Caixa Econômica Federal e do Ministério de Desenvolvimento Agrário (MDA), por intermédio do Programa Nacional de Desenvolvimento Sustentável de Territórios Rurais (PRONAT), tendo sido lançada durante a Multifeira de Santa Maria (FEISMA 2006).

A criação da Rota se deu devido a um forte interesse dos proprietários dos estabelecimentos da região de abrangência, da prefeitura de Santa Maria e a de Silveira Martins e da comunidade local. Foram realizadas visitas aos empreendimentos já existentes, fazendo-se um levantamento prévio das potencialidades turísticas e reunindo todos os interessados, entendendo-se assim que a ideia foi da comunidade local em parceria com os setores públicos e privados, após uma consulta popular.

A parceria entre os setores é um fator de grande importância para o bom andamento de projetos de turismo de qualquer localidade. Pereira (1999) afirma que, a participação do Estado é fundamental para que haja o envolvimento dos usuários e beneficiários do setor na produção e avaliação de políticas públicas de turismo. Não há planejamento que possa ser implantado de maneira eficiente sem que exista a harmonia dos três setores: poder público, iniciativa privada e comunidade (Migliano; Scatena e Cunha, 2003).

Uma das ações que recebeu destaque de ambas as prefeituras, foi com divulgação da Rota Turística e Gastronômica de Santa Maria–Silveira Martins, sendo utilizado um apelo étnico/cultural e da diversidade dos atrativos que estão presentes na Rota para diferenciá-la de outras rotas turísticas do Rio Grande do Sul, devido à forte influência da cultura italiana na região, manifestadas claramente em diversas características da comunidade local, como na gastronomia, artesanato e mesmo no vocabulário.

A Rota Turística Gastronômica Santa Maria–Silveira Martins é composta por mais de 46 pontos de visitação, entre balneários, cascatas, fábricas de facas, cantinas, mirantes, moinho, museu, igreja, capelas, monumentos, pousada e estabelecimentos que comercializam produtos (coloniais e/ou artesanais) e gastronômicos no referido percurso.

Em agosto de 2009, foi criada a Associação da Rota na qual os empreendedores, pequenos produtores e turismólogos concretizaram a vontade de dar uma gestão às ações da Rota, onde os atores sociais que participam da associação realizam, esporadicamente, reuniões para a discussão do desenvolvimento da Rota quanto um atrativo turístico local.

#### **As agroindústrias e a comunicação: o caso de Silveira Martins**

A palavra comunicação, originária do latim (*communicatione*), é definida por “tornar comum” (Pimenta, 2009:15) e atualmente, por meio da mídia, canal de comunicação, tornou-se uma ferramenta imprescindível para estabelecer uma relação com o público alvo, presente na venda de uma imagem, ou de um produto.

A propaganda é considerada a maneira prática de influenciar/persuadir e aumentar a demanda de uma empresa, sendo que a forma de divulgação utiliza todos os veículos de mídia

tornando acessível à mensagem comercial publicitária a esse mesmo público. A comunicação é primordial para as relações em sociedade, sendo, portanto, fundamental para estabelecer a relação da empresa com o seu público. Conforme explica Terciotti e Macarenco (2009:2): “Comunicação é o ato de compartilhar informações entre duas ou mais pessoas, com a finalidade de persuadir ou de obter um entendimento comum a respeito de um assunto ou de uma situação”.

Os fatores que determinam a qualidade de transmissão de informações na comunicação, segundo Pinho (2006), estão ligados a quatro elementos do processo comunicacional: emissor, receptor, mensagem e canal.

Pode-se acrescentar que a comunicação trata das questões e formas de como atingir o receptor e promover estratégias para garantir a eficácia e eficiências das informações que são transmitidas. Para tanto, se utiliza várias formas de comunicação, seja ela, a comunicação verbal, comunicação oral, comunicação comunitária, comunicação dirigida, mídia impressa e televisiva. Dentro da política de mercado a comunicação é vista como todo e qualquer esforço realizado para persuadir as pessoas a comprar determinado produto ou serviço.

Para um processo de comunicação eficaz, são destacados seis componentes necessários para que essa troca de informações, realizada por meio de variados canais: uma fonte de comunicação ou transmissor; uma mensagem; um canal; um receptor; o feedback e o ambiente.

Os canais de comunicação possuem diversos instrumentos de se relacionar para que a informação atinja o seu objetivo desejado, o receptor é aquele que estabelece um feedback entre ambos, onde a mídia acaba influenciando a tomada de decisão dos consumidores.

Nielsen (2002) entende que as diferentes formas de mídia resultem em escolhas distintas e que as aplicações de mídia seja uma parte vital tanto do processo de marketing, quanto do processo das comunicações. Para se entender melhor a mídia de massa, é importantes observar que ela pode ser caracterizada como impressa e eletrônica. Na mídia impressa, são citados os jornais, as revistas, os folders, os postais, etc. Na mídia eletrônica, destaca-se o rádio, a televisão e a internet.

A comunicação é um instrumento comunicacional fundamental para que os produtos turísticos sejam conhecidos pelo consumidor, por meio da divulgação, merecendo destaque o chamado “boca a boca”, como uma ferramenta que utiliza a percepção dos clientes perante o produto como uma forma de propaganda realizada de forma não elaborada e pessoal. Esse processo se caracteriza pela troca de informações e opiniões, de pessoa a pessoa, sobre o produto e/ou serviço. De acordo com Carvalho (2003), os comentários a respeito de uma empresa são a dinâmica do marketing boca a boca. Administrá-lo, controlá-lo e direcioná-lo são tarefas que todas as empresas devem se preocupar em realizar.

Os instrumentos de comunicação tornam os destinos turísticos mais conhecidos, sendo a partir das mídias que se tem uma imagem formada do destino turístico, pois são transmitidas as informações nos seus mais diversos canais para persuadir o turista na sua tomada de decisão, instigando-o e apresentando o destino, por intermédio da comunicação como um papel principal para a tomada de decisão.

Nesse aspecto, Boyer e Viallin (1994:22) explicam que: “Numa comunicação turística, o emissor está na origem da comunicação e o receptor na chegada, os especialistas em turismo colocam em contato países, níveis profissionais ou estratos culturais do turismo e as zonas receptoras”. Explicando de outra maneira, entende-se que o emissor da comunicação turística é o receptor do turista; já o receptor da comunicação turística é o emissor do turista. A dupla atribuição reforça a ideia de que todos os indivíduos são, ao mesmo tempo, e em diferentes níveis, emissores e receptores.

A comunicação no turismo serve para entendermos melhor o papel do marketing para o turismo, pois o marketing é um portador de imagens que são feitas, onde a comunicação se faz através dos veículos da mídia, mas ela é feita também pelos através dos empreendedores, através de informações, onde também os turistas fazem a comunicação (“boca a boca”), pois emitem mensagens para outros turistas. Existem canais e meios de comunicação. Os canais são os elos funcionais utilizados na comunicação e que ligam os elementos da organização. Os meios são os “veículos de transporte e transformação de dados” (Thayer, 1979: 281). No entanto, são os instrumentos que asseguram o processo de comunicação. Segundo Canfield (1991: 97) “há dois métodos gerais para a comunicação com os empregados: o sistema oral ou pessoal, e o veículo impresso ou gráfico”.

Entenda-se que a comunicação é um processo de suma importância para a divulgação de um destino turístico, pois a partir de seus instrumentos é inserida a imagem de um local para que o público alvo seja atingido, que no caso do presente artigo trata-se de uma Rota Turística e Gastronômica. A partir dela se tem como grande relevância a história cultural que se desenvolve no seu torno e a gastronomia do local, que chama a atenção do turista. O produto referencial dos empreendimentos estudados é o consumo da gastronomia local que chama a atenção do seu público e o instiga nos seus meios de comunicação que chegam até o receptor. Atualmente, o consumidor de turismo está cada vez mais exposto a um fluxo maior de informações veiculadas nos instrumentos (sites, redes sociais, revistas, jornais, folders, entre outros), principalmente, pelos meios de comunicação.

#### **Apresentação dos resultados da pesquisa**

A seguir, são descritos os relatos dos responsáveis pelas agroindústrias de Silveira Martins. Para o estudo, foram selecionadas três empresas -- Agroindústria Michelin, Moro Produtos Coloniais e Loro Produtos Coloniais --, identificadas A, B e C, respectivamente, que mostraram interesse em participar da pesquisa.

Foi solicitado a todos os proprietários um breve histórico da criação da empresa, a descrição da produção e a relação/opinião sobre a importância da comunicação no cotidiano da agroindústria.

A agroindústria A (Figura 2), localizada na Estrada do Imigrante, iniciou suas atividades no ano de 1993, com a venda de produtos coloniais; em 2008 foi criado um novo segmento desta, a partir da que já existia, ampliando-se as atividades, quando começou a funcionar um café colonial que agregou um valor a mais ao empreendimento já existente.



Figura 2 - Agroindústria Michelin – Val Veronês, Silveira Martins, RS  
Fonte: Acervo das autoras (2014)

O empreendimento A, é familiar, sendo que a sua criação se deu pelo “saber fazer” da família, que buscava uma renda a mais. A atividade deu muito certo e então, resolveram expandir o negócio. O estabelecimento trabalha com a sua matéria prima e também com a terceirização de produtos que são fornecidos por produtores da região, por não poderem atender toda a demanda; optaram por terceirizar alguns, trabalham com produtos coloniais, farináceos e embutidos. Não há nenhum tipo de parcerias com órgãos públicos que ofereçam alguma forma de incentivo e/ou cursos de apoio à agroindústria.

O empreendimento faz parte da Rota Turística e Gastronômica de Santa Maria–Silveira Martins e, de acordo com seu proprietário, a Rota surgiu por iniciativa das duas prefeituras – a de Santa Maria e a de Silveira Martins. Destacou ainda que o percurso oferece muitos atrativos naturais e também alguns estabelecimentos comerciais. No começo do processo de criação e estabilização da Rota ela trazia algum retorno aos empreendimentos, porém, atualmente, por falta de apoio do poder público acabou se descaracterizando como um recurso com grande potencial e acabou sendo esquecida, por falta de visibilidade. Entretanto, a rota ficou na cabeça do público, dessa forma, seria possível despertar novamente o interesse das pessoas, destacando que seria interessante manter a Rota, de forma que o turista mais distante não viria apenas para visitar a região mais sim para conhecer a região, seguindo o roteiro com possibilidade de visitar mais empreendimentos.

Hoje, o empreendimento tem um público de pessoas que residem na cidade de Santa Maria, ou mesmo aqueles que visitam a cidade por algum motivo e acabam indo até o seu estabelecimento, principalmente nos finais de semana. O empreendedor vê que os canais de comunicação são importantes para seu empreendimento para poder alcançar um maior público, podendo estabelecer um relacionamento com o mercado consumidor e divulgar a empresa. São utilizados como formas de comunicação, anúncios em jornais locais nos períodos de abril a setembro, quando consegue atingir um maior público; utiliza também flyers, redes sociais e site. Modernamente, considera a melhor forma de divulgação para o empreendimento as redes sociais (Facebook), que nos dias de hoje consegue atingir um maior público, e ter um retorno mais rápido.

A agroindústria B (Figura 3), localizada em Val de Buia, iniciou suas atividades em 2008, com a venda de produtos coloniais. É um empreendimento familiar criado pelo sonho do

empreendedor de ter um estabelecimento para comercializar os produtos coloniais de sua própria produção e, também, como uma alternativa para aumentar a renda da família.



Figura 3 - Loro Produtos Coloniais – Estrada do Imigrante, VRS 804, KM 13, Silveira Martins, RS.  
*Fonte: Acervo das autoras (2014)*

O estabelecimento foi construído com o apoio do PRONAF (Programa Nacional de Agricultura Familiar) e trabalha com produtos desenvolvidos a partir de sua própria matéria prima assim como com a terceirização de produtos de empreendimentos da região. O entrevistado destaca considerar de grande importância a terceirização para ser possível atender toda a sua demanda e também para a valorização de produtos de outras agroindústrias. O empreendimento teve incentivos de órgãos públicos como a EMATER (Empresa de Assistência Técnica e Extensão Rural). No que se refere à oferta de cursos de qualificação a agroindústrias, foi relatado que nos dias de hoje não há mais nenhum apoio de órgãos públicos.

O empreendimento está presente na Rota Turística e Gastronômica de Santa Maria–Silveira Martins e o entrevistado relata que estar na Rota traz algum tipo de visibilidade e que isso tem uma grande importância, apesar de faltar muito incentivo dos órgãos públicos e privados. Destaca que foi muito forte no começo de sua criação e que nos dias de hoje não há mais nenhuma atividade que relacione a Rota com os estabelecimentos presentes nela.

Hoje o empreendimento recebe o maior número de visitantes vindos de Santa Maria, por já conhecerem os produtos, mas alguns turistas que visitam a região que vão até a cidade para conhecer e acabam por adquirir algo. O empreendedor relata que não utiliza nenhum tipo de meio de comunicação para se relacionar com o seu público, mesmo considerando isso importante para seu empreendimento. A falta de comunicação por meio de ferramentas tecnológicas decorre do fato de não tem acesso facilitado, pois em virtude da sua localização (por haver pouco sinal de redes telefônicas). A seu ver, o único tipo de comunicação viável, como um instrumento muito importante para seu estabelecimento se relacionar com o seu público e receber muitos clientes novos deve-se ao famoso e convencional “boca a boca”, que traz ao estabelecimento um retorno muito positivo.

A agroindústria C, localizada em Val Veronês, teve o início do seu funcionamento em 2000, com a venda de produtos coloniais. É um empreendimento familiar criado como alternativa



para uma segunda opção de renda e porque o empreendedor não podia mais trabalhar com a agricultura.

No empreendimento C, os proprietários trabalham com produtos de sua própria matéria primas, mas também com a terceirização de produtos de estabelecimentos da região por não atenderem toda a sua demanda. Os órgãos de apoio ao empreendimento são a EMATER (Empresa de Assistência Técnica e Extensão Rural) e o PRONATEC (Programa Nacional de Acesso ao Ensino Técnico e Emprego); com cursos oferecidos ao agricultor, o SEBRAE (Serviço Brasileiro de Apoio às Micro e Pequenas Empresas) presta assessoria aos empreendimentos.



Figura 3 - Moro Produtos Coloniais –Val de Buia, Silveira Martins, RS

Fonte: Acervo das autoras (2014)

O empreendimento está presente na Rota Turística e Gastronômica de Santa Maria–Silveira Martins e, conforme relatado na pesquisa, estar presente nesse atrativo turístico, traz uma grande visibilidade e faz com que o público venha conhecer o estabelecimento.

O empreendimento recebe um público diversificado, sendo que durante a semana frequência maior é de pessoas de Silveira Martins e Santa Maria; nos finais de semana a maior demanda são com os estabelecimentos onde são fornecidos os seus produtos, como restaurantes e mercados. O empreendedor relata que os canais de comunicação são fundamentais para que seja mantida uma relação consistente entre fornecedor e cliente, pois possibilita o relacionamento de uma forma direta com o seu cliente. Destaca que além de promover o boca a boca, utiliza a internet (redes sociais – Facebook, e-mail) e o rádio da região para a divulgação do seu estabelecimento, com propagandas e patrocínios. Ressalta que tem nas redes sociais o seu instrumento de maior eficácia por alcançar mais rápido o seu público, possibilitando maior visibilidade e, conseqüentemente, retornos maiores.

### **Considerações Finais**

Este estudo, com base na pesquisa de campo, revelou que a comunicação é fundamental para a divulgação e fortalecimento dos projetos turísticos regionais. Os canais de comunicação estão presentes em todos os lugares, sendo possível, a partir destes, se formar uma rede mais eficaz de relação com o consumidor, utilizando-se os instrumentos mais convencionais como

também os mais tecnológicos como é apresentado pelos empreendedores entrevistados, que buscam se relacionar de alguma maneira com o consumidor e expressam a importância que estes canais têm para a sobrevivência do seu empreendimento.

Pode-se apontar que os responsáveis pelas agroindústrias pesquisadas, reconhecem a importância da Rota Gastronômica (e desejam continuar inseridos nela pelo potencial de visibilidade viabilizado), mas apontam uma estagnação das ações por parte do poder público e de iniciativas privadas, onde o turismo na região tem um grande potencial. Existe, porém, a necessidade de ter uma estrutura adequada e o necessário investimento para a sua divulgação, para que seja eficaz e que relacione todos os atores sociais envolvidos neste meio de comunicação para seja obtido um resultado positivo até a chegada das informações ao seu público alvo. Atualmente, a maioria de seu público faz parte da comunidade local e de turistas que chegam a Santa Maria por motivos específicos, mas que acabam se deslocando até aos estabelecimentos para conhecer os produtos oferecidos.

Neste contexto, observa-se que a atividade turística no local configura-se como um turismo doméstico, estreitamente local, em que os visitantes são da comunidade e da região. Nesse sentido, entende-se que a divulgação da Rota, feita em parceria com os órgãos públicos e privados tem uma importância relevante para a disseminação do turismo no local, com mais investimento em programas que possibilitem a participação de todos os atores sociais envolvidos na comunidade, para um maior aproveitamento das riquezas que a localidade oferece e investimento para a divulgação da região e de estabelecimentos. Essas práticas podem promover a interação e a integração da comunidade com os turistas para que um segmento turístico, no caso o turismo rural seja forte na região e que chame o público de uma mais ampla, não somente das regiões próximas. Da mesma forma, os empreendedores entendem que a comunicação é de suma importância para o sucesso do seu empreendimento, mas, contraditoriamente, revelam pouco investimento e apostam na comunicação usando o tradicional "boca-a-boca" e na fidelidade de clientes conquistada pela qualidade dos produtos coloniais que comercializam.

Pode-se, ainda, afirmar que o desenvolvimento do turismo no meio rural requer mais investimentos, sendo esse problema apontado em vários momentos pelos entrevistados, requerendo uma maior especialização e necessitando um amplo planejamento da atividade, investimentos em infraestrutura e em recursos humanos, na qualidade dos produtos comercializados e, também, um maior envolvimento da comunidade local e dos poderes públicos de ambas as cidades, Santa Maria e Silveira Martins, para uma melhor estrutura. Já que o turismo rural, aliado à produção e comercialização de produtos coloniais, representa, para vários, empreendedores um reforço a mais na renda da família, além de gerar ocupação dos residentes no local e maior valorização da região ligada ao turismo.

Por fim, acredita-se que a discussão proposta neste trabalho tem forte potencial de impactos econômicos e sociais ao apontar a necessidade de implementação de programas de comunicação em vários níveis e em longo prazo, viabilizando a integração da Rota Gastronômica de maneira mais qualificada na oferta turística regional.

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## Rota das emoções. Paisagem cultural e turismo no Polo Costa do Delta

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### Resumo

A política de turismo no Brasil, nos últimos 13 anos, foi baseada no objetivo de dinamizar a economia regionalmente através de atividades relacionadas ao turismo, utilizando, basicamente, recursos locais, identidade cultural e paisagem. Desta forma, entre os produtos gerados pela política implementada, destacam-se as novas rotas turísticas. Assim, este artigo trata da influência do turismo na região costeira do Piauí, que faz parte do principal produto turístico da região meio-norte, a Rota das Emoções. Portanto, com base numa metodologia qualitativa, a pesquisa incide na área que compreende os municípios de Parnaíba, Ilha Grande, Luís Correia e Cajueiro da Praia, que delimitam o território de estudo, denominado "Polo Turístico Costa do Delta". O presente trabalho tem como objetivo destacar o atual cenário de turismo na Rota das Emoções, apresentando influências na paisagem cultural do Polo Turístico da Costa Delta. Inquirida a população residente, os resultados apontam para um impacto negativo no ambiente natural, transformação no modo de vida local e novas perspectivas econômicas para a região costeira do Piauí, que explicam a modelagem das formas de relação entre os sujeitos com a natureza e espaço turístico.

### Palavras-chave

Rota das Emoções; Polo Turístico Costa do Delta; Impactos do Turismo; Paisagem Cultural.

### 1. Introdução

Cenário paradisíaco constituído por paisagens de diversificada atratividade aos olhares de quem circula pelo litoral do estado do Piauí, região meio norte do Brasil, o Polo Turístico Costa do Delta (Figura 1) congrega histórias e memórias refletidas no modo de vida e uso do território pelas populações locais, as quais interferem no ambiente e imprimem como uma digital as modificações antrópicas que inserem-se na tríade que dinamiza e constitui a paisagem cultural da região, ou seja, influenciadas pelas dinâmicas naturais do Rio Parnaíba e seus afluentes, população residente e pelo mar.

Se por um lado a região é dotada de uma beleza cênica singular sustentada pela natureza com ampla diversidade, atividades extrativistas das comunidades e manifestações culturais de diversificadas influências, porém com destaque às de com base na cultura portuguesa, por outro enfrenta um contexto social e econômico que mostra-se antagônico à perpetuação da identidade do território, tendo em vista os problemas ambientais, os interesses do capital externo, entre outros que condicionam o desenvolvimento regional.

Considerando que a paisagem cultural é, conforme O'Hare (1997), o ambiente modificado e interpretado pela mente humana, que o presente estudo objetiva destacar o atual cenário do turismo na Rota das Emoções, apresentando as influências na paisagem cultural do território de estudo Polo Turístico Costa do Delta. Para tanto, se faz primaz distinguir os diferentes ambientes que integram os cenários naturais e os que sofreram alguma interferência do ser humano.

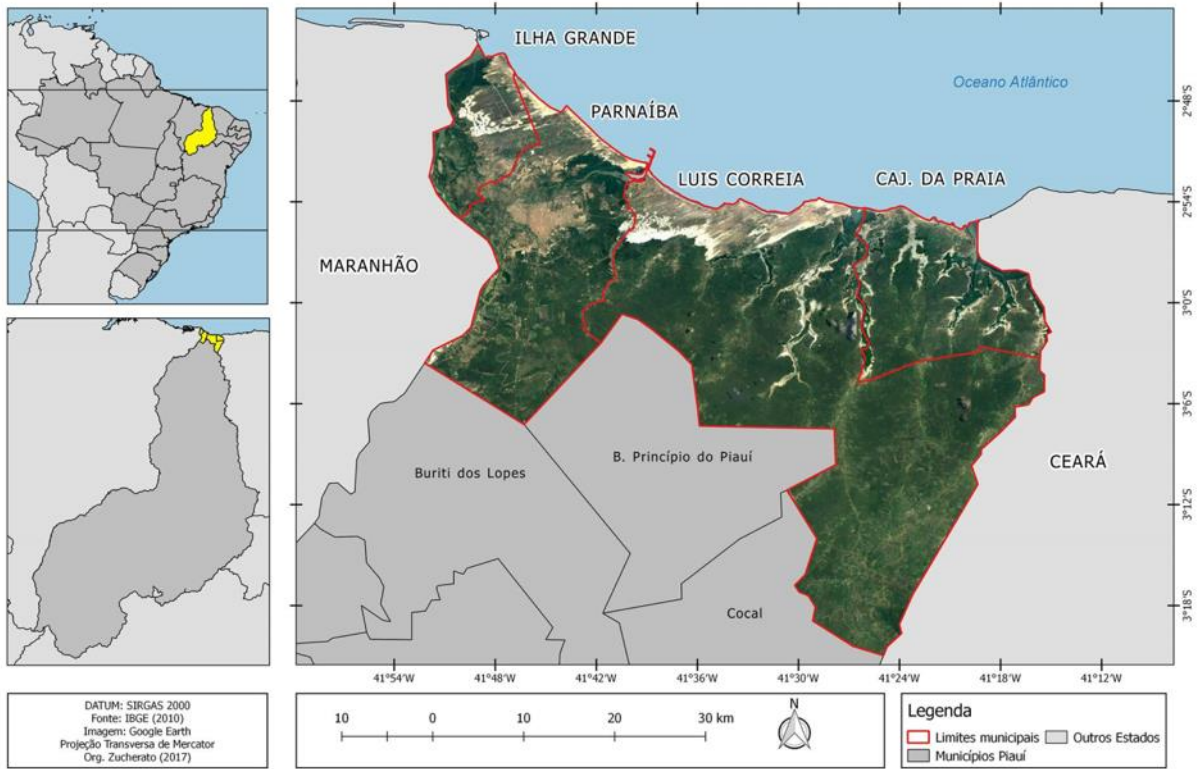


Figura 1 – Mapa do Polo Costa do Delta  
 Fonte: *Elaboração própria, 2017*

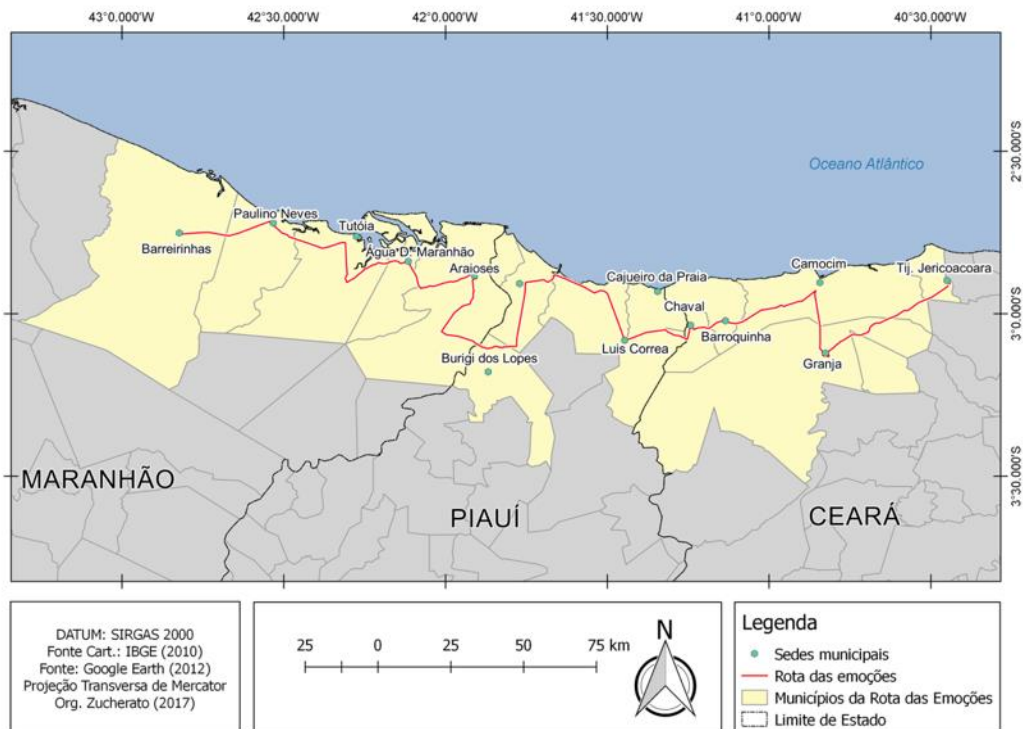


Figura 2 – Rota das Emoções (CE, PI, MA)  
 Fonte: *Elaboração própria, 2017*.

A Rota das Emoções (Figura 2), produto turístico que agrega atrativos e outros elementos da oferta turística da região litorânea dos estados do Ceará, Piauí e Maranhão, mesmo mantendo a característica da descontinuidade territorial promovida pelos atrativos pontuais, tem como objetivo unificar, respeitando as diferenças entre os estados e municípios partícipes, o território abrangido pela rota turística.

Enfatiza-se que, na compreensão de Briedenhann & Wickens (2004 citado por Maia et.al., 2011), a rota turística define-se pelo conjunto de atrações e atividades produzidas que estimulam a circulação de pessoas e mercadorias entre áreas distintas e servem de estímulo ao desenvolvimento econômico através do turismo.

Sendo assim, nos tópicos 3 e 4, como compreensões iniciais e resultados da pesquisa, aborda-se, de forma concisa, as regiões de planejamento territorial do estado do Piauí e, de maneira mais aprofundada, as paisagens culturais com ênfase na relação turismo e impactos ambientais, a compatibilidade ambiental e econômica da macrorregião do litoral piauiense e a aptidão para o desenvolvimento do turismo.

## **2. Metodologia da pesquisa: características e métodos de recolha e análise dos dados**

A relação entre o ser humano, o ambiente e as atividades turísticas são amplamente descritas pela literatura científica. Os autores e pesquisadores<sup>49</sup>, que já debruçaram-se sobre o tema, em sua maioria, reconhecem que as atividades direta e indiretamente ligadas ao turismo são potencialmente geradoras de benefícios assim como de impactos negativos. Desta forma, considerando que os impactos do turismo no ambiente constituem, em conjunto com outros elementos, a paisagem cultural do território deste estudo, percebeu-se a existência de pouca informação sobre os impactos provenientes da implementação da Rota das Emoções, como produto turístico da região litorânea entre Maranhão e Ceará. Esta compreensão evoluiu para o questionamento motivador, estruturando-se da seguinte forma: Quais influências a Rota das Emoções impõem à paisagem cultural do litoral do Estado do Piauí?

Sendo assim, com base na questão de partida optou-se por adotar uma metodologia de investigação sustentada na análise qualitativa, na perspectiva de que haviam fontes de informações não passíveis de quantificação (Lakatos & Marconi, 2007). Portanto, através de inquéritos por questionário aplicados a população residente, 384 indivíduos no total, os dados foram analisados, a partir de uma análise de conteúdo (Bardin, 2009) e descritiva representada pela frequência das respostas, objetivando a complementaridade das informações, além de dados estatísticos pré-existentes. Além dos instrumentos de recolha de dados e informações já explicitados, foram captados conteúdos significativos à pesquisa através de fontes primárias e secundárias, ou seja, através de material bibliográfico e documental.

Portanto, para fins de definição da amostragem, considerou-se como população residente pessoas com residência fixa nos municípios do território, abarcando, além dos munícipes, os gestores municipais (prefeitos e secretários de turismo), experts (professores da Universidade Federal do Piauí), empresários da hotelaria e restauração associados a Rota das Emoções, com idade entre 18 e 65 anos, constituindo um universo de pesquisa com a seguinte dimensão:

- a) Gestores Municipais, experts e empresários: N=113

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<sup>49</sup> Swarbrooke (2000), Wearing & Neil (2000), Luchiari (2000), Inskip (1987), Faulkner & Tideswell (1997), entre outros.



b) População residente: N=190.188 (dados do censo de 2010 do Instituto Brasileiro de Geografia e Estatísticas – IBGE)

Já a amostragem do universo da pesquisa caracteriza-se como aleatória simples, pois julga-se que todos os elementos tiveram a mesma probabilidade de serem selecionados. No entanto, em atenção a Santos (2016), o cálculo amostral fixou-se nos seguintes parâmetros:

- i. Erro amostral: considera-se a diferença entre o valor estimado pela pesquisa e o verdadeiro valor. Para esta pesquisa a margem de erro foi fixada em 5%.
- ii. Nível de confiança: é a probabilidade de que o erro amostral efetivo seja menor do que o erro amostral admitido pela pesquisa, sendo assim, com base na margem de erro, o nível de confiança é de 95%.
- iii. Percentuais máximo e mínimo: não foram definidos, tendo em vista a falta de informação precisa que indicasse que os percentuais não passassem de um determinado valor.

Portanto, o cálculo da amostra do universo da pesquisa obedeceu a seguinte fórmula:

$$n = \frac{N \cdot Z^2 \cdot p \cdot (1 - p)}{Z^2 \cdot p \cdot (1 - p) + e^2 \cdot (N - 1)}$$

Onde:

n = amostra calculada N = população Z = variável normal padronizada pelo nível de confiança e = erro amostral p = verdadeira probabilidade do evento

Portanto, obteve-se, a partir do cálculo com a fórmula acima descrita, uma amostra de 384 indivíduos, considerando o universo da pesquisa.

### **3. Paisagem, Cultura e Turismo: particularidades da região meio norte na Rota das Emoções**

#### **3.1. Compreensões Iniciais Relevantes**

O território do Polo Turístico Costa do Delta encontra-se num litoral entrecortado por rios e mar que, em conjunto a outros elementos, determinam a dinâmica do ambiente costeiro, definindo as paisagens ao longo dos 66 quilômetros de praias e dunas. Reconhecer a potencialidade turística local não é tarefa das mais difíceis, tendo em vista a riqueza de recursos e a beleza cênica do meio natural. Porém, outras condicionantes adicionam-se a esta percepção, como as manifestações culturais que evidenciam os modos de fazer e saber da população autóctone, transformando a paisagem através da simbiose entre sujeito e espaço. Neste sentido, “a paisagem vai, portanto, muito além do real oferecido pela natureza, embora ela também o incorpore, resultando – e ao mesmo tempo fazendo parte – da cultura”, uma vez que a natureza não pode ser vista como um dado independente da representação social (Castro, 2002, p. 123).

A compreensão básica do turismo como prática social é a de que abarca contextos de afastamento do que é familiar ao sujeito visitante, mobilizando processos de surpresa e estranhamento frente ao novo. Sendo assim, o turismo apresenta-se como um apropriador do estético, ou seja, das formas e conteúdo da paisagem cultural. Santos (2002, p.103) indica que “a paisagem é o conjunto de formas que, num dado momento, exprimem as heranças que representam as sucessivas relações localizadas entre o homem e a natureza”.

Dunas, mangues, estuários, são alguns dos ecossistemas presentes no território do Polo Turístico Costa do Delta, trazendo uma característica especial, considerando a pressão da ação de intervenção humana, eles transformaram-se, por vezes permitiram o crescimento e evolução do sistema social local, como no caso de Parnaíba com uma dependência histórica do rio Parnaíba, possibilitando que comunidades rurais e urbanas desenvolvessem relações mais ajustadas ao propósito do desenvolvimento (Bugalho et.al., 2011; Fischer et.al., 2012; Plieninger & Bieling, 2012).

Neste contexto, percebe-se que nos quatro municípios do polo turístico as comunidades tradicionais desenvolveram normas sociais, ou seja, coletivas e, também, comportamentos que ao longo dos séculos garantissem os recursos naturais, de forma compartilhada, para a subsistência e produção de artefactos manuais (Fischer et.al., 2012). Desta forma, o caráter da sustentabilidade no território manteve-se na região até o início dos anos 1990, dando espaço, a partir de então, para outros modos de fazer, mais industrializados, padronizados e de grande escala, como a criação de crustáceos, peixes, caprinos, ovinos, bovinos e equinos, ao mesmo tempo em que mantém práticas extractivistas.

Assim compreende-se que as paisagens culturais do litoral piauiense dependem diretamente do uso humano do espaço (Halada et.al., 2011). Portanto, com o advento do turismo na região outras formas de manipular o território surgiram, como a fragmentação e descontinuidade, através de empreendimentos imobiliários, hoteleiros e, também, a transformação do espaço natural e/ou real em espaço turístico (Boullón, 2006; Plieninger & Bieling, 2012). Além das questões do uso do território pela pressão do capital, a cultura local assimilou elementos até então desconhecidos ou ignorados, como estrangeirismos na linguagem, adaptação do artesanato ao mercado externo, assim como mudanças nos hábitos de vida.

Tendo em vista o avanço do interesse do capital sobre o território, há necessidade de uma gestão territorial mais próxima do sistema social tradicional, ou seja, aquele que vigorava e contemplava o conjunto de necessidades da população autóctone e meio ambiente, não só dos empreendimentos turísticos e visitantes.

No turismo, não diferentemente de algumas outras atividades econômicas, em muitos casos, o consumo do espaço segue o modelo capitalista associado à expropriação da terra. Disfarçadamente os grupos de interesse, principalmente aqueles que integram segmentos beneficiários direto do turismo, usam o espaço condicionando-o aos valores econômicos, tangenciando as populações locais e alijando-as do direito de participar do desenvolvimento econômico do lugar.

Corrêa (2000, p. 72) relaciona o espaço com a sociedade, afirmando que a organização espacial dos lugares implica no futuro dessa própria sociedade, ou seja, na reprodução social, numa época de crescente urbanização da humanidade:

A organização espacial não é somente um reflexo da sociedade, pois ao ser um reflexo passa a ser simultaneamente uma condição para o futuro da sociedade, isto é, a reprodução social. Este papel assume enorme importância devido à crescente acumulação de formas espaciais que o capitalismo contemporâneo cria exemplificada com a progressiva urbanização da humanidade.

A atividade turística caracteriza-se pela multidisciplinaridade, delineando um possível desenvolvimento multifacetado e polissêmico, apropriando-se do estético, da paisagem, impondo regras às transformações do espaço, aos fluxos turísticos e permitindo a mercantilização. Santos (1988, p. 69), determina que:

As formas não nascem apenas das possibilidades técnicas de uma época, mas dependem, também, das condições econômicas, políticas, culturais. Desvendar essa dinâmica social é fundamental, as paisagens nos restituem todo um cabedal histórico de técnicas, cuja era revela; mas ela não mostra todos os dados, que nem sempre são visíveis.

Portanto, percebe-se que o turismo é um “agente” dinamizador da economia e do ambiente em muitas comunidades. Mas, é capaz de produzir a desterritorialização e a reterritorialização (Haesbaert, 2004), gerando configurações do espaço novas, descontínuas e, por vezes, permanentes.

No processo de apropriação do estético, o turismo mal planejado e de massa rende a população local às tentações econômicas e expropria seus territórios, renegando-os a espaços menos favorecidos economicamente.

Considerando os aspectos perturbadores do turismo, no caso do Polo Costa do Delta, compreende-se que o processo de expropriação da terra conta com a negligência do Estado. Santos (2001) explica que na dinâmica de privatização de territórios surge a dominação do capital, objetivando a adaptação e reordenamento territorial às necessidades de empreendedores imobiliários que investem para modificar a geografia das regiões escolhidas. Desta forma, as políticas públicas unem-se aos anseios da iniciativa privada na instalação de infraestrutura turística nos destinos receptores, promovendo mudanças intensas no contexto socioespacial.

Portanto, no caso da atividade turística, a produção do espaço está diretamente ligada à reprodução do capital, ritmando as relações estabelecidas entre os operadores (produtores) turísticos e os consumidores (turistas).

#### **4. Paisagem Cultural da Rota das Emoções: analisando o Polo Turístico Costa do Delta – resultados da pesquisa**

##### *4.1. Regiões de Planejamento Territorial do Estado do Piauí: polos turísticos*

O planejamento territorial, quando se observa o setor turístico, por iniciativa do governo do Estado do Piauí é praticamente inexistente, pois apenas se ampara nos planos da gestão federal. Desta forma, destacam-se planos e projetos para a gestão do território piauiense, fundamentalmente, a porção norte do território que compreende o objeto de estudo.

Entre os programas federais de incentivo e incremento do turismo na região norte do Piauí, os mais efetivos foram o PRODETUR-NE I e II e também um subproduto do PRODETUR intitulado Plano de Desenvolvimento Integrado do Turismo Sustentável – PDITS.

Segundo o Relatório de Avaliação Ambiental Estratégica da Região Costa Norte (s/d), de todos os planos e projetos que incidem na Costa Norte, o PRODETUR é o mais importante, devido o volume de recursos e o caráter do programa. Pois, além de contemplar um plano de gestão estadual e municipal do turismo, influenciado pela preocupação da gestão ambiental no

âmbito do estado, é resultado do desenvolvimento de um programa de âmbito nacional. Já o PDITS é o instrumento técnico de planejamento, gerenciamento, coordenação e execução das decisões de investimento de longo prazo nos pólos de turismo constantes no PRODETUR.

Neste programa a instituição executora é o Banco do Nordeste, porém na segunda fase (PRODETUR-NE II) a elaboração e execução do PDITS fica a cargo do governo estadual, através, geralmente, das secretarias de turismo e/ou outras secretarias e órgãos do estado. O PDITS tem previsto no processo de planejamento e execução a revisão bianual, compreendendo a dinâmica do território e do turismo.

Para financiar o programa, escolheu-se como principal fonte de recursos ao PDITS o Banco Interamericano de Desenvolvimento (BID), o qual disponibilizou, via sistema de empréstimo, US\$400 milhões, sendo que 60% por empréstimo e 40% na forma de contrapartida nacional: governos federal, estadual e municipal.

No entanto, para gerir melhor a execução e gestão de recursos, assim como para mensurar os resultados, elaboraram-se PDITS para os pólos dos estados partícipes da Costa Norte – Piauí, Maranhão e Ceará (Tabela 1).

Tabela 1 – Pólos Turísticos na Rota das Emoções

| <b>Pólos</b>                        | <b>Municípios do Pólo</b>  | <b>Municípios da Área de Planejamento</b>   |
|-------------------------------------|--|---|
| <u>Ceará</u><br>Polo Costa do Sol   | Fortaleza, Caucaia, São Gonçalo do Amarante, Paracuru, Paraíçaba, Trairi e Itapipoca, Aquiraz, Cruz, Itarema, Amontada, Acaraú, Jijoca de Jericoacoara, Camocim, Barroquinha, Chaval, Granja e Viçosa do Ceará   | Fortaleza Caucaia, São Gonçalo do Amarante, Paracuru, Paraíçaba, Trairi, Itapipoca, Aquiraz, Jijoca de Jericoacoara e Camocim |
| <u>Piauí</u><br>Polo Costa do Delta | Teresina, Parnaíba, Ilha Grande, Luís Correia e Cajueiro da Praia  |   |
| Maranhão<br>Polo São Luís e Entorno | Polo 1 – Histórico-cultural: São Luís, Alcântara, Raposa, Paço do Lumiar e São José de Ribamar<br>Polo 2 – Lençóis Maranhenses: Humberto de Campos, Primeira Cruz, Santo Amaro e Barreirinhas<br>Polo 3 – Delta do Parnaíba: Paulino Neves, Tutóia, Água Doce e Araíoses |   |

Fonte: Adaptado de LIMA/COPPE/UFRJ com base em dados do Mtur, 2006.

É dessa forma que a gestão do território de interesse turístico (Figura 3) acontece no Piauí, ou seja, a iniciativa do governo federal conjugado com recursos externos ao Estado é que determinam como ocorrerão os investimentos e intervenções, cabendo ao Estado apenas indicar, quando lhe é permitido, as áreas de interesse.

Sendo assim, o mapa do turismo no Piauí define-se com base na categorização dos municípios da Regiões turísticas do Mapa do Turismo Brasileiro (Portaria nº144/2015), o qual é um instrumento de identificação do desempenho econômico do setor nos municípios que constam no Mapa do Turismo Brasileiro (Portaria nº172/2016).

Para o Ministério do Turismo (2016), a categorização respeita as peculiaridades dos municípios e serve para: otimizar a distribuição de recursos, orientar a elaboração de políticas específicas para cada categoria de municípios, aperfeiçoar a gestão pública, na medida em que fornece

aos gestores do Ministério e dos Estados mais um instrumento para subsidiar a tomada de decisão, auxilia na atualização do Mapa do Turismo brasileiro feita periodicamente e auxilia na reflexão sobre o papel de cada município no processo de desenvolvimento regional.

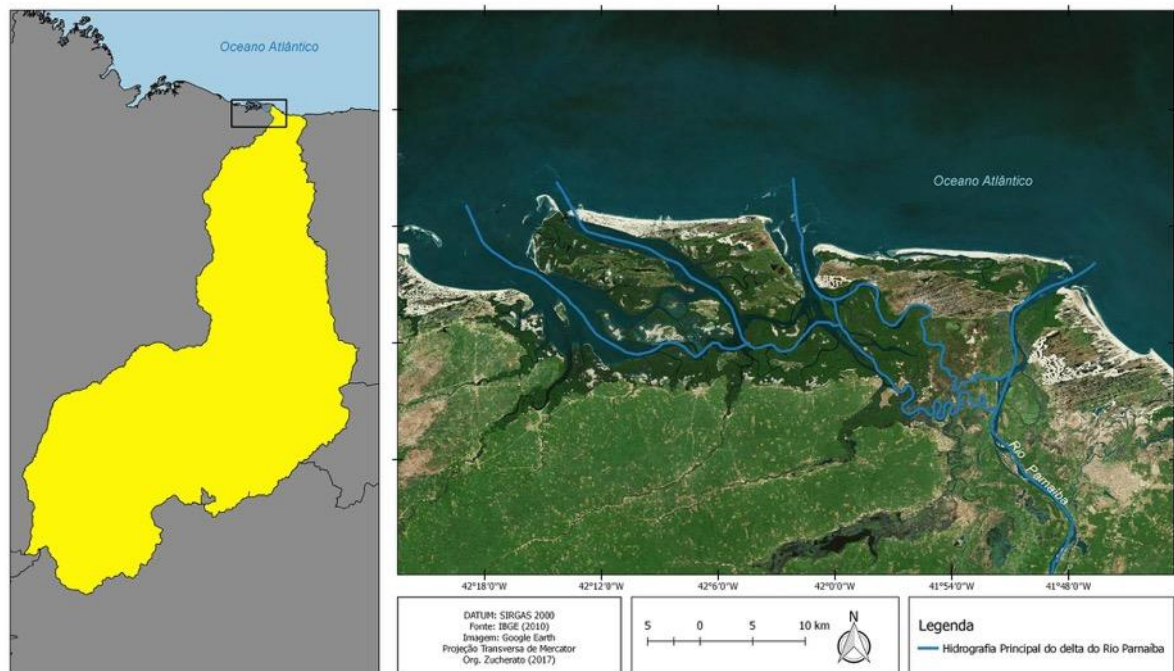


Figura 3 – Área de Interesse Turístico: Delta do Parnaíba e Litoral do Piauí

Fonte: *Elaboração própria, 2017.*

A metodologia para a categorização dos municípios utilizada pelo Ministério do Turismo do Brasil considera a amplitude do universo dos municípios brasileiros, porém, a partir de uma análise quantitativa, com base em dados secundários disponíveis pelo próprio Ministério do Turismo – Mtur, obtendo pela análise de cluster (ou de agrupamento) as referências categóricas.

Desta forma, definem-se os 65 destinos considerados pelo Ministério do Turismo como indutores do turismo regional, os quais foram categorizados para receber investimentos técnicos com base no critério de existência de roteiros que possuíssem infraestrutura turística básica, com atrativos qualificados que fossem capazes de atrair e distribuir o fluxo e benefícios da atividades com as cidades do seu entorno.

Portanto, no Pólo Costa do Delta a cidade considerada indutora do turismo regional é Parnaíba, tendo em vista características específicas definidas pela geografia, fluxo turístico e infraestrutura.

#### 4.2. Características Físicas e Naturais do Polo Turístico Costa do Delta

As características do litoral do Estado do Piauí, principalmente no que tange o relevo, geologia e clima, são muito similares as dos estados vizinhos Maranhão e o extremo noroeste do Ceará. Porém, mas algumas diferenças podem ser apontadas na descrição do território.

Em relação ao relevo e geologia, no litoral piauiense, a pressão que a expansão urbana causa sobre os ambientes costeiros, assim como as atividades de mineração proporcionam profundas transformações, evidenciando os seguintes impactos no meio ambiente:

- i. Modificação da paisagem por ação antrópica, fundamentalmente a movimentação de dunas, as quais com a ação dos ventos e intervenção do homem no ambiente, invadem estradas e casas em diversas localidades, como: Praia de Macapá (Luís Correia), Lagoa do Portinho (Parnaíba), além da perda de vegetação nativa (Figura 4).
- ii. Degradação de áreas pela mineração que causam negativo impacto visual, prejudicando o turismo local.
- iii. Processo de desertificação e aumento de erosão eólica e marinha através da remoção de vegetação nativa: restinga, além da poluição (lixo) nas praias.



Figura 4 – Movimentação das dunas – Praia de Macapá e Lagoa do Portinho (PI)

Fonte: *tripadvisor.com*, 2016.

Já quando se analisa os recursos hídricos, o litoral do Piauí detém um dos principais rios do nordeste brasileiro, o rio Parnaíba, que origina o Delta do Parnaíba, o único delta em mar aberto das Américas. Mesmo privilegiado pelos abundantes cursos de rio, mar e lagoas, atividades que valem-se desses recursos, em sua grande maioria, causam danos e outros impactos aos ambientes, condenando o território a escassez cada vez maior dessa oferta natural.

Pode-se elencar como atividades de maior impacto para o ambiente natural as 13 fazendas de carcinicultura (800ha), coleta indiscriminada de caranguejo, coleta de camarão e mariscos, além de outras atividades de menor impacto, mas que em conjunto com as já citadas formam uma força destrutiva significativa para o ambiente, a qual apresenta os seguintes impactos: diminuição de recursos estuarinos devido a pesca predatória, poluição causada por resíduos e efluentes sanitários, redução do volume de água de lagoas e assoreamento dos rios, prejudicando, principalmente, a navegação (Figura 5).

Os principais ecossistemas existentes no Piauí (Figura 6), às vezes referidos, na literatura específica, como biomas, tendo em vista que a eles associam-se um tipo de clima e um tipo de vegetação de predominância, no caso específico a Caatinga, o Cerrado e as Áreas de Transição (conhecidos como Ecótonos). Desta forma, a caatinga está associada ao clima semiárido, o cerrado ao tropical subúmido e as áreas de transição correspondem ao encontro dos climas do semiárido de leste e tropicais subúmidos de oeste (Castro, 2003).



Figura 5 – Impactos ambientais aos recursos hídricos do litoral do Piauí  
 Fonte: Banco de Imagens Google, 2016.

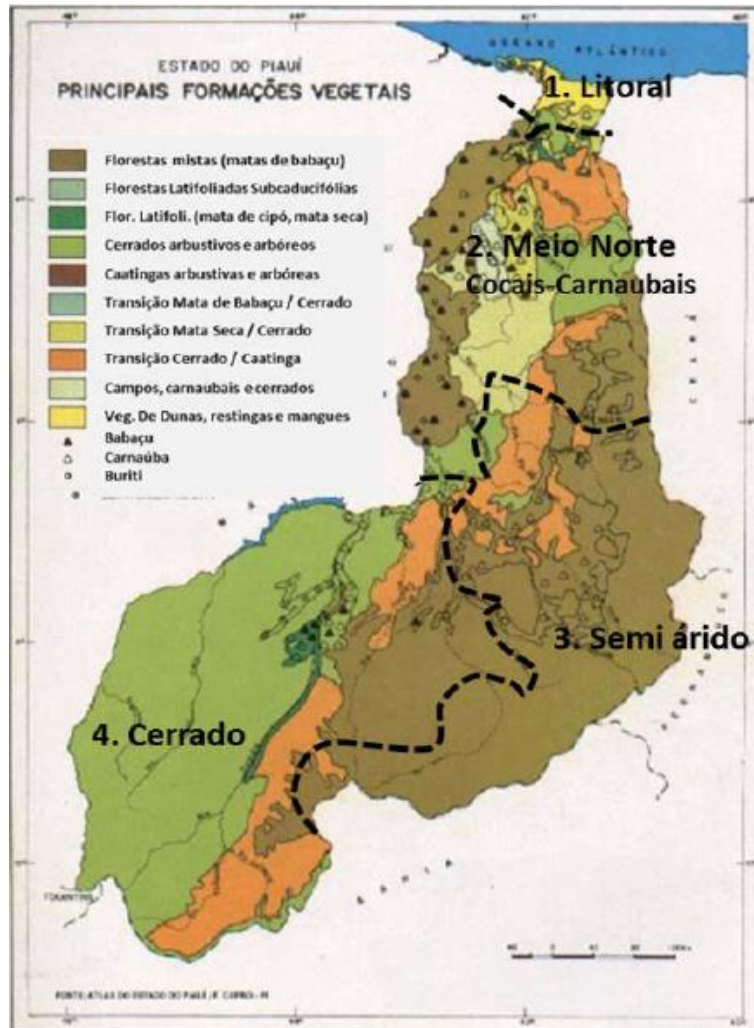


Figura 6 – Principais formações vegetais no Estado do Piauí  
 Fonte: Castro, 2003.

Na região do litoral (Baixo Parnaíba) predominam a Floresta Semidecídua ou Mista e a vegetação litorânea. A floresta mista aparece nos trechos do médio e baixo Parnaíba, regiões mais influenciadas pela umidade, apresentando estrutura complexa, pois além das espécies semidecíduais como as matas fluviais megatérmicas, hidrófilas, também há palmáceas, especificamente o tucum, buriti, babaçu e carnaúba (Figura 7).



Figura 7 – Vegetação do baixo Parnaíba  
*Fonte: Banco de imagens do Google, 2016.*

Sendo assim, a vegetação litorânea, diferentemente da floresta mista, encontra-se apenas nos 66Km de costa, fronteira com o Oceano Atlântico, composta por: paisagens de restinga que vão das dunas aos campos herbáceos, abertos ou fechados com frutícetos inundáveis a não inundáveis e matas com porte médio a elevado; mangues do solo pantanoso; praias arenosas; vegetação de dunas e palmeiras, no caso coqueiros e carnaubais (Castro, 2003).

#### 4.3. Unidades de Paisagem

Aproveitando-se da metodologia e conhecimento explicitado no documento Mapa de Áreas de Proteção Econômica e Proteção Ambiental – Produto 5 (2013), compreende-se que, geralmente, três métodos são utilizados para identificação das unidades de paisagem cultural (analítico, sintético e misto), sendo que no documento supracitado o método definido foi o misto, pois considerou-se “que inclui técnicas de reconhecimento de áreas homogêneas do ponto de vista geográfico e de identificação de descontinuidades paisagísticas relevantes (sintético) e as de superposição de cartas/camadas (mapas temáticos) e delimitação de áreas gerais e posterior integração, de forma visual e quantitativa” (pg. 65). Tais metodologias de identificação foram utilizadas no planejamento territorial de alguns países, dentre eles: Austrália nos anos 1950-60 (CSIRO), pela FAO em 1976 na análise dos recursos territoriais dos países subdesenvolvidos, e pelos adeptos da escola do Landscape Ecology de Troll (1966), representantes do método sintético; e por McHarg (1969), Van Esteweld y Antrop (2004) na Bélgica, e Sabaté (anos 2000) na Espanha, utilizadores do método analítico.

A unidade de paisagem, que resulta dos métodos citados, tende a ser a de um misto de paisagens com unidades únicas, que destacam a especificidade da associação, detalhes geográficos (ecossistemas e formações vegetais), que associam-se com paisagens de unidades de caráter geral, realçando características de predominância.

Ao realizar um levantamento documental, a presente pesquisa, identificou alguns trabalhos já desenvolvidos sobre o Piauí, percebendo que as unidades de paisagem descritas serviriam como orientação para análises de condicionantes ambientais. São eles: ZEE – Zoneamento Ecológico-econômico do Estado do Piauí (SEMAR, 2012, p.144) e cartas de aptidão do uso da terra desenvolvidas pela EMBRAPA.



Desta forma, extraiu-se dados e informações para subsidiar as análises da paisagem cultural da planície litorânea, a qual tem em seu território todos os municípios componentes do pólo turístico Costa do Delta.

Considera-se que a paisagem cultural é um espaço delimitado geograficamente e associado a eventos, atividades, personagens, história da vida de relações que a originou, assumindo valores estéticos e culturais (Sabaté, 2004).

#### 4.4. Paisagem Cultural da Planície Litorânea: 66 quilômetros de litoral

O Pólo Costa do Delta detém valores histórico-culturais e naturais fundamentais para a identidade do piauiense, dentre os quais o conjunto histórico-arquitetônico Porto das Barcas (Figura 8), antigo porto para escoar a produção agropecuarista, o próprio delta do rio Parnaíba – saída para o Oceano Atlântico – o peixe-boi em Cajueiro da Praia, entre outros. A dinâmica da região é ditada pela influência da cidade de Parnaíba, abrangendo onze municípios piauienses e alguns do Maranhão e Ceará, porém, considerando somente o território do norte do Piauí, a cidade é sede das relações econômicas e sociais regionais abarcando, neste contexto, uma população de aproximadamente 280 mil pessoas – soma da população dos municípios influenciados por Parnaíba (IBGE, 2010). Na última década o IBGE – Instituto Brasileiro de Geografia e Estatística detectou, através dos censos, que a região norte do estado cresceu, em população, uma média de 1.38%, representando em Parnaíba um acréscimo próximo a 13 mil pessoas, em Luís Correia algo em torno de 4 mil habitantes e em Cajueiro da Praia pouco mais de mil residentes.

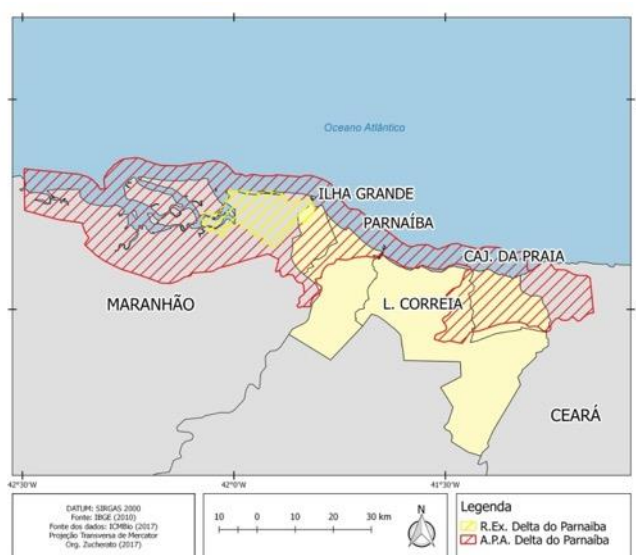


Figura 8 – Delimitação da APA e RESEX do Delta do Parnaíba

Fonte: BIOMAD, 2013.

Com o aumento populacional é perceptível o impacto no ambiente da região, principalmente na paisagem entre as zonas urbanas e rurais, onde cresceram o número de loteamentos e condomínios. Considerando que os quatro municípios do pólo turístico têm seus territórios costeiros pertencentes a APA do Delta do Parnaíba e RESEX do Delta do Parnaíba – Unidades de Conservação Federal – (Figura 8), a pressão sobre o ambiente faz dos ecossistemas locais mais sensíveis a influência humana. Manguezais, restingas e dunas, as quais são de interesse

crescente à atividade turística sofrem com o manejo inadequado proporcionado pelas populações locais, visitantes e *trade* turístico.

As exigências legais impostas pelas unidades de conservação, se observadas pelas gestões municipais, podem transformar-se em benefícios econômicos, sociais e culturais, fortalecendo a economia regional e o turismo. Pois, a presença de inúmeras lagoas, mangues, apicuns e dunas constituem-se em elementos fundamentais e que caracterizam e individualizam a região litorânea do Piauí. Desta forma, conservar e preservar os ecossistemas e as atividades tradicionais ligadas ao extrativismo, desde que controlado nos parâmetros da legislação vigente, apresenta-se como condição primária à identidade e desenvolvimento do território.

Atividades ligadas a agricultura, carcinicultura e pecuária, que num primeiro momento não são consideradas estratégicas ao desenvolvimento do turismo, são fundamentais à dinâmica econômica regional, mesmo na forma atual que são realizadas, pois ainda mantém um grande potencial de destruição de vegetação nativa, poluição de rejeitos, entre outros impactos. Porém, todas as influências negativas podem ser minimizadas e compensadas, permitindo que atividades do ambiente rural, ao moldarem-se às necessidades e desejos dos turistas, possam participar do rol de produtos e serviços conectados a cadeia do turismo (Figura 9). Nesta perspectiva, as instalações hidráulicas de irrigação dos Tabuleiros Litorâneos, onde hoje contrastam com a baixa produção agrícola, seriam a grande facilitadora no desenvolver a fruticultura e produção de hortaliças.

Práticas extractivistas como a coleta do caranguejo e a pesca, as quais são atividades econômicas tradicionais, mesmo num espaço limitado como o litoral do Piauí, também possibilitariam a interação entre turistas e comunidade tradicional, proporcionando experiências e conscientização sobre os ecossistemas locais.



Figura 9 – Porto das Barcas, Lagoa e duna e vinhas dos Tabuleiros Litorâneos  
Fonte: Banco de Imagens Google, 2016.

Mesmo com toda a diversidade de recursos e beleza cênica, algumas questões relevantes encontram-se constantemente na pauta dos debates, audiências públicas e discursos de gestores públicos locais, como: a necessidade da ampliação e fortalecimento dos Arranjos Produtivos Locais, não só das atividades tradicionais ligadas ao extrativismo e agricultura, mas também do artesanato e turismo; a preocupação com a perpetuação dos modos de fazer das atividades econômicas tradicionais, principalmente às que vinculam-se a cadeia do turismo; Preservação do patrimônio histórico-cultural da cidade de Parnaíba e zona portuária.

No âmbito do meio ambiente natural também afloram preocupações com questões ligadas a valorização da APA e RESEX do Delta do Parnaíba, devido a relevância biológica; e proteção de ecossistemas locais, como: as lagoas, dunas, mangues, salgados e apicuns que ainda mantém-

se apesar da crescente pressão do crescimento urbano dos municípios de Ilha Grande, Parnaíba, Luís Correia e Cajueiro da Praia.

#### 4.5. Turismo e Impacto ambiental: a relação conflituosa no território

O turismo na região do pólo Costa do Delta, mesmo sem dados oficiais contínuos, percebe-se (Figura 10) que vem gradualmente crescendo, tendo em vista o aumento do número de estabelecimentos de hospedagem, restauração e entretenimento. O desenvolvimento mais intenso, principalmente na costa do Piauí, de um modo geral, atrai duas dinâmicas de pressão sobre o meio ambiente: a expansão da infraestrutura básica, de apoio e turística e o aumento de moradias de primeira e segunda residência. Segundo Cravidão (1989) conhecer os tipos de residência secundária traz um grande desafio no planejamento do território, pois, para a autora, as habitações secundárias podem, tipologicamente, compreender: residências legais e clandestinas, residências do litoral e do interior, residências de fim-de-semana, residência de férias, antigas propriedades familiares e residência de investimento imobiliário e de aluguel. Mesmo esta tipologia sendo desenvolvida para a realidade portuguesa, muito vale para o entendimento da dinâmica do turismo de segunda residência no território em estudo.

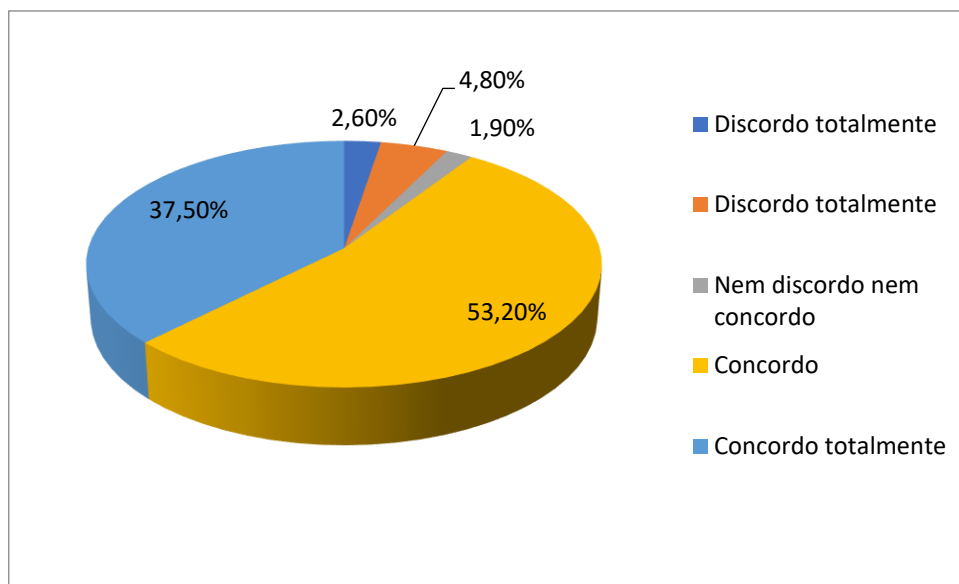


Figura 10 - Nos últimos anos percebe-se o aumento do Fluxo Turístico?

Fonte: Elaboração própria, 2017.

As expansões de infraestrutura e moradia traz, naturalmente, um aumento da população residente e flutuante que, caso ocorra em curtos períodos de tempo, sem proporcionar o prazo adequado para o planejamento e preparação do território, permite o desordenado crescimento, marcando a paisagem local, seja na concepção paisagística, ambiental, urbanístico ou social. A “desordem” evidencia-se na vontade e iniciativa do setor privado e, também, no carácter permissivo e omissivo da gestão pública municipal, tal fenômeno ocorre em diversos destinos turísticos no mundo, porém é recorrente em todo o litoral brasileiro.

Pode-se elencar as principais pressões ambientais no litoral piauiense, provenientes do crescimento urbano desordenado e do turismo, destacando-se: o aumento populacional, crescimento da especulação imobiliária, ocupações irregulares, aumento da disputa pelos recursos naturais e serviços essenciais (água, gás, luz, coleta de lixo), aumento do tráfego de

veículos e número de acidentes, cresce a demanda por recursos sociais (saúde, educação, segurança e limpeza pública), entre outras.

Em outros municípios do litoral brasileiro, considerados destinos turísticos consolidados, como Rio de Janeiro e Florianópolis, a omissão do poder público fez dos impactos negativos incipientes à evolução de pressões ambientais maiores e com maiores custos de reversão ao erário público, algo em eminência no território polo Costa do Delta, pois já se percebe poluição dos recursos hídricos, fundamentalmente cursos de água, devido ao despejo de efluentes sanitários não tratados; poluição do solo, ar e lençol freático tendo em vista o aumento dos resíduos sólidos dispostos em lixões; aceleração da erosão do solo e redução da biodiversidade local.

Outras dinâmicas tendem a surgir com a alteração da paisagem e influência dos impactos no meio ambiente. Em relação aos recursos sociais e ao modo de vida local, com as transformações ambientais as comunidades buscam meios de adaptação e, por vezes, de contestação do modelo de desenvolvimento, tendo em vista a percepção de que o aumento do fluxo de pessoas e de residentes traz a descaracterização da cultura local. Porém, na visão de (Grünwald, 2003), as mudanças culturais não podem ser vistas como impuras ou poluídas, mas como resultado da interação, reações aos grupos partícipes da dinâmica social do turismo, que geram novas formas de perceber o mundo. A população residente mostra-se preocupada e descrente com o turismo na forma como apresenta-se na atualidade (figura 11), pois, altera os modos de vida e, também, agravam-se influências negativas à vida social, como: deslocamento e marginalização de populações (desterritorialização e reterritorialização) e problemas sociais (violência, prostituição, etc.) – Figura 12.

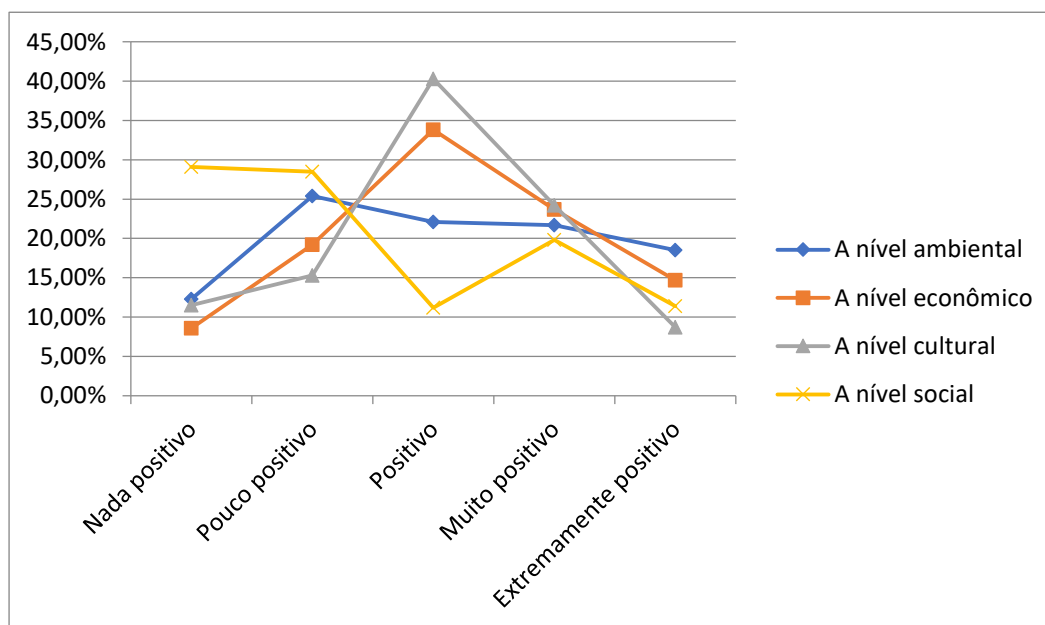


Figura 11 - Em que medida consideras o turismo como algo positivo?

Fonte: *Elaboração própria, 2017.*

Segundo Ruschmann (1997) “litoral, principalmente nas praias, a densificação humana e a concentração sazonal provocam a poluição das águas e o acúmulo de detritos deixados nas areias. (...) Todas essas, e muitas outras alterações são visíveis, porém dificilmente mensuráveis”.



Figura 12 – Impactos negativos do turismo de massa nos municípios do pólo Costa do Delta.

Fonte: Banco de Imagens do Google, 2016.

Compatibilizar as atividades turísticas com as necessidades da população autóctone não é das tarefas mais fáceis para o gestor do território, tendo em vista a percepção do impacto (Tabela 2).

Tabela 2 – Influências do turismo no território: percepções da população autóctone

| <b>Influência do Turismo</b> |   |  |                        |   |
|------------------------------|---|--|------------------------|---|
| <b>Categorias</b>            | <b>Água</b>   | <b>Terra</b>                                 | <b>Clima</b>           | <b>Comunidade</b>                             |
| <b>Ambiental</b>             | Falta na alta temporada/<br>Poluição                                | Desmatamento/<br>Extração irregular de areia | Aumento da temperatura | Sofre com erosão e avanço das dunas e areiais |
| <b>Econômica</b>             | Redução do tempo de permanência do turista.                         | Especulação imobiliária                      | –                      | Desigualdade/<br>Expropriação de propriedade  |
| <b>Cultural</b>              | Uso racional  | Novos usos                                   | –                      | Modo de vida/<br>tradições                    |
| <b>Social</b>                | Responsabilidade individual/<br>compartilhamento do recurso hídrico | Exclusão                                     | –                      | Perda de identidade                           |

Fonte: Elaboração própria, 2017.

Porém faz-se primaz à garantia da qualidade dos recursos, da paisagem cultural e, fundamentalmente, das características do lugar turístico a gestão territorial que minimize os impactos negativos das atividades concernentes ao turismo, conservando as características da paisagem do território, assim como adote estratégias e ferramentas eficientes para maximizar as potencialidades e recursos em prol do turismo e do bem-estar da população local e dos visitantes.

#### 4.6. Compatibilidade Ambiental/Econômica da Macrorregião do Litoral

As restrições que a região do litoral do Piauí apresenta relacionam-se aos recursos naturais. Considerando que o setor de serviços é dominante na composição do PIB local (IBGE, 2010) as transformações percebidas ocorrem em todo o território (Figura 13), porém impactam primordialmente recursos como Água e a biodiversidade, pois variáveis ambientais como o clima são amplamente favoráveis as atividades econômicas, principalmente ao turismo.

A compatibilidade entre meio ambiente e economia regional é dinamizada pelas restrições e riscos ambientais ao território litorâneo, pois abriga diversificados ecossistemas específicos que interagem entre si, tornando a ocupação humana mais impactante.

Em relação ao relevo/solo, o segmento do turismo provoca transformações no território, perceptível quando se observa a expansão urbana e de atividades correlatas ao turismo, sobretudo o aumento do mercado imobiliário de segunda residência. Esse movimento de expansão escasseia as áreas próprias para serem ocupadas, desencadeando problemas mais graves socialmente, economicamente e ambientalmente, como: a ocupação de áreas alagadas, várzeas, mangues e dunas; retirada de terra de determinados lugares, por vezes, de espaços protegidos por lei, para o uso como aterro; verticalização das moradias e impermeabilização do solo e obstrução de áreas de movimentação de dunas (CEPRO, 2013).

O impacto sobre a reserva de água é mais visível, e se não controlado, no que tange ao elevado consumo sazonal, traz, em tempos de férias, colapsos no abastecimento e prejuízos à qualidade da oferta.



Figura 13 – Falta de água e verticalização das moradias.

Fonte: Banco de Imagens do Google, 2016.

Tabela 3 – Compatibilidade entre os segmentos econômicos e recursos ambientais

| Relevo - Solo                  | Clima                          | Água                           | Bioma (Vegetação)                    |
|--------------------------------|--------------------------------|--------------------------------|--------------------------------------|
| Turismo                        | Turismo                        | Turismo                        | Turismo (Lazer)                      |
| Industria Extrativa Mineral*   | Industria Extrativa Mineral    | Industria Extrativa Mineral*   | Industria Extrativa Mineral          |
| Petróleo e Gás                 | Petróleo e Gás                 | Petróleo e Gás                 | Petróleo e Gás                       |
| Energias Renováveis            | Energias Renováveis            | Energias Renováveis (biomassa) | Energias Renováveis (biomassa)       |
| Agronegócio                    | Agronegócio                    | Agronegócio (agr. Irrig)       | Agronegócio                          |
| Infraestrutura                 | Infraestrutura                 | Infraestrutura (portuária)     | Infraestrutura (hidrov. e portuária) |
| Educação e Cultura             | Educação e Cultura             | Educação e Cultura             | Educação e Cultura                   |
| Ciência, Tecnologia e Inovação | Ciência, Tecnologia e Inovação | Ciência, Tecnologia e Inovação | Ciência, Tecnologia e Inovação       |
| APLs                           | APLs                           | APLs                           | APLs (pesca/carnicultura)            |

Branco (neutro), Azul (Muito compatível), Amarelo (Compatível), Vermelho (Pouco compatível)

Fonte: ZEE/CEPRO, 2013.

A tabela 3 demonstra a relação entre as atividades econômicas no litoral do Piauí e a relevância do impacto sobre o ambiente que proporcionam, sendo assim percebe-se que o setor mineral, no que concerne a extração de petróleo e gás, ainda é inexistente, exceto a exploração de areia, argila e seixo.

As atividades turísticas denominam, no presente momento, as maiores preocupações com o ambiente local, pois considera-se que há ligação entre o aumento do interesse do setor imobiliário pela região e o aumento do fluxo de turistas. Todavia, quando se analisa o impacto ao relevo/solo identifica-se pontos específicos e, se o poder público atentar-se, reversíveis. Já em relação a água, o aumento do consumo ocorre somente em períodos de férias, o qual traz a toda alta temporada o colapso no abastecimento, tendo em vista a má dimensionalidade da infraestrutura pela empresa responsável e governo local. O impacto mais notório do turismo se dá na forma de ocupação do espaço territorial, o qual sofre com a perda de vegetação nativa, sendo no litoral a perda de áreas de restinga.

#### 4.7. Aptidão do Polo Turístico Costa do Delta para o turismo na Rota das Emoções

De acordo com o Ministério do Turismo (2016), o turismo na região nordeste do Brasil vem ao longo dos últimos dez anos crescendo mais do que o de outras regiões do país. Segundo a pesquisa Sondagem do Consumidor/Mtur (2016), o nordeste brasileiro concentra 41% da preferência de viagem, destes uma pequena parte indica o Piauí como destino turístico.

Entre os estados do Maranhão, Piauí e Ceará, o Piauí apresenta, atualmente, a mais baixa procura, a qual justifica-se revela-se na pouca exposição do estado no mercado turístico e um único voo interestadual com possibilidade de conexão com destinos estrangeiros. Porém, o fluxo turístico ao litoral é crescente, mas sazonal por concentrar-se em determinados períodos do ano, ocorrendo no sentido interior – litoral e em menor dimensão de estado para estado (Figura 14).

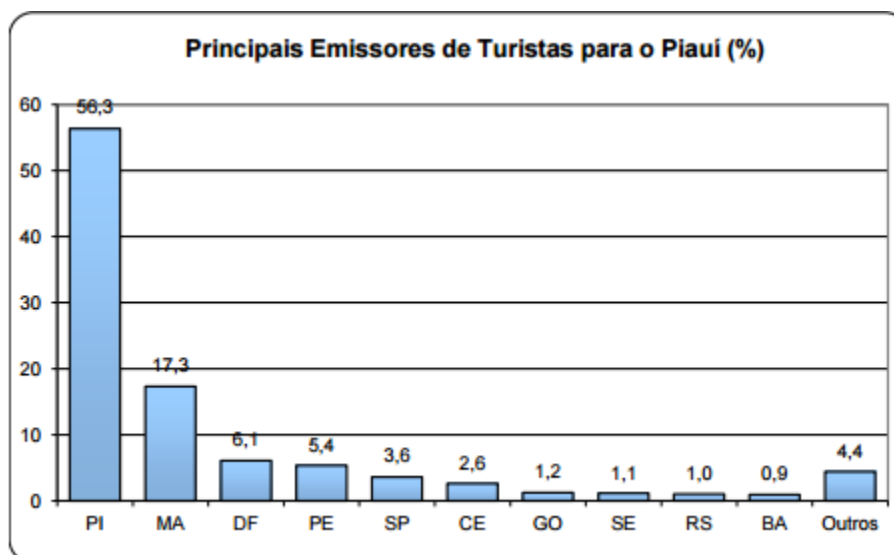


Figura 14 – Turismo doméstico: Polos emissores  
 Fonte: FIPE/Mtur, 2012.

As condições necessárias ao desenvolvimento do turismo no pólo Costa do Delta já existem, no entanto o setor esbarra na burocracia, inação estatal, falta de planejamento do setor e, conseqüentemente, poucos dados confiáveis, forte participação de mercado dos estados

vizinhos Ceará e Maranhão, relegando ao litoral piauiense preferência secundária. Nesta questão, em específico, uma das razões pelas quais a preferência se dá pelos estados vizinhos é o acesso aos atrativos turísticos, principalmente os da Rota das Emoções (Figura 15).

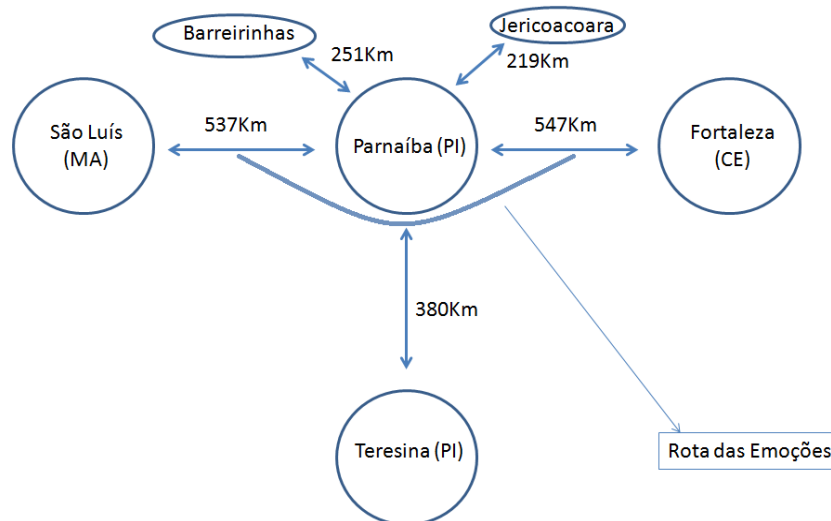


Figura 15 – Distâncias regionais entre Parnaíba e polos emissores

Fonte: elaborado pelo autor com base no Guia Rodoviário Michelin, 2016.

Sendo assim, o potencial turístico do pólo Costa do Delta firma-se na diversidade de ecossistemas no pequeno território de 66 Km, com destaque ao Delta do Rio Parnaíba. Nesta pequena extensão territorial todos os municípios foram agraciados pela natureza com recursos naturais aptos ao desenvolvimento de produtos turísticos (Figura 16).



Figura 16 – Atrativos naturais do Pólo Costa do Delta

Fonte: Banco de Imagens Google, 2016.

A dinâmica socioeconômica do turismo no Polo Costa do Delta caracteriza-se, dentre outros aspectos, pelo fluxo de turistas que se deslocam na chamada zona de trânsito<sup>50</sup>, a qual é percebida como o espaço geográfico que mostra-se de grande relevância em relação às

<sup>50</sup> No caso da Rota das Emoções, as zonas de trânsito localizam-se entre os municípios de Jijoca de Jericoacoara e Parnaíba (pela extremidade leste da rota) e Parnaíba e Barreirinha (pela extremidade oeste).



atividades econômicas concernentes ao turismo, pois a área de abrangência do Polo abarca municípios que detém atrativos que tendem a ser compreendidos como complementares na perspectiva de formatação de produtos turísticos, da operacionalização de rotas e roteiros e da comercialização.

O efeito multiplicador do turismo na região induz, em parte, o surgimento de novos empreendimentos e atividades, ao todo são aproximadamente 68 empreendimentos no setor de hospedagem, 80 estabelecimentos de restauração e 17 agências de viagem, porém ainda não apresenta uma distribuição e circulação da renda mais ampla e menos desigual. A arrecadação de imposto, o qual pode significar os benefícios econômicos, nessa área de influência podem ser verificados através da conta ISSQN – Imposto sobre Serviço de Qualquer Natureza das prefeituras da zona de trânsito (Figura 17), pois incide diretamente no desenvolvimento das atividades turísticas que promovem a perpetuidade das produções locais em artesanato, gastronomia, entre outras, criando um mercado para a produção local.

Verificar a amplitude da distribuição dos benefícios do crescimento econômico regional, no Polo Costa do Delta, não se mostra tarefa fácil, tendo em vista a falta de dados estatísticos do ambiente social e econômico da região. Mesmo com tais dificuldades, algumas informações surgem de algumas iniciativas, como as da Fundação CEPRO, as quais apresentam, com certa defasagem temporal, dados estatísticos sobre educação, turismo, saúde, segurança e demonstram, a partir de dados quantitativos, o crescimento regional do turismo.

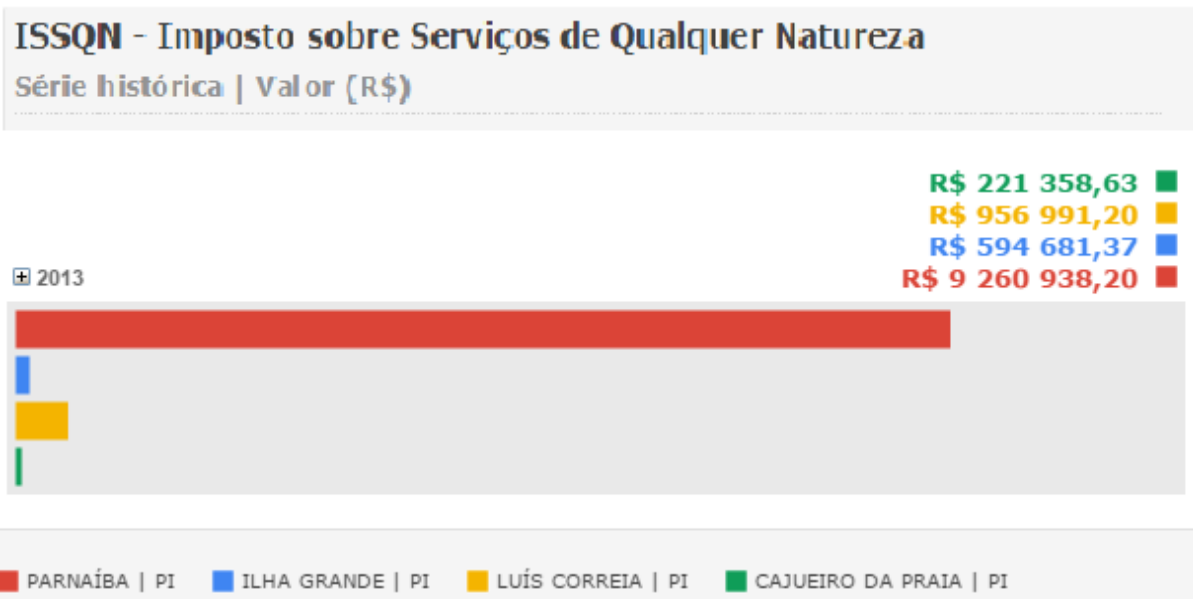


Figura 17 – ISSQN em 2013

Fonte: Tesouro Nacional/Siconfi-contas anuais, 2015.

Sendo assim, a aptidão para o desenvolvimento do turismo no território pólo Costa do Delta se dá pelo reconhecimento da amplitude e diversidade dos recursos naturais e sua singularidade, pela crescente capacidade de atração de investimentos e pela melhoria incipiente do acesso aos municípios do pólo e atrativos turísticos. Nos últimos dois anos, a infraestrutura de apoio ao turismo apresentou melhoras com investimentos do governo brasileiro e do Estado do Piauí, atendendo a ampliação da pista de pouso e decolagem do Aeroporto Internacional

Prefeito Dr. João Silva Filho (capacidade para 500 mil passageiros/ano, segundo a INFRAERO, 2016) e recomposição da capa asfáltica das BR's 343 e 402.

### **Conclusões**

A paisagem cultural do território do Polo Turístico Costa do Delta mostrou-se de grande complexidade e variável de acordo com cada grupo de interesse. Para a população local, os aspectos que potencialmente tendem a pressionar o ambiente, mudando-o eventualmente, são as forças da natureza ligadas ao clima e a ação humana. Neste contexto, o turismo é percebido como um agente dinamizador do território, porém também um dos responsáveis pelas intervenções na paisagem.

O questionamento inicial que propunha a pesquisa de identificar as influências na paisagem cultural do Polo Turístico Costa do Delta a partir do contexto atual da Rota das Emoções, orientou os estudos encaminhando para as seguintes conclusões:

- i) as influências sobre a paisagem derivam dos interesses dos *stakeholders* e modelo de desenvolvimento turístico do Polo;
- ii) mesmo com a riqueza de diversidade dos recursos naturais, a paisagem cultural do Polo ainda não é, por si só, atrativo suficiente para mobilizar os turistas a entrarem na Rota das emoções por Parnaíba;
- iii) o aumento da intensidade do uso do território pelas atividades turísticas traz a possibilidade da perda de parte da identidade do território, tendo em vista o processo de adaptação e padronização dos espaços e dinâmica social impostos pela pressão do mercado;
- iv) a ausência da presença do poder público, fundamentalmente o municipal, reflete na inação como política pública presente no território, falta de planejamento, permitindo, assim, uma menor regulamentação e fiscalização das iniciativas do setor privado no turismo.
- v) o turismo no modelo de desenvolvimento existente é insuficiente para atender as demandas da população local no âmbito das suas necessidades e expectativas.

Sendo assim, as influências da Rota das Emoções, demandadas pelos interesses dos estados do Maranhão e Ceará, vizinhos ao Piauí, presentes no território Polo Turístico Costa do Delta, evidenciam-se na força do capital, o qual determina as políticas públicas e ações da iniciativa privada no que tange ao uso dos recursos naturais, dos espaços no território, e as dinâmicas sociais locais. Assim, com a pressão constante existente, os gestores locais, na visão da população autóctone, adotam iniciativas equivocadas, que ferem os interesses das comunidades tradicionais e privilegiam o capital, fundamentalmente pela busca de protagonismo regional, tanto em relação ao turismo, na recepção de visitantes, quanto na influência política.

Concluindo o raciocínio, enfatiza-se que a paisagem cultural nos municípios do Polo Turístico, apesar de diversa, tende a homogeneização pelo processo de urbanização dos espaços turísticos e naturais e, também, pela adoção de novos modos de vida pela população local, destinando a espaços mais longínquos e periféricos, como áreas específicas da unidade de conservação APA Delta do Parnaíba, o caráter da conservação da identidade local reconhecida pelas tradições culturais que associam os modos de fazer e saber popular.

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## **Caminho Padre João Schiavo: community belonging. Located in Caxias do Sul, it begins to attract religious tourism**

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### **Summary**

The tourism potencial is related to the history, the memory and the community experience. Religion is one of people expressions who contribute for making places around the world eye-catching sights and emotional touching. Expressions permeate the material and immaterial heritage of a community. This study focuses on a course from Caxias do Sul/RS - Brazil, established by Law and whose name is "Caminho Padre João Schiavo Route". The intention behind it is to reflect how a touristic force derived from religiosity as well as the return of investment (ROI) that this new route, located in a rural zone may generate to the protagonists, who are the farmers and other residents nearby. From the methodological point of view, bibliographic research was made for better understanding of religious tourism within communities, besides the thoughts of authors in the area of tourism, law, communication, among others. The following article made visible that beyond social and economic purposes, the following route allows visitors to know the life and the work of the priest who will soon be beatified and whose history contributes to the sense of belonging to the inhabitants, encouraging them to share with others the place where they were all born and where Schiavo left his legacy afterwards.

### **Keywords**

Tourism; patrimony; João Schiavo; community; memory.

### **1. When faith drives tourists and gives birth to a new route**

Cities are dynamic territories and their tourism potential is related to the history, memory and experiences of the population. Religion is one of the expressions that help building a tourist point and make it attractive to the eyes and feelings of visitors. This study focuses on a route from Caxias do Sul established by Law and whose denomination is "Caminho Padre João Schiavo". The main goal is to reflect on the tourist force generated by religious customs. From the methodological point of view, research was made for better understanding of the relevance of religious tourism in society.

The tourist route was established according to the common venues Father Schiavo used to stay in Caxias do Sul. The beatification of the priest, who was born in Italy in 1903 and lived in the state of Rio Grande do Sul from 1931 to 1967, was authorized by Pope Francisco and will take place on October 28, 2017, in Caxias do Sul, where the priest developed several educational works, as well as social and religious formation. The beatification process came to a conclusion since Catholic Church recognized a miracle operated by Schiavo in 1997, regarding Juvelino Cara, who suffered intestinal thrombosis and at that moment, had no chance of cure. Eventually he survived.

The body of Schiavo is buried in Fazenda Souza, in the countryside, where his memory still being venerated. Actually, many believers keep going to the district to thank the graces they have received or to know more about the priest's biography.

This route, which is being analysed in this article, is crossed by four other routes: Conceição da Linha Feijó, Galópolis, Ana Rech and Fazenda Souza. The last one is the town where the chapel

and the tomb of the future Saint will be located. Fifty-five kilometers of natural beauties and centenary buildings composes the region, bringing together religiosity, culture and tourism. The route was built collectively by the Conceição community, Territory Museum of the Hércules Galló's Institute, Sociedade Amigos de Ana Rech (Samar) and Murialdinas Sisters from Fazenda Souza. All this places are connected to Father Schiavo's life and community work throughout his life. Therefore, the path has turned to be a spiritual, cultural and social itinerary.

However, the path lacks from economic to collaborative work to function properly. It is expected that a new walking trail will be built (Figure 1-2) and that would attract even more faith-driven tourists. The sense of belonging and identification of the residents to these religious matters are notorious.

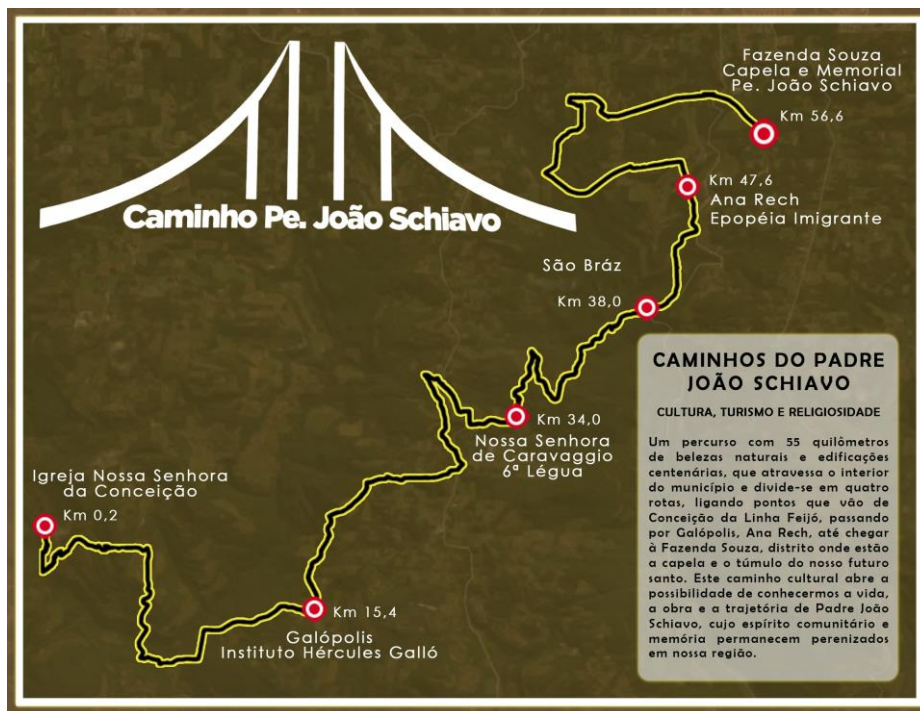


Figure 1 – Caminho Padre João Schiavo attraction map

Source: Câmara Municipal de Caxias do Sul

According to the World Tourism Organization data, the sector, when well planned, contributes to the socio-economic development of their destinations, expanding the job's market and income, strengthening local identity, and contributing to the preservation of natural and historical-cultural assets. In the article named "*Turismo Religioso no Brasil: uma perspectiva local e global*", based on the reflections of Boyer (1996) and Omena (1989), the anthropologist and doctor in Science of Religion Emerson Sena da Silveira (2007: 36) notes that for many people, tourism is a circulation, a peculiar ride that emerged in the nineteenth century, although its roots date back to the eighteenth century. In the understanding of the scholar, the phenomenon of tourism goes far beyond a single trip and must be analyzed "in its interfaces and its intertwining with so many aspects of social life, such as religiosity".



Figure 2 – Placing signs in the Padre João Schiavo route

Source: *Finger rede / Rádio Caxias*

Regarding the practice and the concept of tourism, Panosso Netto (2010) emphasizes that they are linked, among other aspects, to social inclusion and cultural studies. In the case of religious tourism, Schneider (2013) sees it as a modern and defined phenomenon, according to the World Conference of Rome (1960), being an event capable of motivating numerous pilgrims on journeys through the mysteries of faith or devotion to some Saint. In the real world, such phenomenon is vastly evidenced by pilgrimages going to sacred sites.

From this perspective, it is essential to understand that religious tourism is not based only upon religious people or by the religion itself. According to Nadais (2010), there are four touristic agents: pilgrim, tourist, pilgrim-tourist or tourist pilgrim. Regardless the category, when the tourist is well treated and absorbed by the attraction and its agents, the attraction itself becomes even more relevant, increasing the advertisement. The more Padre João Schiavo route is visited, the more it will become popular in the touristic scene.

Silveira (2007: 43) clarifies that these kinds of routes as Caminho Padre João Schiavo consist of certain spatial traits expected by the devotees: a church, a hermitage, chapels, among others. He mentions that one of the most famous worldwide place is Santiago de Compostela, Spain. In Brazil, "many potential attractions were created or had been there before, and were eventually worked by businessmen, local governments and the Church (Gazoni, 2003), among them: Caminho do Sol, Caminho da Luz, Passos de Anchieta, etc. The chances of these attractions become popular are enormous" (2007: 43).

## **2. Tourism and its potential**

In the last decades, tourism has been showed as an alternative for cities, regions and countries development. Data from the World Tourism Organization (WTO), a branch of United Nations (UN) in this matter, claims that the sector, if well organized, contributes to the socioeconomic development of their destinations, creating jobs, strengthening local identity and maintaining cultural resources.



According to the WTO, in 2016, 956 million of tourists traveled to different parts of the world between January and September 2016 - an increase of 4% over the same period last year. The increase in tourism has occurred in all regions of the world, except in the Middle East. The Asia-Pacific region has recorded growth of 9.3%, followed by Africa (8.3%), the Americas (4.4%) and Europe (1.6%). Tourism in the Middle East has fallen 6.4% in the same period of time.

Based on the latest edition of the global report on the subject, WTO General-Secretary Taleb Rifai stressed that "tourism is one of the most resilient and fast-growing economic sectors, but it is also very risk-sensitive, both for real daily experience as well as perceived". According to the WTO, the main markets in the world reported increase in energy consumption during the period from March to September 2016. Among the top five markets, first is China, reporting 19% growth in spending. United Kingdom comes after, with 10% of growth in spending, United States with 9%, Germany with 5% and France with 3%.

By the way, the UN will dedicate the year of 2017 as the International Year of Sustainable Tourism for Development. The date was adopted by the General Assembly of the United Nations at the end of 2016. The resolution recognizes "the importance of international tourism, and in particular the designation of an international year of sustainable tourism for development, to promote a better understanding between peoples throughout the world, leading to greater awareness of the rich heritage of various civilizations". The date still seeks to promote "a better appreciation of the values inherent in different cultures, thus contributing to the strengthening of peace in the world".

In Brazilian territory, about 6 million tourists visit the country every year. Brazil is listed as one of the forty most visited nations in the world, according to the World Tourism Organization (WTO). In Brazil, there is a great goal established by the National Tourism Plan (PNT) to transform the country into the third most profitable nation when related to tourism GDP until 2022. In other words: the intention is to leave the sixth to the third tourist economy of the planet, behind China and the United States. To achieve this goal, the country will need to have an average of annual growth touching 8% in the sector, which is higher than the average growth of this activity in the world.

According to PTN data, the participation of tourism in the Brazilian economy represents 3.7% of the country's GDP. From 2003 to 2009, the sector grew 32.4%, while the Brazilian economy expanded by 24.6% (MTUR, 2012a). The PTN reported for the World Travel & Tourism Council (WTTC) that, in 2011, about 2.74 million direct jobs were generated by tourism and following the growth estimated at 7.7% for 2012, the receipt created 2.95 million jobs (WORLD TRAVEL & TOURISM COUNCIL, 2013a).

For 2022's estimative, tourism sector will be responsible for 3.63 million jobs. Activities related to hotels, travel agencies, airlines, other types of passenger transport, restaurant and leisure are included as direct employment generators. In order to have a tourist flow dimension, in 2015, from the total number of foreigners arriving in Brazil, 2,079 million or 33% came from Argentina. The United States remains in second place (575 thousand or 9%), followed by Chile (306 thousand or 4.8%). As a whole, 54% of foreign tourists who came to Brazil in 2015 were from South America's neighbors. Paraguay ranks in 4<sup>th</sup> position in the list with 301 thousand visitors and Uruguay in 5<sup>th</sup> position, with 267 thousand. France is in sixth place, sending

261,000 tourists to Brazil, following Germany (224,000), Italy (202,000), England (189,000) and Portugal (162,000).

Among 27 Brazilian states, São Paulo still being the main gateway for foreigners arriving in Brazil. In 2015, 2 million 248 thousand and 917 visitors landed in São Paulo, a growth of 1.3% compared to 2014. Rio de Janeiro, known for Cristo Redentor, comes on the second position, followed by Rio Grande do Sul, which has been increasingly chosen as a route of access to the country, mainly by land (89%), which can be explained by the proximity of the borders to neighboring countries.

### 2.1. The “religiosity” factor in the tourist segment

Survey hosted by the Ministry of Tourism in 2016 showed that there is much more empty space for the development of tourism. In that year, Brazil hosted almost 900 tourist events in all regions of the country. Artistic, cultural and folkloric led the calendar with 303 records, followed by religious celebrations, which totaled 149, and for gastronomy, with the record of 101 events.

According to Pinto, when it comes to religious tourism, figures follow a growing curve, mobilizing 15 million people each year in the religious tourism segment, “which corresponds to the financial turnover of R\$ 6 million/year, inclined to progressive elevation”. One of the attractions that most instigate visitors in the country is the Catholic feast in honor of the Patroness of Brazil, “Nossa Senhora Aparecida”, which shakes the city of Aparecida (SP) mainly in October, gathering at the same place more than 160 thousand tourists in the Aparecida’s Sanctuary. This space is considered one of the main poles of religious tourism in Brazil, registering around 12 million visitors per year, according to the temple administration data. The Basilica has the capacity to celebrate masses for up to 35 thousand people in the inner area and for up to 300 thousand in the external area.

On the website of the Tourism Ministry, it is stated many celebrations that increase the numbers and its syncretism by the country. Círio de Nazaré’s celebration in Belém (PA), for example, is one of the largest religious festivals in the world, which gathers more than 2 million on the second Sunday in October. In Juazeiro do Norte (CE), the pilgrimage receives about 2 million devotees of Padre Cícero per year, in addition to the Romaria to Nova Trento (SC), in the Madre Paulina’s Sanctuary, considered the first Brazilian saint, summing up about 20 thousand pilgrims per month.

There are also Buddhist temples such as Zulai in Cotia (SP) and Odsal Ling in Três Coroas (RS), which together receive almost 150,000 visitors per year. The Al-Khatib Mosque (Foz de Iguaçu-PR), is the third most sought attraction in the city, behind the famous Falls and the Itaipu Power Plant. The administration of the Muslim temple estimates to receive about 60 thousand tourists from different religions per year. Still in the Catholicism field, in the region of Serra gaúcha, city of Farroupilha, there is the annual pilgrimage for Nossa Senhora de Caravaggio, which hosts, on average, 130 thousand devotees around May.

In Caxias do Sul, the city that contains part of the “Caminho Padre João Schiavo” route, it is said that it needs an update to become a consolidated tour. In addition to strengthening the given routes, it is necessary to update and create new routes related to the bigger one, which goes into the same direction as it is claimed in the article 30 of the Federal Constitution of the Brazilian State, which brings to the municipal zone allowance to legislate on matters of local

interest, as well as expressively, in its section IX, the need to promote the protection of the local historical-cultural heritage.

In accordance with the Federal Constitution, the Organic Law of Caxias do Sul, in its article 202 brings that tourism is a factor of social and economic development of the city. In Brazil, tourism has taken attention of the federal government. Since 2003, the government has increased the support and investment in the activity by creating the Tourism Ministry, with the purpose of generating economic, social and cultural benefits.

Countryside tourism has a peculiar attractiveness due to the geographical location of the city, allowing people to contemplate scenarios formed by hills and fields forming an original landscape. In the districts, there is an exuberant nature and historical-cultural heritage, which ensures attractions. When it links with religiosity, it opens up even more doors for different opportunities. Still, within the possibilities of conceptualization of religious tourism, it is high time to consider the words of Andrade (2000: 77), for whom the set of activities, “with partial or total use of equipment, and the accomplishment of ride tours with locals who express mystical feelings or arise faith, hope and charity to believers or people linked to religions, is called religious tourism”. That is exactly the type of tourism that may be held by Caminho Padre João Schiavo route.

## 2.2. Tourism experience: socioeconomic alternative for the rural zone

Undeniably, one of the axes of tourism is the economic strength, whether it is related to urban or rural zones. Specifically, in the rural area, which is the basis of the itinerary studied in this article, when there is an emphasis on tourism activity, the farmer and his family add value to what they produce and, consequently, increase their income afterwards. In this context, there are multiple alternatives beyond the essential functions of the field, which are agriculture and farming.

As part of a touristic route, rural families have the chance to open their homes and show the beauties and the cuisine they cultivate, creating and selling new products. By standard processes, they can show the culture and practices that follow them from their ancestors and create the attractions on their own with original and collective brands. After all, what do visitors want, if they do not try out new contexts, scenarios, sensory, emotional and gastronomic experiences and still bringing home, for those relatives who could not travel, a little of what they experienced during the trip?

Taking as an example the Caminho Padre João Schiavo route, there are plenty of elements that lead the tourists to reflect to the lifestyle of the Europeans, considering that it was a city colonized mainly by Italians who arrived in 1875 and settled down there to help the city development. These traits make the route even more appealing. It is worth considering that the more elements an attraction sums up, the merrier.

However, planning and organization are essential to fulfill its demands. For instance, a door is opened to the State's participation, fortifying, for example, infrastructure and the advertisement of the venues. According to Brambatti (2002), itineraries are routes that tourists take in order to enjoy a contextual environment that is organized. Farmers can analyze the processes as well as financing them and giving a new face to the rural area (Figure 3). By exploring the strength of religiosity, which is one of the active elements of the Italian culture of the Rio Grande do Sul state, Caminho Padre João Schiavo route sows a horizon of

strengthening for those who live in the countryside of Caxias do Sul and want to know more about the well-known priest.



Figure number 3 – One of the route's landscapes

Source: Luis Carlos Erbes

### **3. The biography of Father Schiavo, which gives the name of the newest attraction**

Father João Schiavo's biography, written by Sister Elisa Ana Rigon, affirms that the priest was born in the city of Santo Urbano, Italy, on July 8th, 1903. First of nine children, the couple Luigi and Rosa Fitorelli Schiavo were in charge of the family. João grew up in a poor family, but engaged with a deep faith and solid virtues. The father was a cobbler and his mother carried out all the activities of the home, taking care of the children with dedication.

Sacrifices, cares and renunciations were part of the education given for little João, all elements connected to the Christian religion. João Schiavo (Figure 4) has learnt very earlier in life the principles of a Christian pedagogy, grounded in love and fraternity, especially for the most in need.

On July 10<sup>th</sup>, 1927, he was ordained as a priest in the Cathedral of Vicenza, Italy. He exercised the priestly mission from the first to the last day of his life. Along with his vocation, he fostered another desire: to become a missionary. Eventually, he made the request to the superiors and was accepted, coming to carry out his mission in Brazil.

In 1931, he embarked for Brazilian lands, arriving in Jaguarão, in the State of Rio Grande do Sul, on September 5th. He was later transferred to Ana Rech, where he remained as a professor until 1934. The presence of the Josephites in the town of Conceição began in October 1932, with Father Girolamo Pianezzola, resident of Ana Rech, following the request of Archbishop João Becker of Porto Alegre.

On July 14<sup>th</sup>, 1940, Schiavo wrote to the General Father informing that he had received a house offer in Conceição, where he planned to build a Novitiate in the future. In Conceição, on December 8<sup>th</sup>, 1946, Bishop José Baréa Benedict set the first stone of the future house of the

Novitiate, with the presence of the provincial Father João Schiavo and the mayor of the city of Caxias do Sul, Dante Marcucci, besides confreres, merchants, paraninfos and citizens.

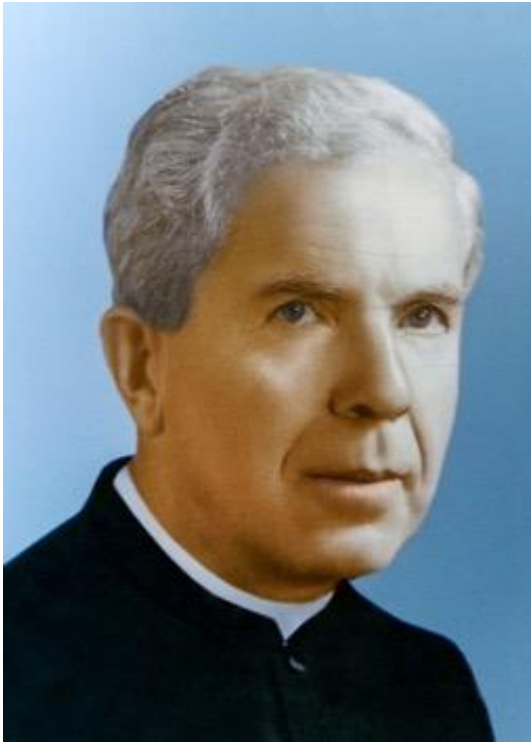


Figure 4 – Father João Schiavo

Source: *Personal archive*

Father João spent the years 1935 and 1936 in Galópolis, district of Caxias do Sul, as the director of a school and parish priest of the town. In 1937, he lived in Ana Rech, acting as a director until 1940 and being one of the prestigious founder of the Normal Rural Murialdo school.

In 1941, he founded the Josefino Seminary of Fazenda Souza (figure 5). He assumed the first director role at that time. He also founded the São José Children's Shelter in Caxias do Sul, an internship composed by a school, the first relevant social work for the city, especially for the homeless children.



Figure 5 – Chapel and tomb of Father João Schiavo in Fazenda Souza

Source: *Luis Carlos Erbes*

As provincial, he waited Murialdine Sisters Congregation to be founded in Italy by Father Luiz Casaril to start his own Charism process at Murialdo. On May 9<sup>th</sup> 1954, the first group of Murialdine Sisters began in Brazil, which had as the organizer, administrator and spiritual father, João Schiavo.

On November 20<sup>th</sup>, 1966, Nossa Senhora da Saúde's day was celebrated, the Patroness of Fazenda Souza, while Father João Schiavo was sent to hospital for treatment. He remained at Nossa Senhora de Pompéia Hospital for 39 long days. On December 15<sup>th</sup>, a biopsy was made and he was diagnosed with liver cancer. Father João Schiavo was supposed to undergo a surgery, but knowing he was cardiac, doctors avoided the surgery, since general anesthesia could lead him to death. In November 1966, he was hospitalized and after two months, he died on January 27<sup>th</sup>, 1967.

On the same day, a pilgrimage began at the tomb of the priest (Figure 5) and, according to friends and devotees, many graces were reached through his intercession since then. Many reports from the community endures that Father Schiavo's blessings were and still being effective. Many mothers have said they solved health problems that medicine had not been able to cure previously. That is one of the reasons that, even in the ending hours, Father João would greet people and give them the blessing. As a result of the beginning of the process of beatification, on December 14<sup>th</sup>, 2015, a commission of cardinals, after analyzing the Book of Life and Virtues, Pope Francis decreed the venerability of Father João Schiavo.

Father João Schiavo is assigned the cure of Juvelino Cara in 1997. From March 19<sup>th</sup> to September 12<sup>th</sup>, 2009, a new process was sued in the Diocese to analyze this case, having the testimonies of the doctors and nurses who attended Juvelino and relatives. All this process was taken to the Vatican, held by the Congregation for the Causes of Saints and accompanied by the postulator Father Orides Ballardín.

On February 18<sup>th</sup>, 2016, the Vatican Medical Commission acknowledged in the documentation analyzed that Juvelino's cure has no medical-scientific explanation. In October 2016, the miracles were recognized by the Cardinals and Bishops of the Vatican, applying the issuance of the "Miracle Decree". The beatification ceremony will be held on October 28 of this year (2017) in Caxias do Sul, where Father Schiavo had his charitable and Christian actions. The path of the priest's life is the basis for the touristic route highlighted in this article.

## **Conclusion**

This study focused on a new itinerary of religious tourism that is already established by Law and it is being implemented in the city of Caxias do Sul, Rio Grande do Sul, Brazil. It is called "Caminho Padre João Schiavo route", the religious man that will be beatified by the Vatican this year, in a ceremony that will take place in Caxias do Sul, on October 28<sup>th</sup>, 2017. This route passes through the rural area of Caxias do Sul and touches other four routes: Conceição da Linha Feijó, Galópolis, Ana Rech and Fazenda Souza, district where the chapel and the tomb of the future Saint is located. It is a journey of 55 kilometers of natural beauties and centenary buildings, bringing together religiosity, culture and tourism, where Schiavo went and worked. Built by the hands of the community, the route is a spiritual and cultural itinerary for the region. Meanwhile, it can set up a popular religious tourism route with activities that encourage faith – based upon the miracles and reported graces already given – enhancing the entrepreneurship and flux between residents and visitors.

In this article, we detailed this new itinerary and, based on theorists of the studied field, we tried to accomplish the potency of tourism, and punctually, religious tourism in Brazil, providing new knowledge, entrepreneurship, employment and income generation, social integration and cultural maintenance. According to the World Tourism Organization, when well planned, the segment collaborates with the cities development, preserving local identities as well as natural and historical assets.

In addition to the socioeconomic interest, there is a possibility that the locals and tourists will get to know better the great life and work of Schiavo, following the path that commonly made the priest's life recognizable and tends to grow the sensation of belonging to the inhabitants. Taking part into historical events, this route may lead tourists to have faith experiences that give motion to the place where he used to live.

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# O desenvolvimento de uma rota turística no litoral leste do Estado do Ceará (Brasil) ancorada em paisagens culturais

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## Resumo

Este estudo se propõe a analisar a viabilidade para a implantação de uma rota turística ancorada em paisagens culturais do Ceará, nordeste brasileiro. Os dois municípios estudados, Aquiraz e Aracati, estão localizados na costa leste de Fortaleza, capital do estado e principal portão de entrada para os turistas. Os destinos consolidaram-se no segmento de lazer, não trabalham o turismo cultural como um produto principal e/ ou como produto complementar a oferta existente. Identifica-se como ter cultura, dominar conhecimentos e habilidades que permitem que pessoas compreendam e desfrutem de bens sofisticados, como obras de arte, literatura instruída, espetáculos teatrais e saberes e fazeres de um grupo de um determinado lugar. As viagens, voltadas para atrações culturais, são portanto oportunidades para se conhecer os celeiros culturais. O Ceará explora maioritariamente a praia como produto turístico. O património histórico material e imaterial dos municípios estudados seria, portanto, uma forma de diferenciação, dando visibilidade a expressão cultural local. Aquiraz, foi a primeira capital do estado, ocupa uma área territorial de aproximadamente 481 km<sup>2</sup>, sendo 30 quilómetros de praia as mais conhecidas são; Porto das Dunas (*Beach Park*) e Iguape, registra-se em seu território a existência de quilombola e de uma tribo indígena. Aracati, com casas azulejadas construídas as margens do Rio Jaguaribe, desenvolveu-se sobre a influência da Igreja Católica, com vocação comercial e exportadora e sob a égide do poder económico dos coronéis de gado, sendo uma das mais importantes aglomerações urbanas do estado nos séculos XVIII e XIX, a praia mais conhecida é Canoa Quebrada. A integração dos dois destinos, pensados de forma integrada e colaborativa, possibilitaria o desenvolvimento de novas práticas turísticas, atribuindo novos significados e usos aos espaços e ao património histórico.

## Palavras chave

Rotas turísticas, Paisagens culturais, Território

## 1. Introdução

Este estudo tem por objetivo geral estudar a viabilidade de implantação de uma rota turística ancorada na existência de paisagens culturais no estado do Ceará no nordeste brasileiro. Os dois municípios estudados, Aquiraz e Aracati, estão localizados no litoral leste de Fortaleza, capital e principal portão de entrada do estado, ambos são destinos turísticos consolidados no segmento de lazer (sol e praia) e que não desenvolvem o potencial de associação do turismo de lazer com o turismo cultural. A figura 1, apresenta o mapa de localização dos municípios estudados, bem como seus limites e representa o recorte territorial.





Figura 1: Mapa de localização dos destinos turísticos

Fonte: IBGE, 2010

Alguns passos descrevem o caminho desta pesquisa. Inicialmente realizou-se um levantamento bibliográfico sobre os pilares conceituais do trabalho, questões como cultura, património e turismo passam por uma revisão de literatura, foram elencados autores que corroboram com as ideias propostas. Em um segunda fase, foram realizadas atividades de campo, com visitas às comunidades para análise do património imaterial, auscultação das múltiplas vozes e análises sobre a viabilidade da rota para essas comunidades. Por fim, realizamos uma leitura das múltiplas realidades estudadas e o mapeamento das áreas.

O trabalho esta dividido em quatro partes. A primeira parte introduz o leitor a temática. A segunda, apresenta reflexões sobre cultura, de património e de turismo, sendo de fundamental importância para a proposição de uma rota que se baseia em traços culturais. Posteriormente apresenta-se o processo de desenvolvimento do turismo no Ceará, desde de sua génese aos dias atuais. A quarta parte tem por objetivo apresentar o território estudado, demonstrar suas potencialidades para atuação no turismo cultural, apresenta ainda aproximações e distanciamentos entre as áreas de estudo.

Formadas as bases sobre cultura, património, desenvolvimento turístico, buscamos construir uma proposta de rota turística ancorada nestes traços. Idealizada para inserir atores sociais dispersos e isolados nos territórios, mas verdadeiros celeiros culturais, como na teria de Geertz (2015).

## 2. Cultura e sociedade

A cultura pode ter diversas abordagens. Assim, segundo Neves (2003, p. 50), o senso comum identifica como ter cultura, “o domínio de certos conhecimentos e habilidades que permitem a

*algumas pessoas compreender e usufruir de bens ditos superiores, como obras de arte, literatura erudita, espetáculos teatrais etc.”* A este panorama geral agrega-se o pensamento do antropólogo Geertz (2015) ao explicar que em um dado momento da evolução humana, passamos a ser capazes de agir como recebedores e transmissores, iniciando o processo de acumulação de cultura, sendo esta acumulação definidora de caminhos.

Os conceitos e definições de cultura variam de acordo com a abordagem aplicada, como a antropológica, sociológica e estética. Segundo Pérez (2009) pode-se, por exemplo, em uma perspectiva antropológica, associar a cultura a um modo de vida, na noção sociológica, abordar a cultura como campo do conhecimento de grupos humanos, preocupando-se com a produção e o consumo de atividades culturais. A estética estuda a cultura, através da aproximação com a música, a literatura, o teatro e outras expressões relacionadas as belas artes.

Martins (2003) entende que a cultura *“refere-se às obras dos homens, portanto, aos conteúdos e símbolos que governam essas relações e que dão significado e continuidade a ação social”* (MARTINS, 2003, p. 44). Entretanto, para o autor, os conceitos de sociedade e de cultura são indissociáveis, devendo-se unir os dois termos como forma de facilitar o entendimento tanto do termo sociedade como da cultura, dessa forma sociedade seria:

*“Um conjunto de indivíduos identificados como membros de um grupo social, que inclui minimamente a ambos os sexos e a diferentes gerações, ou a uma família realizando o processo social total, ou a várias famílias nucleares desenvolvendo relações orgânicas comuns.”* Martins (2003, p. 44)

Castoriadis (1982, p. 404) amplia a ideia apresentada ao afirmar que a sociedade *“faz ser um mundo de significações e é ela própria por referência a um tal mundo. Sendo o que unifica uma sociedade a unidade de seu mundo de significações. Ela se institui instituindo um mundo de significações.”* São essas significações, marcas de um tempo em um determinado espaço, que atraem os olhares dos turistas. Esse olhar volta-se para a cultura do outro, repleto de estranhezas, mas sedento de seus sabres. Gastal (2002, p. 69) contribui com as ideias de Martins e acrescenta a visão do autor que atualmente, *“a cultura foi além da visão romântica de intelectuais como Haulot, que viam nela a ‘beleza do mundo’, para se tornar, consistente fator econômico nas suas diferentes manifestações.”* Rolnik e Pinheiro (2005) seguindo a mesma corrente de pensamentos defendem a evolução dos conceitos e afirmam que a noção de cultura passa por transformações, deixando de ser relacionada apenas a cultura erudita ou as belas artes, passando a incorporar as manifestações populares e a moderna cultura de massa. Conceito inclusive que vem sendo adotado pela Unesco ao estender a sua ideia de Patrimônio Cultural.

Colaborando com esta corrente de pensamento Santana (2009) entende que é cultura é sempre dinâmica e representa um elemento tangível, físico e como os significados que concedemos àqueles elementos e às relações com os outros; a cultura que nos faz ver e nos vê de uma forma concreta torna-se o centro e o eixo do cotidiano.

Alguns pesquisadores tem buscado entender a relação a cultura e seus usos culturais. Nesta perspectiva Gastal (2002, p. 69) afirma que, para o turismo, a cultura deixou de ser apenas motivadora da viagem, passando a ser o eixo que envolve a formatação dos produtos e o planejamento dos destinos. A cultura e o turismo estão intrinsecamente relacionados. A cultura compõe o produto turístico e sua preservação faz parte dos impactos positivos verificados. E

como “*somos filhos do nosso tempo*” como afirma Castoriadis, convém compreender o turismo enquanto fenómeno e traço cultural na sociedade atual.

a. *O turismo cultural do nascimento dos mercados de massa ao consumo emocional*

Sabe-se que o turismo cultural é um dos segmentos que mais cresce contemporaneamente. A busca por conhecer o mundo do outro, descobrir outras manifestações culturais e observar no património janelas da história, faz com que os turistas dos dias atuais, de alguma forma, se diferenciem dos turistas tradicionais. A lista dos dez países mais visitados do mundo (UNWTO, 2016) dar-se um destaque a destinos que tem forte apelo aos atrativos culturais. Assim, entre estes sete países, ou seja, o apontamento de França (1), Espanha (3), Itália (5), Turquia (6), Alemanha (7), Reino Unido (8) e Rússia (10), indica uma clara busca por destinos turísticos que valorizam a história, a cultura e o património. Apenas dois países associam outras estratégias para o desenvolvimento turístico, os Estados Unidos (2) com seus parques temáticos, cassinos e urbes modernas e o México (9) que apesar de sua forte diferenciação cultural, ainda tem sua imagem muito associada ao sol, a praia e aos *resorts*.

De acordo com Lipovetsky (2006), podemos dividir o consumo em três fases distintas em seu modo de comprar. Essas fases, no entanto, não ocorrem da mesma forma e ao mesmo tempo em todos os lugares, sendo possível observar características da primeira e da segunda fase ainda nos dias atuais de acordo com o desenvolvimento do espaço observado. Na primeira fase, iniciada, segundo o autor, nos anos 1880 estendendo-se até fim da Segunda Guerra Mundial, nasce o mercado de massa, há uma expansão da produção, seguindo princípios da organização científica do trabalho, criam-se as marcas e há uma democratização do desejo e o “consumo-distração” de que o turismo tanto necessita para se desenvolver.

Urry (2001) explica que as viagens, antes da expansão do consumo, eram socialmente seletivas e indicavam um *status* social. E cita o caso dos Balneários Ingleses que na segunda metade do século XIX, começam a ser visitados pela classe trabalhadora das pequenas grandes cidades industriais. O primeiro exemplo de turismo de massas é portanto, doméstico, praticado pela classe trabalhadora, valorizava o consumo distração e não estava associado ao aprendizado ou a trocas culturais. Diferencia-se completamente do *modus* viajante das classes económicas dominantes.

A segunda fase começa por volta dos anos de 1950, ou seja, está associado aos novos valores sociais definidos na reestruturação do mundo ocidental pós Segunda Grande Guerra, prologando-se apenas até o final dos anos de 1970. Lipovetsky (2006) acredita que é neste momento que se chega ao modelo puro da sociedade do consumo de massa ou sociedade da abundância, onde há um alargamento do poder de compra, cresce o modo de vida que busca o lazer e as férias como forma de realização. Impera, nesse momento, os princípios da sedução efémera, inicia-se a segmentação de mercado e há a criação de necessidades artificiais. O princípio do trabalho-sacrifício é gradualmente substituído pelo desejo crônico. Os avanços tecnológicos, o avanço dos meios de comunicação e o encurtamento das distâncias, acabam por finalmente popularizar as viagens, fazendo com que um maior número de viajantes querem ostentar o *status* social de viajante. Nessa fase, surgem novos destinos turísticos, fora da centralidade europeia, os destinos exóticos e ligados ao turismo étnico ganham força em países periféricos.

Na última fase, segundo Lipovetsky (2006 se inicia a partir do final dos anos de 1970 e estende-se até os dias atuais. Nesse momento o consumo deixa de estar relacionado ao *status* e passa a ser interpretado como uma lógica de diferenciação social, existe uma pressão contínua por preenchimento de valores. As referências de conforto, lazer, modelo de consumo do tipo individualista, mas mantem o potencial de prestígio. A era do “hiperconsumo” requer objetos para “viver”, mais do que para exibir, cria-se o valor experimental e esse é o cenário ideal para o turismo cultural, uma vez que a curiosidade torna-se “uma paixão das massas”, os artigos comprados, assim como as viagens realizadas, criam uma identidade individual, revelando personalidades partir das compras.

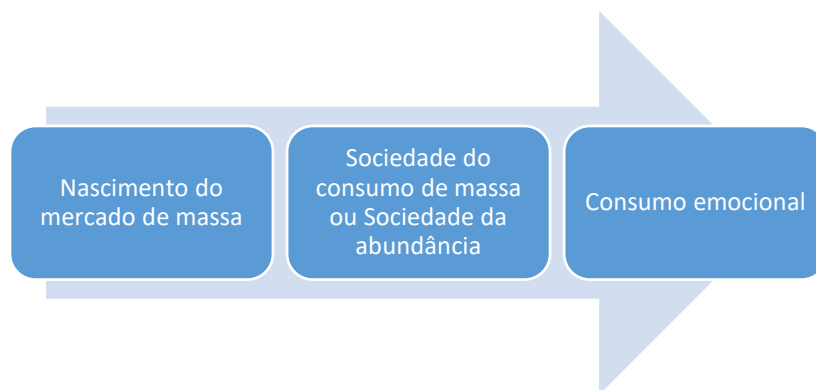


Figura 2 – As fases do consumo.

Fonte: Lipovetsky, 2006.

O consumo emocional proporciona aos consumidores/turistas uma diversidade de experiências, tais como: afetivas, visitar regiões dos antepassados; imaginárias, ilustra a vida das cortes e realezas de períodos históricos; e sensoriais, sentir o cheiro das catacumbas, a forma de elaboração tradicional de alimentos (denominações de origem, comida patrimônio), criando-se as aventuras sensoriais.

Na terceira fase do consumo, na fase do consumo emocional ou experimental, Urry (2001, p. 117) defende que “a cultura passou a ocupar uma posição mais destacada na organização das sociedades atuais, cujo cultura contemporânea pode ser caracterizada pelo menos em parte como pós-moderna.” O olhar do turista passou por transformações tanto pela massificação da comunicação, como pela problematização da realidade. Ainda este sociólogo explica que “as formas culturais pós-modernas não são consumidas em um estado de contemplação [...]. A cultura pós-moderna afeta os espectadores através do seu impacto imediato, por meio daquilo que ela faz por alguém, através de regimes de prazer e não das propriedades formais do material estético” (URRY, 2001, p.120)

É importante ressaltar que ao utilizar o termo pós-modernidade, não se busca um alinhamento teórico com Molina (2003) e com o surgimento do pós-turismo defendido pelo autor. O pós-turismo pressupõe o desinteresse as culturas locais, a reconstrução de ambientes em sistemas fechados e produtos turísticos que não utilizam recursos naturais ou culturais. A terceira fase do consumo pressupõe experimentação, consumo emocional e baseados nos sentidos, dificilmente a criação de realidades artificiais despertaria esse tipo de consumidor. O ponto em comum entre as duas linhas de estudo diz respeito ao desafio dos países em desenvolvimento de competirem com os novos destinos que surgem desse fenômeno do pós-turismo. Uma vez que segundo o próprio Molina (2003) o turismo que busca autenticidade, valorização de

atrativos naturais e culturais e um sentido de lugar, de identidade se distanciam do que o autor define como uma tendência para a atividade turística.

Ciente da complexidade de instituir-se um único modelo de desenvolvimento do turismo diante da diversidade do mundo e dos desejos dos turistas e dos interesses dos destinos ou espaços turísticos, ressaltamos a importância de pensarmos modos de desenvolvimento adequados as comunidades e pensados pelos diversos atores. As críticas as práticas de turismo cultural vigentes passam pela concentração do fluxo em áreas de preservação, por questões como a sazonalidade, banalização de espaços sagrados, criação de guetos de turismo, onde circulam exclusivamente turistas e profissionais do setor. Mas se pensarmos o turismo como uma atividade cultural da contemporaneidade, teremos que fazer reflexões mais profundas sobre os usos dos patrimónios.

#### *b. O turismo e o património*

Para pensarmos os usos do património em uma rota turística, precisamos refletir sobre seus conceitos e sobre sua importância para a atividade. De acordo com a Convenção para Proteção do Património Mundial, Cultural e Natural (1972), o património é principalmente um bem revertido de especial interesse, deixando evidente em seu primeiro e segundo artigo a diferença entre o património natural e cultural. Neste trabalho, seguiremos a ideia de Santana (2009), que defende a necessidade de trabalharmos o património de forma integrada e multidisciplinar, seja ele natural, cultural material ou imaterial.

O património, entendido como herança, tem muitas funções e entre essas funções que podem ser identificadas nos objetos antigos está, sem dúvida, a de significar: significar o tempo. Não o *Chronos*, aquele que se costuma medir no cotidiano, o tempo cíclico: os dias, as horas, as marés, mas o tempo mudança, o não linear, o tempo *Kairós*. O tempo irreversível. Preservar esses objetos projetando, portanto, a rapidez e a diferença da mudança, ou a presença da transformação que se opera nos objetos e seus ambientes parece ser uma necessidade reconhecida (MELLO NETO, 1983). Assim, entendemos o desejo da humanidade de eleger objetos, edificações e monumentos como significantes do tempo, como representantes da história ou mesmo como símbolos das transformações sociais e políticas.

A ideia de património, associada a cultura, se faz presente desde as sociedades tribais, não sendo uma criação da sociedade moderna ocidental. Choay (2010, p 15) explica ainda que “*a noção de monumentos históricos e as práticas de conservação que lhes estão associadas expandiram-se para fora da Europa, onde tinham nascido e que tinham permanecido durante muito tempo o seu território exclusivo.*” Na Europa, “*No atual contexto de (re) descoberta dos territórios, o património [...], constitui o fulcro de preocupações estéticas e vivenciais das populações da pós-modernidade, destaca-se como recurso de elevado significado, capaz de configurar vias complementares ou alternativas de desenvolvimento.*” (Carvalho, 2012, p 62)

Segundo Gonçalves (2010) as categorias do património, entendido como um conjunto de valores, são delimitadas, podendo ser econômico/financeiro, cultural ou natural, não tendo havido sempre essa segregação. Recentemente, passou-se a qualificar o património como material ou tangível, para os bens de pedra e cal e imaterial ou intangível, para os aspetos culturais e sociais. Choay (2010) explica que associa-se a palavra património uma serei de adjetivos, requalificando-a e tornando-a uma palavra de semântica nómade.

Por património cultural material se entende: “ os bens, qualquer que seja sua origem e proprietário, que as autoridades nacionais, por motivos religiosos ou profanos, sejam especificamente importantes para a arqueologia, a pré-história, a história, a literatura, a arte, a ciência e que pertençam as seguintes categorias; a. *Coleções e exemplares raros de zoologia, botânica, mineralogia, anatomia e os objetos de interesse paleontológico*; b. *os bens relacionados com a história, inclusive com a história da ciência e das técnicas, a história militar e a história social, assim como com a vida dos dirigentes, pensadores, sábios e artistas nacionais e com os acontecimentos de importância nacional*; c. *o produto das escavações (tanto autorizadas como clandestinas) o dos descobrimentos arqueológicos*; d. *os elementos procedentes do desmembramento de monumentos artísticos ou históricos e de lugares de interesse arqueológico*; e. *Antiguidades que tenham mais de 100 anos, tais como inscrições, moedas e selos gravados*; f. *Material etnológico*; g. *Os bens de interesse artístico, tais como: i) quadros, pinturas e desenhos feitos inteiramente à mão a mão sobre qualquer suporte e em qualquer material (com exceção dos desenhos industriais e dos artigos manufaturados decorados à mão); ii) produções originais de estátuas de arte e de escultura em qualquer material; iii) gravados, estampas y litografias originais; iv) conjuntos artísticos e obras montadas originais em qualquer material*; h. *Manuscritos raros e, livros antigos, documentos e publicações antigas de interesse especial (histórico, artístico, científico, literário, etc.) soltos ou em coleções*; i. *Selos de correio, selos fiscais e análogos, soltos ou em coleções*; j. *Arquivos, incluídos os fonográficos, fotográficos y cinematográficos*; k. *Objetos de mobiliário que tenham más de 100 anos e instrumentos de música antigos.*” (ICOMOS, 2008, p. 4)

Já o património cultural imaterial se entendem: “ *usos, representações, expressões, conhecimentos e técnicas – juntamente com os instrumentos, objetos, artefactos e espaços culturais que lhe são inerentes – que as comunidades, os grupos e em alguns casos os indivíduos reconhecem como parte integrante de seu património cultural. Se manifestam nos seguintes âmbitos: a. Tradições e expressões orais, incluindo o idioma como veículo do património cultural imaterial; b. Espetáculos; c. Usos sociais, rituais e atos festivos; d. Conhecimentos e usos relacionados com a natureza e o universo; e. Técnicas artesanais tradicionais.*” (ICOMOS, 2008, P.6).

A proposta da rota turística se baseará nos conceitos apresentados, tanto de património material e imaterial e ainda terá elementos do património natural.

### **3. O desenvolvimento do turismo no Ceará**

As consequências do crescimento do turismo vivenciadas durante o século XX criaram a necessidade de implementação de órgãos governamentais para administrar esse novo setor econômico. Boullón (*apud* BENI, 2006) afirma que na América Latina os trabalhos nessa área se iniciaram nos anos 1970, tendo a maioria dos países elaborado o Plano Nacional de Turismo. O autor afirma que nesse período:

“[...] a maior parte dos estudos foi encomendada para consultorias estrangeiras ou foi elaborada pelas repartições especializadas de organismos internacionais como a Organização dos Estados Americanos (OEA), o Banco Interamericano de Desenvolvimento (BID), a Organização Mundial do Turismo (OMT), ou o Banco Mundial [...]. Uma vez recebidos os relatórios finais, surgiu um novo problema: pôr em prática [...]. Assim, com muitos planos e

*pouco planejamento, o turismo cresceu na América Latina com os resultados conhecidos por todos. “(BOULLÓN apud BENI, 2006, p. 12).*

No Brasil, no período político vivido entre 1937 e 1945, iniciou-se a proteção dos bens históricos e artísticos e a fiscalização e a comercialização de passagens aéreas. No decorrer dos anos, o turismo foi sendo transferido entre diversas pastas, da Justiça e Negócios, para a Indústria e Comércio, para Desporto e Turismo, para finalmente em 2003 ser criado o Ministério do Turismo (MTUR).

As políticas nacionais de turismo, segundo Beni (2006), nem sempre foram claramente explícitas, além de muitas vezes se restringirem a ações de *marketing* ou promoção. Surgem então os principais problemas decorrentes da atividade, tanto no que diz respeito à infraestrutura quanto aos custos sociais.

Em 1991, ocorre uma primeira grande transformação da política de turismo no Ceará, sendo decretada a junção da EMCETUR com a Companhia de Desenvolvimento Industrial (CDI) e a Companhia Cearense de Mineração (CEMINAS), surgindo uma nova empresa a Companhia de Desenvolvimento do Ceará (CODITUR).

A Secretaria do Turismo do Ceará (SETUR) foi criada em 12 de junho 1995, através da Lei n.º 12.456, pelo então governador Tasso Ribeiro Jereissati, com a missão de fortalecer o Estado como destino turístico nacional e internacional, de forma sustentável, com foco na geração de emprego e renda, na inclusão social e na melhoria de vida do cearense. Antes da criação de uma pasta específica para a atividade, o turismo era gerido pela Secretaria da Indústria e do Comércio. O turismo no Ceará foi gerido inicialmente pela arquiteta Anya Ribeiro, responsável pela elaboração de documentos norteadores do desenvolvimento turístico no Estado como o Plano de Desenvolvimento do Turismo (PRODETURIS) e o Planejamento Estratégico do Turismo, 1995-2020.

Em 1998 foi assinada a primeira fase do Programa para o Desenvolvimento do Turismo no Nordeste (PRODETUR-NE), financiado com recursos do Banco Interamericano de Desenvolvimento, gerido pelo Banco do Nordeste do Brasil (BNB) e executado pelas Unidades Executoras nos estados (UEE) nordestinos. No Ceará, a UEE foi instalada na SETUR e focou investimentos na melhoria da infraestrutura turística dos municípios beneficiados. Em sua primeira fase o Programa não beneficiou os municípios objetos deste estudo, uma vez que suas ações foram realizadas na costa oeste do Ceará. Neste período, iniciou-se a duplicação da rodovia que liga o litoral leste a capital, foram realizadas urbanizações e investimentos em urbanização de orlas e sinalização turística, como o caso de Canoa Quebrada.

Na segunda etapa do PRODETUR/NE, Aquiraz foi o único município do litoral leste a ser incorporado no escopo do Programa, sob a justificativa de ter sido fortemente impactado pela primeira fase, dada sua proximidade a Fortaleza.

A partir de 2011 o Governo do Ceará iniciou a busca para interiorizar o turismo e levar o desenvolvimento da atividade como uma alternativa para regiões pouco desenvolvidas. A construção dos aeroportos regionais foi a ação mais evidente dessas políticas, sendo construído um no litoral leste, em Aracati, e um no litoral oeste, em Cruz, ambos em áreas identificadas pelo Ministério do Turismo como destinos indutores do desenvolvimento regional. Ressalta-se no entanto, que os aeroportos ainda não estão em operação.

Em 2012 a Secretaria de Turismo, inaugurou um moderno Centro de Eventos, com uma área de 76 mil metros quadrados, divisíveis em 44 salas. Segundo informações do órgão gestor do turismo, o espaço conta com uma infraestrutura inteiramente acessível, seguindo padrões construtivos internacionais. Dados recentes da SETUR (2015), demonstram que os principais fatores motivadores das viagens para o Estado ainda são o Lazer e Visitas a parentes e amigos, conforme demonstrado na Figura 3.

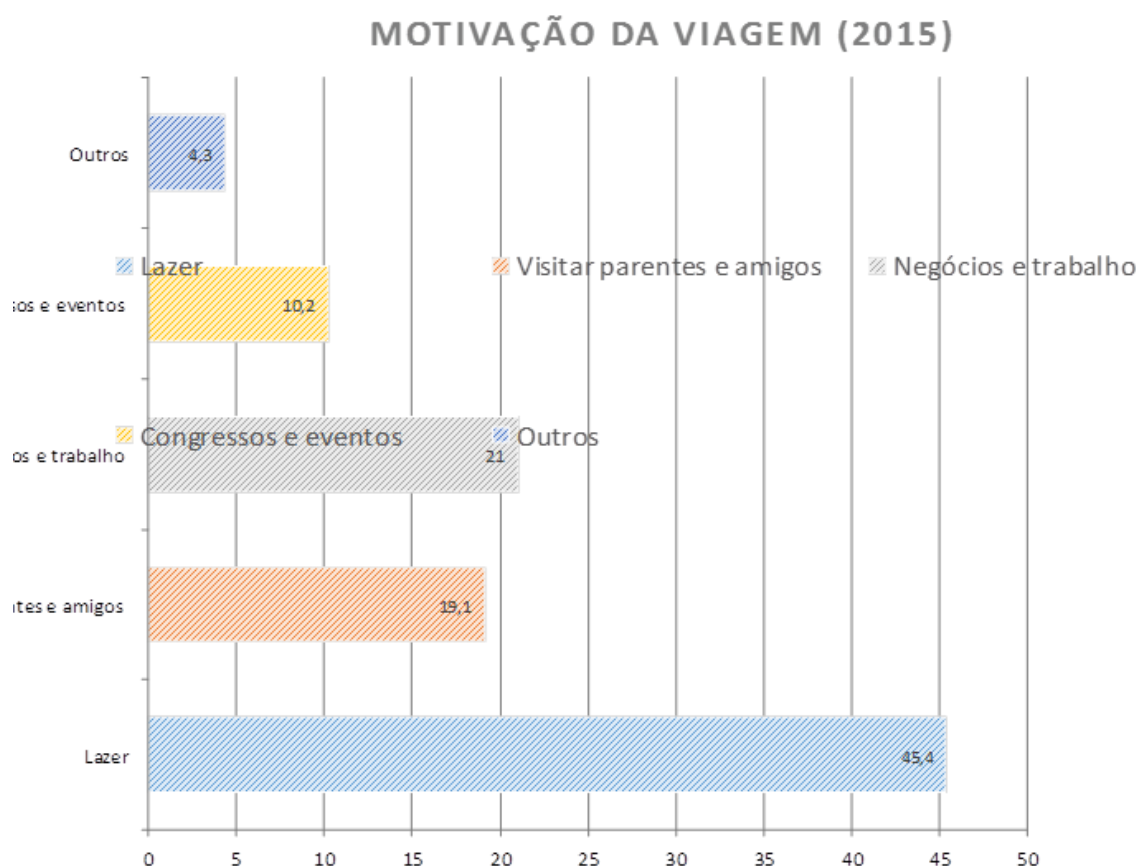


Figura 3 – Fatores motivadores das viagens para o Ceará

Fonte dos dados: Secretaria de Turismo do Estado do Ceará, 2015.

No Brasil o grande fluxo turístico é de brasileiros. Fatores como localização geográfica do país e dimensão territorial, são citados como justificativa para o pequeno fluxo internacional. Uma publicação recente da Revista Super Interessante, escrita por Betina Neves (2016), questiona por que ninguém viaja para o Brasil? Esse questionamento diz respeito ao pequeno número de turistas internacionais. A matéria ressalta a diversidade de atrativos que o país dispõe, sejam naturais ou culturais, mas ressalta que existem entraves para o crescimento do número de visitantes estrangeiros, são eles: a infraestrutura deficitária, o fato de termos uma nação monoglota e a ausência de estratégias de marketing e de conectividade que deem visibilidade aos produtos brasileiros no mercado internacional. O Ceará, apesar de estar localizado na Região Nordeste, mais próxima da África, Europa e América Central e do Norte, segue a mesma tendência do restante do país, sendo dependente do fluxo doméstico, conforme demonstrado na Figura 4.



## Fluxo de turistas via Fortaleza (2015)

■ Nacional ■ Internacional

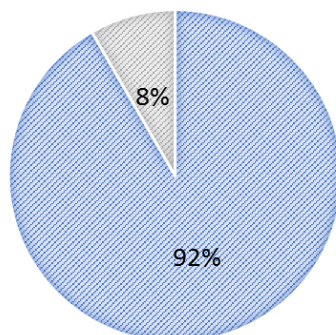


Figura 4 – Fluxo de turistas no Ceará via Fortaleza

Fonte dos dados: Secretaria de Turismo do Estado do Ceará, 2015.

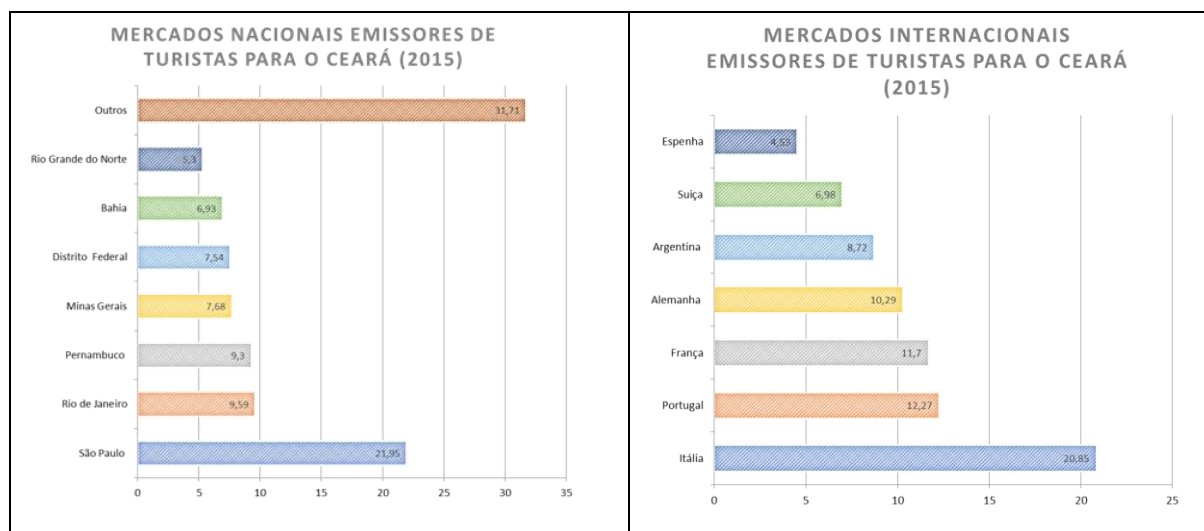


Figura 5 – Principais mercados emissores de turistas para o Ceará

Fonte dos dados: Secretaria de Turismo do Estado do Ceará, 2015.

Os principais mercados emissores de turistas para o Ceará, são os estados da própria região nordeste, tais como os vizinhos Rio Grande do Norte e Pernambuco, bem como o estado de São Paulo, o mais próspero do Brasil. Entre os mercados emissores internacionais Itália e Portugal apresentam volumes mais significativos. Destaca-se que a empresa a Transportes Aéreos Portuguese (TAP), possui voos diários e sem escalas de Lisboa para Fortaleza, com aproximadamente seis horas e meia de duração.

Os governos defendem a atividade turística como atividade econômica geradora de empregos, distribuidora de renda e capaz de incluir a mão-de-obra local. Ao analisarmos os dados que tratam dos empregos gerados no Ceará, observamos que a grande maioria deles estão ligados a alimentação, seguido pela hospedagem. Os turistas afirmam gastar mais em compras, depois seguidos por alimentação e hospedagem.

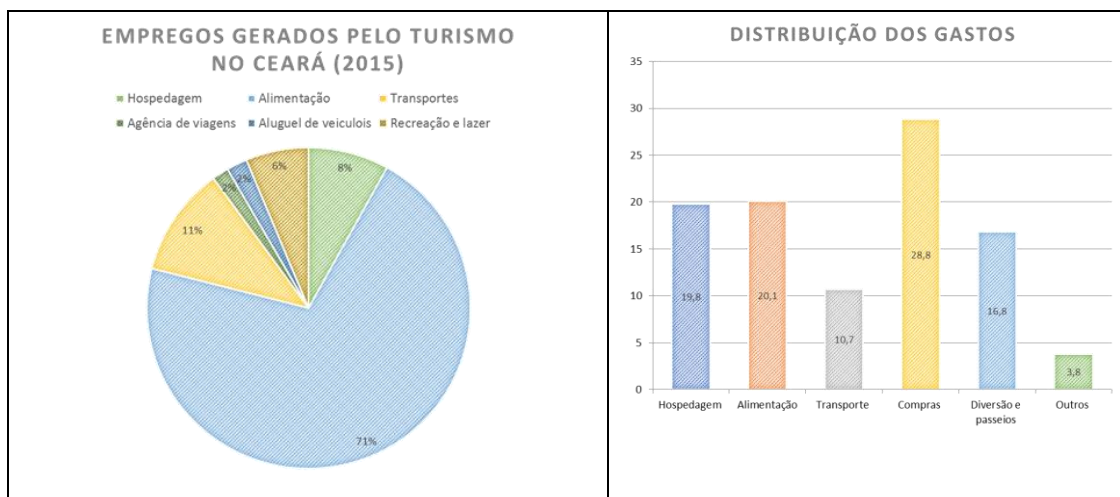


Figura 6 – Empregos gerados e a distribuição dos gastos dos turistas no Ceará

Fonte dos dados: Secretaria de Turismo do Estado do Ceará, 2015.

Apesar da forte atuação dos órgãos de gestão da atividade turística no Brasil e no Ceará, observa-se que o foco das ações foi o fortalecimento do segmento de lazer, ancorado no sol e na praia, ficando as ações de preservação do patrimônio histórico material e imaterial desassociadas as políticas de turismo, ligadas á área de cultura. Apesar dos volumosos investimentos na interiorização e no segmento de negócios e eventos, ainda não se percebe na realidade cearense, um impacto significativo, conforme demonstram os dados do órgão de turismo na Figura 2. A criação de rotas turísticas, com a imagem associada ao turismo cultural, não voltado para a massa, pode contribuir não para o increem do fluxo turístico, mas para a inclusão de novos atores, para a valorização de aspetos culturais até então adormecidos, e para a diversificação da oferta.

#### 4. O recorte territorial estudado

##### 4.1. O município de Aquiraz- água logo adiante

O município Aquiraz<sup>51</sup> ocupa uma área territorial de aproximadamente 481 km<sup>2</sup>, divididos entre oito distritos, sendo destes, 30 quilômetros de litoral. As seis praias que fazem parte de seu território são de Oeste para Leste: Porto das Dunas, Prainha, Presídio, Iguape, Barro Preto e Batoque. Possuem um forte apelo paisagístico, o que demonstra a razão pela qual se destaca a prática do segmento de sol e praia no município.

Aquiraz é integrante da Região Metropolitana de Fortaleza (RMF), estando o núcleo central da cidade há apenas 28 quilômetros do Aeroporto Internacional Pinto Martins, construído na primeira fase do Programa de Desenvolvimento do Turismo do Nordeste (PRODETUR/NE), sendo este o principal ponto de embarque e desembarque do Estado do Ceará, fato que gera benefícios e impactos para a região.

A Secretaria Estadual de Turismo (SETUR/CE) demonstra através de suas pesquisas de demanda e fluxo, que Aquiraz é uma das localidades cearenses mais visitadas nos últimos anos e que possui ainda o segundo maior parque hoteleiro do Ceará.

O município de Aquiraz possui um vasto e rico patrimônio do povo cearense, alguns protegidos pelos tombamentos outros ainda em processo de tombamento e alguns gritando para serem

<sup>51</sup> Dados do IBGE referentes ao ano de 2007. Disponível em: <[http://www.ibge.gov.br/brasil\\_em\\_síntese](http://www.ibge.gov.br/brasil_em_síntese)>. Acesso em: 8 jan. 2008.

protegidos. Aquiraz foi à primeira Vila do Ceará, criada em 1699, através de Carta Régia e a primeira capital da Capitania do *Siará-Grande*, chamava-se Vila São José de Ribamar de Aquiraz, em referência ao padroeiro São José de Ribamar de Botas, em uma clara homenagem aos bandeirantes desbravadores e valentes.

Em tempos de dominação portuguesa Aquiraz construiu sua história sobre a influência dos jesuítas, dos índios e negros que compunham o cenário da época. Segundo Cavalcante, Sousa e Albino (2005, p. 43), “no Ceará, os primeiros jesuítas chegaram em 1607, instalando-se na serra da Ibiapaba, Por mais de um século e meio (1606-1759), os jesuítas criaram escolas de ler, escrever e contar nos aldeamentos.”

Onde a globalização massifica, Aquiraz consegue manter traços dos tempos idos. A tribo *Jenipapo-Kanindé*, localizada na lagoa da Encantada, tenta a duras penas manter suas tradições e crenças, repassá-las aos *cumrumins*, sem deixar de se preocupar com os meios de inserir seu povo no processo de desenvolvimento econômico. A lagoa da Encanta, segundo os índios que ali vivem, seria a guardiã de uma grande cidade de ouro e todos os seus tesouros estariam sob suas águas. Cavalcante, Souza e Albino (2005) afirmam que em 1997, a Fundação Nacional do Índio (FUNAI), realizou estudos e demarcou as terras dos *Jenipapo-Kanindé* que possui dez hectares.

É sabido que no Ceará existe uma crença de que nesta terra não existem negros, muito menos comunidades quilombolas<sup>52</sup>. Tal concepção ignora a existência da trajetória da população negra, tanto na zona rural como nas principais aglomerações urbanas. Assim, no senso comum da população cearense, não se admite a participação dos negros na sua formação étnica. Em Aquiraz existem duas comunidades na Lagoa do Ramo e Goiabeiras, localizadas no distrito de Serpa, as quais fortalecem a identidade e a autogestão de comunidades quilombolas em nosso Estado (FURTADO, 2005).

O primeiro município a compor a rota, Aquiraz, reúne portanto traços culturais dos colonizadores portugueses registrados em seu patrimônio histórico arquitetônico, indígena e negro.

#### 4.2. O município de Aracati- vento que sopra e alivia os ardores do estio

O segundo município da rota é Aracati. Registra-se que, em 1603, Pero Coelho ergueu, em Aracati, o primeiro forte, e que inicialmente essa localidade era chamada de São José do Porto dos Barcos, passando à Cruz das Almas, posteriormente Santa Cruz de Aracati e, finalmente, Aracati. Escrevia-se Aracaty ou mesmo Aracati, o que para muitos especialistas significava Vento que soprava do norte e refrescava os ardores do estio. Os aracatienses, no entanto, a chamam de Terra dos Bons Ventos.

Os documentos históricos levantados por Nobre (1976) apontam que, em 1747, o Rei de Portugal, Dom João V, ordenou que fosse erguida uma vila na foz do Rio Jaguaribe. Registra-se que, nesse período, já havia, no local, o Porto das Barcas, por onde circulavam embarcações de pequeno porte. O ouvidor geral do *Siará Grande* cumpriu a determinação e fundou a Villa de Santa Cruz do Aracati. Como visto anteriormente, as fronteiras nesse período eram fluidas, e oficialmente Aracati fazia limite com a vila de Aquiraz e a vila de Icó, sendo este o nascedouro do Rio Jaguaribe, na Serra da Joanhina.

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52 Denomina-se quilombola o negro refugiado em quilombo, sendo as comunidades quilombola as que guardam a cultura remanescente do quilombo.

Assim surgiu a cidade de Aracati, com seus casarios construídos às margens do rio Jaguaribe, sob forte influência da Igreja Católica e com vocação comercial e exportadora. Configurou-se, sob a égide do poderio econômico dos coronéis de gado, uma das aglomerações urbanas mais importantes para o estado do Ceará nos séculos XVIII e XIX. Podemos observar, através das imagens abaixo, a imponência da arquitetura do lugar.

Corrêa (2013, p. 61) afirma que as cidades são lugares dotados de singularidade,<sup>53</sup> e assim se diferenciam dos demais. Essa identidade cultural<sup>54</sup> do lugar é expressa de muitas formas nos aspectos sociais. Em Aracati, existem diversas referências históricas que constituem sua identidade e sua singularidade – ressaltamos, no entanto, não haver uma identidade única, uma cultura homogênea que resuma todas as múltiplas expressões desse lugar. Descreve-se, na obra de Le Bosse apud Corrêa (2013, p. 226), que a construção da identidade passa pelas heranças e pela preservação de um patrimônio sócio-histórico, mas principalmente pela capacidade de um povo de recordar, preservar e perpetuar um passado, surgindo, assim, os “lugares de memória”.

Em Aracati, antigos espaços aparecem com novos usos e novos espaços, com marcas proeminentes que se notabilizam por um padrão turístico. (FERRARA, 2010). Esses aspectos são associados e potencializam o desenvolvimento de um espaço para a prática do turismo. Um exemplo emblemático da ocorrência desses lugares de memória é o Instituto Museu Jaguaribano, antiga residência que evidencia reminiscências de um passado de apogeu econômico e de fortes amálgamas com o Vale do Jaguaribe.

Apenas no século XX, mais especificamente a partir dos anos 1970, novos olhares foram lançados sobre esse espaço. Dessa vez, o foco seria o litoral e não mais a sede do município. Então, começa a se desenvolver uma nova fração do espaço no município de Aracati, outros aspectos da paisagem passam a ser valorizados, sendo ressignificados, e um novo ciclo de relações se iniciou, novas redes de relações foram constituídas. Ao invés dos antigos vínculos estabelecidos com o sertão, as relações agora eram formadas com escalas geográficas mais amplas.

#### *4.3. Aproximações e distanciamentos entre Aquiraz e Aracati*

Das fundações oficiais dos municípios estudados, aos dias atuais, Aquiraz e Aracati foram construindo suas histórias, estabelecendo pontos de contato, mas também de distanciamento, quer seja por características socio-espaciais, quer pela especialização produtiva local. No passado, na fase colonial, onde a divisão política-admirativa era ditada pelas sesmarias, esses dois territórios faziam limite, com a passar dos anos e em função das transformações políticas administrativas, os espaços foram sendo gradualmente divididos. Atualmente, existem cinco municípios entre Aquiraz e Aracati.

De acordo com dados divulgados em 2016 pelo Instituto de Pesquisa e Estratégia Econômica do Ceará (IPECE), a população de Aquiraz é de aproximadamente 72.628 habitantes, sendo que 92.37% dessa população vive em áreas urbanas e apenas 7.63% vive em áreas rurais. Já em Aracati, a população é de aproximadamente 69.159, com 63.67% da população em áreas

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<sup>53</sup> Dotado de singularidade, de algo que o distingue dos outros.

<sup>54</sup> “A identidade cultural de uma cidade pode ser, de modo marcante, o resultado de uma construção intelectual, derivada de uma tradição étnica cujos traços são permanentemente recriados”. (CORREA, 2013, p. 61).

urbanas e 36.33% em áreas rurais. A Tabela 1, apresenta um resumo do perfil básico dos dois municípios estudados, facilitando a compreensão das realidades estudadas.

Tabela 1 – Perfil básico dos municípios de Aquiraz e Aracati

|  | Aquiraz  | Aracati   |
|--|--|---|
| Ano de criação                                 | 1699   | 1747  |
| Toponímia                                      | Gentio da terra / água logo adiante                      | Vento que sopra do norte e refresca os ardores do estio   |
| Área absoluta                                  | 480,976 Km <sup>2</sup>                                  | 1.229,19 Km <sup>2</sup>                                  |
| Distância em linha reta da capital (Fortaleza) | 21 Km  | 122 Km  |
| População residente                            | 46.305   | 69.159  |
| IDH  | 0,641 (33 <sup>ª</sup> )                                 | 0,655 (20 <sup>ª</sup> )                                  |
| PIB per capita                                 | 18.749,00  | 13.956,00   |
| PIB por setor                                  | Agronegócio 7,10%<br>Indústria 34,70%<br>Serviços 56,20% | Agronegócio 10,84%<br>Indústria 30,69%<br>Serviços 58,47% |

Fonte: *Perfil do Município de Aracati e Perfil do Município de Aquiraz (IPECE), 2016*

Aquiraz se localiza na Região Metropolitana de Fortaleza e a proximidade com a capital, principal portão de entrada dos turistas, traz vantagens e desvantagens para o município. Dentre as vantagens, podemos citar o uso de serviços públicos e as boas vias de acesso que facilitam a distribuição de produtos e serviços. Entre as desvantagens, podemos refletir sobre a imagem do destino, que não consegue se desassociar de Fortaleza, sendo seus produtos comercializados como parte do pacote da capital ou como produtos complementares. A ocupação dos postos de trabalho por profissionais da capital e a aquisição de produtos fora da comunidade, também são citados como problemas causados pela proximidade pela população local. Se observarmos a Tabela 1, perceberemos que a renda *per capita* é superior a de Aracati, havendo um setor industrial e de serviços levemente mais forte, no entanto. O índice de Desenvolvimento Humano (IDH) é inferior ao do município mais afastado da zona de influência de Fortaleza.

Tabela 2 – Demanda de turistas para os destinos de Aquiraz e Aracati

|         | PERCENTUAL NA DEMANDA EM RELAÇÃO AO ESTADO | NÚMERO DE TURISTAS | PERMANÊNCIA |
|---------|--|--------------------|-------------|
| Aquiraz | 12,02                                      | 402.046            | 6,8         |
| Aracati | 9,40                                       | 314.564            | 5,10        |
| Ceará   | 100  | 3.343.815          | 10,70       |

Fonte dos dados: *Secretaria de Turismo do Estado do Ceará, 2015.*

Do ponto de vista do desenvolvimento da atividade turística os distanciamentos entre as áreas se evidenciam. O primeiro destino turístico de Aquiraz, se desenvolve a partir da década de 1970, quando a localidade da Prainha começa a ser utilizada como lugar de veraneio pelos residentes de Fortaleza. Só posteriormente (1989) surge o *Beach Park*, produto principal, transformando-se em um grande atrativo do lugar. Não são exclusivamente o sol e a praia a mobilizar os fluxos, associado a eles o Parque faz o papel de produto âncora, atraindo uma

serei de outros empreendimentos para as suas proximidades. De acordo com dados divulgados pela Secretaria Estadual do Turismo (SETUR/CE) em 2015, Aquiraz recebeu 12,02% dos turistas do Ceará, conforme demonstrado na Tabela 2, sendo que esses turistas permanecem em média 6.8 dias no destino.

Aracati, recebe um percentual menor dos turistas que visitam o Ceará, apenas 9.40%, e os visitantes permanecem um tempo inferior, são em média 5.10 dias. No entanto, se observarmos a Tabela 3, perceberemos que a oferta dos dois destinos é muito diferenciada. O parque hoteleiro de Aracati, apesar de maior, tem um número inferior de unidades habitacionais, ou seja, os empreendimentos de Aracati são de médio e pequeno porte, enquanto em Aquiraz, os meios de hospedagem caracterizam-se como de médio e grande porte.

Os estudos sobre planejamento e marketing turístico demonstram que, através da caracterização da oferta, podemos traçar um perfil do público-alvo desejado. Aquiraz construiu uma imagem de destino para famílias, com crianças e adolescente, uma vez que o Parque é o fator motivador das viagens. Em Aracati a oferta se caracteriza de forma diferente e o perfil do turista atendido também se modifica. público é essencialmente de jovens solteiro e adultos solteiros e casados, mas sem filhos, totalizando 62.5% dos seus visitantes (Diógenes, 2016). Consta-se que Aquiraz seguiu a tendência dos grandes empreendimentos, atraídos essencialmente pelo empreendimento âncora. Os *resorts* são frequentes na orla do destino, assim como os grandes condomínios que mesclam segunda residência e hotel (tempo compartilhado/*time-sharing*), a exemplo do *Aquaville*. Aracati, e mais especificamente a Vila de Canoa Quebrada, desenvolveu-se seguindo a lógica do “mito do paraíso perdido”, onde os turistas optam por permanecer no destino e encontram o turismo como alternativa para a permanência e subsistência. Ressaltamos que os dados apresentados tratam apenas do número de turistas nos dois destinos, não agregando os quantitativos de excursionistas, prática recorrente nos dois lugares

Tabela 3 – Oferta dos meios de hospedagem de Aquiraz e Aracati

| OFERTA HOTELEIRA | MEIOS DE HOSPEDAGEM | UNIDADES HABITACIONAIS | LEITOS | PERCENTUAL EM RELAÇÃO A OFERTA HOTELEIRA |
|------------------|---------------------|------------------------|--------|--|
| Aquiraz          | 39                  | 1437                   | 4.473  | 3,3                                      |
| Aracati          | 88                  | 1.207                  | 3.102  | 7,57                                     |
| Ceará            | 1.161               | 28.733                 | 74.748 | 100                                      |

Fonte dos dados: Secretaria de Turismo do Estado do Ceará, 2015.

Assim, apesar de pertencerem a um mesmo território e de haver uma clara proximidade, o foco no turismo de lazer com o sol e o mar sendo evidenciados, observamos que os destinos turísticos assume posicionamentos distintos, atundo com um público-alvo diferenciado. As diferenças, podem ser resultado de políticas públicas de desenvolvimento do turismo distintas, ou mesmo do posicionamento adotado pela setor empresarial.

## **5. O desenvolvimento de uma rota turística ancorada no património histórico dos municípios turísticos de Aquiraz e Aracati**

A grande maioria das rotas turísticas, principalmente as religiosas, surgem como resultado de um itinerário praticado, com conexões previamente existentes, tais como os caminhos de peregrinação, rotas comerciais ou mesmo pela existência de antigas estradas que ligavam as cidades. O grande desafio na proposição desta rota é a integração de elementos que não estão previamente em contato. A inter-relação, neste caso, é resultado de um trabalho científico que busca proporcionar aos turistas uma visão plural das múltiplas formas de cultura existentemente no território cearense.

De acordo com o relatório do *International Council on Monuments and Sites* (ICOMOS, 2008), existe uma tendência em se reconhecer os itinerários como um novo conceito de património, uma vez que representam processos interativos, dinâmicos e evolutivos das relações humanas. Assim, uma rota ancorada na valorização dos aspetos culturais, que reconhece a diversidade das incorporações de povos distintos, pode contribuir para que se lance outros olhares<sup>55</sup> sobre a história de um povo.

As ideias de itinerário cultural apresentados pelo ICOMOS (2008) trazem reflexões sobre: valores de entorno, escala territorial e valor intrínseco de cada elemento na composição do todo. Assim seguiremos essas ideias para propormos o desenvolvimento dessa rota turística. O visitante possui o olhar de estranhamento ao local visitado, tudo apresenta-se como algo novo e inusitado, quanto mais distante da realidade vivenciada cotidianamente, maior será o estranhamento. Muitas vezes no entanto, esse distanciamento ocorre também com os que estão próximos fisicamente, mesmo os moradores de uma região, desconhecem a história de formação de seu território.

No Ceará, onde se lê José de Alencar criador de um poema nacional, que apresenta em prosa o mito fundador, terra que foi canário para a Guerra dos Bárbaros, entre indígenas e colonizadores, onde primeiro se aboliu a escravidão dos negros e terra da prisão da heroína republicana Bárbara de Alencar, pouco se fala da riqueza cultural desse povo.

Se culturalmente o povo não despertou para a riqueza cultural de sua história. As estratégias de marketing adotadas também não o fizeram, não evidenciam a cultura local. Na última década, incluíram em sua “carteira de produtos” a serra e o sertão, ressaltando a existência de paisagens distintas do litoral. Mas sem adotar uma postura de valorização da identidade local.

Boullón (2002) entende que o espaço turístico é “consequência da presença e distribuição dos atrativos turísticos” e a rota seria o percurso, ou caminho percorrido entre esses atrativos. Assim para a concepção dessa rota associaremos a ideia de Boullón de caminho percorrido, a ideia defendida pelo ICOMOS que explica a importância de pensarmos não apenas em vias históricas de comunicação para conectarmos o património cultural material e imaterial, mas também em formas plurais e justas de se contar a história.

No caso específico deste estudo de caso, o trajeto apresentado propõe a integração de dois municípios com traços culturais relevantes da identidade cearense e brasileira. No Brasil existem exemplos consolidados de rotas ancoradas em aspetos histórico, como é o caso da Estrada Real e da Rota dos Tropeiros. No nordeste brasileiros busca-se trabalhar a ideia de

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<sup>55</sup> Saramago em seus Ensaio Sobre a Cegueira

rotas integradas, envolvendo um conjunto de destinos e seus atrativos, muitas vezes em estados distintos da federação, como no caso da Rota das Emoções.

Dessa forma, a integração dos dois destinos, comercializados de forma isolada e sem uma imagem associado ao turismo cultural, possibilitariam o desenvolvimento de novas práticas turísticas, atribuindo novos significados e usos ao patrimônio histórico.

Para a idealização da referida rota turística, foi realizado um levantamento do patrimônio material dos dois municípios estudados, o trabalho levou em consideração bens matérias protegidos por leis municipais, estaduais e federais, bem como bens com potencial para proteção.

Tabela 4 – Lista do patrimônio material de Aquiraz e Aracati

| MUNICÍPIO | NOME  | CLASSIFICAÇÃO  | DESCRIÇÃO  |
|-----------|---|--|--|
| Aquiraz   | Mercado de Carne e Lojas Adjacentes                       | Edificação Protegida pelo IPHAN desde 1984             | Arquitetura popular formada por uma construção em planta quadrada com telhado de quatro águas feito em madeiramento de carnaúba de grande efeito plástico apoiado em coluna central de alvenaria e tijolos   |
| Aquiraz   | Casa de Câmara e Cadeia (Museu Sacro São José de Ribamar) | Edificação Protegida pelo Governo do estado desde 1983 | Pequeno prédio de planta retangular. O primeiro pavimento, que servia de cadeia, foi erguido no século XVIII, com paredes de pedra e cal. O segundo pavimento, onde se reunia a Câmara data da seca de 1877 e foi construído com o fim de fornecer trabalho aos flagelados. Refuncionalizado recebeu o Museu de Arte Sacra   |
| Aquiraz   | Igreja Matriz São José de Ribamar                         | Edificação Protegida pelo IPHAN desde 1984             | A Igreja de São José do Ribamar começou a ser erguida no início século XVIII, logo depois de ser expedida em Lisboa (Portugal), em 13 de fevereiro de 1699, a Ordem Régia mandando criar-se uma vila na capitania do Ceará, no lugar Iguape, atualmente a cidade de Aquiraz. A partir daí tem início a estruturação urbana onde se estabeleceram os principais edifícios públicos civis, militares e religiosos.   |
| Aquiraz   | Casa do Capitão-Mor                                       | Edificação Protegida pelo Governo do estado desde 2006 | Construída há cerca de 300 anos. Foi a residência da maior autoridade da capitania durante o século XVIII. Construídas em taipa, a edificação apresenta telhado em duas águas e estrutura em madeira atada com tirar de couro de boi. O madeiramento é em pau d'arco, carnaúba e aroeira, com portas de cedro, piso em tijoleira e arcaicas tramelas. As ferragens são todas em ferro batido, de desenho singular. Os portais e as soleiras em pau d'arco. |
| Aracati   | Igreja Matriz de Nossa Senhora do Rosário                 | tombado pelo IPHAN desde 2001<br>Inclui todo o         | Construída a partir de 1761. A igreja possui algumas imagens e mesa de comunhão em jacarandá, uma bandeira da porta do batistério (entalhada à ponta de faca), e uma   |



|         |  |         |   |
|---------|--|---------|---|
|         |  | acervo  | portada de arenito baiano, com portas de almofada em relevo, arrematadas por motivos fitomórficos. Diante da Igreja há um grande cruzeiro, com os símbolos dos sofrimentos da Paixão de Cristo, de 1859.  |
| Aracati | Prédio da casa de câmara e cadeia na Rua Liberato Barroso esquina com a Praça da Independência | tombado | Construída na segunda metade do século XVIII, para servir de câmara, audiência, cadeia para homens e mulheres. Um dos documentos mais importantes para reconstituição da história do edifício é uma aquarela de José dos Reis Carvalho, pertencente ao Museu de História Nacional. Aluno de Debret na Academia Imperial, e pintor da Comissão Científica de Exploração, Reis percorreu o Ceará sob direção do botânico Freire Alemão, entre 1859 e 1861                                       |
| Aracati | Sobrado Barão de Aracati (Instituto do Museu Jaguaribano)                                      | tombado | Construído no século XIX, com quatro pavimentos, era a residência do Barão de Aracati, José Pereira da Graça. A partir de 1889, após a morte do barão, no sobrado funcionaram colégio, clube e hotel. A fachada principal é guarnecida por azulejos portugueses estampilhados e as paredes de seus salões são decoradas por inúmeras pinturas. Nos amplos espaços, estão preservadas estruturas de madeira e alvenaria, além de peças artesanais como a escada-caracol do primeiro pavimento. |
| Aracati | Conjunto Urbano  | tombado | Com desenho setecentista em seu traçado urbano. O conjunto arquitetônico e paisagístico da cidade, tombado pelo Iphan, em 2001, é formado por sobrados, igrejas e diversos prédios que somam mais de 2.500 edificações construídas e decoradas com azulejos portugueses de alto valor.  |

*Fonte dos dados: IPHAN, 2017 e Governo de estado do Ceará (2017)*

O simples levantamento do patrimônio edificado, não seria capaz de contar a história de formação do povo cearense, certamente representam relatos importantes do modo de vida urbano nas vilas e cidades do período colonial, no entanto, outros atores também desempenharam papéis e merecem ser ouvidos pelas gerações atuais.

Em Aquiraz, a ideia é valorizar o papel dos índios Jenipapo-Canindé, residentes na Lagoa DA Encantada e do Quilombola na Lagoa de Ramos, esperasse com isso dar voz para que eles contem suas versões da história.

Em Aracati, espera-se dar voz a Comunidade do Cumbé, para que ela conte sua versão dos fatos e seus conflitos. Nascimento (2014), relata que no Ceará existe um “consenso” de que não haviam índios ou negros, essa ideia, imposta para viabilizar a expulsão de comunidades tradicionais, acaba por instituir no litoral um tipo de turismo que exclui e concentra. Um rota que vai de encontro a esse consenso, dando visibilidade ao homem do mar.

A grande preocupação que envolve a proposta da rota, é a inclusão dos atores locais, tal como já acontece com outras iniciativas de turismo comunitário desenvolvidas no estado pela Rede

Tucum Assim como o delineamento das demais fases da pesquisa de campo. Essas fases envolverão uma maior interação com os atores locais e uma caracterização detalhada da rota.

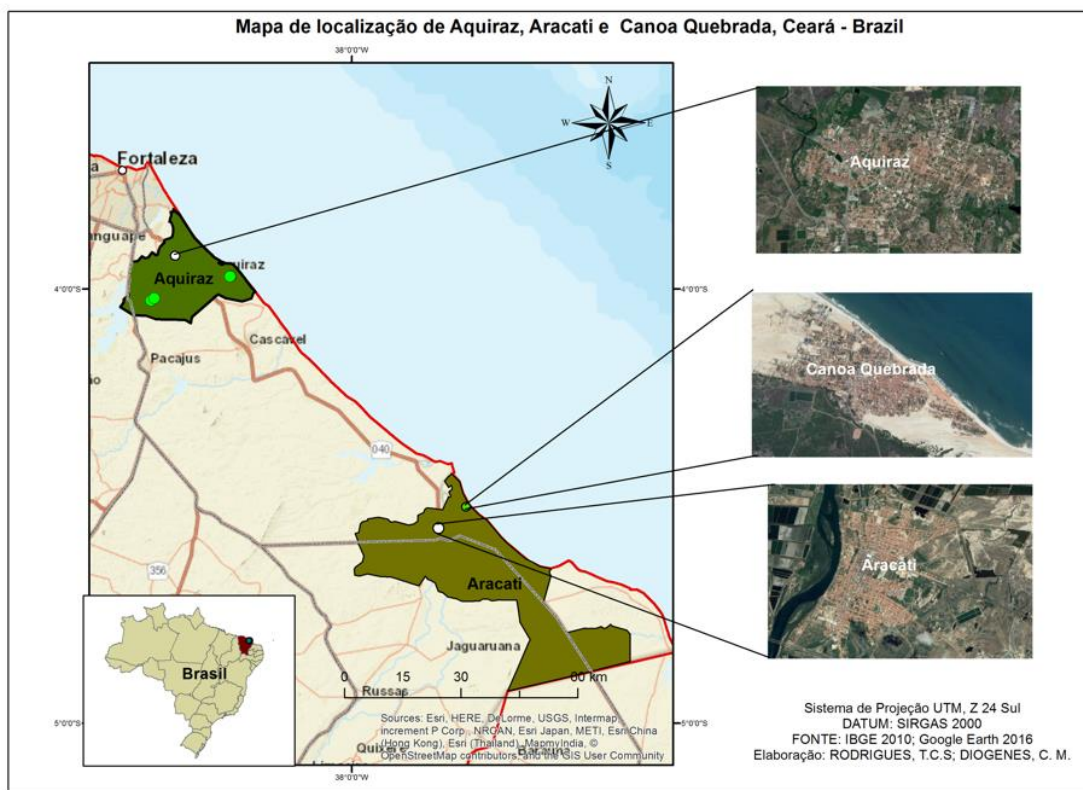


Figura 6 – Mapa de localização dos municípios da Rota Turística  
Fonte dos dados: IBGE (2010)

### Conclusões

O objetivo de analisar a viabilidade para a implantação de uma rota turística ancorada em paisagens culturais no Estado do Ceará, nordeste do Brasil, ainda não foi completamente alcançado. A pesquisa encontra-se em andamento, sendo necessário realizar estudos mais aprofundados para que se possa afirmar a viabilidade ou não da rota proposta. As etapas que se seguem têm uma importância significativa para este estudo.

Fica evidente nesta primeira etapa que no recorte territorial existe um vasto patrimônio material e imaterial capaz sustentar uma rota turística que associe elementos das culturas indígenas, coloniais e negras. No entanto, percebe-se que este é um estudo acadêmico, que deve servir de subsídio para as comunidades envolvidas e não apontar soluções.

Muitas são as limitações encontradas, mas a principal delas é a ainda insuficiente aproximação com as comunidades. Só o acolhimento da ideia fará com que a pesquisa consiga realizar uma leitura aproximada das realidades.

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# O patrimônio cultural de João Pessoa (Paraíba, Nordeste do Brasil) na ótica da geomorfologia cultural

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## Resumo

Considerando que o patrimônio construído possui um viés essencialmente antrópico, parece-nos interessante uma correlação entre o patrimônio cultural e o patrimônio geomorfológico, sob a ótica da Geomorfologia Cultural, que enfatize o valor cultural do patrimônio geomorfológico. João Pessoa é a terceira cidade mais antiga do Brasil, fundada em 5 de agosto de 1585. O objetivo desta pesquisa foi analisar o papel das diferentes compartimentações do relevo no condicionamento da instalação do sítio de João Pessoa que posteriormente assumiu a importância cultural que hoje se lhe reconhece, através da ótica dos cronistas do período colonial (1500-1822), representada em documentos textuais e iconográficos diversos, como a jesuítica 'Sumário das Armadas' ou a franciscana 'Novo Orbe seráfico', entre outras, assim como na iconografia portuguesa e holandesa, ressaltando seus valores funcionais, econômicos e estéticos. Afinal, a história das civilizações, na forma de sistemas de defesa, edificações, simbolismos, entre outros, sempre esteve atrelada aos aspectos da natureza, em especial ao relevo. Ademais, estas preocupações são fatores associados que nos permitem compreender a escolha do lugar em que a cidade foi edificada, a sua evolução e a própria forma de seu traçado urbano. Nos tempos atuais, as feições geomorfológicas têm sido ferramenta, basicamente, de estudos científicos, restringindo a possibilidade de atingir um público maior que não seja do meio acadêmico. Busca-se, através desta análise de correlação entre o meio físico e meio cultural, redescobrir o sentido de uma geoconsciência através do apelo estético que esta paisagem urbana instiga e da sua importância para a sociedade primitiva.

## Palavras-chave

Patrimônio Cultural; Geomorfologia Cultural; Cronistas; Período Colonial; João Pessoa.

## 1. Introdução

As formas de relevo são resultantes do modelamento das rochas à superfície da Terra, possuindo o papel de reconstituir e explicar a evolução da crosta terrestre, local de interação das diversas esferas orgânicas em um sistema aberto com troca de energia e massa. Há um eixo de ligação inerente ao processo de evolução de uma civilização humana, seja antiga ou moderna, com o meio abiótico, o que confere ao geopatrimônio, em especial ao patrimônio geomorfológico, um grau de importância particular. O geopatrimônio apoia o desenvolvimento econômico e a qualidade de vida, podendo ser utilizado e fruído em atividades de recreação e turismo, propiciando esta conexão entre geomorfologia, paisagem, cultura e as atividades de lazer.

A relação da Geografia com os estudos da paisagem datam do final do século XVIII, apresentando dois pontos de vista: uma visão naturalista, onde o ser humano se situava à margem da descrição dos elementos físicos da paisagem e suas relações, tendo nos trabalhos

pioneiros de Humboldt e Saussure sua base teórico-metodológica e; uma visão humanista, embasada nas pesquisas de La Blache, que enfatiza o elemento cultural da paisagem (Reynard, 2009), de onde descenderá o conceito de 'Paisagem Cultural'.

Para tratar da relação específica entre a geomorfologia, o patrimônio cultural e a paisagem cultural, Panizza e Piacente (2003) elaboraram o conceito de Geomorfologia Cultural, que enfatiza o valor cultural do Patrimônio Geomorfológico. Para os autores, a Geomorfologia Cultural é a disciplina que estuda a componente geomorfológica de um território, onde estão inseridas as feições culturais da paisagem, assim como as interações entre a geomorfologia e o patrimônio cultural, seja do tipo arqueológico, histórico, arquitetônico, entre outros. Em outras palavras, a Geomorfologia Cultural é a ciência que estuda as Paisagens Culturais, em especial o elemento 'relevo'.

Para a UNESCO, a Paisagem Cultural representa "o trabalho combinado do homem e da natureza", segundo seu Art. 1º da Convenção do Patrimônio Mundial (1972). Coelho (1992) conceituou, de maneira genérica, Patrimônio a partir desta mesma ótica integrada entre os bens, materiais e imateriais, produzidos pela sociedade e o papel da natureza, quer enquanto matéria prima ou recurso para as atividades do ser humano, quer pela sua beleza estética. A Convenção do Patrimônio Mundial da UNESCO, em 1992, reconheceu a importância de proteger as ditas 'Paisagens Culturais'<sup>56</sup>.

A Paisagem Cultural consiste, assim, na importância do meio natural, na forma das grandes paisagens naturais, como as planícies fluviais, as montanhas, os desertos, as cavernas, o solo e clima favorável, para o estabelecimento do ser humano em um determinado terreno.

Desse modo, Panizza e Piacente (*op. cit.*) esquematizam dois pontos de vista, integrados e recíprocos, entre os elementos culturais e a geomorfologia. Em um sentido amplo, a geomorfologia pode ser entendida como um componente do patrimônio cultural de um território, como a tela de um pintor que representa os Alpes suíços. Corresponde à percepção da paisagem através de uma determinada expressão artística, onde o relevo é a fonte de inspiração, compreendendo o diálogo interdisciplinar entre as Geociências e as Ciências Humanas e Sociais. Em um sentido restrito, alguns componentes culturais, como a arqueologia e arquitetura, são inseridos em um contexto geomorfológico específico. As pinturas rupestres encontradas em uma gruta indicam que seres primitivos habitavam aquele ambiente como forma de proteção do exterior.

É pensando em ambos os aspectos da geomorfologia cultural que o presente trabalho se desenvolverá, a partir da metodologia abaixo seguida.

## **2. Metodologia e objetivos**

A metodologia utilizada neste trabalho baseia-se em duas fases, a partir da proposta de Panizza e Piacente (2000), para o estudo da Geomorfologia Cultural.

Na primeira fase, para o entendimento da paisagem, processa-se a observação dos elementos físicos, descrevendo a evolução geomorfológica, onde o aparato cultural está localizado.

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<sup>56</sup> UNESCO. Disponível em <http://whc.unesco.org/en/culturallandscape/#1>. Acesso em 08 maio 2015.

Consiste, assim, no mapeamento geomorfológico do local, considerando sua importância para o estabelecimento das civilizações.

Na etapa II, inicia-se a consideração da relação dos elementos estudados na etapa I com o aparato cultural, em especial as causas geomorfológicas que condicionaram a sua instalação. Afinal, a história das civilizações, na forma de sistemas de defesa, edificações, agricultura, abastecimento de água, entre outros, sempre esteve atrelada aos aspectos da natureza, em especial aos elementos da geodiversidade.

Este trabalho visa relacionar as formas de relevo com o Patrimônio Cultural construído na Capitania da Parahyba, Nordeste do Brasil, através da análise de uma farta documentação histórica elaborada pelos viajantes durante o período colonial (1500-1822), na forma de textos e cartas (sentido restrito da Geomorfologia Cultural) ou iconográfico (sentido amplo). A relação entre relevo e o patrimônio cultural, que configura a Paisagem Cultural da área, ainda se apresenta praticamente sem pesquisas e divulgação, em um diálogo interdisciplinar entre geodiversidade e cultura.

Afinal, se a paisagem natural e suas feições geomorfológicas têm servido de inspiração para a literatura e as artes desde os primórdios do período colonial, nos tempos atuais ela tem sido ferramenta, basicamente, de estudos científicos relativamente herméticos, o que tem restringido a sua difusão junto de um público maior que não seja do meio acadêmico. Assim, busca-se, também, através desta análise de correlação do meio físico com o meio cultural, redescobrir um sentido de geoconsciência através do apelo estético que esta paisagem instiga e de sua importância para a sociedade primitiva.

### **3. A Geomorfologia da Capitania da Parahyba**

A área de estudo pertence à unidade geomorfológica Planícies e Tabuleiros Litorâneos, de acordo com Ross (1985), possuindo relação direta com movimentações tectônicas antigas, geradas durante o afastamento das placas Sul-Americana e Africana (Asmus, 1975), somadas a eventos tectônicos cenozóicos (Bezerra e Vita-Finzi, 2000; Bezerra *et al.*, 2001, entre outros).

Podemos identificar 3 subunidades para a Capitania da Parahyba: a baixada litorânea (ou planície costeira), os baixos planaltos costeiros (ou tabuleiros litorâneos) e as planícies aluviais, que podem ainda ser subdivididas em fluviais e fluviomarinhas (Melo e Rodriguez, 2003). O topo dos tabuleiros é unido às planícies por vertentes relativamente íngremes, onde afloram os calcários da Formação Gramame, principalmente naquelas voltadas para o Rio Paraíba, segundo um eixo nordeste-sudoeste.

A baixada litorânea está em contato direto com o mar, possui altitude entre 0 e 10 m, cuja sedimentação quaternária de origem fluvial, marinha e fluviomarinha preencheu a planície costeira, dando origem a inúmeras feições geomorfológicas que foram mapeadas e descritas na documentação histórica produzida durante o período colonial. Nas margens do Rio Paraíba, ocorrem planícies aluviais com maiores altitudes, com presença de manguezais afastados até 12 Km da linha de costa, que denotam a sua importância ecológica. Na porção norte da área de estudo, a Restinga de Cabedelo, primeiro local de ocupação do colonizador português, separa o Rio Paraíba do Oceano Atlântico.



Os baixos planaltos costeiros, também conhecidos como tabuleiros litorâneos, correspondem a uma porção mais elevada do terreno, suavemente inclinados, com topos geralmente planos e basculados para leste, resultado da ação dos agentes exógenos que esculpíram a Formação Barreiras, incluindo a abrasão marinha sobre as falésias, outra forma deste litoral, na sua porção oriental. A maior parte do sítio urbano de João Pessoa está assentada sobre esta unidade geomorfológica e a escolha desta área pelo colonizador luso tem relação direta com a unidade. Segundo Brito Neves *et al.* (2004) e Rossetti *et al.* (2013), estes baixos planaltos foram resultados de amplos arqueamentos e de uma sucessão de pediplanos escalonados para o interior, subordinados ao paleoclima e em que a estrutura tipo *graben-horst* controlou a morfologia. Reativações de zonas de cisalhamento do embasamento, com direção E-W e NE- SW, a partir do EoCretáceo, atingiram os sedimentos da Formação Barreiras, formando escarpas de falhas que foram depois afeiçoadas por terraços aluviais, dunas arenosas, detritos de deslizamento, coluviões, solos e vegetação, e que serviram como delimitadoras do leito dos rios, enquanto as porções soerguidas foram dissecadas (Lima *et al.*, 1990). Assim, as cotas altimétricas do compartimento urbano dos tabuleiros mostram porções soerguidas (a oeste, cujas altitudes chegam a 70 m) e porções rebaixadas (entre o Rio Mumbaba e o Rio Sanhauá, afluente do Rio Paraíba, onde as altitudes não passam dos 40 m), voltando a subir (no curso superior do Rio Cuiá), decrescendo novamente em direção a leste. Longe da área urbana desenvolveu-se a atividade canavieira, pela presença do fértil solo massapê, que se estende por algumas dezenas de quilômetros da linha de costa.

#### **4. A Paisagem Cultural da Capitania da Parahyba na ótica dos viajantes do período colonial**

A conquista da Parahyba foi resultado das intenções da Coroa portuguesa de expansão para o Norte. Antes de sua conquista, durante cerca de trinta anos, expedições aportaram na costa oriental e meridional da colônia, explorando basicamente o 'pau de tinta', dando origem ao primeiro ciclo desta era pré-colonial, o 'ciclo do pau Brasil'.

Estas expedições de idas-e-vindas ao território colonial e a outras colônias portuguesas espalhadas pelo mundo formaram pressupostos candidatos a donatários das terras que passariam a ser doadas ao rei, a partir de 1531, terras estas denominadas 'capitanias hereditárias'. A partir deste momento iniciar-se-ia uma efetiva colonização, onde as capitanias do nordeste, especialmente as de Pernambuco e Itamaracá entrariam na pauta das discussões da estrutura econômica colonial. Os elementos da geodiversidade do litoral da Paraíba, a exemplo do relevo, as rochas, o solo, hidrografia, recortes litorâneos, entre outros, assim como sua biodiversidade, começaram a ser documentados por dezenas de viajantes. Neste caso, os relatos acerca dos elementos da biodiversidade (fauna e flora) superaram quantitativamente os do meio abiótico.

Diversos viajantes, durante o período colonial, tiveram a oportunidade de conhecer o nordeste, assim como a Capitania Real da Paraíba e a sua capital, Nossa Senhora das Neves, primeiro nome da atual João Pessoa. Produziram farta documentação acerca do geopatrimônio desta capitania, em especial suas formas de relevo, num primeiro momento restrita ao núcleo urbano da capital e proximidades e, posteriormente, com a interiorização da ocupação, aos sertões.

Nos primórdios da ocupação, o assédio de franceses à costa setentrional da Capitania de Itamaracá, aliado aos gentios potiguares, nas redondezas da barra do Rio Parahyba, cada vez

mais ousados, obrigou o ouvidor geral Martim Leitão, autorizado pelo rei D. Sebastião, a organizar e até mesmo a participar em algumas expedições de conquista da banda norte da capitania, após a fundação da Capitania Real da Paraíba, cuja data mantém-se polêmica. Entre 1574 e 1585, quatro expedições tentaram conquistar estas terras, sendo que apenas a quinta foi bem sucedida. Todas estas expedições foram narradas na obra *“Summario das armadas que se fizeram, e guerras que se deram na conquista do rio Parayba; escripto e feito por mandado do muito reverendo padre em Christo, o padre Christovam de Gouveia, visitador da Companhia de Jesus, de toda a provincia do Brasil”*, ou de forma simplificada no *“Sumário das Armadas”*, cuja autoria e época de publicação permanecem objeto de discussão e investigação, apesar de a historiografia paraibana defender o nome dos padres da Companhia de Jesus, **Jerônimo Machado e/ou Simão Travassos**, que participaram das expedições de fevereiro e outubro de 1585, sendo esta última feita após a conquista, e ambas com a participação de Martim Leitão. A obra, a primeira especificamente associada à Capitania Real da Paraíba, é dividida em 24 capítulos e abrange uma temporalidade que vai de 1574, ano da primeira expedição, ao início de 1587, após a Paraíba ter sido conquistada e a cidade de Nossa Senhora das Neves dar o seus primeiros passos. É uma obra de inestimável valor histórico pois seu autor se diz ‘testemunha de vista’ dos acontecimentos e apresenta fatos pormenores, tanto dos embates inerentes à relação português/indígena/francês, naquele contexto histórico, quanto da paisagem natural que o circundava. Nesta perspectiva, o meio abiótico, em especial os recursos hídricos, o relevo, o solo e as rochas são alguns elementos da paisagem que foram detalhadamente inseridos nos relatos do *“Sumário”*, sendo que o relevo será aqui divulgado por esta ótica.

A obra ‘Summario’, em seu primeiro capítulo, denominado *“Ideia particular destas partes e geral do Brasil”*, pode ser subdividida em três partes: numa primeira, o autor descreve os elementos geológicos e geomorfológicos do estuário do Rio Paraíba onde, segundo o autor, o rio corre *“athe a ponta de Cabedelo que he já dentro”* (Summario, 1848, p. 25), sendo esta ponta uma extensa península que separa o Rio Paraíba do Oceano Atlântico, correspondendo a um terraço marinho holocênico, formado na última transgressão marinha, ocorrida a 5,10 Ka AP. Registra a largura da barra do rio, a presença de bancos de areia que afloram nas marés baixas, a Ilha da Restinga, a possibilidade de bom calado para embarcações de grande porte, sempre comparando com os portos de Itamaracá e Pernambuco e cita a presença de recifes tangenciando a costa. Estes recifes são do tipo rochoso, os *‘beach rocks’*, que se estendem por até 8500 metros, sendo depósitos consolidados que resultam da litificação por calcita de sedimentos na zona entremarés, típicos de costas tropicais, quentes e fóticas (Turner, 2005) que, segundo Suguio (1998), são formados por arenitos e conglomerados, cimentados por calcita, possuindo conchas fragmentadas ou inteiras de moluscos. Uma vez que o topo destes recifes pode aflorar acima do nível médio do mar atual, e considerando estas rochas foram datadas, possuindo idades acima de 5,5 Ka AP (Suguio *et al.*, 2013), podemos inferir que houve um rebaixamento no nível do mar na segunda metade do Holoceno, o que possibilitou ao autor do *“Sumário”* visualizar o topo destes recifes, mesmo situando-se a cerca de 1300 metros da linha de costa. Este rebaixamento pode ter relação com o início da Pequena Idade do Gelo, que data desta época, se estendendo até meados do século XIX.

A segunda e terceira partes deste capítulo se entrelaçam, uma vez que se referem aos hábitos dos gentios potiguares, enaltecendo sua personalidade guerreira, ao mesmo tempo que discorre positivamente sobre a funcionalidade da geodiversidade, em especial sobre o relevo da

planície fluvial. Dá ênfase à qualidade das várzeas, gerando um solo alagado na medida certa para a profusão de uma vegetação densa de manguezais e de um pau Brasil que o autor descreve como “as matas das arvores são muito maiores e muito mais altas e grasas” (Summario, 1848, p. 26), além de “ter mais pau brasil que Pernambuco he muito melhor porque quanto mais para o norte tanto melhor [...] O pau desta Capitania he o mais e o melhor [...] mais de lei que todas as outras [...]” (Summario, 1848, p. 26-31), além de toda qualidade de mantimentos, como a mandioca, “tão grossa como grandes nabos maz com raizes compridas com muitas pernas e tenras” (Summario, 1848, p. 27), e seu derivado beiju, “que são redondos como manguaes, [...] pouco mais groços que hóstias he muito bom comer” (Summario, 1848, p. 27), bem como a potencialidade do cultivo de cana, na porção da península de Cabedelo, cuja várzea é “toda retalhada de esteiros e rios caudales de água doce que podem dar mais de quarenta engenhos de asucar por toda a terra [...] por ser Rio morto e pelo menos no inverno todo navegável” (Summario, 1848, p. 26). Nestas entrelinhas, podemos identificar a percepção que o autor possui sobre o valor funcional da geodiversidade, uma vez que a morfologia do relevo propicia a formação de solos aluviais que representam o último pacote sedimentar depositado na área, na forma de depósitos aluviais de canal fluvial. São argilas, cascalhos e muita matéria orgânica em decomposição, depositadas no Holocênico, agindo como um habitat para os biomas descritos no “Sumário”, como a mata atlântica e seu pau Brasil e as formações litorâneas, neste caso os manguezais. Toda este sistema ambiental costeiro e fluvial é o resultado de uma interação entre atmosfera, cujas variações meteorológicas geram um clima tropical litorâneo, com chuvas concentradas no inverno; biosfera, em especial, a flora; litosfera, representada pelos depósitos aluviais; e a hidrosfera, através da singularidade de um estuário ricamente descrito pelo autor, onde a água doce do rio se mistura de maneira harmoniosa com a água salgada do mar, durante as marés altas. Os nativos da área sabiam tirar proveito do que este ambiente propício fornecia, como o autor bem discorre neste primeiro capítulo.

Logo após o ‘apertar de mãos’ que selou o acordo de paz entre os índios tabajaras e os portugueses, aos pés do plano de falha do Rio Sanhauá, que separa a cidade alta da cidade baixa e que simboliza, segundo os historiadores, a conquista da Capitania da Parahyba, os líderes locais iniciaram o reconhecimento da paisagem das redondezas, com o intuito de verificarem as reais possibilidades de fixação do assentamento humano e da futura expansão urbana. Afinal, este reconhecimento do sítio que daria lugar à sede da capitania régia era necessário e mesmo obrigatório, considerando que as instruções dadas ao capitão João Tavares faziam parte das Ordenações do Reino. Todas as cidades fundadas na colônia deveriam seguir um padrão comum, que consideraria alguns condicionantes pertencentes à geodiversidade, a exemplo da salubridade do local, terra, facilidades de acesso e comunicação, proximidade dos rios, porto abrigado de ventos, entre outros, além dos procedimentos de divisão de terras, organização hierárquica da administração, entre outras. Assim, o ouvidor-geral Martim Leitão percorreu os arredores do Ribeiro de Jaguaribe ao Cabo Branco, retornando com a confiança de que o lugar previamente escolhido era o melhor lugar, uma vez que possuía afloramentos calcários para fornecimento de pedra para cantaria e cal, um porto protegido de ventos, água doce brotando das rochas e uma elevação que possibilitava visualizar grande parte da planície fluvial que repousava aos pés do sítio. E, distante seis léguas do litoral, naquele momento desguarnecido de sistemas defensivos, o único forte então construído, o Forte de São Filipe e São Tiago, estava abandonado. Como se vê, as formas de relevo foram fundamentais para a primitiva ocupação e fixação do colonizador na região, justificando a análise da sua descrição e registro pelos diversos

documentos específicos ao longo do tempo histórico delimitado pelo período colonial. O Forte de Cabedelo e da Restinga seriam construídos para formar o triângulo defensivo que protegeria a desembocadura do rio, principal local de acesso para se atingir a cidade de Nossa Senhora das Neves, localizada 10 Km foz acima.

O Forte de Cabedelo, que evoluiu para uma fortaleza apenas no século XVII, constitui um dos monumentos histórico-arquitetônicos mais importantes da área, resultado da valorização histórica do terraço marinho holocênico, nas proximidades do estuário do Rio Paraíba, cujo sítio foi selecionado estrategicamente como um ponto de defesa ao oferecer excelente visão do baixo curso do rio e do seu vale, bem como um amplo panorama do oceano à sua frente.

Assim, os detalhes do estuário do Rio Paraíba, com seus terraços férteis onde abundavam plantações de cana-de-açúcar, desembocando em um oceano cujos arenitos praias formavam um obstáculo natural e a presença da restinga, acabaram por inspirar a maior parte dos relatos existentes no período colonial.

A partir de um segundo regimento enviado pelo Rei Phillippe II de Portugal, em 31 de agosto de 1612, ao então governador geral do Brasil, Gaspar de Sousa, o sargento-mor Diogo de Campos Moreno realizou, entre 1612 e 1613, um impressionante levantamento cartográfico de todas as capitanias brasileiras sob administração de D. Diogo de Menezes (1608 a 1612), apresentando dados estatísticos, econômicos, militares e geográficos (Moura Filha, 2003), entremeados por detalhes da geodiversidade, visando o reconhecimento da ocupação, povoamento, defesa e economia do território, então sob o domínio da União Ibérica. O resultado deste levantamento foi a obra “O livro que dá razão do Estado do Brasil”, publicado em 1616, cuja representação cartográfica ficou a cargo do cosmógrafo João Teixeira Albernaz, o Velho, que não participou das expedições e inseriu os mapas posteriormente.

Esta obra sucede à “Relação das praças fortes e coisas de importância que Sua Majestade tem na costa do Brasil”, que o sargento havia publicado em 1609 e que é referida como contendo a primeira representação cartográfica da cidade. A cidade nascente foi retratada na planta intitulada ‘Capitania da Paraíba a 6 graus a sul da Equinothial - 1609’, de autoria desconhecida, tendo sido descrita como uma

[...] povoação, a que chamam cidade, há três mosteiros, com seus frades, a saber, um de São Francisco, que bastava, mui bem acabado e capaz de muitos religiosos, um do Carmo, que se vai fazendo, e um de São Bento que se fabrica e uma Casa da Misericórdia mui bem lavrada e a Sé mais pobre que todas, porque não é particular (Ministério do Reino, Coleção de plantas, mapas e outros documentos iconográficos, doc. 68, Torre do Tombo (referência PT/TT/MR/1/68).

A iconografia mostra uma visão geral do curso inferior do Rio Paraíba (figura 1a) e, em primeiro plano, à direita, o Forte de Cabedelo, resguardando a foz do rio e, à esquerda, circulado, a cidade de Filipeia N. S. das Neves, detalhada na figura 1(b). A legenda original da figura 1 (a) está representada na figura 2, com sua transcrição, em que os elementos do relevo predominam, como a citação da localização dos bancos de areia, informações acerca do estuário do Rio Paraíba e a presença da cidade, no alto de um ‘monte’ (ponto F).

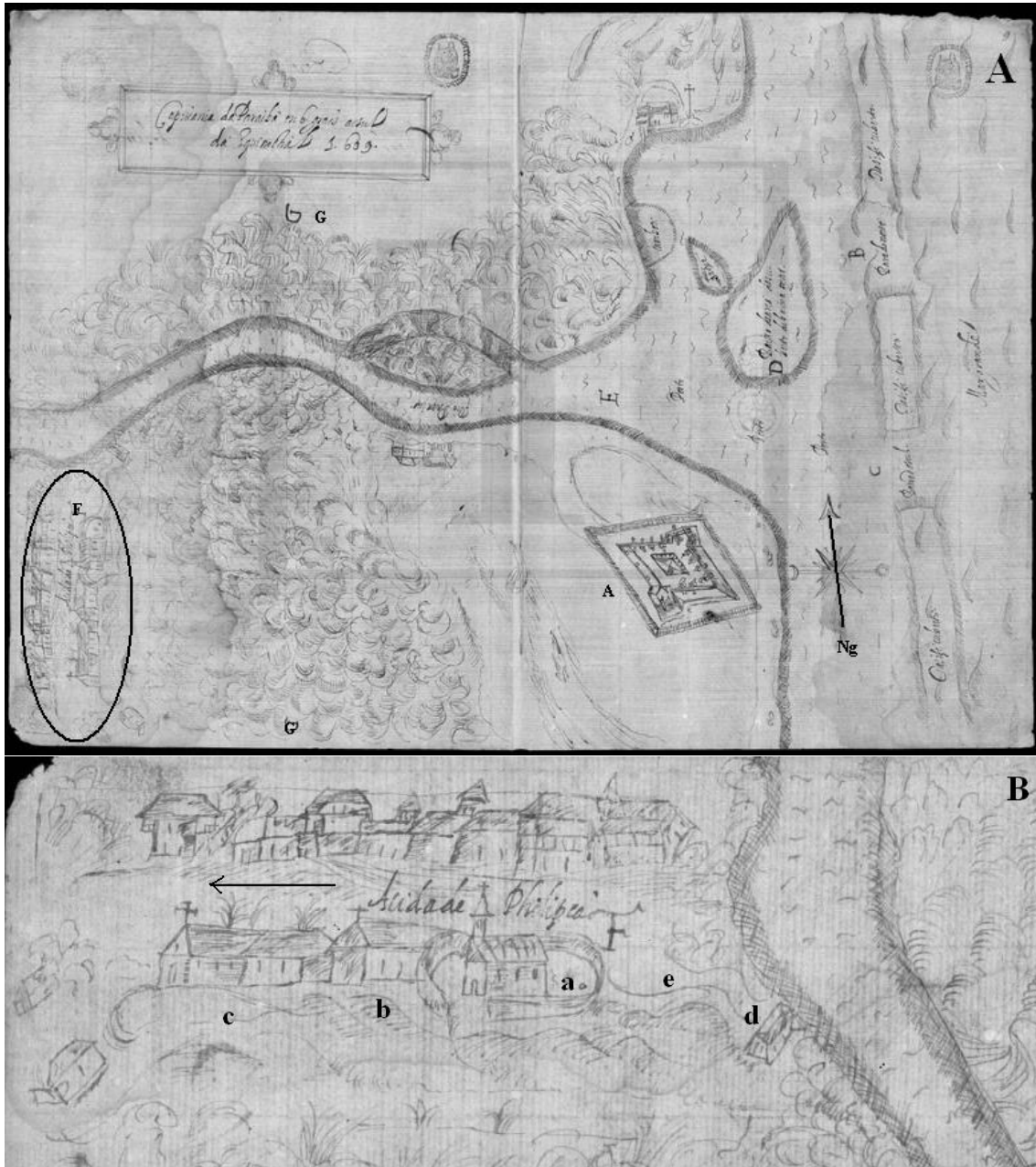


Figura 1 - Desenho 'Capitania da Paraíba em 6 graus a sul da Equinothial - 1609', mostrando a foz do Rio Paraíba, à direita, cercada de uma paliçada e, à esquerda, a mancha urbana da Filipeia N. S. das Neves (letra 'f'). b-Detalhe da cidade e seu porto, sendo a-Convento de São Francisco, b-Igreja de N. S. do Carmo, c-Igreja e Mosteiro de São Bento, d-Porto do Varadouro, com o armazém e e-ladeira de São Francisco, que liga a cidade alta à cidade baixa (Porto de Varadouro). A flecha representa a Rua Nova.

Fonte: *Relação das praças fortes e coisas de importância que Sua Majestade tem na costa do Brasil, 1609* (extraído e modificado de Ministério do Reino, *Colecção de plantas, mapas e outros documentos iconográficos, doc. 68, Torre do Tombo, referência PT-TT-MR-1-68\_m0016*).

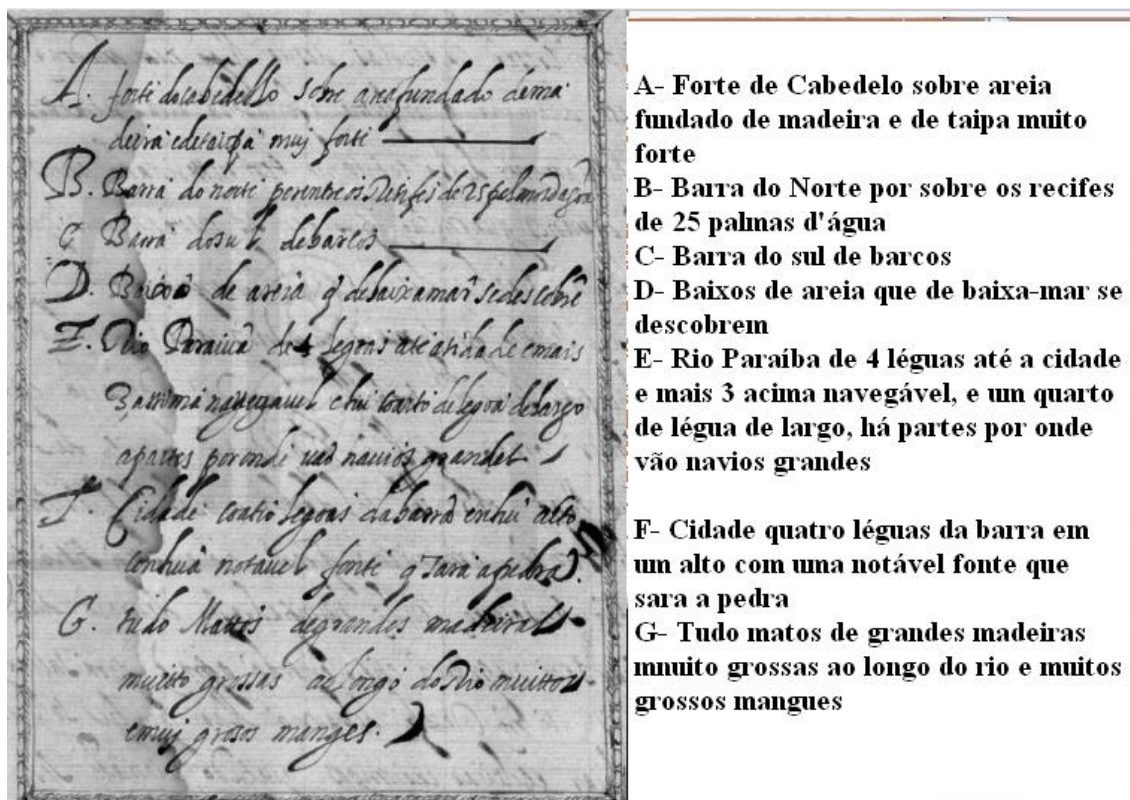


Figura 2 - Legenda original do mapa 'Capitania da Paraíba a 6 graos a sul da Equinothial 1609', de autoria de Diogo de Campos Moreno, à esquerda, e a transcrição de seus elementos, à direita. Fonte: Ministério do Reino, Coleção de plantas, mapas e outros documentos iconográficos, doc. 68, Torre do Tombo, referência PT-TT-MR-1-68\_m0014).

Nesta época, o sítio urbano já estava claramente configurado em uma cidade alta e uma cidade baixa, reproduzindo os moldes das urbanizações realizadas em Portugal desde o século XIII, cuja divisão espelhava as atividades político-econômicas do período. Esta compartimentação estava relacionada com a topografia, sendo a cidade baixa, conhecida como Varadouro, a área da planície fluvial do Rio Sanhauá, afluente da margem direita do Rio Paraíba; a cidade alta incrustada nos baixos planaltos, ou tabuleiros, principal feição geomorfológica local. Mas também refletia uma clara segregação funcional e socioeconômica, que se perpetuou ao longo dos tempos, onde na porção inferior da cidade, no núcleo primitivo, se formou o porto, o forte, o armazém e, posteriormente, as atividades comerciais (ponto 'd' no mapa), nomeadamente o embarque dos produtos que deveriam integrar o mercado ultramarino. Na cidade alta constroem-se os prédios religiosos (pontos 'a' ao 'c'), as primeiras residências, traçam-se as primeiras ruas e, mais adiante, os prédios administrativos (Teixeira e Valla, 1999), tendo na Rua Nova imóveis dos homens de administração pública e proprietários rurais de alto poder aquisitivo, a exemplo de Duarte Gomes da Silveira<sup>57</sup>. O elo de ligação era a 'ladeira do São Francisco' (ponto 'e').

A primeira consideração que devemos traçar visualizando esta representação iconográfica diz respeito à posição geográfica e ao sítio da cidade. Dois aspectos devem ser levados em consideração neste ponto: 1) a preocupação estratégica com a defesa do território, com a

<sup>57</sup> Na tese de Moura Filha (cf. Moura Filha, 2004, p. 194), sugere-se, utilizando como fonte escrituras de lote doadas ou vendidas ao Mosteiro de São Bento que, em 1612, na Rua Nova, as principais edificações existentes eram a Igreja Matriz, Casa da Câmara (na esquina), cadeia, açougue velho, Igreja de São Bento (em construção) e algumas residências, como as de Gaspar Gonçalves, Pedro de Lião, João de Heredia e Pedro Álvares.

delimitação da posição dos fortes; 2) a edificação da cidade no período da União Ibérica, momento em que a cultura e a forma de administração espanhola influenciam as práticas portuguesas. Estes dois fatores associados nos permitem compreender a escolha do lugar em que a cidade foi edificada e a forma de seu traçado urbano. Fatores como a ameaça da invasão francesa e a necessidade de resguardar-se dos aglomeramentos indígenas resistentes ao contato, marcaram o seu posicionamento (Pereira e Amaral, 2014). “O sítio natural, assim, articula-se intimamente com a evolução urbana e com o processo de produção e apropriação do espaço da cidade, constituindo tanto um dos elementos [geo]morfológicos básicos da cidade quanto participante da sua estruturação, influenciando na segregação e podendo destacar percursos” (Silveira, 2004, p. 86).

Os mapas do “Livro que dá Razão” foram desenhados em pergaminho e pintados a aquarela, com dimensões 0,566 m x 0,400 m (Pinto, 1977). Segundo Almeida (1978, p. 163-164), Varnhagen divulgou trechos esparsos deste livro, e a edição integral foi lançada “pelo Arquivo Público do Estado de Pernambuco, com introdução e notas de Hélio Viana [...]” .

Ao descrever a cidade de Filipéia de Nossa Senhora das Neves, faz referência ao sítio urbano, que “está situado em hua llanura [planície], q se faz em alto desabafada, viltosa e de bons ares, e agoas com sua fonte particular, q a sua agoa é remedio notavel contra o mal da pedra [...]”<sup>58</sup> (Livro, 1968, fl. 72, grifo nosso). Faz uma varredura na composição demográfica, com oitenta vizinhos brancos, e arquitetônica da cidade, com ‘tres mosteiros e hum delles de aspecto mui sumptuoso com outros edifícios nobres e pedra e cal, q quada dia se aumentão’<sup>59</sup> (Livro, 1968, fl. 72). Ao final traça rasgados elogios à Capitania, onde ‘será este hum dos mais favorecidos povos particulares de toda a costa’, ainda mais se ocorresse uma união com Itamaracá, prenúncio do que haveria de acontecer 150 anos depois, com a anexação da Paraíba a Pernambuco. Finaliza com a preocupação de se fortificar a cidade, que dá bons lucros ao rei, com a exploração do pau Brasil considerando ser uma capitania real, e não de donatário (Livro, 1968, fl. 72).

A gravura ‘Paraíba ou Rio São Domingos’, datado de 1626, está representada na figura 3 (a). Esta gravura é uma das várias que ilustram o “Livro que dá Razão do Estado do Brasil”, sendo Diogo de Campos Moreno o responsável pelo levantamento cartográfico feito em 1612 e João Teixeira Albernaz I (o Velho) pela produção cartográfica. Em (a), podemos ter uma visão completa do sítio em que a cidade foi edificada, marcada com um círculo, assim como o curso inferior do Rio Paraíba, os engenhos, suas ilhas, barra e o forte de Cabedelo. Pela legenda, representada na figura 4, os pontos ‘a’ e ‘b’ - barras formadas por um gigantesco banco de areia depositado no local são elementos costeiros descritos que servem para facilitar ou dificultar a passagem dos navios, conhecimento pertinente e relevante, face à política mercantil da época.

<sup>58</sup> ‘Mal das pedras’ referia-se ao problema de pedra nos rins, mal tão comum naquela época e que se estendeu aos dias atuais.

<sup>59</sup> Este prédio ‘sumptuoso’ refere-se, provavelmente, ao Convento de São Francisco, corroborado, poucos anos depois, por Ambrósio Fernandes, quando o considerou “o melhor dos daquela ordem de todo o Estado do Brasil” (cf. Brandão, 1977, p. 49).

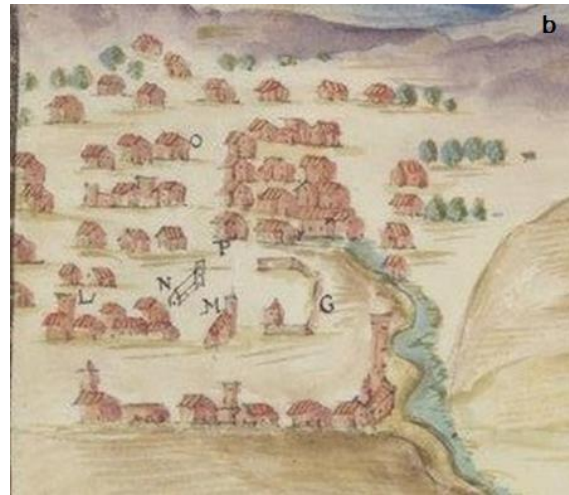


Figura 3 - a) Cópia fotográfica do mapa intitulado 'Paraíba ou Rio São Domingos', com uma visão ampla da cidade de Filipeia de Nossa Senhora das Neves, circulado, e do curso inferior do Rio Paraíba. Não foi encontrado o ponto 'D' no mapa. b) Detalhe da área circulado, sendo G-Cidade de Filipeia de N. S. das Neves, L-Igreja de N. S. do Carmo, M-Convento de São Francisco, O-Santa casa da Misericórdia e P-Mosteiro de São Bento.  
 Fonte: LIVRO (1968, fl. 75).

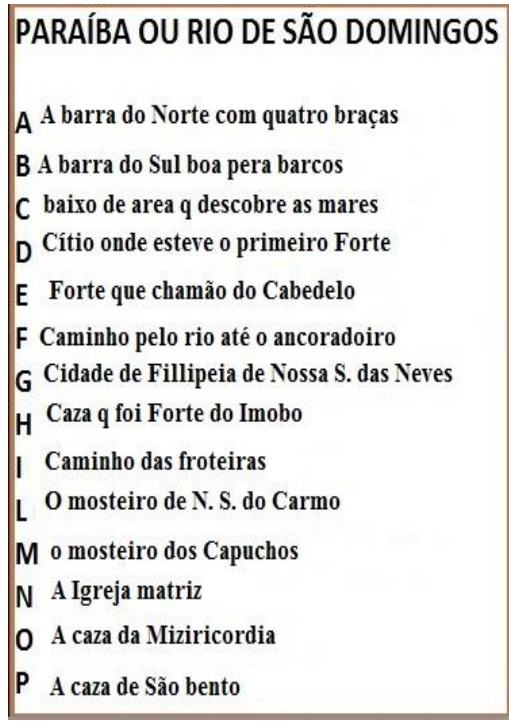
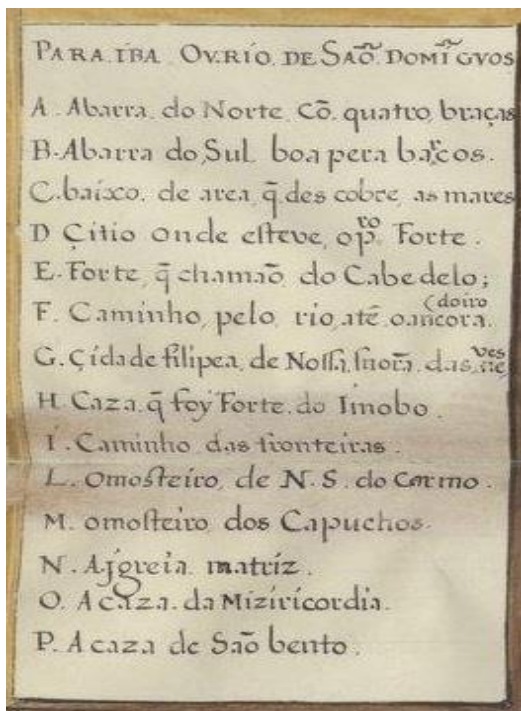


Figura 4-Legenda original, à esquerda, do Mapa 'Rio Paraíba ou São Domingos', de autoria de João Teixeira Albernaz I e a transcrição, à direita, de seus elementos.  
 Fonte: LIVRO (1968, fl. 75).



A figura 3 (b) detalha, mesmo com uma feição gráfica ingênua, a cidade de Filipeia, destacando alguns elementos de sua paisagem.

Pelas características da área escolhidas para serem inseridas na legenda, transcrita na figura 4, podemos concluir que era interesse do autor a representação dos fortes e edificações da cidade nascente.

A partir de uma visão da figura 3 (b), no alto da colina, frondosas árvores de Mata Atlântica foram cartografadas nos arredores da cidade, e no seu entorno os engenhos. A ladeira de São Francisco, primeiro caminho ligando a cidade baixa à cidade alta, sutilmente foi representada na porção inferior direita do mapa, através de um declive de cor mais escura, assim como o ancoradouro e o armazém, no Rio Sanhauá. O grau de detalhe da representação mostra um traçado complexo das ruas, apesar de irregular e com alguns erros de cartografia. Menezes (1985) sugere que a suposta ausência de um levantamento planimétrico mais eficiente da cidade teria colaborado para isto. O Convento de São Francisco (ponto M), por exemplo, teria como eixo de ligação à Santa Casa (ponto O) a Rua Nova, o que não acontece de fato. E a Rua Direita, nesta iconografia, não foi representada.

Araújo (2012) alerta para a importância desta planta no entendimento da geometria das formas que consolidaram o sítio urbano de Filipeia, em especial na configuração das redondezas do ancoradouro. O autor identifica dois pontais ou promontórios, no extremo direito da figura 3 (b), em cima e em baixo, que representariam os terraços estruturais modeladores das vertentes que correm para o oeste e são responsáveis, por exemplo, pelos afloramentos de águas subterrâneas.

Entre 1634 e 1654, a capitania esteve sob domínio holandês. Ao findar este período, o principal legado por eles deixado refere-se aos registros escritos e iconográficos deste período, com uma precisão de detalhes cujos interesses envolviam, tanto adquirir informações sobre a situação dos engenhos, quanto meramente descrever as características de Frederica<sup>60</sup> e de seus arredores.

Em 1634, por exemplo, a cidade de Frederica foi representada por Claes Jansz Visscher, cujo detalhe pode ser visto na figura 5(a), representando parte do desenho denominado “*Afeelding der Stadt em Fortressen Van Parayba*”, ou simplesmente “Parayba”.

Num plano mais amplo, visualizado na figura 5(b), esta estampa mostra os eventos decorrentes da chegada dos holandeses na região, os trajetos e os elementos fortificados erguidos pelos portugueses para dificultar este avanço. A legenda da ilustração, na figura 6, ressalta estes elementos, como o local de desembarque das tropas, na praia, alguns quilômetros a sul da barra do rio Paraíba; o avanço pelo Rio Paraíba e a tomada da fortaleza de São Bento, denominação dada para o fortim na ilha da Restinga; as várias trincheiras, ou ‘*aproches*’-fosso, encontrados no caminho, nas redondezas dos fortes, assim como os fortes, a exemplo de Cabedelo e Santo Antônio. Nas proximidades do forte de Santa Catarina, os holandeses ergueram uma verdadeira muralha fortificada, com baterias e quartéis, a exemplo do assinalado como o do “Governador Sigmundus von Schoppen”, e colocaram barcos vigiando o curso inferior do rio. Este mesmo governador teve sua embarcação encalhada em um baixio no Rio Paraíba, no canal sul da Ilha da Restinga. Esta característica morfológica do rio será retratado em outras gravuras, a exemplo

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<sup>60</sup> Nome dado pelos holandeses à cidade de João Pessoa.

da obra 'Frederica Civitas', datada entre 1637-1645, de autoria de Jan Van Brosterhuisen e 'Frederice Stadt', de Johannes Vingboons (1640).

Pormenorizando a visão que o autor tem da cidade de Frederica, podemos notar na figura 5(b) a regularidade do traçado das ruas, em xadrez, e algumas edificações mais proeminentes, além da delimitação de lotes de terras nos arredores da zona urbana. Em (a, em baixo), podemos ver o detalhe do traçado urbano de Frederica, com sua bem marcada disposição de lotes e quadras, sendo enumerados alguns novos elementos da cidade, daqueles traduzidos na legenda original, entre eles a ladeira de São Francisco, principal elo de ligação entre a cidade baixa e a cidade alta, com uma fortificação no Varadouro. O Largo da Câmara, com o pelourinho, pode ser identificado, assim como as igrejas das principais ordens religiosas. A Igreja Matriz, com a posição frontal invertida, mostra-se superestimada, pois segundo relatos de Herckmans (1982), descritos posteriormente, estava arruinada e em obras. O Convento de São Francisco, sede dos representantes da Companhia das Índias Ocidentais e seus soldados, aparece fortificado. A legenda original, em alemão, com sua tradução aparece na figura 6.

**Elias Herckmans** foi nomeado terceiro diretor da Capitania Real da Paraíba, entre 1636 e 1639.



Figura 5 - Obra 'Parayba', de Claess Visscher (1634). a) Visão geral da obra, com o Forte do Varadouro às margens do Rio Sanhauá e a cidade de Frederica circulada. b) Detalhe da cidade de Frederica, com a enumeração de alguns elementos. Os números originais, que estão circulados em vermelho, foram transcritos na próxima figura. Os demais, em vermelho: Nº 1- Igreja Matriz; 2-Largo da Câmara (Rathaus) e o Pelourinho; 3-Ladeira de São Francisco e; 4-Santa Casa da Misericórdia. A linha tracejada representa a Rua Nova e a contínua, a Rua Direita. Nota-se a presença de uma terceira rua, não referenciada na bibliografia, paralela à Rua Direita. A cidade, a sul, termina de forma abrupta. Norte para cima.

Fonte: Arquivo Histórico Ultramarino, documento AHU\_CARTi\_014,D.1642

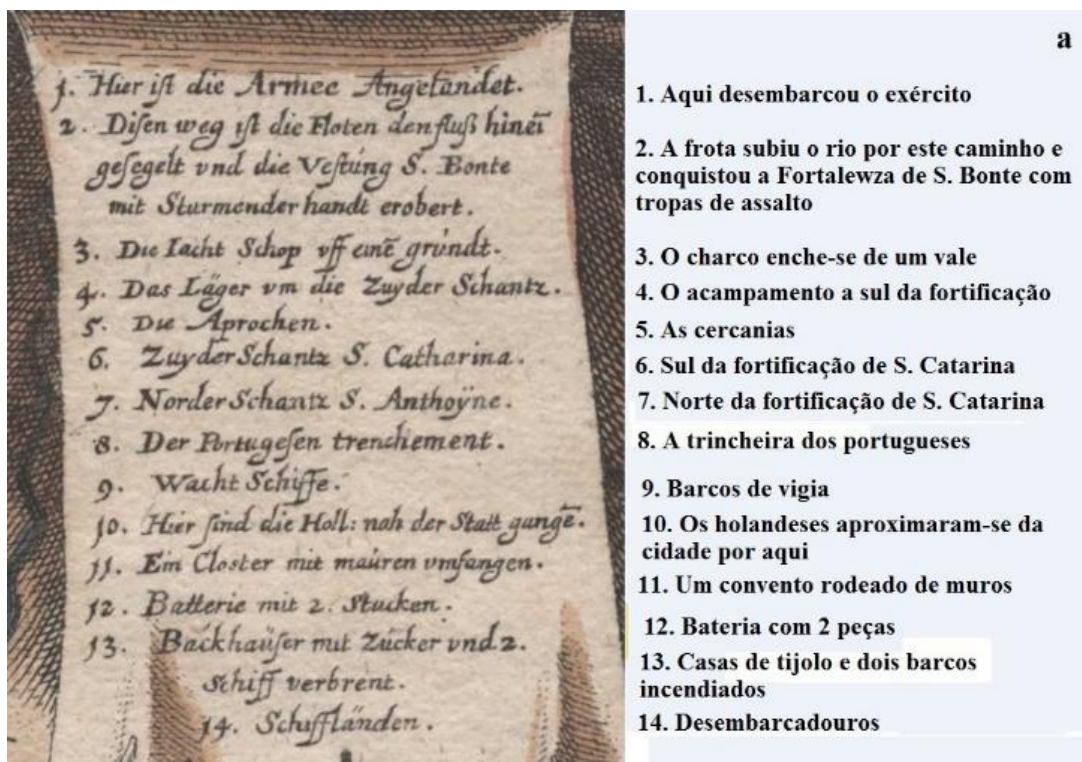


Figura 6 - Legendas originais da figura 5 com a transcrição, à direita, de seus elementos.  
Fonte: Arquivo Histórico Ultramarino, documento AHU\_CARTI\_014,D.1642.

Neste interim, desenvolveu um relatório minucioso sobre vários aspectos da Capitania da Parahyba, tais como as características físicas das suas principais bacias hidrográficas, aspectos urbanos de Frederica e hábitos cotidianos dos índios tapuias, moradores no interior da Capitania. Este relatório, escrito em 1639, foi impresso apenas em 1879, na Crônica do Instituto de Utrecht, na Holanda e, no Brasil, foi divulgado pelo historiador pernambucano José Higino, em 1887, quando foi feita a publicação, com o título “Descrição Geral da Capitania da Parahyba”, na revista do Instituto Arqueológico de Pernambuco, tomo 5, número 31, páginas 239 a 288. Na Paraíba, entretanto, este livro foi publicado apenas em 1911, no Almanaque do Estado da Paraíba (Herckmans, 1982), de onde foi extraído este texto.

Dividido em três partes, na primeira e mais densa, sem título, o autor faz uma descrição completa, inicialmente, da bacia do Rio Paraíba, através de sua foz e afluentes, adentrando na cidade de Frederica e, posteriormente, avançando rio acima, descrevendo os inúmeros engenhos associados aos terraços fluviais. Ao afirmar que “Em águas, ares e fertilidade é esta a Capitania uma das regiões mais saudáveis do Brasil” (Herckmans, 1982, p. 9), o autor antecipa os elogios aos aspectos naturais da Capitania que perpassam por todo o relatório, assim como relata que “fora do Varadouro, subindo o rio durante os Barreiros, que quer dizer sítio onde há muito barro, e aí se costuma cozer muitos vasos e telhas para as cobertas das casas” (Herckmans, 1982, p. 17).

Os **recortes litorâneos**, sejam da atual porção do litoral urbano, seja do litoral sul do Estado, com seus elementos associados, foram descritos tanto por Gabriel Soares de Sousa quanto por Herckmans.

Em suas andanças que resultaram no livro ‘Descrição geral da Capitania da Parahyba’, Herckmans faz também uma varredura pelo litoral sul, ao longo de algumas de suas bacias e recortes litorâneos. A respeito da bacia do Rio Gramame, que desagua ao sul da cidade de Frederica, o autor descreve um elemento pertinente do relevo, ao qual denomina de ‘campina’, explicando, em seguida, tratar-se dos tabuleiros ou terra alta. Segundo o autor, “do Gramame segue um caminho pelas campinas o qual passa meia légua à mão direita por diante desta aldeia [...] Campina é a terra alta ou tabuleiro do Gramame que do mesmo rio ao Taperubu tem quatro léguas de largo” (Herckmans, 1982, p. 24). Esta área reconhecida por Herckmans, em estudos geomorfológicos posteriores, foi considerada como representando os terrenos mais altos do litoral paraibano, consequência de eventos tectônicos pós Cretáceo.

Estes tabuleiros, também chamados de baixos planaltos, desenvolvem-se sobre o escudo cristalino e apresentam, em sua face voltada para o mar, falésias, como a de Cabo Branco. No texto, o autor faz referência à ‘Ponta de Cabo Branco’, atual ‘Ponta do Seixas’, ponto mais oriental das Américas, onde a “quatro ou cinco léguas desta baía [Popoca] para o norte se acha o Cabo Branco; é uma ponta que se faz mui branca a quem vem do mar, e por isso assim se chama. Daí até o Cabedelo ou barra do Paraíba se contam diretamente quatro léguas pelo mar, mas por terra contam-se seguramente seis por causa da grande curva que faz a costa, a modo de meia lua” (Herckmans, 1982, p. 25). Ao afirmar que por terra a distância do Cabo Branco a Cabedelo é maior do que por mar, o autor está fazendo referência aos recortes do litoral de Frederica e da restinga de Cabedelo, formada pelas enseadas das praias de Cabo Branco, Tambaú, Manaíra, Bessa, Intermars, Ponta de Campina, Poço, Camboinha, Areia Dourada, Formosa e Miramar.

Frederica e o vale do Rio Paraíba serviram ainda de inspiração artística para belíssimos perfis traçados, conforme o sentido lato da Geomorfologia Cultural. No primeiro caso, a pintura intitulada “*Parayba*” (figura 7a), na altura do Rio Sanhauá, de autoria provável de Frans Post (1647), pintor da comitiva de Nassau, e que ilustra o livro de Barleus com uma estampa na versão latina, onde se pode identificar o Convento franciscano no morro, à esquerda, o armazém e fortaleza, no porto, e uma edificação de grande porte, no centro, que poderia ser identificada como a Santa Casa, todos circundados por uma densa área verde, que marca a paisagem (figura 7b). O brasão da Paraíba, na parte superior esquerda da gravura, foi idealizado por Nassau, sendo representado por seis pães de açúcar, de forma piramidal, dispostos em três fileiras formando um triângulo. Esta representação confirma a importância do açúcar paraibano para a economia colonial já que, mesmo que Pernambuco possuísse 120 engenhos contra os 18 da Paraíba, o açúcar paraibano era de melhor qualidade (Almeida, 1978).

Os passeios pelo estuário do Rio Paraíba fascinaram e inspiraram artistas a pintarem belíssimas obras que retrataram o cotidiano local e a relação dos moradores com o meio que os circunda. A desembocadura do rio Paraíba foi retratado no livro de Barleus (figura 8), de autoria de Frans Post, denominada *Ostium Fluminis Paraybae*, de 1647). Pode-se ver, em segundo plano, o forte de Margarida, nova denominação do Forte de Cabedelo durante o domínio holandês e, do lado oposto, o Forte de Santo Antônio; em primeiro plano, uma bananeira, planta tropical que os holandeses desconheciam até então. O desenho retrata também os hábitos diários dos moradores da barra do rio, como o transporte manual de mercadorias, o trabalho escravo nos engenhos, vestimentas, o aporte de barcos, a pescaria, entre outros, mostrando o papel fundamental da natureza sobre o cotidiano destes moradores.



Figura 7- a) Vista da Frederica, em segundo plano, no alto do morro, a partir do Rio Sanhauá; b) Detalhe da cidade alta e baixa, onde A-Rio Paraíba; B-Cidade de Frederica (cidade alta); C-Convento de São Francisco; D-Armazém; E-Forte, e entre o Convento de São Francisco e o forte, a ladeira de São Francisco.

Fonte: modificado de REIS FILHO, 2000, CD rom.



Figura 8 - Gravura retratando o cotidiano dos moradores na barra do Rio Paraíba, presente no livro de Gaspar Barleus, com o forte de Cabedelo, em segundo plano.

Fonte: Barleus (1940).

## Conclusões

A paisagem é um componente cultural do território em que se misturam elementos naturais e antrópicos. A percepção do valor cultural da paisagem pode ser identificada através de expressões artísticas específicas, como pintura, poesia, música, entre outros, correspondendo ao sentido lato da Geomorfologia Cultural, conforme Panizza e Piacente (2003), assim como os registros textuais em documentos históricos atestam a importância das formas do relevo para a fixação de determinada civilização, o que corresponde ao sentido restrito da Geomorfologia Cultural.

Para tanto, algumas pessoas acompanhavam as expedições, a serviço do Rei ou da Igreja e registravam, através de dados escritos (textos e cartas) ou iconográficos (plantas e desenhos), todas as informações que fossem pertinentes ao Reino na perspectiva de ‘se conhecer para explorar’. Com “classes sociais variadas, profissão e formação intelectual diversificada, descreveram aspectos do Brasil, através de crônicas, relatos de viagem, correspondência, memórias, diários e álbuns de desenhos. O conjunto de obras por eles deixadas integra a chamada “*literatura de viagem* e se constitui numa *literatura de testemunhos* [...]” (CALDEIRA, 1991, p. 17). Pode-se também citar a importância de viajantes estrangeiros que por aqui estiveram, seja como invasores, a exemplo dos franceses e holandeses, seja como aliados da Coroa Portuguesa, como os espanhóis na época da União Ibérica, ou os ingleses, após a ‘abertura dos portos’, em 1808, que também deixaram um legado de suma importância para conhecermos a história de um período especial da formação de nosso território. No contexto histórico de colonização, o objetivo da maior parte destes cronistas era documentar informações que assegurassem a maior descrição possível sobre este novo território, envolvendo, por exemplo, tanto os hábitos culturais dos povos indígenas, até as características da fauna e flora presentes, ou seja, sua biodiversidade.

A geodiversidade, enquanto diversidade abiótica, que envolve, entre outros elementos, os de cunho geomorfológico (formas de relevo, depósitos e os processos que os geraram), era um dos principais objetos de análise por parte destes cronistas, uma vez que era interesse preliminar da Coroa, em um primeiro momento, explorar o substrato rochoso da colônia atrás de minérios que viessem a enriquecer o Reino, assim como, num momento posterior, se fixar no recente território ‘descoberto’. Assim, estes cronistas estavam valorizando, mesmo sem saber, a geodiversidade da terra conquistada e o seu geopatrimônio, e divulgando-a além-mar, apesar destas ações irem na contramão daquilo que hoje consideramos ser o geoconservacionismo.

Outros viajantes, durante o período colonial, tiveram a oportunidade de conhecer o nordeste brasileiro, assim como a Capitania Real da Parahyba e a sua capital, Nossa Senhora das Neves. Produziram farta documentação acerca da geodiversidade desta capitania, num primeiro momento restrita ao núcleo urbano da capital e proximidades e, posteriormente, com a interiorização da ocupação, aos sertões. Analisando-se por esta ótica, o objetivo deste trabalho foi descrever o resultado destas documentações, especialmente após a conquista da Capitania da Parahyba, desvinculada da Capitania de Itamaracá e elevada posteriormente ao *status* de Capitania Real, assim como durante o período em que esta Capitania fez parte do contexto econômico da colônia, se livrando das amarras da metrópole em 1822. Estes relatos foram priorizados no que diz respeito às formas de relevo, depósitos correlativos e processos responsáveis, com o intuito de reconhecimento do valor econômico, estético e funcional da geodiversidade, elevada, pontualmente, ao status de patrimônio geomorfológico.

O somatório destes elementos, aliados ao aparato cultural daquele período histórico, possibilitou aferir-se sobre a **paisagem cultural** da região. Afinal, suas construções, estabelecimentos humanos, usos da terra e do mar, tradições culturais, entre outros aparatos culturais, e que foram posteriormente patrimonializados, são consequências de determinadas condições naturais ideais, particularmente das geomorfológicas, para a criação do trabalho humano, que resultou na expansão urbana de João Pessoa.

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