TOUR-WHPO PROJECT PUBLICATION

TOURISM AND WORLD HERITAGE:

SELECTED MANAGEMENT APPROACHES AND EXPERIENCES FROM WORLD HERITAGE SITES OF PORTUGUESE ORIGIN AND INFLUENCE (TOUR-WHPO)

A cooperation project of

Turismo de Portugal and UNESCO World Heritage Centre
This publication is based on the cooperation project “Tourism Management at World Heritage Sites of Portuguese Origin and Influence” that has been implemented in partnership by Turismo de Portugal and UNESCO’s World Heritage Centre.
Edited by
Margarida Alçada, Katri Lisitzin, and Kerstin Manz
Disclaimer

The authors are responsible for the choice and presentation of the facts contained in this publication and for the opinions expressed therein, which are not necessarily those of Turismo de Portugal or UNESCO and do not commit the organizations.

The designation employed and the presentation of material throughout this publication do not imply the expression of any opinion whatsoever on the part of UNESCO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.
TABLE OF CONTENTS

PREFACE
FOREWORD
ACKNOWLEDGEMENTS
ABBREVIATIONS

A. INTRODUCTION TO THE PROJECT CONTEXT
1. World Heritage and Sustainable Tourism – the framework
2. World Heritage of Portuguese Origin – the networking initiative
3. Introduction to the Project Experiences
   a. Brief Presentation of the Project Pilot Sites
   b. Brief Descriptions of the Participating World Heritage Sites of Portuguese Origin and Influence

B. TOURISM AT WORLD HERITAGE SITES OF PORTUGUESE ORIGIN AND INFLUENCE – SELECTED APPROACHES AND EXPERIENCES
1. Management and Monitoring
   a. Setting the scene: the concept of Outstanding Universal Value
   b. Developing an integrated management approach
   c. Stakeholder involvement
   d. Monitoring
2. INTERPRETATION
   a. From interpretation to stories
   b. Working with an interpretive framework
   c. Interpreting the World Heritage value – transmitting the key messages
3. IDENTIFYING TOURISTIC ATTRACTIONS
   a. Listing and Mapping
   b. Creating Tourism Products

C. MANAGING TOURISM AT WORLD HERITAGE OF PORTUGUESE ORIGIN – LESSONS LEARNED AND FUTURE STEPS
1. Some Lessons Learned
2. Future Steps

GLOSSARY
BIBLIOGRAPHY
ANNEXES
The overarching goal of the *World Heritage Convention* is the protection of cultural and natural properties of Outstanding Universal Value (OUV). These properties are also some of the most well-known tourist destinations in the world. They represent the natural and cultural assets needed for a rapidly expanding tourism industry. In fact with millions of tourists visiting World Heritage sites each year, tourism has become an important cross-cutting issue and a management concern at many World Heritage sites.

If undertaken responsibly, tourism at World Heritage sites can be a vehicle for the preservation and conservation of cultural and natural heritage and a major driver for sustainable development.

Preserving the values and spirit of the place while also providing socio-economic well-being and quality of life to its communities represents both an opportunity and a challenge to these World Heritage properties. It offers the opportunity for enhanced cooperation and dialogue amongst stakeholders from the public and private sectors, cultural institutions and tourism industries to better manage tourism. The challenge is that in some instances the full potential value of the tourism is not being realized by local communities and the sites themselves, and unplanned or mismanaged tourism is having a negative effect.

Turismo de Portugal and the UNESCO World Heritage Centre have risen to this challenge to develop a project that features efficient heritage-sensitive approaches to visitor management at sites of Portuguese origin and influence.

The joint project has demonstrated the importance of broad stakeholder engagement in planning and managing tourism activities that takes a destination perspective. By stakeholders joining forces, World Heritage sites can achieve an added value for heritage conservation and local development. The project has also demonstrated that knowing the strengths and presenting the assets of each site reinforces the site's position in an economy where tourism is increasingly functioning as a creative industry with high-quality visitor experiences. This approach was also shown to make a difference when it comes to developing and marketing heritage sites as a sustainable touristic destination.

Furthermore, by addressing the World Heritage sites' needs and offering capacity-building opportunities, this initiative corresponds to the overall goals of the UNESCO World Heritage Centre's World Heritage and Sustainable Tourism Programme adopted by the World Heritage Committee in 2012.

I therefore thank Turismo de Portugal and the Republic of Portugal for their commitment and support to the safeguarding and sustainable development of World Heritage through sustainable tourism management.

Kishore Rao
Director of the UNESCO World Heritage Centre
PREFACE

Turismo de Portugal is the central organization for promoting Portugal as a travel destination. We aim to communicate the beauty, diversity and vibrancy of the country to people in Portugal and abroad. Our activities include the development of marketing strategies based on specific themes and events and also bringing together and optimizing the diverse activities of partners in the travel industry.

In this capacity, Turismo de Portugal assists destinations development that sustains or enhances the geographical character of the places, defining and assessing policies, as well as providing information and promoting training to support and qualify tourism activities. Our business goals are to increase the volume of tourist traffic and strengthen Portugal’s profile as a business location and position the country as a diverse and attractive travel destination.

Cultural touring is one of the 10 products to be developed and consolidated, as is emphasized by our National Strategic Plan for Tourism. There is clearly a demand for heritage-based tourism. Culture is an increasingly important element of the tourism products, which creates distinctiveness in a crowded global marketplace.

We believe that, with the tourism economy estimated to grow over the next years, investing in our heritage makes sense now more than ever. Heritage as the creative expression of our regions that can boost their attractiveness has become an integral part of our future as a pillar for the tourism industry, for the regional entrepreneurship and the nation’s economy.

With one of the oldest frontiers of Europe and its time of Discoveries, Portugal’s history has left lasting traces in a rich and diversified heritage. Portugal is home to 14 World Heritage sites, some of the greatest legacies of humankind recognized by UNESCO and additional 26 World Heritage sites with Portuguese origin or influence can be found all over four continents.

World Heritage sites are, per excellence, the highlights of a nation’s cultural expression and the main focus for an ever growing cultural tourism. They are major travel generators and marketing icons for the tourism industry and the way to attract visitors to the region’s diverse heritage. While resource constraints may limit our ability to operate at heritage property level, tourism can be a crucial source of income for their conservation and long term preservation. Key in this will be to create good quality experiences for visitors at World Heritage destinations, which are based on products and services that enable better understanding and appreciation of their outstanding universal values and their cultural context.

Yet, developing World Heritage sites into tourist destinations is a long and collective procedure in order to qualify the global experience for visitors and promote heritage destinations in an increasingly competitive market. Skills are required to provide a high level tourism destination and innovative products are necessary to succeed in a highly competitive market. In order to guarantee the sustainability at
these destinations, managers have to find solutions that will preserve and enhance the unique values of the sites while bringing attractiveness to the places as well as greater prosperity to the communities concerned.

On this assumption, Turismo de Portugal partnered with the UNESCO World Heritage Centre for a capacity building project with the aim to qualify Portuguese World Heritage sites and sites of Portuguese origin or influence as tourism destinations by strengthening capacities to use heritage values as a resource for a creative process of sustainable tourism development.

With this project *Tourism Management at World Heritage Sites of Portuguese Origin* (Tour-WHPO) we seek to contribute to a new paradigm, empowering the WHPO Net, sharing common challenges and good practices among professionals and creating a synergetic process of promotion of the best testimonies that in conjunction build our identity and provide a strong basis for our sustainable future - one that cares for the well-being of local communities and their business growth rooted on the uniqueness of their traditions and cultures and on their long-term diversity.

Following the valuable results already shown, it would be desirable that this experience would be shared and utilized by an ever growing number of heritage sites creating networking opportunities for capacity building and collaboration - both to those sites on the national Tentative Lists in order to be better prepared for the opportunities and challenges a potential recognition might bring, and to other heritage assets which are important complements of the World Heritage properties, as they are part of the “soul” of the place and contribute to build richer travel experiences. By building great destinations we are also building great places to live.

*Frederico Costa*

President of Turismo de Portugal
Tourism demand worldwide is increasing and diversifying, especially at cultural destinations, and World Heritage site managers have to address the broad range of impacts as a result – from managing visitation to competing for the visitors’ attention and for economic investment as a touristic destination. Experience at the site level, however, continues to reveal that the mutual understanding of and dialogue between the “tourism world” and the “heritage world” remains a major obstacle in the process of finding solutions and addressing such challenges. Yet, if managers are not adequately prepared to address these issues, the result can be tourism that is socially, culturally and economically disruptive, and have a devastating effect on fragile environments, cultural fabric and local communities.

The stakes are thus high yet so are the goals: Protecting World Heritage sites and their Outstanding Universal Value while ensuring that tourism delivers benefits for the conservation of the properties, sustainable development for local communities, as well as providing a quality experience for visitors. This will require skills to plan and implement efficient actions that reconcile heritage preservation and economic benefits and help mitigate visitation pressures. Daily management of heritage sites around the world illustrates that it is not easy for site management to live up to these high expectations and that there is a continuous need for adequate resources, training and skill development.

Such skills can be acquired through professional capacity-building programmes. But learning can also be received through the exchange of experiences and good practices among World Heritage sites. This conviction has been at the core of the project “Tourism Management at World Heritage Sites of Portuguese Origin and Influence (Tour-WHPO)”. Building upon the “Network of World Heritage Sites of Portuguese Origin and Influence (WHPO)”, founded in 2010 (see also Chapter A.2), and valorizing the importance and support that Turismo de Portugal gives to tourism management at World Heritage sites, this project has aimed to gather managers and other stakeholders from World Heritage sites in Portugal and from World Heritage sites with heritage of Portuguese influence to exchange and learn about concrete steps in sustainably planning visitation at their sites. The format of interactive workshops was considered to be the most conducive framework for learning, questioning and openly discussing the issues at stake.

Portugal hosted two project workshops at their World Heritage sites – the Monastery of the Hieronymites in Lisbon, and the Historic Centre of Évora – and thereby also allowed all participants to see World Heritage from a “meta-touristic” perspective – experiencing the sites while discussing aspects of their presentation, visitation and touristic infrastructure.
Such dual effect is also hoped to be the longer-term outcome for the project participants: Not only to have experimented specific approaches to tourism planning at World Heritage sites, but also to have reinforced the learning result through the personal experience of identifying layers of shared history and heritage beyond geographical borders as members of the WHPO network.

We are confident that the participating sites and all sites involved in the existing Network of World Heritage of Portuguese Origin and Influence (WHPO), while benefiting from this project initiative, will also serve as platforms for disseminating good practices and lessons learned to World Heritage and other cultural heritage destinations.

Margarida Alçada
Turismo de Portugal

Kerstin Manz
UNESCO World Heritage Centre
ACKNOWLEDGEMENTS

This project has only been made possible by a large number of dedicated individuals who have supported the project throughout its preparation and implementation.

We therefore wish to thank in particular:

- National Museums of Kenya: Mr Idle Omar Farah and his team at Fort Jesus, Mr Mbarak Abdallah, Ms Saadu Hashim Rashid and Mr Galgalo Rashid Abdi (Mombasa)
- City of Évora: Mr José Ernesto de Oliveira (Mayor) and Ms Claudia Sousa Pereira (Vereadora), Mr Nuno Domingos and his planning team (Évora)
- Fundação Côa Parque: Mr Fernando Real and Mr Antonio Batarda Fernandes
- Monastery of the Hieronymites and Tower of Belém: Ms Isabel Cruz de Almeida and her team
- National Commission of Portugal for UNESCO: Ambassador Fernando Andresen Guimarães, Ms Manuela Galhardo and Ms Clara Cabral
- ICOMOS Portugal: Ms Ana Paula Amendoeira
- ICCROM: Gamini Wijesuriya and Joseph King
- African World Heritage Fund: Mr Jacob Nyangila and Ms Inge Herbert
- TUI Travel Portugal: Ms Jasmin Lotter
- TOI Secretariat: Ms Maria Cristina Civili
- Turismo de Portugal: Ms Teresa Ferreira, Ms Maria José Coelho, Mr Alberto Marques
- World Heritage Centre: Mr Peter DeBrine, Ms Petya Totcharova, Ms Lise Selle, Ms Ida Federica Pugliese and Mr Carlos Eduardo Serrano Vazquez, Mr Lazare Eloundou and Ms Jana Weydt
- Mr Jon Kohl, UNESCO consultant and workshop facilitator
- Mr Arthur D. Pedersen, former UNESCO tourism specialist

We finally like to thank all participants, who were the protagonists of the two project workshops, for their enthusiasm, professional commitment and valuable contributions.
<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>DMO</td>
<td>Destination Management Organization</td>
</tr>
<tr>
<td>ICCROM</td>
<td>International Centre for the Study of the Preservation and Restoration of Cultural Property</td>
</tr>
<tr>
<td>ICOMOS</td>
<td>International Council on Monuments and Sites</td>
</tr>
<tr>
<td>IUCN</td>
<td>International Union for the Conservation of Nature</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-Governmental Organization</td>
</tr>
<tr>
<td>NMK</td>
<td>National Museums of Kenya</td>
</tr>
<tr>
<td>OUV</td>
<td>Outstanding Universal Value</td>
</tr>
<tr>
<td>PAVC</td>
<td>Parque Arqueológico do Vale do Côa (Côa Valley Archaeological Park)</td>
</tr>
<tr>
<td>PSML</td>
<td>Parques de Sintra-Monte da Lua (public company)</td>
</tr>
<tr>
<td>PUP</td>
<td>Public Use Planning</td>
</tr>
<tr>
<td>ROS</td>
<td>Recreational Opportunity Spectrum</td>
</tr>
<tr>
<td>TO</td>
<td>Tour-Operator</td>
</tr>
<tr>
<td>TOI</td>
<td>Tour Operators’ Initiative for Sustainable Tourism Development</td>
</tr>
<tr>
<td>Tour-WHPO</td>
<td>Tourism Management at World Heritage Sites of Portuguese Origin and Influence</td>
</tr>
<tr>
<td>TP</td>
<td>Turismo de Portugal</td>
</tr>
<tr>
<td>TUI</td>
<td>Touristik Union International</td>
</tr>
<tr>
<td>UNESCO</td>
<td>United Nations’ Educational, Scientific and Cultural Organization</td>
</tr>
<tr>
<td>UNWTO</td>
<td>United Nations’ World Tourism Organization</td>
</tr>
<tr>
<td>WHC</td>
<td>World Heritage Centre</td>
</tr>
<tr>
<td>WHPO</td>
<td>World Heritage Sites of Portuguese Origin and Influence</td>
</tr>
<tr>
<td>WHST</td>
<td>World Heritage and Sustainable Tourism Programme</td>
</tr>
</tbody>
</table>
A. INTRODUCTION TO THE PROJECT CONTEXT

A.1 THE WORLD HERITAGE AND SUSTAINABLE TOURISM PROGRAMME - the framework

For more than a decade, the World Heritage Centre has been engaged in supporting World Heritage sites in their tourism planning and visitor management efforts at the request of the World Heritage Committee. In 2012, the Committee renewed its request to the World Heritage Centre by adopting the (new) World Heritage and Sustainable Tourism Programme of the World Heritage Centre (see Annex 3). The Programme is designed to serve as an international framework for the cooperative and coordinated achievement of shared and sustainable outcomes related to tourism at World Heritage properties. To achieve its objectives, the Programme takes a strategic approach in its implementation by working in partnership with the key stakeholders: national authorities, site managers, the tourism sector, destination management organizations as well as local communities.

**The key concept: a destination approach** - A World Heritage destination is a geographical space in which the entire tourism experience takes place. For World Heritage destinations this encompasses the World Heritage property itself and the surrounding area.

As World Heritage properties are primary drivers of tourism, to realise their full value requires a broader destination approach that reflects local conditions and needs. Efficient collaborative partnerships involving key stakeholders are needed to enhance a destination’s sustainability. The Programme therefore includes ways of guiding destinations in developing in tune with the preservation of heritage values (in particular their Outstanding Universal Value, OUV), allowing to enhance heritage values both within and outside the protected properties and ensuring that the tourism development does not compromise the value and potential contribution of World Heritage to sustainable development in the long term.

Priority support is provided to the development and implementation of tourism development plans that consider the destination as a whole including the heritage values that exist outside the World Heritage property. Key in this will be to create good quality experiences for visitors at World Heritage destinations which are based on sustainable tourism products and services that enable better understanding and appreciation of World Heritage values (OUV) and conservation of the tangible and intangible heritage at the destination. It is essential that any destination planning be preceded by an assessment of the capacity of the World Heritage property in terms of the number and kinds of visitors it can receive, as well as in terms of the related infrastructure it can accommodate.
These complex and ambitious objectives can only be achieved by creating synergies and adding value to existing initiatives so as to potentiate the existing regulatory mechanisms linked to the *World Heritage Convention* as well as the World Heritage Centre existing partnerships with public and private entities and their respective policy-guiding and decision-making instruments.

The new World Heritage and Sustainable Tourism Programme thereby aims to contribute to a new paradigm that is guided by the *World Heritage Convention* and that promotes tourism as a vehicle for ensuring the conservation, presentation and transmission of World Heritage properties with the ultimate goal being sustainable development. Among others, this requires an open dialogue with the tourism sector – both the private businesses and the government administration concerned – and a clear focus on local community development.

### THE WORLD HERITAGE AND SUSTAINABLE TOURISM OBJECTIVES

**Objective A:** Integrate sustainable tourism principles into the mechanisms of the World Heritage Convention.

**Objective B:** Strengthen the enabling environment by advocating policies, strategies, frameworks and tools that support sustainable tourism as an important vehicle for protecting and managing cultural and natural heritage of Outstanding Universal Value.

**Objective C:** Promote broad stakeholder engagement in the planning, development and management of sustainable tourism that follows a destination approach to heritage conservation and focuses on empowering local communities.

**Objective D:** Provide World Heritage stakeholders with the capacity and the tools to manage tourism efficiently, responsibly and sustainably based on the local context and needs.

**Objective E:** Promote quality tourism products and services that encourage responsible behaviour among all stakeholders and foster an understanding and appreciation of the concept of Outstanding Universal Value and protection of World Heritage.

At the local level – as targeted in the context of this Tour-WHPO project – the Programme concretely seeks to (a) promote broad stakeholder engagement in the planning, development and management of sustainable tourism that follows a destination approach to heritage conservation and focuses on empowering local communities, (b) provide World Heritage stakeholders with the capacity and the tools to manage tourism efficiently, responsibly and sustainably based on the local context and needs, and (c) promote quality tourism products and services that encourage responsible behaviour among all stakeholders and foster an understanding and appreciation of the concept of Outstanding Universal Value and protection of World Heritage.

Since it is understood that capacity-building is the key instrument to achieve the above-mentioned objectives at the local level, the Tour-WHPO project has sought to contribute its part to identifying needs at the site level, supporting an exchange platform, and informing about tools and approaches sustainable tourism management.
A.2 WORLD HERITAGE OF PORTUGUESE ORIGIN AND INFLUENCE – the network initiative

The idea of fostering cooperation among Portuguese World Heritage sites and World Heritage sites that have experienced Portuguese influences over time emerged based on a joint initiative by the University of Coimbra (Portugal), ICOMOS Portugal and Portuguese national authorities related to Culture, in particular the National Commission of Portugal for UNESCO and IGESPAR. In 2006, a first international meeting of this initiative, called “World Heritage of Portuguese Origin and Influence” (abbreviated as WHPO), was hosted by the University of Coimbra.

Deliberately of academic and scientific nature, the initiative prompted a pioneering process in the history of Portuguese cultural cooperation. The originality of this initiative lies on the fact that, for the first time, efforts have been made to join World Heritage properties with cultural heritage of Portuguese influence to discuss effective methods of cooperation related to the conservation and management of World Heritage properties and of those sites on the participating States Parties’ Tentative Lists.

The broad participation and positive feedback at the first meeting reflected the interest of this cooperation initiative and led to the formal creation of the so-called WHPO Network during the second international meeting in 2010, where also other partner institutions such as Turismo de Portugal joined.

The World Heritage Sites of Portuguese Origin and Influence Network was created in the spirit of exchange and mutual support, which is well reflected in the Declaration of Coimbra of 2010 that also set out the main goals of this initiative.

Ana Paula Amendoeira

EXTRACT OF THE DECLARATION OF COIMBRA

[...] We know about the conflictual dimension of the history that we share and the heritage that we want to know, to conserve, to use and to live. We know, like the poet Fernando Pessoa told us, that “the civilization consists of giving something a name that is not appropriate, and then to dream about the result. And, in fact, the false name and the true dream create a new reality. The object really becomes another, because we turn it into another. We manufacture realities.”
“The sea was yesterday what the heritage can be today, all we have to do is to defeat some Adamastores” (Mia Couto), no longer the ones from the writer Luís de Camões, but the ones from the obstacles created throughout history, in these vast and different territories, so complex and so common, and whose consequences led in part to our unequal world. We want to beat them with knowledge and culture. To know, to research, to study more and more and in network, and to cooperate, putting at everyone’s disposal all we were able to obtain in order to manage, safeguard and protect our amazing, and sometimes brilliant shared heritage and everything that we will build for a culture of quality and hope in our territories, from the values of freedom, peace and knowledge: “no people is grand for having only luxuries to tell, but for the freedoms that it was able to live and for the love that it has to give”. This teaching by the writer from Timor, Fernando Silvan, shows us how the youngest country in the world, Timor Loro Sae, can teach us lessons on fundamental values.

We also and always acknowledge the importance and the presentness of the historical and visionary words by great leaders of the African continent, such as Léopold Senghor, who have never given up stating that “culture is the beginning and the end of development” and they are a pillar for the future of this Network project, whose formation the University of Coimbra is honoured to welcome today in its founding act.

Among the exercises that were carried out within the framework of this Tour-WHPO project, one aimed at establishing an interpretive framework that could serve as common denominator of the WHPO Network. During the first workshop, the shared history of exchanges and common features of the sites served as a baseline for group work on identifying major events, products and personalities linked to each World Heritage site’s position in the WHPO Network and its relation to Portuguese influence. Participants elaborated on the theme of the interaction of and with the Portuguese people over centuries and the exchange it has brought about in terms of tangible and intangible heritage.
By drawing attention to the importance of exchange and the values of mutually shared heritage in the territories, another layer of each World Heritage site’s history was intended to be revealed and thereby added to the messages and interpretation of each site. While the tangible influence of Portuguese culture in World Heritage sites outside of Portugal is often referred to when describing the sites’ values, World Heritage sites in Portugal do not necessarily relate their history to the linkages with other territories or continents. Beyond the well-known history of the discoverers, the lesser known stories of influences experienced by Portugal through the imported goods, habits and know-how are yet to be elaborated in more detail. This theme will also allow making a concrete connection to intangible heritage values, including food produce.

“The Project is a tool to spread the cultural diversity of different countries of the world. And at once a tribute to the Portuguese who brought their culture to those areas. Is a permanent dialogue in time and space. It is a way to get together the Portuguese culture that had been spread across all continents since the beginning of the voyages of discovery.”

Statement by Nelsys Fusco-Zambetogliris, Colonia de Sacramento (Uruguay)
A.3 INTRODUCTION TO THE PROJECT EXPERIENCES

Managing tourism at a World Heritage site on a day-to-day basis is not always straightforward. Striking the right balance between quality of life of the inhabitants and quality experience of the visitors, while ensuring – above all – that the heritage values are being maintained, can be a challenge.

Keeping in mind the wide spectrum of World Heritage sites, it can be difficult to provide specific guidance on tourism planning. Each World Heritage property is unique in its character, in the kind of attractions it offers and in its specific management challenges. Even the visitors are different.

As a first step, it is important to understand that visitation requirements and tourism strategies need to be an integral part of the overall management cycle of a World Heritage site. This not only ensures the compatibility of conservation objectives and tourism development goals but also creates synergies between these two and enhances the potential of their respective benefits for the local communities.

To address some of the challenges, this project built upon existing resource materials for World Heritage and public use planning, and, by doing so, also aimed at testing the effectiveness of these resource materials for a broad typology of World Heritage sites, particularly those located in an urban context.

Key reference documents including the “Practical Manual for World Heritage Site Managers on Managing Tourism at World Heritage Sites”, published by UNESCO in 2002 in the series of the World Heritage Papers, as well as resource manuals...
published by the Advisory Bodies, such as the UNESCO-IUCN Resource Manual on Managing Natural World Heritage Properties, guided the two project workshops held in Portugal.

Particular attention was given to the Public Use Planning Manual by Jon Kohl. Public use planning is one of several ways of conceiving participatory planning and management. The concept has emerged from experiences at natural protected areas and has been updated over the recent years of its application at selected World Heritage sites and other protected areas around the world. Taking a broad approach to tourism site planning while also providing hands-on exercises, the manual introduced the participants to techniques for facilitating meetings and engaging stakeholders, creating an interpretive framework, identifying the sites’ attractions and mapping their potential to provide quality experiences for visitors, and eventually defining touristic products.

PUBLIC USE PLANNING IN THE WORLD HERITAGE CONTEXT

Public use planning is understood as a participatory planning approach for any “touristic, educational, interpretive, recreational, and investigative uses by visitors who participate in activities that do not extract (except for sport and research) or introduce resources into a natural or cultural heritage area” at site level. (PUP Manual)

Over the last years, this approach proposed by the Public Use Planning Manual had been applied and experimented in a number of World Heritage properties around the world. While first experiences were gathered in natural World Heritage sites, more recent planning work was also carried out at cultural World Heritage sites, such as Hoi-An in Vietnam (see article in WH Review 58). Its goal is to serve as a training-of-the-trainers guidance. The manual’s structure by separate training modules was considered an adequate guidance to familiarize the project participants with key aspects of participatory tourism planning in a step-wise fashion.

PROJECT METHODOLOGY

The project was structured in two distinct activities: Two training workshops were held in Portugal. The first workshop in December 2011 (Monastery of the Hieronymites, Lisbon) and the second in April 2012 (Évora) allowed broad participation by representatives from WHPO sites (see List of Participating WHPO Sites in Chapter A.3.b. and List of Workshop Participants in Annex 2). The participants from Africa, Asia, Europe and Latin America contributed their views and experiences while learning about and testing:

• how to facilitate stakeholder involvement,
• how to develop their sites’ messages for different types of audiences,
• what can be an attraction at their sites, and
• what kind of experiences their sites could offer to visitors.
Following the first introductory workshop, additional field work was carried out at three World Heritage sites – the Historic Centre of Évora (Portugal), the Portuguese component of the Prehistoric Rock Art Sites of Côa Valley and Siega Verde (Portugal/Spain) and Fort Jesus, Mombasa (Kenya). This revealed the need to engage in more in-depth testing of the public use planning approach at different types of sites and led to concrete steps taken in the planning process at the individual sites. Throughout this process, the participating sites were offered assistance and guidance by the project consultant and the author of the planning manual.

ABOUT THIS PUBLICATION

This publication provides “snapshots” of the various practical approaches and experiences that were found to be most important for the World Heritage sites within the Tour-WHPO project as heritage tourist destinations. The goal has been to showcase the achievements and rich experiences of each of the participating World Heritage sites. We further sought to situate the experiences and findings in the larger framework of UNESCO World Heritage and Sustainable Tourism Programme and World Heritage Capacity Building Strategy and to give inspiration to expand on this work in the context of becoming good practice examples and contributing to the current body of knowledge on sustainable tourism management at heritage sites. Experience has shown that some concepts and techniques are not easily adaptable to any cultural and institutional context but can be valuable in complementing policy guidelines and planning regulations.
The following central part of this publication first gives an overview of management and monitoring issues that should be considered when planning tourism in and around a World Heritage property, placing the approach of public use planning in the framework of World Heritage and its core principles and referring to the key documents and other tourism-related resources. It also situates the project experiences at the site level within the World Heritage context.

In a next step the sites’ project activities in interpretation, identification of attractions and development of touristic products are being presented, each according to three steps: the World Heritage context, the Public Use Planning approach and selected experiences from Case Studies.
A.3.a. Brief Presentations of the Project Pilot Sites

As explained above, three of the participating World Heritage properties decided to apply the tourism planning approach at the site-level. Each of these pilot sites represents a different type of site and thereby ensured a diversified basis for the testing of the approach. The experiences of the following World Heritage properties therefore form the core of the body of case studies.

FORT JESUS, MOMBASA (KENYA)

The Fort, built by the Portuguese in 1593-1596 to the designs of Giovanni Battista Cairati to protect the port of Mombasa, is one of the most outstanding and well preserved examples of 16th Portuguese military fortification and a landmark in the history of this type of construction. The Fort’s layout and form reflected the Renaissance ideal that perfect proportions and geometric harmony are to be found in the human body. The property covers an area of 2.36 hectares and includes the fort’s moat and immediate surroundings.

Fort Jesus, Mombasa, was inscribed on the World Heritage List in 2011 and is thus a young member of the “World Heritage family” with a recent experience in preparing a comprehensive nomination dossier and complying with the requirement of a World Heritage management plan. Along with its inscription, the property has a Statement of Outstanding Universal Value in place that forms the baseline for its management.

This property is a single monument and is managed by the local branch of the national public institution of National Museums of Kenya (NMK).
HISTORIC CENTRE OF ÉVORA (PORTUGAL)

This museum-city, whose roots go back to Roman times, reached its golden age in the 15th century, when it became the residence of the Portuguese kings. Its unique quality stems from the whitewashed houses decorated with azulejos and wrought-iron balconies dating from the 16th to the 18th century. Its monuments had a profound influence on Portuguese architecture in Brazil.

The Historic Centre of Evora was inscribed in 1986 and has since then accumulated substantial experience with managing the centre as a World Heritage site. It is a complex urban site that faces multiple challenges due to its various functions and users. The property is in the process of presenting its retrospective Statement of Outstanding Universal Value, which shall become the main reference for its conservation and management decision. With a relatively low number of tourists, the city authorities felt that the proposed tourism planning approach of the project can be of additional benefit to the overall management that is implemented by the Municipality.

PHOTO 6
The World Heritage property of Historic Centre of Évora (Portugal) inscribed in 1986. © UNESCO, Thérin-Weibe

PREHISTORIC ROCK ART SITES IN THE CôA VALLEY AND SIEGA VERDE (PORTUGAL/SPAIN)

The two Prehistoric Rock Art Sites in the Côa Valley (Portugal) and Siega Verde (Spain) are located on the banks of the rivers Agueda and Côa, tributaries of the river Douro, documenting almost continuous human occupation from the end of the Paleolithic Age. Hundreds of panels with thousands of animal figures (5,000 in Foz Côa and around 440 in Siega Verde) were carved over several millennia, representing the
most remarkable open-air ensemble of Paleolithic art on the Iberian Peninsula. Côa Valley and Siega Verde provide the best illustration of the iconographic themes and organization of Paleolithic rock art, using the same modes of expression in caves and in the open air, thus contributing to a greater understanding of this artistic phenomenon. Together they form a unique site of the prehistoric era, rich in material evidence of Upper Paleolithic occupation.

Côa Valley has been inscribed on the World Heritage List since 1998 and recently became a serial transnational property with the Spanish component of Siega Verde (extension in 2010). The project activities were only carried out by the Portuguese component of this archaeological site, Côa Valley, which corresponds to the figure of an archaeological park, managed by the public entity of the Foundation Côa Park. The site is located in a remote area, which does not facilitate easy access and visitation in particular by international visitors.

“The number of foreign visitors to the (Archaeological) Park has always been low. Hence, the main reason for the Park to participate in the Tour-WHPO project and become a pilot site was raising the international profile of the Park and the rock-art it manages.”

Antonio Batarda (PAVC, Côa Valley)
A.3.b. Brief Descriptions of the Participating World Heritage Sites of Portuguese Origin and Influence

Representatives from the following World Heritage sites participated in the project’s activities. The brief descriptions below correspond to the texts included on the World Heritage Centre’s website. Please note that the list of participants as well as the complete list of all World Heritage sites of Portuguese origin and influence can be found in Annexes 1 and 2.

HISTORIC TOWN OF OURO PRETO (BRAZIL)

Founded at the end of the 17th century, Ouro Preto (Black Gold) was the focal point of the gold rush and Brazil’s golden age in the 18th century. With the exhaustion of the gold mines in the 19th century, the city’s influence declined but many churches, bridges and fountains remain as a testimony to its past prosperity and the exceptional talent of the Baroque sculptor Aleijadinho.
CIDADE VELHA, HISTORIC CENTRE OF RIBEIRA GRANDE (CAPE VERDE)

The town of Ribeira Grande, renamed Cidade Velha in the late 18th century, was the first European colonial outpost in the tropics. Located in the south of the island of Santiago, the town features some of the original street layout impressive remains including two churches, a royal fortress and Pillory Square with its ornate 16th century marble pillar.

PHOTO 10

The World Heritage site of “Cidade Velha, Historic Centre of Ribeira Grande” (Cape Verde) inscribed in 2009 © CRAterre / UNESCO
FORTS AND CASTLES, VOLTA, GREATER ACCRA, CENTRAL AND WESTERN REGIONS (GHANA)

The remains of fortified trading-posts, erected between 1482 and 1786, can still be seen along the coast of Ghana between Keta and Beyin. They were links in the trade routes established by the Portuguese in many areas of the world during their era of great maritime exploration.
CHURCHES AND CONVENTS OF GOA (INDIA)

The churches and convents of Goa, the former capital of the Portuguese Indies – particularly the Church of Bom Jesus, which contains the tomb of St Francis-Xavier – illustrate the evangelization of Asia. These monuments were influential in spreading forms of Manueline, Mannerist and Baroque art in all the countries of Asia where missions were established.
CENTRAL ZONE OF THE TOWN OF ANGRA DO HEROISMO IN THE AZORES (PORTUGAL)

Situated on one of the islands in the Azores archipelago, this was an obligatory port of call from the 15th century until the advent of the steamship in the 19th century. The 400-year-old San Sebastião and San João Baptista fortifications are unique examples of military architecture. Damaged by an earthquake in 1980, Angra is being restored since then.

PHOTO 13
The World Heritage site of "Central Zone of the Town of Angra do Heroísmo in the Azores" (Portugal) inscribed in 1983
© Turismo de Portugal
**CONVENT OF CHRIST IN TOMAR (PORTUGAL)**

Originally designed as a monument symbolizing the Reconquest, the Convent of the Knights Templar of Tomar (transferred in 1344 to the Knights of the Order of Christ) came to symbolize just the opposite during the Manueine period – the opening up of Portugal to other civilizations.
**MONASTERY OF BATALHA (PORTUGAL)**

The Monastery of the Dominicans of Batalha was built to commemorate the victory of the Portuguese over the Castilians at the battle of Aljubarrota in 1385. It was to be the Portuguese monarchy's main building project for the next two centuries. Here a highly original, national Gothic style evolved, profoundly influenced by Manueline art, as demonstrated by its masterpiece, the Royal Cloister.

*PHOTO 15*

The World Heritage site of “Monastery of Batalha” (Portugal) inscribed in 1983
© Turismo de Portugal
MONASTERY OF THE HIERONYMITES AND TOWER OF BELÉM IN LISBON (PORTUGAL)

Standing at the entrance to Lisbon harbour, the Monastery of the Hieronymites – construction of which began in 1502 – exemplifies Portuguese art at its best. The nearby Tower of Belém, built to commemorate Vasco da Gama’s expedition, is a reminder of the great maritime discoveries that laid the foundations of the modern world.
MONASTERY OF ALCOBÂÇA (PORTUGAL)

The Monastery of Santa Maria d'Alcobaça, north of Lisbon, was founded in the 12th century by King Alfonso I. Its size, the purity of its architectural style, the beauty of the materials and the care with which it was built make this a masterpiece of Cistercian Gothic art.
CULTURAL LANDSCAPE OF SINTRA (PORTUGAL)

In the 19th century Sintra became the first centre of European Romantic architecture. Ferdinand II turned a ruined monastery into a castle where this new sensitivity was displayed in the use of Gothic, Egyptian, Moorish and Renaissance elements and in the creation of a park blending local and exotic species of trees. Other fine dwellings, built along the same lines in the surrounding serra, created a unique combination of parks and gardens which influenced the development of landscape architecture throughout Europe.
HISTORIC CENTRE OF OPORTO (PORTUGAL)

The city of Oporto, built along the hillsides overlooking the mouth of the Douro river, is an outstanding urban landscape with a 2,000-year history. Its continuous growth, linked to the sea (the Romans gave it the name Portus, or port), can be seen in the many and varied monuments, from the cathedral with its Romanesque choir, to the neoclassical Stock Exchange and the typically Portuguese Manueline-style Church of Santa Clara.
ALTO DOURO WINE REGION (PORTUGAL)
Wine has been produced by traditional landholders in the Alto Douro region for some 2,000 years. Since the 18th century, its main product, port wine, has been world famous for its quality. This long tradition of viticulture has produced a cultural landscape of outstanding beauty that reflects its technological, social and economic evolution.
HISTORIC CENTRE OF GUIMARÃES (PORTUGAL)

The historic town of Guimarães is associated with the emergence of the Portuguese national identity in the 12th century. An exceptionally well-preserved and authentic example of the evolution of a medieval settlement into a modern town, its rich building typology exemplifies the specific development of Portuguese architecture from the 15th to 19th century through the consistent use of traditional building materials and techniques.
LANDSCAPE OF THE PICO ISLAND VINEYARD CULTURE (PORTUGAL)

The 987-ha site on the volcanic island of Pico, the second largest in the Azores archipelago, consists of a remarkable pattern of spaced-out, long linear walls running inland from, and parallel to, the rocky shore. The walls were built to protect the thousands of small, contiguous, rectangular plots (currais) from wind and seawater. Evidence of this viniculture, whose origins date back to the 15th century, is manifest in the extraordinary assembly of the fields, in houses and early 19th-century manor houses, in wine-cellars, churches and ports. The extraordinarily beautiful man-made landscape of the site is the best remaining area of a once much more widespread practice.
TOUR-WHPO Project Publication

A. Introduction to the Project Context

Island of Gorée (Senegal)

The island of Gorée lies off the coast of Senegal, opposite Dakar. From the 15th to the 19th century, it was the largest slave-trading centre on the African coast. Ruled in succession by the Portuguese, Dutch, English and French, its architecture is characterized by the contrast between the grim slave-quarters and the elegant houses of the slave traders. Today it continues to serve as a reminder of human exploitation and as a sanctuary for reconciliation.

PHOTO 23
The World Heritage site of “Island of Gorée” (Senegal) inscribed in 1978 © Our Place – The World Heritage Collection/UNESCO

Ruins of Kilwa Kisiwani and Ruins of Songo Mnara (Tanzania)

The remains of two great East African ports admired by early European explorers are situated on two small islands near the coast. From the 13th to the 16th century, the merchants of Kilwa dealt in gold, silver, pearls, perfumes, Arabian crockery, Persian earthenware and Chinese porcelain; much of the trade in the Indian Ocean thus passed through their hands.

PHOTO 24
The World Heritage site of “Ruins of Kilwa Kisiwani and Ruins of Songo Mnara” (Tanzania) inscribed in 1981 © UNESCO
HISTORIC QUARTER OF THE CITY OF COLONIA DEL SACRAMENTO (URUGUAY)

Founded by the Portuguese in 1680 on the Río de la Plata, the city was of strategic importance in resisting the Spanish. After being disputed for a century, it was finally lost by its founders. The well-preserved urban landscape illustrates the successful fusion of the Portuguese, Spanish and post-colonial styles.

In addition to site representatives from the above-mentioned World Heritage sites, participants also included representatives from the Regional Directorate of Culture of Algarve and the African World Heritage Fund (AWHF).
B. TOURISM AT WORLD HERITAGE SITES OF PORTUGUESE ORIGIN AND INFLUENCE – selected approaches and experiences

B.1 MANAGEMENT AND MONITORING

“La propuesta de Turismo para el Plan consiste en un proyecto de difusión territorial y recualificación turística, a través de mecanismos de coordinación y metodologías de participación comunitaria. Se parte de la sociedad, desde su trama y espesor, para (re)valorizar su(s) cultura(s) y condicionar el turismo para evitar que él nos condicione a nosotros. [...] El impacto esperado es el aumento de la calidad y competitividad del destino a través de la (re)valorización del Patrimonio y del espacio turístico, en el marco de la sostenibilidad y de la rentabilidad socioeconómica con énfasis en el desarrollo local.”


PHOTO 26
Aerial view of the historic core of the City of Colonia del Sacramento surrounded by the Rio de la Plata (Uruguay). © José del Cerro
B.1.a. Setting the Scene: The concept of World Heritage Outstanding Universal Value

The concept of ‘Outstanding Universal Value’ underpins the World Heritage Convention. It is the touchstone for all inscribed properties. The basic purpose of nominations is to explain what a property consists of, why it demonstrates potential Outstanding Universal Value, and how this value will be sustained, protected, conserved, managed, monitored and communicated. All policies, objectives and actions must prioritize and take into account the values, which have justified the property’s inscription on the World Heritage List.

**Outstanding Universal Value** stands on three pillars: 1) the criteria for its inscription, 2) its condition – the notions of authenticity and integrity and 3) the conservation and management. The criteria tells “why” the property has been inscribed, the justification of its global importance.

**Authenticity** (for cultural properties only) stands for that the value is truthfully and credibly expressed through attributes (key elements) such as form, design, materials, function, traditions, setting, language and – not to forget – the spirit.

Both natural and cultural heritage properties must also meet the condition of **integrity**, which refers to wholeness of the site. For example, is it large enough to include all necessary key features? Is it robust enough to face the changes over time and is it in a good state?

Maintaining the Outstanding Universal Value of the site is the goal for all conservation and development measures of the site as well as the basis for its presentation and promotion. A shared understanding – by all involved – about the values and about the responsibilities required by signing the World Heritage Convention is therefore essential to decision-making about all interventions regarding the site. In World Heritage sites, policies and objectives must be in line with the Outstanding Universal Value as it was defined when the site was inscribed.

The Tour-WHPO pilot sites found that it is sometimes necessary to go back to the nomination dossier for guidance about the World Heritage value. It became clear that those sites which were inscribed a long time ago might need specific attention in comparison with those who have recently worked with the nomination dossier for the site and followed the whole nomination and evaluation process.
B.1.b. Developing an integrated management approach

**APPROACH**

World Heritage sites have always attracted visitors. Tourism is part of the growing complexity of management challenges, and is now recognized as having cultural, ecological, socio-economic and political dimensions (World Heritage Paper 31). Inadequately managed tourism can have severe consequences compromising the (World Heritage) value of the sites, depriving the local communities of benefits and potentially degrading the destination itself. Sustainable tourism development requires therefore a proactive management approach respecting the capacity of the property to accept visitation without degrading or threatening heritage values.

A World Heritage property should already have a management system in place. In many sites, a separate tourism management plan or strategy is prepared, often with outside experts. In order for it to be effective - to be understood and implemented - the tourism strategy should be integrated with the general property management plan.

A heritage management plan is an agreement, a ‘public contract’ between the management organization and the community and all stakeholders of the property. It is also a tool for clarifying responsibilities and roles in the implementation process and establishes a framework for decision-making. The management must balance conservation and community interest to ensure a sustainable development of the place.

An effective management plan must give clear directions and guidance, and therefore it should be one document, which addresses the key management challenges including tourism and integrates the different contributions from stakeholders and interest groups. For its effective implementation it is essential that the management plan objectives and actions are integrated in the current planning processes in the area, whether they are territorial or urban plans, socio-economic or environmental plans. This approach, also called values - based management requires the early involvement of all stakeholders.
A key part of the Management Plan is the Action Plan. Its function is to give an overview about concrete actions, which implement the specific objectives of the Management Plan. These plans or projects can be in different phases; to be financed or already ongoing. It is important that actions or projects are feasible and shared by all stakeholders involved. If they are not updated and realistic, they will only be a ‘wish-list’ instead of a strategic tool.

**THINK ABOUT**

**A MANAGEMENT PLAN IS NOT**
- a tourism management plan
- business plan
- urban conservation plan
- monument restoration plan
- nature conservation plan

**BUT it coordinates, sets priorities and provides a tool for decision-making.**

**EXPERIENCES FROM PUBLIC USE PLANNING WORK**

Tour-WHPO project pilot sites confirm the need to have a shared understanding of the meaning and value of the property, as management objectives must be clearly and understandably linked to the values of the site. The stepping stone for successful heritage management is to take into account the expectations and needs of the local community and to develop a benefit sharing mechanism. Keeping in mind that benefits are not only valued in economic terms! The Public Use Planning guidance used during the Tour-WHPO project stresses the importance of an updated plan – even monthly – and the need for capacity building so that the stakeholders can implement the plan without outside support.
The site management entity of Cultural Landscape of Sintra, Parques de Sintra-Monte da Lua (PSML), represents one of the more recent management structure created in Portugal. It is set up as a public company, governed through a board of public institutions shareholders, while financially functioning according to private market rules in the sense that it does not receive public subsidies but solely depends on revenues from visitation and additionally gained project grants from private and public entities (e.g. EEA grants). PSML’s business model is therefore focused on ensuring financial stability and economic sustainability in order to carry out its primary role as conservation manager of the World Heritage property.

It is crucial to ensure the funding for the daily management on site. Tourism can play an important role of in site management provided that priority remains with conservation of the site, rather than increased visitor number. The structure must also be flexible enough to handle its budget on its own.
**B.1.c. Stakeholder involvement**

Atendiendo el espíritu que lidera el proceso de elaboración del Plan de Gestión del sitio Patrimonio Mundial “nunca se debe olvidar que el patrimonio es un barrio, sus casas y calles, un paisaje, un subsuelo que guarda trazas arqueológicas, donde hay autoridades para su gobierno y especialistas para su investigación, pero donde lo esencial es su significado para la sociedad y el aprecio que ésta siente por “su” patrimonio”. Es en este sentido que se convocaron a decenas de instituciones públicas y privadas durante la elaboración del plan para que volcaran sus ideas.”


Tourism management brings in a wide range of stakeholders and expertise. They all may have different perspectives on future development of the site, many opinions and expected actions. Learning about each other’s expectations, views on the benefits and potentials that tourism can bring is the base for a collaborative management. Without this competing agendas may lead to unnecessary and lengthy conflicts of interest and priorities.

**EXPERIENCES FROM THE PUBLIC USE PLANNING WORK**

The first step of the public use planning suggests how to form a core planning team, carry out an organizational analysis, research the planning framework (that is, all the policies and expressions of will that affect and give direction to the strategic planning), initial interviews with stakeholders, logistical preparations, and among others, the terms of reference designed to forge agreements about how to conduct the planning process.

It was emphasized that these activities, and particularly the terms of reference, require the heritage site to transparently negotiate its intentions with other stakeholders. While aiming to provide additional techniques and create opportunities to power share and jointly make decisions, the success of any external guidance essentially depends on whether or not the site is willing and able to apply the suggested techniques.

Jon Kohl
WORLD HERITAGE CONTEXT

The World Heritage Sustainable Tourism Programme has identified a range of stakeholder groups in World Heritage and sustainable tourism and their potential roles. Among them are actors who are not always included in World Heritage management, as the tourism private sector and so called Destination Management Organisations, who typically undertake marketing activities.
An informed appreciation of the site’s Outstanding Universal Value and the implications of potential adverse impacts through tourism on heritage values are essential to decision-making by a broad range of tourism stakeholders including:

a) States Parties wishing to establish and implement policies and strategies to realise development objectives and long-term benefits for local and other communities;
b) The tourism industry wanting to realise long-term commercial profits;
c) Visitors seeking full appreciation of the World Heritage, guidance to appropriate behaviour, and a potential incentive to contribute towards their maintenance and protection;
d) Local communities seeking improved quality of life while maintaining the integrity of and access to their natural and cultural heritage representing their history and identity.

World Heritage Sustainable Tourism Programme (UNESCO 2012)

However, “participatory approach” does not only mean including a greater number of stakeholders, but also emphasizing the visitor perspective. The means of communication and information sharing should be established at the start of any consultative process and should have agreed goals and objectives - and allow enough time.

There are different degrees of participation and interests in power-sharing.

Tourism activities do lead to socio-economic changes over time. While general guidance on planning can be difficult to give because of different social, economic and political realities of places, working together with the community has proven to be a way of re-defining and strengthening the sense of community identity.

Restoring a site’s vitality and spirit is a complicated operation that cannot be obtained by means of monetary investment (as is the case with physical restoration of heritage). Rather, it tends to involve social issues that affect local communities, which often have had no control over the situation in which they find themselves. It is important to bear in mind that any solution that attempts to replace the true protagonists of the site runs the risk of ending up like a theme park.

Viñals and Morant; in: UNESCO (2012a)
There are different ways one can identify interested people, for example asking the following questions:

- Who knows about local natural and cultural heritage?
- Who owns heritage places in the local area?
- Who has custodial, caretaker or legal responsibility for local heritage places?
- Who has worked at or earned a living from local heritage places?
- Who is interested in using local heritage places, now or in the future?
- Who is interested in protecting or conserving local heritage places?
- Who is interested in your goals? Who would support action towards reaching your goals?
- Who will the achievement of your goals affect, either positively or negatively?
- Who has had similar goals to yours in the past?
- Who needs to be kept informed about progress towards reaching your goals?

PHOTO 29
In many World Heritage sites school classes are a large and crucial visitor group because of their regular visits and the pedagogical programming linked to the site. The higher the percentage of schools in the overall visitation is, the more important is it to consider their needs and interests when planning the use of World Heritage sites. © Jon Kohl

EXPERIENCES:

EXPERIENCES FROM ÉVORA – HOW TO CREATE A STAKEHOLDER AGREEMENT

The World Heritage property of Évora had been working on the revision of its World Heritage Management Plan targeting a finalization date of 2012. The Tour-WHPO project was therefore seen as an additional timely opportunity to enhance the overall management planning document with a tourism component. Engaging in the project as a pilot site, Évora constituted an ideal example of a complex urban World Heritage property. Following the first Tour-WHPO training workshop, the city of Évora set up a core planning team with five staff members from different municipal departments. Political and institutional support by the Mayor and the Cultural City Delegate (Vereadora) as well as the personal commitment of the head of the planning team were crucial preconditions for carrying out the tourism planning activities.

Be aware that participation is an ongoing process – not a one-time exercise. Allow enough time!
Following first coordination steps, the team started to identify and involve key stakeholders in the planning process. A substantial number and large diversity of stakeholder groups were invited to engage in the planning process and underlined the validity of the proposed participatory approach, which allowed gathering a large range of stakeholders in the city for the first time. The following entities pledged to sign an agreement that determines the terms of reference of this planning commitment in November 2012.

- Municipality of Évora
- Regional Directorate for Culture of Alentejo
- University of Évora
- Foundation Eugénio de Almeida
- Arch-Diocese of Évora
- Regional Tourism Board of Alentejo
- Association of Salespeople
- Association of Hotel Directors
- Association of Guides and Interpreters (AGIA)
- Association of Hotels, Restaurants and Similar Businesses of Portugal (AHRESP)
- Association of Companies (APECATE)
- Coleção B
- CENDREV
- Pé de Xumbo
- Eborae Mvsica
- Association “Do Imaginário”

(see complete document in Annex 9.a.)
LENSONS LEARNED

While full stakeholder participation in and regularity of meetings have been a challenge from the beginning, the positive experience of the city of Évora has shown that complex urban sites can succeed in mobilizing local communities and stakeholder groups through persistent dialogue. The group that formed can be seen as an advisory group of stakeholders as it is recommended for all World Heritage properties.

Another effect of the city’s engagement can be seen in the capacity-building of the core planning team: The head of the planning team familiarized quickly with facilitation skills for a participatory process to such an extent that he already applied it successfully in several other meetings and occasions.

PHOTO 31
The support of the participatory planning by the local decision-makers is a key ingredient for the success of the activities – Mayor José Ernesto de Oliveira with the head of the planning team Mr Nuno Domingos during the Tour-WHPO workshop in Évora. © Jon Kohl
EXPERIENCES: EXPERIENCES FROM FORT JESUS, MOMBASA – SHARING NEW PERSPECTIVES

Following the first Tour-WHPO workshop, the three professionals from Fort Jesus, Mombasa, involved in the project set out to convince their institution, NMK, to engage in the tourism planning activities and to form a core planning team. The team was completed and a first external stakeholder meeting held could be reported on during the second workshop of the Tour-WHPO project in Évora. The invitation to meet was well attended and widely appreciated by external stakeholders. The site being managed by the local branch of a central State institution (NMK), the first stakeholder meeting also provided an opportunity to (re)define the site’s relationship with its neighboring communities. This tourism-focused planning exercise furthermore allowed this recently inscribed World Heritage site to apply and elaborate its revised World Heritage management plan through continuous dialogue with the local communities. Based on its first planning experience, Fort Jesus produced a first stakeholder agreement (see Annex 9.b)

LESSONS LEARNED

This experience of working with Public Use Planning has made us revisit the issue of stakeholders, i.e. it has helped us to rethink, identify and work with our stakeholders hand in hand (...)

Statement by the Fort Jesus Planning Team

PHOTO 32
The core planning team of Fort Jesus, Mombasa, during one of the information and consultation meetings with local stakeholders. © Jon Kohl
EXPERIENCES:

EXPERIENCES FROM CÔA VALLEY – INVOLVING THE LOCAL COMMUNITY AS AN ACTIVE PARTNER IN SITE MANAGEMENT

Having started with a rather problematic relationship between the local communities and the site management due to the creation of the Archaeological Park in 1996, the Côa Valley team reported in 2008 that the greater part of the local community now sees the Park as an invaluable partner in achieving a common goal: that of developing, in a sustainable fashion, regional tourism overall, with the rock art sites as the main attraction. This was achieved through a number of activities such as “special free of charge visits for the local population have been conducted. The PAVC organized the open days through local interest groups: one open day was only for restaurant owners/managers, another was focused on tourist accommodation owners, another for wine producers, etc. Many of these activities were enhanced by visits to wine producing farms.” Furthermore, “on the Park’s important anniversaries (such as its creation, or the inscription on the World Heritage List), special commemoration programmes are organized in order to foster the interaction of visitors and local residents. Such programmes include concerts, exhibitions, talks, wine and local food tasting, and experimental interpretations of Upper Palaeolithic meals.”

LESSONS LEARNED

Among the lessons learned, the site management team concluded that “it is not possible for the Park to exist in isolation from its socio-economic context: in the long term, a sustainable future for the rock art will depend, to a great extent, on the success of the Park’s efforts in reaching the local community. The goal is to make the local population an active partner in the management, preservation and conservation of the Côa Valley heritage as a whole, and a key player in regional sustainable development.” “Workshops, in which several local and regional stakeholders participated, also helped to further strengthen the already profitable connection between the Park and the community.”

Batarda et al. (PAVC, Côa Valley)
B.1.d. Monitoring

**APPROACH**

Monitoring can demonstrate if the management is achieving its goals - or if changes need to be made. It gives information and is an indication about the current situation of the property, its state of conservation and its likely future. Moreover, monitoring results are useful as arguments to convince stakeholders about the success of the management, or about changes, which must be done. A basic knowledge of the range of impacts can also aid planning and generate a useful checklist for developing tourism monitoring indicators, essential for determining whether management objectives are being met (World Heritage Paper 1).

Awareness of present visitor profiles and of future tourism trends is essential for all management activities. The analysis of the tourism structure must be continually updated in order to serve as base for management decisions. An analysis of the structure of the tourism should be the base for management decisions.

---

**Figure 1. The WCPA Framework for Assessing Management Effectiveness.**

*Source: Hockings et al. (2006).*

---

**FIGURE 6**

The framework illustrates the process of World Heritage management. *Source: UNESCO (2008)*
WORLD HERITAGE CONTEXT

In addition to the nomination and inscription of heritage properties to the World Heritage List, there are also the more technical challenges of monitoring and measuring impacts from tourism and using this to set parameters for property planning, development and management. The mechanisms of the World Heritage process (the nomination process, Reactive Monitoring and Periodic Reporting, for example) represent an opportunity to identify situations where tourism may represent a threat to the heritage values and where tourism is having a positive impact. The Periodic Reporting offers a tool for a self-assessment, which can form a basis for a database that is useful for informed decision making. It also offers a set of concrete indicators. These deal with impacts over time, inside and outside the site and – not to forget – both positive and negative impacts.

**Figure 7**
The Periodic Reporting exercise is one of the statutory tools of the World Heritage Convention to monitor the state of conservation of World Heritage sites. Being a State Party-driven exercise, the indicators used should also feed into the sites’ monitoring systems. Source: WHC Website (whc.unesco.org)

**Think About**

*Being a World Heritage site brings about the exposure to international tourism. Receiving foreign visitors needs specific attention in management and should be included in monitoring indicators.*

Monitoring is also a follow-up activity of the existing management – it is not meant to be a new layer of management or one more checklist to be filled in. It is also important to link the Action plan in the Management Plan to monitoring and to see which changes are needed, or if it is time to review the Action Plan. When developing monitoring programmes it is therefore important to review any current monitoring activities and choose the data collecting method that fits the purpose and is available with existing resources.
- Consider alternative methods. Different methods require different levels of resources, look for the most cost-effective option.
- Involve the local community in monitoring, it also helps to increase local involvement in management and may have an added value in increasing understanding and support of the management objectives.
- Review monitoring activities regularly – are the right things monitored, are the results used to improve management.
- Direct and simple ways can be as effective as complicated technical methods or time-consuming questionnaires; a photo of a place at a given time can give valuable information.

Cultural Heritage Guide Programme (2007) Unit 5

**EXPERIENCES:**

As part of the project, we developed a questionnaire to find out from the tourists what they feel are the attractions in Fort Jesus. The Education Department did a survey recently and distributed a questionnaire to the visitors in the month of April (see Annex 9.c). We visit and read TripAdvisor website to get feedback from to the Fort.

Statement by the Fort Jesus Planning Team

The city of Colonia de Sacramento cooperates with the Ministry of Tourism and Sport of Uruguay, among others to monitor the annual visitation to the site and in comparison with other major destination country-wide. Statistics show that overnight stays have more than tripled over the last ten years, increasing from 82,000 in 2002 to 270,000 in 2011, and that overnight stays only represent a third of the overall number of visitors to the site.

**FIGURE 8**


<table>
<thead>
<tr>
<th>País</th>
<th>Nº Dormidas</th>
<th>% das dormidas, segundo o país de residência habitual</th>
</tr>
</thead>
<tbody>
<tr>
<td>PORTUGAL</td>
<td>188,971</td>
<td>62,3 %</td>
</tr>
<tr>
<td>ALEMANHA</td>
<td>11,484</td>
<td>3,8 %</td>
</tr>
<tr>
<td>ESPANHA</td>
<td>21,063</td>
<td>6,9 %</td>
</tr>
<tr>
<td>FRANÇA</td>
<td>13,829</td>
<td>4,6 %</td>
</tr>
<tr>
<td>ITÁLIA</td>
<td>6,590</td>
<td>2,2 %</td>
</tr>
<tr>
<td>PAÍSES BAIXOS</td>
<td>9,956</td>
<td>3,3 %</td>
</tr>
<tr>
<td>REINO UNIDO</td>
<td>5,866</td>
<td>1,9 %</td>
</tr>
<tr>
<td>EUA</td>
<td>8,311</td>
<td>2,7 %</td>
</tr>
</tbody>
</table>
Making ample use of high-end technologies, the site management entity of Sintra, Parques de Sintra-Monte da Lua (PSML), has put in place a sophisticated visitor monitoring system for its parks and palaces applied at the larger territorial level. It has thereby gathered solid statistical data on the number and origins of its visitors.

PHOTO 33
Electronic ticket control allows the management of Parques de Sintra-Monte da Lua to monitor visitation patterns at its parks and palaces, like at the Pena Palace above that represents one of the major attractions of the World Heritage site. © Jon Kohl

FIGURE 9
Based on monitoring tools, the site management establishes statistics that help to understand the numbers and origins of the visitors; here the example of visitor origins at Pena Palace. Source: PSML

13,90%
86,10%
FOREIGNERS PORTUGUESE

PARK AND PALACE OF PENA
SPAIN 21,20%
UNITED KINGDOM 15,70%
PORTUGAL 8,10%
BRAZIL 10,00%

Valores referentes ao período de 20 de Setembro de 2010 a 24 de Julho de 2011 - Total 4 Parques
Valores referentes ao período de 20 de Setembro de 2010 a 24 de Julho de 2011 - Parque e Palácio da Pena
"The system that was implemented is one of restricted access, in that a strict daily limit on visitor numbers was established, and also restricted in the sense that the public may only visit the three sites that are open on Park-organized visits or on visits organized by the private companies certified by the Park. As there are strict daily limits on visitor numbers visitors are advised to book in advance.

It has been argued that recreational countryside areas have a perceptual carrying capacity, a limit that has more to do with human psychology than with the characteristics of the setting itself. In that sense, the Côa Valley daily limits were set by resorting to what we can partly classify as perceptual carrying capacity constraints. In fact, the rule is that there should be no more than one group of visitors at any site at the same time. The maximum number of visitors per day was calculated by taking advantage of the optimal light conditions essential for best viewing of the engravings, by adjusting the departure times of the tours from the visitor centres and by taking into consideration the time needed to visit the sites.

The implementation of preventive surveillance measures, although essential to the preservation of these sites, cannot, in itself, avoid all possible vandalism episodes and other visitor pressure consequences. Therefore education, information and promotion have to form an important part of the overall cultural heritage management practices of any institution involved."

“Public access to such delicate cultural resources as rock art sites is a double-edged sword: it can benefit society globally but at the same time endangers the endurance of the heritage we choose to value, protect and present. That is why it is so important, as the World Heritage Convention stresses, if we want these significant places to endure in their full meaning and context, to employ defensive practical approaches when managing our relationship with the ‘natural human-made world’.”

Batarda (PAVC, Côa Valley)
B.2 INTERPRETATION

"Necesitamos ver de nuevo aquello que ya hemos visto, ver en primavera lo que vimos en verano, ver de día lo que vimos de noche, con el sol donde la primera vez llovía... necesitamos volver sobre los pasos ya dados para trazar al costado nuevos caminos"  
José Saramago
quoted in Siedlecki Huerta (2011)

B.2.a. From interpretation to stories

Interpretation is the art of explaining the uncommon or new with language and images familiar to visitors.

APPROACH

“All World Heritage sites have more than one important story to tell about their history; the way they were constructed or destroyed, the people who lived there, the various activities there and the happenings, the previous uses of the site and perhaps tales of the notable treasures. In presenting and interpreting the historical story of the heritage site, it is necessary to be selective and to decide which elements will be of most interest to the kind of people that the site will attract; human interest stories are often the most popular.” Jokilehto in ICCROM Management Guidelines for World Cultural Heritage Sites (1998).

Tourist preferences and expectations have changed considerably in recent years, becoming much more diverse. Today’s cultural heritage tourists are more experienced and better educated than previous generations and they expect more from their travel experiences. This has made quality and authenticity more important than ever before. These higher expectations and increasing competition for visitors’ time also mean that the visit of a site has to create an impressive and personalized experience.
Approved in 2008, the ICOMOS International Charter for the Interpretation and Presentation of Cultural Heritage Sites (ENAME Charter) is designed to guide heritage and tourism professionals when it comes to addressing presenting and interpreting heritage values for visitation purposes. It defines the notions and differences of Presentation and Interpretation as follows:

“Presentation” denotes the carefully planned arrangement of information and physical access to a cultural heritage site, usually by scholars, design firms, and heritage professionals. As such, it is largely a one-way mode of communication.

“Interpretation,” on the other hand, denotes the totality of activity, reflection, research, and creativity stimulated by a cultural heritage site. The input and involvement of visitors, local and associated community groups, and other stakeholders of various ages and educational backgrounds is essential to interpretation and the transformation of cultural heritage sites from static monuments into places and sources of learning and reflection.
WORLD HERITAGE CONTEXT

World Heritage sites are important elements in the tourism products provided by both high-volume and specialist tour companies. Cultural tours have become an important product and World Heritage sites are important items although their values are not always specifically promoted by neither tourism organizers, nor the site. Making tourism stakeholders aware of and appreciate the heritage values is key to presenting the World Heritage properties. There is a need to communicate these values in a way that is clearly understood and explains its significance within a local, national and international context. The visitors themselves are a potential for management and they need to know how they can help to support the site’s conservation and sustainable development.

“The purposes of interpretation are [therefore] to provoke, to excite, the intellect and to reinforce the experience. Interpretation should generate interest, develop deeper understanding of the site and elicit concern and support for the conservation of the site’s Outstanding Universal Value”, the Cultural Heritage Guide Programme (2007) states and further recommends that “Interpretation and presentation programmes should also identify and assess their audiences demographically, geographically and culturally.”

Also the Ename Charter for the Interpretation and Presentation of Cultural Heritage Sites adopted by ICOMOS International in 2008 (Annex 7) contains principles for site interpretation; some key points are:

• Local people should be involved in the development of interpretation and presentation programmes to ensure they are locally relevant
• Qualified interpretation professionals should be included within site staff.
• Interpretation addressed to children should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. School programmes are required, which will be substantially different from the adult visitor programmes.

Interpreting the Outstanding Universal Value of the World Heritage property may involve values that are not necessarily those initially most obvious to local people and visitors. The attraction of the place may lie in other experiences or striking qualities of the place. But in World Heritage management the Outstanding Universal Value is the starting point for all interpretation.
Once planning pillars are in place, the public use planning process begins with a collective identification of site heritage supply information (as in “tourism supply and demand”). It is argued that the most fundamental component that heritage sites have to offer are the meanings themselves, and that the meanings that stakeholders hold about their place are the most valuable element that ties them to that place.

The goal of creating an interpretive framework is to forge a consensus-based set of meanings that are internally coherent, motivating, revelatory, and sufficiently encompassing as to incorporate the majority of attractions and touristic activities, except in situations where tourism has largely abused and overrun the meanings previously ascribed to a site. They should be concrete enough to inspire and avoid incorporating elements that do not relate to heritage values of the site. In the next planning steps, these meanings would serve to prioritize attractions, contribute to visitor experiences, and orient the creating of touristic products and services.

Workshop participants are guided from a brainstorming exercise to organizing emerging messages. These emergent messages then enter the next stage of “distillation” by a small committee of informed staff and critical thinkers in order to produce an interpretive framework which is usually (but not necessarily) a hierarchically organized set of messages (over-arching message, sub-messages, storylines, stories, attractions, and even public use products). The framework holds the potential, in theory, of becoming the core of a heritage site,
the set of meanings organized and controlled by the community, modified on an ongoing basis, incorporating new attractions and products as they come on line.

Jon Kohl

“If the same message is repeated throughout the site through different stories (by guides, signs, and brochures), the idea is reinforced causing a bigger impact than if only experienced once.”

PHOTO 36
“Staff can use limited resources more effectively to develop one important message-story.” – A brainstorming session with site’s staff offers great potential for developing innovative presentation and interpretation with the existing resources. © Jon Kohl

THINK ABOUT

Tourist guides are the ambassadors of your site! Make sure that they are well-informed communicators.

CONNECTING TO THE BIG PICTURE: DO NOT ONLY INTERPRET YOUR SITE, INTERPRET HUMANITY

Developing an Interpretive Framework at the site for communication purposes helps to identify how a site’s history affects larger histories in the region and world. All messages should relate to larger realities that your site illustrates so that the visitor not only learns about the site but also comes to experience larger meanings about being part of humanity in its built and natural environment.

When site managers think of interpretation, they often focus only on their site, sometimes as narrow as a particular building in their site. Yet, such a constricted
focus sacrifices most of the site's interpretive potential. While visitors should understand the site to appreciate and support it, what also matters and what moves people, is the re-creation of their own perspectives about themselves and the human condition through their tourism experiences.

Telling a visitor that a specific king lived in a place or that indigenous people years ago carried out rituals can be considered mostly entertainment and is most likely, according to studies, to be soon forgotten. In return, one can use the site as an illustration of a bigger picture about evolving history and how it reflects on humanity. World Heritage sites offer this opportunity by definition but also any other cultural heritage site can paint itself into a larger picture and thus give greater meaning to the visitor experience, than simply interpreting what exists on site.

For example:

A landscape that produces a particular wine can interpret not just the wine-making process, but how that wine has culturally influenced other regions of the world in terms of techniques and culinary traditions.

A religious monument, such as a monastery or a cathedral, would talk not only about the style and history of this particular building, but also about how this type of buildings has influenced the design and social structures of its immediate surroundings and across Europe and the world.

---

Visitors remember messages through stories. They won’t remember names or number of times a fort has been attacked, but they will remember a bigger idea, like “people fight for locations that promote their survival.”
EXPERIENCES

As mentioned in Chapter A.2., one of the exercises of this Tour-WHPO project aimed at establishing an interpretive framework that could serve as common denominator of the WHPO Network.

During the first workshop, the shared history of exchanges and common features of the sites served as a baseline for group work on identifying major events, products and personalities linked to each World Heritage site's position in the WHPO Network and its relation to Portuguese influence. Participants elaborated the theme of the interaction of and with the Portuguese people over centuries and the exchange it has brought about in terms of tangible and intangible heritage.

By drawing attention to the importance of exchange and the values of mutually shared heritage in the territories, another layer of each World Heritage sites' history was revealed and thereby added to the developing the messages and interpretation of each site.

While the tangible influence of Portuguese culture in World Heritage sites outside of Portugal is often referred to when describing the sites' values, World Heritage sites in Portugal do not necessarily relate their history to the linkages with other territories or continents. Beyond the well-known history of the discoverers, the less known, yet fascinating, stories of influences experienced by Portugal through the imported goods, habits and know-how from regions around the world are yet to be elaborated in more detail. This theme will also allow making a concrete connection to intangible heritage values, including food produce.
B.2.c. Interpreting the World Heritage value – transmitting the key message

Given the importance of ‘translating’ each World Heritage site’s Statement of Outstanding Universal Value into clear messages, all participating sites - and in particular the pilot sites - undertook the exercise of developing clear messages that capture their site’s value and communicate it to the broader public.

EXPERIENCES:

EXPERIENCES FROM FORT JESUS MOMBASA – DRAWING THE WIDER PICTURE

Having a Statement of OUV in place, the team of the World Heritage site of Fort Jesus, Mombasa, worked on its messages and also issued them in a leaflet of the property (see Annex 9.d).

1) Protecting Trade Routes
Fifteenth and Sixteenth Century military coastal forts like Fort Jesus consolidated and coordinated East African trade routes which otherwise would have remained in the chaos of piracy and conflict.

Explanation
Mombasa was then a strategic harbor for Portuguese trader’s route to India via Cape Town for the spice, ivory and slave trade. Trade was prominent among traders from China, Persian Gulf, Greece and any one occupying the fort served as the powerful control of trade among other ventures. The Turkish fort at Mamangina drive (Fort St. Joseph) shows how strategic Mombasa was in ensuring safety in terms of enemy intrusion.

2) Seeding a Diverse and Tolerant Mombasa Community
Mombasa’s strategic coastal location, critical for controlling the East African trade routes, attracted fierce competitors from distant Europe and Asia. Yet the violent and on-going clashes which led to Fort Jesus changing hands nine times between the Portuguese, Omanis, British and their allies, ironically seeded a diverse and tolerant cultural mix of peoples living here today.

Explanation.
Mombasa hosted different cultures and civilizations during the time and left traces of all the cultures that were interacting either in language, commerce, food, dressing, architecture and religion. The Swahili culture has traces of all these Arabic, Portuguese and British influence and has lived to be known for their warm welcoming attitude hence making Mombasa a famous tourist destination in Kenya.

3) Perfection of Human Form
Historically, humans have defended themselves through the power of a tool-making mind, yet the Renaissance perspective exalted the geometric perfection of the human body that inspired the design of Fort Jesus and later other 16th Century Portuguese military forts that could defend themselves in all directions, across land and sea, and against the weaponry of the times.
Explanation
The Fort from an aerial perspective can be seen as a human form with projections that look like the limbs and the head of a human being i.e. head (seaward), two arms and two legs (landward). The design done by the Italian architect Joao Batista Cairato was the best during its time and managed to fend off the enemy completely. A testimony to this superior design is the fact that the Omani Arabs could only resort to laying a siege for 33 months in order to take over the Fort-the great siege of Fort Jesus in 1698.
B.3 IDENTIFYING TOURISTIC ATTRACTIONS

Too many tourists can turn intangible heritage into folklore. In such circumstances heritage becomes just another product on the market, rather than a unique and special feature. There is often conflict between those who regard the sites as a cultural asset and those who see them as commodities, products for sale. Cultural assets will be conserved and restored within the context of social responsibility for our collective cultural identity, whereas in the second case they will be obtained and restored so as to be marketed more effectively, for example to tourism. (Pedersen, 2004)

B.3.a. Listing and Mapping

APPROACH

It is recommended that a heritage site set up a thoughtful directory of touristic attractions tested and filtered against market knowledge, rather than scientific lists and inventories. It needs to be differentiated between resources of a site and its potential for being an attraction. Attractions normally represent only a very small proportion of entire resource lists compiled from scientific viewpoints. In practice the market determines what is an attraction – not architects, museologists or archaeologists.

What may make a resource an attraction goes well beyond the so-called “wow factor”. Stakeholders including the local communities should be consulted to identify a site’s potential attractions. Moreover, surveys of visitor preferences can guide the site planning in identifying suitable attractions.

Based on a first listing, the public use planning approach suggests ranking the identified resources according to the following five criteria to determine their potential as attractions:

- Attractiveness
- Competition area
- Resistance to visitor use
- Importance to purpose and messages
- Accessibility in time and space

Attraction can be defined as “any object, person, place or concept that draws people either geographically or through remote electronic means so that they might have an experience. The experience can be recreational, spiritual or other”.

Public Use Planning Manual / Module 3
“It is interesting to note that what we took for granted as an attraction, our stakeholders gave different attractions.”
Fort Jesus planning team on its experience when identifying attractions at their site.

EXPERIENCES

The two Portuguese pilot sites – Evora and Côa Valley – have both developed directories of touristic attractions, which are included in Annexes 9.e and 9.f.
EXPERIENCES: EXPERIENCES FROM ÉVORA AND CÔA VALLEY– MAKING CHOICES

The Évora core planning team together with a group of stakeholders carried out an exercise to identify, list and score the main attractions in and around the World Heritage city. The final list of twenty attractions included single monuments and places in the urban context as well as events and archaeological sites in the surroundings of the city. In addition to scoring their respective attractiveness, their accessibility and adequacy to the World Heritage site’s main messages were also rated. The emblematic monument of the Roman Temple scored highest, not only because it is easily accessible and most adequate to the city’s history and messages, but also because it was found to be the most often represented monument on postcards and other items related to Évora.

When discussing places that would reflect Évora’s interaction with other places of Portuguese influence and in particular its influences from Portuguese discoveries, it was found that certain important places were absent from the list due to their inaccessibility for the public. However, the private Casas Pintadas was considered to best represent an example of the influences that Évora has received from the returning discoverers, manifested in the paintings of flora and fauna from other continents that can be found in the building. (see table in Annex 9.f)

LESSONS LEARNED

By identifying and correcting barriers – like the inaccessibility of Casas Pintadas – we can correct the actual list and work in order to create new attractions in places that are important for value transmission and for improving the experience of the site.

PHOTO 40
This detail from the Casas Pintadas in Évora showing a panther originating from South America illustrates the import of species from other continents to Portugal. © Fundação Eugénio de Almeida, Mural da História
### ATRAÇÕES

<table>
<thead>
<tr>
<th></th>
<th>ATRATIVIDADE</th>
<th>CONCORRÊNCIA</th>
<th>RESISTÊNCIA</th>
<th>ACESSIBILIDADE</th>
<th>ADEQUAÇÃO ÀS MENSAGENS</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Catedral de Évora</td>
<td>9</td>
<td>5</td>
<td>4</td>
<td>2</td>
<td>5</td>
<td>25</td>
</tr>
<tr>
<td>2 Capelo dos Ossos</td>
<td>8</td>
<td>5</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>24</td>
</tr>
<tr>
<td>3 Templo Romano</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>30</td>
</tr>
<tr>
<td>4 Cremaleque dos Almendres</td>
<td>7</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>21</td>
</tr>
<tr>
<td>5 Praça do Giraldo</td>
<td>6</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>25</td>
</tr>
<tr>
<td>6 Universidade/ Colégio Espírito Santo</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>5</td>
<td>22</td>
</tr>
<tr>
<td>7 Muralhas</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>22</td>
</tr>
<tr>
<td>8 Museu de Évora</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>Alto de S. Bento /Câstris/</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Aqueduto</td>
<td>8</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>24</td>
</tr>
</tbody>
</table>

**Figure 12**

The extract of the scorecard of attractions developed in Évora illustrates how the five criteria for the rating of attractions lead to an overall rating of the attractions potential. Source: City of Évora.

**Photo 41**

The Roman Temple in Évora is not only the most attractive monument for visitors, it also scored highest when the stakeholder group rated the city’s attractions. © José Emilio Guerreiro
As one of the project-related planning activities, the site management of Côa Valley carried out an inventory of attractions located within the Park: “The intent behind the attraction list of the Côa Valley Archaeological Park (PAVC) was not creating a comprehensive survey of all tourist attractions in the area but just of those considered to be more relevant by local and regional tourism stakeholders. Moreover, right from the start of the process it was decided that only those located within the territory of Park were to be considered. These has meant that attractions which, although also located or passing by the territory of the Park, for its geographic extent (the Douro River wine landscape, for example, which, as the Côa rock art, is on the World Heritage List) are difficult to characterize in a list dedicated to a concrete and relatively small territory. Other attractions in the territory of the park occur seasonally and are also common to a wider region (the Blossoming Almond Trees festival or the Harvest of Wine). As such, these seasonal attractions are of problematic characterization in this list and it has also been decided not to include them. On the other hand, the territory of PAVC has interesting natural values. However, it was found appropriate to signal the natural values through the inclusion in this list of the Faia Brava Natural Reserve rather than characterizing the whole area’s rich biodiversity features. With regard to Côa Valley rock art sites, it has been determined by those participating in the making of the list to include only those that are open for public visits: Penascosa, Canada do Inferno and Ribeira de Piscos. At this very moment, about 70 different rock art sites are known in the territory of PAVC and its immediate surroundings. Not including all these places that are not shown to the public is justified by the prudence that the PAVC puts in the management of the heritage for which it is the organization legally devoted to its protection. Not disclosing the exact location of the sites avoids vandalism, theft or even destruction of the rock art these sites contain. It was therefore decided not to include these ‘reserve’ sites in the attractions list despite the fact that tourists expect the region to offer the possibility to visit all the sites. Hence, it has been agreed by those participating in the process that the above-mentioned three sites open to the public, as well as the also considered Côa Museum, represent the tourism offer in the region regarding the Côa Valley rock art heritage. Finally, a scoring exercise of all identified attractions was done.”

“It must be noted that it was not unproblematic to score each attraction. If all participants agreed that the Côa rock art sites and Museum should be placed top of the list, the assessment of other attractions fuelled interesting and profitable debates. In the end, it was decided for each attraction to calculate an average value from all participants’ scores.”

Antonio Batarda (PAVC, Côa Valley)
MAPPPING A SITE’S ATTRACTIONS AND EXPERIENCE OPPORTUNITY AREAS

The public use planning approach suggests to start the mapping exercise with a collective brainstorm, in which all classes of applicable resources and attractions can be considered. It then asks visitors to choose the most important before rating them by using five criteria (attractiveness, relevance to planning framework, resistance to visitor impact, abundance within the region from which the heritage site draws its visitors, and accessibility in time and space).

*Public Use Planning Manual /Module 4*
Look Outside Your Borders
You should consider the experience opportunity just outside your site borders, whether in the buffer or not. Just as ecology does not respect political borders drawn on a map, neither do factors that influence visitor experiences. Landscape changes such as human settlements or highways can change the experience of adjacent lands just inside your site, so you need to consider what lies beyond your borders. Although a site does not have the same jurisdiction to manage land outside its boundaries, a participatory and friendly site still influence its neighbors.

Why We Offer Experience Opportunity and Not Just Experiences?
We map experience opportunities and not experiences because different visitors can have different experiences given the same set of conditions. Thus we manage for a set of conditions that create an opportunity to have a certain kind of experience defined by the zone, but not every visitor will have the experience for which we plan the area. As managers we can only offer opportunities, while visitors create the experiences inside their heads.

Source: Kohl, Jon (2012)
B.3.b. Creating tourism products

El proceso que debe cumplirse para llegar a configurar lo que habitualmente se conoce como “producto turístico patrimonial” involucra una doble transformación: de recursos a productos y de productos en ofertas dirigidas al mercado. El punto de partida del proceso, el recurso, lo constituye el conjunto de atractivos del territorio, su patrimonio natural y cultural, (in)materiaal, terrestre y sumergido. Todos estos recursos culturales y naturales constituyen un notable potencial para las acciones de revalorización y gestión del Sitio, orientadas hacia la conservación, el desarrollo de infraestructuras, la producción cultural, el turismo y la satisfacción de la sociedad civil en la medida que la población local los reconozca como propios y se genere el proceso de internalización que dicha relación necesita. [...] No se trata de crear recursos artificiales, en Colonia existen de todo tipo. De lo que se trata es de transformar los bienes patrimoniales pasivos en recursos culturales activos, con capacidad de generar ingresos y contribuir a su propia conservación como ser llevando a la práctica el concepto de “atmósfera creativa” entre otros.

Siedlecki Huerta (2011) Colonia de Sacramento, Uruguay

APPROACH

To be able to develop touristic products for a site the following components should be taken into consideration by the site-managers: attractions, access to attractions, activities, services, trained personnel and marketing and promotions. The steps towards designing a touristic product would be to refer to the already identified priority attractions, organize them according to five criteria (barriers to developing the attraction; the priority of the attraction; the activity attractiveness, competitiveness, and feasibility), determine their relevance for visitation throughout the year, define the principal services necessary to carry out the activities, identify which institutions can offer the services, and finally fill out a product description sheet (see Figure 13 and Annex 10).

Jon Kohl
DEFINING “QUALITY EXPERIENCE” FOR VISITORS AT HERITAGE SITES

Heritage practitioners, educators, professional guides and experienced heritage visitors agree on certain attributes and characteristics of what constitutes good quality experience at heritage sites. Visitors having quality experience at heritage sites usually:

• Learn more from their visit
• Express satisfaction with their visit
• Enjoy the visit
• Become interested in discovering more about the topic or place resulting in greater understanding
• Become inspired to change and adopt minimal impact behaviour and practices
• Become more appreciative of the heritage site

Summing it all up, one can link the above experiences with the concept of “mindfulness” - a state in which visitors experience the site that leads them to be active, interested, questioning, and capable of reassessing the way they view the world.

Macao Case Study Extract of Cultural Heritage Guide Programme (2007) Unit 5

Exchanges with tour-operator representatives have confirmed that the quality of the visitors’ experiences also influences their interest in supporting conservation efforts at a site. The experience of a personalized visit that allows insights into life and work of a World Heritage site can significantly enhance the visitors’ feeling of connectivity with the site.

WHAT’S IN A TOURISM PRODUCT?

Different products of different industries have different components. In tourism, a product is made up of, at least

1. An attraction
2. Access to the attraction
3. An activity to experience the attraction
4. Services to support the activity
5. Trained personnel to offer the services
6. Promotions so that the market can become aware of the product.

Publi Use Planning Manual / Module 5
FIGURE 14
Filling in the product description sheet can help deciding which product to develop with priority (see also Annex 10). Source: Kohl, Jon (2012)

WORLD HERITAGE CONTEXT

The World Heritage Tourism Programme has as one of its actions to identify and promote authentic, sustainable and responsible products and services that provide high quality and low impact visitor experiences at World Heritage properties and the destination as a whole.

(World Heritage and Sustainable Tourism Programme 2012)

In its Cultural Tourism Charter, ICOMOS underlines that “Tourism promotion programmes should protect and enhance Natural and Cultural Heritage characteristics. [...] 6.4 The promotion, distribution and sale of local crafts and other products should provide a reasonable social and economic return to the host community, while ensuring that their cultural integrity is not degraded.

How do you use the World Heritage Emblem and what are the conditions for its use?
The World Heritage Emblem, adopted as the official emblem of the Convention in 1978, is used to identify properties inscribed on the World Heritage List. It has been designed with the goal of creating a strong and consistent visual identity that heightens awareness of the World Heritage brand and its values by visitors, communities, other government entities and management personnel. Experience has proven that the emblem has fund-raising potential that can be used to increase the marketing value of products with which it is associated. It symbolizes the World Heritage Convention, signifies the States Parties' adherence to the Convention, and serves to identify sites inscribed on the World Heritage List. The emblem should be used to promote the aims of the Convention and enhance knowledge of the Convention world-wide. It should not be used for unauthorised commercial purposes. The Operational Guidelines include directions on the use of the emblem by World Heritage sites and other contracting parties, especially those operating for predominantly commercial purposes (see Section VIII of the Operational Guidelines in Annex 5). (UNESCO, 2002)

WHPO – an add-on to World Heritage site-specific products?
It is argued that the presentation and interpretation of each WHPO site from a WHPO perspective can provide an added value to each single World Heritage site. This would not only apply to an enhanced interpretive framework and broader range of stories to tell but also help to diversify the offer of visitor experiences at each site. By underlining the long history of exchanges, in particular those visitors from other culturally connected countries will experience a sense of familiarity that links them to the visited World Heritage site.
Not the least in economic terms, joining forces for creating high-quality products and marketing is an important asset given the increasing competitiveness of the market at the international level, despite World Heritage's high visibility and profile as tourism destinations.
Beyond the number of visitors, raising the profile of WHPO sites would also influence the types of visitors. With an increased willingness to pay higher prices for high-quality tourism experiences, World Heritage sites would thus potentially increase their revenues provided that these are reinvested in the adequate maintenance of the sites and in the local facilities.

EXPERIENCES: EXPERIENCES FROM CôA VALLEY – EXPLORING NEW PRODUCTS

Côa Valley being a part of a serial transnational World Heritage site since 2011, the promotion and development of touristic products for this dispersed and remotely located World Heritage destination also need to be addressed in a joint manner. After having published a booklet in Spanish, Portuguese and English on the World Heritage property in October 2012, the site management entities on both sides of the Spanish-Portuguese border therefore plan the creation of a joint entrance ticket for Siega Verde (Spain) and Côa Valley that permits the visitors of one of the parts of the property to benefit from free entrance during the following 3 days at the other parts of the property.
Next to using the World Heritage emblem to draw attention to the site’s OUV, Côa has also created its own logo, which consists of the drawing of a goat depicted in the engravings. This is now used in a large variety of products and places and has even been applied by the local municipalities for paving sidewalks and squares. The Park thus not only created a corporate identity but also an image that enables local communities to identify with the specific heritage in their area.
The site management of Côa Valley has recently developed a number of joint offers in cooperation with local and regional tour-operators in order to include the WH site into the circuits of excursions and packaged tours. Departing from the city of Porto by train, boat or coach along the Douro river, tourists are offered visits to the site’s museum and/or to selected rock art sites in the park. Such packaged offers allow countering the disadvantage created by the remote location of this World Heritage site.

LESSONS LEARNED

Bringing visitors to the area benefits the local businesses. Well selected local products reinforce these benefits for local business and highlight the Outstanding Universal Value of the place.

EXPERIENCES: EXPERIENCES FROM SINTRA – OFFERING A WIDE CHOICE OF PRODUCTS

While ensuring continuous restoration works in different parts of the Cultural Landscape of Sintra, the site management entity Parques de Sintra-Monte da Lua (PSML) has also been setting up a wide range of touristic products linked to its parks and palaces. Located in a densely populated territory in the immediate surroundings of Lisbon, the parks’ and palaces’ offers and activities are designed to address both national and international visitors and local communities through a diverse offer ranging from visits to the key monuments and “highlights” of the site to regularly changing temporary exhibitions on the history of the place and its flora and fauna. Particular importance is given to the use of latest technologies for a broad dissemination, such as the interactive use of mobile phone applications that allow individual visits or 3D maps that enhance the understanding of this complex site. By way of a training programme, a significant number of guides are trained to inform visitors on general aspects of the site as well as to provide them with specialized information on the historical and natural values of the parks and palaces.

LESSONS LEARNED

Continuously inform and train guides to ensure that they have state-of-the-art knowledge and awareness about your site.

FIGURE 17

One of PSML’s latest product is the multimedia visit “Talking Heritage” that allows the visitor to interactively discover the parks and palaces through a multimedia application for smartphones. Source: PSML
C. MANAGING TOURISM AT WORLD HERITAGE OF PORTUGUESE ORIGIN AND INFLUENCE – lessons learned and future steps

The following points and lessons learned reflect the project participants’ feedback, which was identified through interviews and questionnaires. They are also based on the pilot sites’ experiences and views after having applied steps of the tourism planning approach.

C.1 SOME LESSONS LEARNED

Just as the overall site management in general, tourism planning and tourism management is also a perpetual process that necessitates perseverance when involving established and new stakeholders, monitoring trends and changes in visitation at the site and finding and agreeing on adequate adaptation measures that do not compromise the preservation of the heritage values.

Those World Heritage sites that engaged in the application of the public use planning approach quickly realized that timing of progress is not necessarily in their hands. Participatory processes can and have to be facilitated and guided but they cannot be controlled – thus resulting in adaptive time planning of the actual planning processes.

The exercise of developing an interpretive framework and defining messages that reflect the values of each World Heritage site has clearly raised awareness to the importance of presentation and interpretation for an improved visitor guidance.

Through the exchange about management experiences among cultural World Heritage sites of different nature and cultural background each site manager has not only learned about other ways of dealing with problems but also enhanced the reflection about his or her own site. Putting into perspective one’s own site can eventually result in an added value when it comes to making concrete management decisions.

At the level of tourism planning and visitor management, presentation and interpretation of the sites has received main attention. Capacity-building on how to “translate” the sites’ heritage values and to improve the quality of information material for different types of visitors was highlighted as one point of interest. While the idea of developing WHPO sites-specific messages as an additional interpretive layer would still need to be further elaborated and discussed in order to have any added value, the suggestion of streamlining the marketing of World
Heritage sites as a joint set of sustainable destinations into national tourism strategies has been retained as a valuable and practicable proposal. Also marketing and business skills at the site level were pointed out as useful and of interest for future capacity-building activities, and in particular fund-raising skills.

While the proposed approaches helped to open up discussions and reflections about the sites’ potential and needs, it has also become clear that World Heritage-specific policy guidance and concrete relevant tools are still to be developed. Guidance and tools that are integral part of the overall site management system and allow each site to bridge the gap between heritage conservation measures and sustainable tourism development.

“As managers of a large territory, a living and evolving cultural landscape, we need appropriate tools to address the management challenges and to benefit from the opportunities that tourism in our World Heritage site can bring about.”
Filinto Girão and Nuno Fazenda – Alto Douro Wine Region (Portugal)

The project finally also confirmed the great interest and need for approaching the tourism and the heritage sectors and thereby improving dialogue and understanding of the different perspectives.

### C.2 FUTURE STEPS

Since Tour-WHPO has constituted the first thematic project initiative in the framework of the World Heritage Sites of Portuguese Origin and Influence Network, the feedback sought from the participating sites is valuable in a twofold way – it reflects the sites’ specific ongoing needs in terms of tourism planning and visitor management, and it also delineates a broader spectrum of possible future activities within the Network.

Having gathered diverse types of World Heritage sites, it is also suggested to consider future cooperation among similar types of sites or sites with a similar management structure, such as monuments being centrally administered by a public institution.

Since the occasion to exchange and learn about the logic and requirements of the tourism industry was well appreciate during this project, it should be considered to facilitate links with the committed tour-operators at the international and at the local levels.

At the regional level, it should be considered to engage with capacity-building entities such as the Centre for Heritage Development in Africa (CHDA) in Kenya, the École du Patrimoine Africain (EPA) in Benin, UNESCO Category II Centres such as the one in Brazil and the World Heritage-specific UNESCO Chairs.
Finally, the wish to extend the identification and support of heritage to those sites included in the national Tentative Lists and to intangible heritage elements has been mentioned and underlines the opening up of site perspectives to encompass different concepts of heritage in one integrated management approach.

While the World Heritage Centre and the Advisory Bodies can facilitate and advise on many of the above-mentioned ideas and activities, it appears crucial for the WHPO Network to dispose of a solid platform for information exchange that is regularly updated and can continuously serve as a communication tool for this worldwide network. It has been suggested that such a platform serve on the one hand the scientific World Heritage community, and on the other hand the large community of visitors and potential visitors around the world to inform about the value of World Heritage and in particular the World Heritage Sites of Portuguese Origin and Influence.

The web-site that will complement this project publication is conceived to contribute to the virtual networking activities (www.tour-whpo.org).

As it was also suggested to hold annual fora on Heritage and Tourism in different WHPO sites of the Network, it should finally be emphasized that several sites have offered to host international meetings and regular workshops in order to maintain the momentum and develop future steps from this project.

Continuing this networking experience while continuing to look for good solutions in tourism planning at the World Heritage sites – there is a broad scope for the future World Heritage Sites of Portuguese Origin and Influence.
GLOSSARY

— ATTRACTION
Any object, person, place or concept that draws people either geographically or through remote electronic means so that they might have an experience. The experience can be recreational, spiritual, or other. (PUP Module 3)

— AUTHENTICITY
Depending on the type of cultural heritage, and its cultural context, properties may be understood to meet the conditions of authenticity if their cultural values (as recognized in the nomination criteria proposed) are truthfully and credibly expressed through a variety of attributes including:
• form and design;
• materials and substance;
• use and function;
• traditions, techniques and management systems;
• location and setting;
• language, and other forms of intangible heritage;
• spirit and feeling; and
• other internal and external factors. (Operational Guidelines para. 82)

— CARRYING CAPACITY
The concept of carrying capacity addresses the question of how many people can be permitted into an area without risk of degrading the site and the visitors’ experience of it. It has generally been broken down into three categories: physical, ecological and social (World Heritage Paper 1).

— DESTINATION
A World Heritage destination is a geographical space in which the entire tourism experience takes place. For World Heritage destinations this encompasses the World Heritage property itself and the surrounding area. (World Heritage and Sustainable Tourism Programme 2012)

— INTEGRITY
Integrity is a measure of the wholeness and intactness of the natural and/or cultural heritage and its attributes. Examining the conditions of integrity, therefore requires assessing the extent to which the property: a) includes all elements necessary to express its Outstanding Universal Value; b) is of adequate size to ensure the complete representation of the features and processes which convey the property’s significance; c) suffers from adverse effects of development and/or neglect. (WH Operational Guidelines para. 88)

— INTERPRETATION
Interpretation refers to the full range of potential activities intended to heighten public awareness and enhance understanding of cultural heritage site. These can include print and electronic publications, public lectures, on-site and directly related off-site installations, educational programmes, community activities, and ongoing research, training, and
evaluation of the interpretation process itself. (ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites 2008)
The input and involvement of visitors, local and associated community groups, and other stakeholders of various ages and educational backgrounds is essential to interpretation and the transformation of cultural heritage sites from static monuments into places and sources of learning and reflection.

__INTERPRETIVE INFRASTRUCTURE__
Interpretive infrastructure refers to physical installations, facilities, and areas at, or connected with a cultural heritage site that may be specifically utilised for the purposes of interpretation and presentation including those supporting interpretation via new and existing technologies. (ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites 2008)

__LIMITS TO ACCEPTABLE CHANGE (LAC)__
A park planning methodology that focuses management action on the state of particular resource conditions, both natural and social, by setting maximum limits beyond which the conditions should not exceed. (PUP Chapter 6)

__OUTSTANDING UNIVERSAL VALUE (OUV)__
Outstanding Universal Value means cultural and/or natural significance which is so exceptional as to transcend national boundaries and to be of common importance for present and future generations of all humanity. As such, the permanent protection of this heritage is of the highest importance to the international community as a whole. The Committee defines the criteria for the inscription of properties on the World Heritage List. (Operational Guidelines para. 49)

__PARTICIPATORY PLANNING__
Any planning methodology that explicitly attempts to integrate the participation of stakeholders into the planning process. (PUP Chapter 6)

__PRESENTATION__
Presentation more specifically denotes the carefully planned communication of interpretive content through the arrangement of interpretive information, physical access, and interpretive infrastructure at a cultural heritage site. It can be conveyed through a variety of technical means, including, yet not requiring, such elements as informational panels, museum-type displays, formalized walking tours, lectures and guided tours, and multimedia applications and websites. (ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites 2008)

__PUBLIC USE__
Includes all touristic, educational, interpretive, recreational, and investigative uses by visitors who participate in activities that do not extract (except for sport and research) or introduce resources into a natural or cultural protected area. Public use does not include extractive activities for commerce or subsistence such as logging or mining. (PUP Chapter 1)

__RECREATIONAL ATTRACTION__
This category includes all attractions built by humans for the purpose of contemporary
recreation. Examples include amusement parks, botanical gardens, museums, zoos, shopping malls, etc. Contrast with geophysical- aesthetic, ecological-biological, and cultural-historical attractions created either by nature or humans but not for the purpose of contemporary human recreation. (PUP Chapter 7 and Module 3)

RECREATION OPPORTUNITY SPECTRUM (ROS)
A methodology developed by the US Forest Service and Bureau of Land Management for zoning and managing a protected area based on different classes of visitor opportunities. (PUP Chapter 6)

STAKEHOLDER
A person or institution that has an interest or stake in the outcome of a particular project or related effort. A stakeholder may or may not be actively participating in the planning process or may or may not live in the region of the project. (Public Use Planning Manual)

TOURIST
A person who comes from outside the region, spends at least one night, and consumes touristic services.

TOURISTIC PRODUCT
A touristic product consists of the following components: attractions, access to attractions, activities, services, trained personnel, and promotions. (PUP Chapter 7)

VISITOR
Any person who comes from within or outside the region and consumes touristic services.
BIBLIOGRAPHY


ICOMOS International (2008): The ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites; adopted in Québec (Canada). (http://www.international.icomos.org/charters/interpretation_e.pdf)


ANNEXES

1. List of World Heritage Sites of Portuguese Origin and Influence
2. Participants List of the Project Workshops 1 and 2
3. Action Plan of the World Heritage and Sustainable Tourism Programme (WHC-12/36.COM/5E.Inf)
4. Stakeholder groups in World Heritage and sustainable tourism and their potential roles (World Heritage and Sustainable Tourism Programme; 36 COM information document)
5. Extract of the Operational Guidelines on the World Heritage Emblem (Chapter VIII)
6. ICOMOS Charter on Cultural Tourism
7. ICOMOS Charter on Interpretation
8. The Burra Charter - The Australia ICOMOS Charter for Places of Cultural Significance
9. Pilot Sites Documents:
   a) Terms of reference Evora
   b) Terms of reference Fort Jesus
   c) Questionnaire Fort Jesus
   d) Leaflet of Fort Jesus
   e) Directory of Attractions Côa Valley
   f) Attractions Scorecard Evora
   g) Map of the recreational opportunity spectrum of Côa Park
10. Product description sheet (Public Use Planning Manual / Module 5)
11. Cultural Heritage Guide Programme (UNESCO Bangkok) (extract)
# ANNEX 1. List of World Heritage Sites of Portuguese Origin and Influence

<table>
<thead>
<tr>
<th>Name of the Site</th>
<th>Country</th>
<th>Year</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Zone of the Town of Angra do Heroismo in the Azores</td>
<td>Portugal</td>
<td>1983</td>
<td>(iv) (vi)</td>
</tr>
<tr>
<td>Monastery of the Hieronymites and Tower of Belém in Lisbon</td>
<td>Portugal</td>
<td>1983</td>
<td>(iii) (vi)</td>
</tr>
<tr>
<td>Monastery of Batalha</td>
<td>Portugal</td>
<td>1983</td>
<td>(i) (ii)</td>
</tr>
<tr>
<td>Convent of Christ in Tomar</td>
<td>Portugal</td>
<td>1983</td>
<td>(i) (vi)</td>
</tr>
<tr>
<td>Historic Centre of Évora</td>
<td>Portugal</td>
<td>1986</td>
<td>(iii) (iv)</td>
</tr>
<tr>
<td>Monastery of Alcobaça</td>
<td>Portugal</td>
<td>1989</td>
<td>(i) (iv)</td>
</tr>
<tr>
<td>Cultural Landscape of Sintra</td>
<td>Portugal</td>
<td>1995</td>
<td>(ii) (iv) (v)</td>
</tr>
<tr>
<td>Historic Centre of Oporto</td>
<td>Portugal</td>
<td>1996</td>
<td>(i) (iii)</td>
</tr>
<tr>
<td>Prehistoric Rock Art Sites in the Côa Valley and Siega Verde</td>
<td>Portugal/Spain</td>
<td>1998 2010</td>
<td>(iv)</td>
</tr>
<tr>
<td>Laurisilva of Madeira</td>
<td>Portugal</td>
<td>1999</td>
<td>(ix) (x)</td>
</tr>
<tr>
<td>Historic Centre of Guimarães</td>
<td>Portugal</td>
<td>2001</td>
<td>(ii) (iii) (iv)</td>
</tr>
<tr>
<td>Alto Douro Wine Region</td>
<td>Portugal</td>
<td>2001</td>
<td>(iii) (iv) (v)</td>
</tr>
<tr>
<td>Landscape of the Pico Island Vineyard Culture</td>
<td>Portugal</td>
<td>2004</td>
<td>(iii) (v)</td>
</tr>
<tr>
<td>Garrison Border Town of Elvas and its Fortifications</td>
<td>Portugal</td>
<td>2012</td>
<td>(iv)</td>
</tr>
<tr>
<td>Name of the Site</td>
<td>Country</td>
<td>Year</td>
<td>Criteria</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>--------------------------------</td>
<td>------</td>
<td>----------</td>
</tr>
<tr>
<td>Jesuit Missions of the Guaranis: San Ignacio Mini, Santa Ana, Nuestra Señora de Loreto and Santa Maria Mayor (Argentina), Ruins of Sao Miguel das Missoes (Brazil)</td>
<td>Argentina / Brazil</td>
<td>1983</td>
<td>(iv)</td>
</tr>
<tr>
<td>Qal‘at al-Bahrain – Ancient Harbour and Capital of Dilmun</td>
<td>Bahrein</td>
<td>2005</td>
<td>(i) (ii) (iv)</td>
</tr>
<tr>
<td>Historic Town of Ouro Preto</td>
<td>Brazil</td>
<td>1980</td>
<td>(i) (ii)</td>
</tr>
<tr>
<td>Historic Centre of the Town of Olinda</td>
<td>Brazil</td>
<td>1982</td>
<td>(ii) (iv)</td>
</tr>
<tr>
<td>Historic Centre of Salvador de Bahia</td>
<td>Brazil</td>
<td>1985</td>
<td>(iv) (vi)</td>
</tr>
<tr>
<td>Sanctuary of Bom Jesus do Congonhas</td>
<td>Brazil</td>
<td>1985</td>
<td>(i) (iv)</td>
</tr>
<tr>
<td>Historic Centre of São Luís</td>
<td>Brazil</td>
<td>1997</td>
<td>(ii) (iv) (v)</td>
</tr>
<tr>
<td>Historic Centre of the Town of Diamantina</td>
<td>Brazil</td>
<td>1999</td>
<td>(ii) (iv)</td>
</tr>
<tr>
<td>Historic Centre of the Town of Goiás</td>
<td>Brazil</td>
<td>2001</td>
<td>(ii) (iv)</td>
</tr>
<tr>
<td>São Francisco Square in the Town of São Cristóvão</td>
<td>Brazil</td>
<td>2010</td>
<td>(ii) (iv)</td>
</tr>
<tr>
<td>Rio de Janeiro, Carioca Landscape between the mountains and the Sea</td>
<td>Brazil</td>
<td>2012</td>
<td>(v) (vi)</td>
</tr>
<tr>
<td>Cidade Velha, Historic Centre of Ribeira Grande</td>
<td>Cape Verde</td>
<td>2009</td>
<td>(ii) (iii) (vi)</td>
</tr>
<tr>
<td>Historic Centre of Macao</td>
<td>China (Special Administrative region of Macao)</td>
<td>2005</td>
<td>(i) (ii) (iv) (vi)</td>
</tr>
<tr>
<td>Fasil Ghebbi, Gondar Region</td>
<td>Ethiopia</td>
<td>1979</td>
<td>(i) (iii)</td>
</tr>
<tr>
<td>Fort Jesus, Mombasa</td>
<td>Kenya</td>
<td>2011</td>
<td>(ii) (v)</td>
</tr>
<tr>
<td>Kunta Kinteh Island and Related Sites</td>
<td>Gambia</td>
<td>2003</td>
<td>(iii) (vi)</td>
</tr>
<tr>
<td>Forts and Castles, Volta, Greater Accra, Central and Western Regions</td>
<td>Ghana</td>
<td>1979</td>
<td>(vi)</td>
</tr>
<tr>
<td>Churches and Convents of Goa</td>
<td>India</td>
<td>1986</td>
<td>(iii) (iv) (vi)</td>
</tr>
<tr>
<td>Melaka and George Town, Historic Cities of the Straits of Malacca</td>
<td>Malaysia</td>
<td>2008</td>
<td>(ii) (iii) (iv)</td>
</tr>
<tr>
<td>Portuguese City of Mazagan (El Jadida)</td>
<td>Morrocco</td>
<td>2004</td>
<td>(ii) (iv)</td>
</tr>
<tr>
<td>Island of Mozambique</td>
<td>Mozambique</td>
<td>1991</td>
<td>(iv) (vi)</td>
</tr>
<tr>
<td>Jesuit Missions of La Santísima Trinidad de Paraná and Jesús de Tavarangue</td>
<td>Paraguay</td>
<td>1993</td>
<td>(iv)</td>
</tr>
<tr>
<td>Island of Gorée</td>
<td>Senegal</td>
<td>1978</td>
<td>(vi)</td>
</tr>
<tr>
<td>Region/Location</td>
<td>Country</td>
<td>Year</td>
<td>Code</td>
</tr>
<tr>
<td>---------------------------------------------------------</td>
<td>-------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Old Town of Galle and its Fortifications</td>
<td>Sri Lanka</td>
<td>1988</td>
<td>(iv)</td>
</tr>
<tr>
<td>Ruins of Kilwa Kisiwani and Ruins of Songo Mnara</td>
<td>Tanzania</td>
<td>1981</td>
<td>(iii)</td>
</tr>
<tr>
<td>Historic Quarter of the City of Colonia del Sacramento</td>
<td>Uruguay</td>
<td>1995</td>
<td>(iv)</td>
</tr>
<tr>
<td>Site / Institution</td>
<td>Participant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alcobaça</td>
<td>Cecília Gil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alto Douro Wine Region</td>
<td>Filinto GIRÃO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Azores: Angra do Heroismo</td>
<td>Jorge Augusto PAULOS BRUNO and Francisco BARROS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Azores: Pico Landscape</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Batalha</td>
<td>Pedro REDOL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Belém, Monastery of the Hieronymites</td>
<td>Isabel CRUZ DE ALMEIDA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cóa Valley</td>
<td>Fernando REAL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cóa Valley</td>
<td>Antonio BATARDA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colónia de Sacramento</td>
<td>Nelsys FUSCO-ZAMBETOGLIRIS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Évora</td>
<td>Nuno DOMINGOS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guimarães</td>
<td>Sofia FERREIRA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Porto</td>
<td>Teresa RESENDE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ínsola, Cultural Landscape</td>
<td>José Maria LOBO DE CARVALHO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ínsola, Cultural Landscape</td>
<td>Maria-João RAPOZO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tomar</td>
<td>Ana CARVALHO DIAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cidade Velha</td>
<td>Hamilton Jair FERNANDES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fort Jesus, Mombasa</td>
<td>Saadu HASHIM RASHID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fort Jesus, Mombasa</td>
<td>Mbarak ABDALLAH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fort Jesus, Mombasa</td>
<td>Galgalo RASHID ABDI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forts and Castles, Volta, Greater Accra, Central and Western Regions</td>
<td>Nicholas IVOR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ilé de Gorée</td>
<td>Éloi COLY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ouro Preto</td>
<td>Maria Cristina CAIRO SILVA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ouro Preto</td>
<td>Cecília ALFENAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ruins of Kilwa Kisiwani and Ruins of Songo Mnara</td>
<td>Revocatus BUGUMBA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DRCA</td>
<td>Dália PAULO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turismo de Portugal</td>
<td>Margarida ALÇADA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turismo de Portugal</td>
<td>Teresa FERREIRA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turismo de Portugal</td>
<td>Maria José COELHO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>African World Heritage Fund (AWHF)</td>
<td>Jacob NYANGILA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Commission of Portugal for UNESCO</td>
<td>Manuela GALHARDO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Commission of Portugal for UNESCO</td>
<td>Clara CABRAL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ICCROM</td>
<td>Katri LISITZIN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IGESPAR</td>
<td>Manuel Lacerda</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IGESPAR</td>
<td>Isabel RAPOSO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAGALHAES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ICOMOS Portugal</td>
<td>Ana Paula AMENDOEIRA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consultant (PUP)</td>
<td>Jon KOHL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNESCO World Heritage Centre</td>
<td>Kerstin MANZ</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ANNEX 3. Action Plan of the World Heritage and Sustainable Tourism Programme
(WHC-12/36.COM/5E.Inf)

A. Introduction


2. The UNESCO World Heritage Centre will have the overall coordinating responsibility in the implementation of the Programme.

3. The identified actions and activities will be implemented in cooperation with a number of stakeholders to the World Heritage Convention as identified in Table 1 including the tourism private sector.

4. The Programme is designed to benefit a broad range of stakeholders including States Parties and government agencies, World Heritage property managers/coordinators, local communities, tourism private sector, consent authorities, conservation practitioners, destination management organisations, academia, civil society and NGOs, etc. (See Table 1).


6. A flexible and coordinated approach will be taken in securing resources for the implementation of the Action Plan. Funding may be channelled either via UNESCO or directly to the implementation partners.

7. Funding proposals will be developed upon the prioritised actions and will articulate the roles and responsibilities of each implementation partner. Proposals will be shared with States Parties and potential donors from public as well as private sector. Implementation partners will be selected according to their ability to implement the different activities.

B. Explanation to the table:

8. Objectives

The Objectives represent the overarching goals of the Programme (WHC-12/36.COM/5E). While the Objectives carry equal importance, actions necessary to integrate sustainable tourism into the mechanisms of the Convention will be prioritised in the first phase of the Programme.

Objective A: Integrate sustainable tourism principles into the mechanisms of the World Heritage Convention.

Objective B: Strengthen the enabling environment by advocating policies and frameworks that support sustainable tourism as an important vehicle for protecting and managing cultural and natural heritage of Outstanding Universal Value.

Objective C: Promote broad stakeholder engagement in the planning, development and management of sustainable tourism that follows a destination approach to heritage conservation and focuses on empowering local communities.
Objective D: Provide World Heritage stakeholders with the capacity and the tools to manage tourism efficiently, responsibly and sustainably based on the local context and needs.

Objective E: Promote quality authentic tourism products and services that encourage responsible behaviour among all stakeholders and foster understanding and appreciation of the concept of Outstanding Universal Value and protection of World Heritage.

9. Outcomes
An outcome is the first effect of the intervention which contributes to the attainment of results. It is a tangible or intangible product deriving from the interventions. In general terms outcomes can be considered as the new knowledge and skills built and disseminated in collaboration with concerned stakeholders.

10. Actions
Actions correspond to the overall objectives of the Programme. The objectives and actions form the overall Programme strategy, and were developed through an inclusive and consultative process. Some actions will require an initial development phase before further implementation. Prioritised actions are marked with an asterisk (*).

11. Activities
The proposed activities follow the actions. Several activities will be cross cutting where working group(s) may be established to address one or more of the issues (e.g. data collection, information sharing, capacity building, etc.) to thereby ensure coherence, synergies and cost efficiency. Activities are cross referenced to demonstrate synergies within the Programme.

12. Timeline

13. Performance indicators
The World Heritage Centre will report on the progress of the Programme implementation to the World Heritage Committee on a biennial basis. Monitoring of the Programme will be conducted according to the Results Based Programming, Management and Monitoring (RBM) approach as applied by UNESCO, where goals and performance indicators will form the basis of the report to the World Heritage Committee on the progress of the Programme implementation. An assessment of the Action Plan 2013-2015 will take place end of 2015.

14. Estimated Budget
The estimated budget for the implementation of the Action Plan 2013 - 2015 is itemized per annum and includes the overall coordination cost for the World Heritage Centre estimated to US$ 330 000 per annum.
**Objective A: Integrate sustainable tourism principles into the mechanisms of the World Heritage Convention.**

**Outcomes:**
- The World Heritage Committee endorses the integration of sustainable tourism management into the mechanisms of the World Heritage Convention.
- An increased number of World Heritage properties are using the mechanisms of the World Heritage Convention for sustainable tourism management, monitoring and reporting.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Activities</th>
<th>Performance indicators</th>
</tr>
</thead>
</table>
| A.1     | Develop for the nomination process requirements for a tourism baseline analysis and necessary elements ensuring sustainable tourism management taking a destination approach. | - Develop a template taking impacts and management of tourism into consideration.  
- Disseminate draft template through appropriate channels.  
(Ref.: C.1) | - Baseline analyses completed.  
- Template for the nomination process developed.  
- Template disseminated to States Parties. |
| A.2     | Integrate sustainable tourism management indicators into the *Operational Guidelines* (OG), and develop supporting materials and tools assisting in their implementation. | - Identify and develop a framework for the integration of sustainable tourism management indicators into the OG (potentially as an annex).  
- Develop supporting material and tools for the implementation of the OG and disseminate it through appropriate channels.  
(Ref.: C.1) | - Integration framework completed and management indicators identified.  
- Supporting materials and tools for implementation are developed and disseminated. |
| A.3     | Integrate sustainable tourism management indicators in the Periodic Reporting (PR), State of Conservation Reporting (SoC) and Reactive Monitoring (RM) mechanisms, and undertake strategic analysis of the results from all monitoring to identify opportunities and challenges in terms of World Heritage and sustainable tourism. | - Identify and test management indicators for integration into the PR, SOC and RM.  
- Develop methodology for strategic analyses of the results and disseminate it through appropriate channels.  
- Collect, analyse and communicate data and results.  
(Ref.: C.2) | - Sustainable tourism indicators at all WH property categories are identified and tested.  
- Methodology for strategic analyses of the results identifying opportunities and challenges are disseminated through appropriate channels.  
- Data and results collected, analysed and communicated. |
Objective B: Strengthen the enabling environment by advocating policies, strategies, frameworks and tools that support sustainable tourism as an important vehicle for protecting and managing cultural and natural heritage of Outstanding Universal Value.

Outcomes:
- Sustainable tourism is reflected in policies as an important vehicle for protecting World Heritage.
- Increased collaboration between relevant international agencies and organisations in policy development relevant to World Heritage conservation.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Activities</th>
<th>Performance indicators</th>
</tr>
</thead>
</table>
| B.1     | Support relevant data generation and quality research identifying examples of successful policies, regulatory frameworks, institutional arrangements and development strategies strengthening the enabling environment, policy development and decision making concerning World Heritage and sustainable tourism both at a national and destination level. | - Identify specific research needs.  
- Develop research proposals and distribute it to the implementation partners.  
- Implementation partners conduct the research.  
- Research outcomes distributed through appropriate channels.  
(Ref.: A.3) | - A number of research proposals are distributed.  
- Relevant research conducted and made available. |
| B.2     | Work with relevant international agencies and organisations (e.g. other UN related organisations) to promote and support the dissemination of relevant policies, frameworks and tools to World Heritage stakeholders. | - Establish contact and collaboration with relevant international agencies and organisations.  
- Provide a platform for information exchange and disseminate relevant policies to WH stakeholders.  
- Use existing fora to promote and advocate the development of policies, frameworks and tools.  
(Ref.: B.1) | - Active collaboration with relevant international agencies and organisations in policy development and relevant policies disseminated. |
| B.3     | Identify and disseminate methodologies, practices and techniques to measure and monitor the capacity and impacts of tourism on World Heritage destinations that can be used to guide sustainable tourism planning and management. | - Identify research needs and develop research proposals and distribute it to the implementation partners.  
- Implementation partners to identify and test methodologies, practices and techniques.  
- Develop manual “Assessing and monitoring impacts of proposed developments and tourism/public use activities on the OUV of WH properties” (ref. WHC-09/17.GA/8) and | - A number of research proposals distributed.  
- Methodologies, practices and techniques identified and disseminated.  
- Manual developed and
- Implementation partners to conduct ongoing research.
- Data and research outcomes disseminated through appropriate channels.
(Ref.: A.1, A.2, A.3, C.2)

- A number of relevant research activities conducted and results made available.
### Objective C: Promote broad stakeholder engagement in the planning, development and management of sustainable tourism that follows a destination approach to heritage conservation and focuses on empowering local communities.

### Outcomes:
- Increased participation of local communities in the planning, development and management of sustainable tourism at and around World Heritage properties.
- Broad stakeholder networks established that adopts a destination management approach to the planning, development and management to sustainable tourism at and around World Heritage properties.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Activities</th>
<th>Performance indicators</th>
</tr>
</thead>
</table>
| C.1     | Develop frameworks and guidelines that support the development and implementation of sustainable tourism management plans and other appropriate planning and management frameworks that involve and engage a broad set of stakeholders and empower and provide benefits to local communities. | - Conduct research and identify relevant resources to develop frameworks and guidelines.  
- Develop a dissemination strategy identifying the appropriate channels.  
- Identify selected properties and assist in implementing frameworks and guidelines.  
- Identify replicable good practices and examples and disseminate these through appropriate channels.  
(Ref.: A.1, A.2) | - Frameworks and guidelines developed and disseminated.  
- Selected properties assisted.  
- Replicable good practices and examples identified and disseminated. |
| C.2     | Develop a tool for self-evaluation based on performance indicators, and create incentive mechanisms to foster comprehensive tourism management that provides for conservation and preservation of the World Heritage properties. | - Identify self evaluation models and adapt them to develop a self evaluating tool supplementing the Periodic Reporting exercise.  
- Identify and develop incentives, and promote the self evaluation tool.  
- Develop a system of analyses to utilise the data and communicate results and good practices.  
(Ref.: A.1, A.2, A.3, B.3, E.2) | - Tool for self evaluation developed and incentive mechanisms created.  
- Data collected and results and good practices communicated. |
| C.3     | Support relevant data generation and quality research identifying good practices concerning World Heritage and sustainable tourism (planning, development and management). | - Identify relevant data and indicators.  
- Develop research proposals and distribute it to the implementation partners.  
- Implementation partners to conduct the research. | - Relevant data and indicators identified and research proposals distributed. |
<table>
<thead>
<tr>
<th>Stakeholder engagement and benefits.</th>
<th>- Research outcomes distributed through appropriate channels. (Ref.: B.1, B.3)</th>
<th>- Relevant research conducted and made available.</th>
</tr>
</thead>
<tbody>
<tr>
<td>C.4 Facilitate information sharing, exchange of experience and good practices among stakeholders through the creation of networking opportunities and incentive mechanisms.</td>
<td>- Create networking opportunities and incentive mechanisms for information sharing, capacity building and collaboration. - Support capacity building meetings and events in relation to key tourism and sustainability's issues. (Ref.: C.2, E.2, E.4)</td>
<td>- Network opportunities and incentive mechanisms for information sharing, capacity building and collaboration created.</td>
</tr>
</tbody>
</table>
**Objective D: Provide World Heritage stakeholders with the capacity and the tools to manage tourism efficiently, responsibly and sustainably based on the local context and needs.**

**Outcomes:**
- Appropriate tools are available and utilised by stakeholders in the management of tourism at and around World Heritage properties.
- Increased number of World Heritage stakeholders managing tourism efficiently, responsibly and sustainably.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Activities</th>
<th>Performance indicators</th>
</tr>
</thead>
</table>
| D.1 Identify capacity development, training and education needs among stakeholders in relation to World Heritage and sustainable tourism, and develop approaches to integrate into existing initiatives such as the World Heritage Capacity Building Strategy. | - Conduct desk studies and/or surveys to identify capacity development, training and education needs.  
- Develop pilot projects aligned with the World Heritage Capacity Building Strategy. | - Capacity building, training and education needs identified and pilot projects developed. |
| D.2 Develop tools and strategies to support stakeholders, and in particular property managers/coordinators, in the management of World Heritage and sustainable tourism that can be adapted to local context and needs. | - Identify existing tools and good practice examples and conduct a needs assessment.  
- Develop tools and strategies based on the identified needs (D.1).  
- Disseminate tools and strategies through appropriate channels.  
- Identify replicable good practices and examples and disseminate through appropriate channels. (Ref.: A.2, D.1) | - Tools and strategies developed and adapted to local context and needs.  
- Tools and strategies disseminated. |
| D.3 Support information sharing, linkages, networking and collaboration among stakeholders, and establish links to training, education and research institutions (including World Heritage Category 2 Centres) delivering appropriate training and education. | - Create mechanisms for information sharing, networking, capacity building and collaboration.  
- Engage stakeholders in the information sharing mechanisms. | - Mechanism established and running with participants. |
**Objective E: Promote quality tourism products and services that encourage responsible behaviour among all stakeholders and foster understanding and appreciation of the concept of Outstanding Universal Value and protection of World Heritage.**

**Outcomes:**
- An increased awareness, understanding and appreciation among stakeholders of the concept of OUV and protection of World Heritage.
- An increased number of quality tourism products and services that encourages responsible behaviour are developed and made available.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Activities</th>
<th>Performance indicators</th>
</tr>
</thead>
</table>
| E.1 Identify, communicate and support approaches to increase knowledge, understanding and appreciation of the concept of Outstanding Universal Value of World Heritage in the tourism management context amongst stakeholders. | - Create communication strategies and tools for the understanding, appreciation and application of OUV.  
- Disseminate the tools through appropriate channels. | - Communication strategies developed and tools disseminated. |
| E.2 Create incentive mechanisms that encourage stakeholders (especially tourism industry and visitors) to act responsibly in terms of site conservation and to provide social and economic benefits to the local communities. | - Identify existing tools and good practice and conduct a needs assessment.  
- Develop appropriate incentive mechanisms (e.g. policy, visibility, recognition, financial incentives, certification, prize, technological tools, apps, etc.).  
- Operationalize the mechanism(s). (Ref.: C.2, C.4, E.3) | - Incentive mechanisms identified and developed.  
- Incentive mechanisms are operational. |
| E.3 Identify and promote authentic, sustainable and responsible tourism products and services that provide high quality and low impact visitor experiences at World Heritage properties and the destination as a whole. | - Develop and/or adapt criteria to identify quality, sustainable and responsible tourism products and services. A thematic approach is proposed.  
- Disseminate criteria through appropriate channels.  
- Assist in developing products and services in selected properties.  
- Identify replicable good practices and examples and disseminated these through appropriate channels.  
- Promote quality, sustainable and responsible tourism products and services. | - Criteria developed / adapted and disseminated.  
- Products and services developed.  
- Replicable good practices and examples identified and disseminated. |
| E.4  Support relevant data generation and quality analyses on visitation, impacts and trends, and increase the availability of good practices and lessons learned through information sharing and recognition mechanisms. | - Develop and/or adapt indicators relating to impacts and trends.  
- Collect and analyse data.  
- Compare data sets and explore pooling of databases.  
- Communicate results and good practices.  
(Ref.: A.3, B.1, B.3) | - Indicators developed / adapted.  
- Data collected and analysed.  
- Results and good practices communicated. |
<table>
<thead>
<tr>
<th>Stakeholder Group</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>a) States Parties</strong></td>
<td>to the World Heritage Convention develop and implement relevant policy, institutional and legal frameworks for the management of properties.</td>
</tr>
<tr>
<td><strong>b) World Heritage Committee</strong></td>
<td>consists of representatives from 21 of the States Parties to the Convention elected by the General Assembly. The Committee is responsible for the implementation of the World Heritage Convention, defines the use of the World Heritage Fund and allocates financial assistance upon requests from States Parties. It has the final say on whether a property is inscribed on the World Heritage List.</td>
</tr>
<tr>
<td><strong>c) Government agencies</strong></td>
<td>at national, regional and local levels hold responsibility in the management of World Heritage properties, tourism management and promotion, local planning and infrastructure, and community and economic development.</td>
</tr>
<tr>
<td><strong>d) Property managers/coordinators</strong></td>
<td>are responsible for managing the World Heritage properties including aspects relating to tourism and resources management.</td>
</tr>
<tr>
<td><strong>e) Local communities</strong></td>
<td>living at and around the World Heritage properties (including indigenous peoples and minorities). Actions and decisions of local communities can affect the sustainability of the properties. Local communities are involved in both the demand and supply side.</td>
</tr>
<tr>
<td><strong>f) Tourism private sector</strong></td>
<td>operators and providers are significant investors in sustainable tourism and have in interest in the development of properties as attractive tourism destinations.</td>
</tr>
<tr>
<td><strong>g) Destination Management Organisations (DMOs)</strong></td>
<td>typically undertake marketing activities. However their remit is becoming far broader, increasingly acting strategic leaders in destination development. Destination management calls for a coalition of many organisations and interests working towards a common goal. DMOs role should be to lead and coordinate activities under a coherent strategy.</td>
</tr>
<tr>
<td><strong>h) International agencies</strong>, including the World Heritage Committee, the UNESCO World Heritage Centre, Category 2 Centres working under the auspices of UNESCO, UNEP, UNDP, the UN World Tourism Organisation, the World Bank Group and Advisory Bodies such as ICOMOS, IUCN, ICCROM and ICOM. These agencies influence the development of standards and good practices for sustainable tourism management at and around World Heritage properties.</td>
<td></td>
</tr>
<tr>
<td><strong>i) Researchers and academics</strong></td>
<td>including organisations part of the UNITWIN/ UNESCO Chairs Programme provide insight on the impact of tourism and may influence management practices and approaches.</td>
</tr>
<tr>
<td><strong>j) Consent authorities</strong></td>
<td>may control development at properties and control development in the local area. This can provide facilities for tourism</td>
</tr>
</tbody>
</table>
k) Civil society and NGOs provide a range of services that potentially support site managers, help local communities benefit from tourism, and influence local planning and national policy formulation.

l) Funding providers for tourism projects at or near World Heritage properties have the potential to influence the nature of tourism development.

m) Tourism promoters have the potential to raise awareness of the importance of the heritage of a destination.
ANNEX 5. Extract of the Operational Guidelines on the World Heritage Emblem
(Chapter VI)

VIII. THE WORLD HERITAGE EMBLEM

VIII.A Preamble

258. At its second session (Washington, 1978), the Committee adopted the World Heritage Emblem which had been designed by Mr. Michel Olyff. This Emblem symbolizes the interdependence of cultural and natural properties: the central square is a form created by man and the circle represents nature, the two being intimately linked. The Emblem is round, like the world, but at the same time it is a symbol of protection. It symbolizes the Convention, signifies the adherence of States Parties to the Convention, and serves to identify properties inscribed in the World Heritage List. It is associated with public knowledge about the Convention and is the imprimatur of the Convention's credibility and prestige. Above all, it is a representation of the universal values for which the Convention stands.

259. The Committee decided that the Emblem proposed by the artist could be used, in any colour or size, depending on the use, the technical possibilities and considerations of an artistic nature. The Emblem should always carry the text "WORLD HERITAGE . PATRIMOINE MONDIAL". The space occupied by "PATRIMONIO MUNDIAL" can be used for its translation into the national language of the country where the Emblem is to be used.
260. In order to ensure the Emblem benefits from as much visibility as possible while preventing improper uses, the Committee at its twenty-second session (Kyoto, 1998) adopted "Guidelines and Principles for the Use of the World Heritage Emblem" as set out in the following paragraphs.

261. Although there is no mention of the Emblem in the Convention, its use has been promoted by the Committee to identify properties protected by the Convention and inscribed on the World Heritage List since its adoption in 1978.

262. The World Heritage Committee is responsible for determining the use of the World Heritage Emblem and for making policy prescriptions regarding how it may be used.

263. As requested by the Committee at its 26th session (Budapest, 2002), the World Heritage Emblem, the “World Heritage” name and its derivatives are currently being registered under Article 6ter of the Paris Convention for the Protection of Industrial Property and are therefore protected.

264. The Emblem also has fund-raising potential that can be used to enhance the marketing value of products with which it is associated. A balance is needed between the Emblem's use to further the aims of the Convention and optimize knowledge of the Convention worldwide and the need to prevent its abuse for inaccurate, inappropriate, and unauthorized commercial or other purposes.

265. The Guidelines and Principles for the Use of the Emblem and modalities for quality control should not become an obstacle to co-operation for promotional activities. Authorities responsible for reviewing and deciding on uses of the Emblem (see below) need parameters on which to base their decisions.

VIII.B Applicability

266. The Guidelines and Principles proposed herein cover all proposed uses of the Emblem by:

a. The World Heritage Centre;
b. The UNESCO Publishing Office and other UNESCO offices;
c. Agencies or National Commissions, responsible for implementing the Convention in each State Party;
d. World Heritage properties;
e. Other contracting parties, especially those operating for predominantly commercial purposes.
VIII.C Responsibilities of States Parties

267. States Parties to the Convention should take all possible measures to prevent the use of the Emblem in their respective countries by any group or for any purpose not explicitly recognized by the Committee. States Parties are encouraged to make full use of national legislation including Trade Mark Laws.

VIII.D Increasing proper uses of the World Heritage Emblem

268. Properties inscribed on the World Heritage List should be marked with the emblem jointly with the UNESCO logo, which should, however, be placed in such a way that they do not visually impair the property in question.

Production of plaques to commemorate the inscription of properties on the World Heritage List

269. Once a property is inscribed on the World Heritage List, the State Party should place a plaque, whenever possible, to commemorate this inscription. These plaques are designed to inform the public of the country concerned and foreign visitors that the property visited has a particular value which has been recognized by the international community. In other words, the property is exceptional, of interest not only to one nation, but also to the whole world. However, these plaques have an additional function which is to inform the general public about the World Heritage Convention or at least about the World Heritage concept and the World Heritage List.

270. The Committee has adopted the following Guidelines for the production of these plaques:

a) the plaque should be so placed that it can easily be seen by visitors, without disfiguring the property;

b) the World Heritage Emblem should appear on the plaque;

c) the text should mention the property’s Outstanding Universal Value; in this regard it might be useful to give a short description of the property's outstanding characteristics. States Parties may, if they wish, use the descriptions appearing in the various World Heritage publications or in the World Heritage exhibit, and which may be obtained from the Secretariat;

d) the text should make reference to the World Heritage Convention and particularly to the World Heritage List.
and to the international recognition conferred by inscription on this List (however, it is not necessary to mention at which session of the Committee the property was inscribed); it may be appropriate to produce the text in several languages for properties which receive many foreign visitors.

271. The Committee proposes the following text as an example:

"(Name of property) has been inscribed upon the World Heritage List of the Convention concerning the Protection of the World Cultural and Natural Heritage. Inscription on this List confirms the Outstanding Universal Value of a cultural or natural property which deserves protection for the benefit of all humanity."

272. This text could be then followed by a brief description of the property concerned.

273. Furthermore, the national authorities should encourage World Heritage properties to make a broad use of the Emblem such as on their letterheads, brochures and staff uniforms.

274. Third parties which have received the right to produce communication products related to the World Heritage Convention and World Heritage properties must give the Emblem proper visibility. They should avoid creating a different Emblem or logo for that particular product.

 VIII. E Principles on the use of the World Heritage Emblem

275. The responsible authorities are henceforth requested to use the following principles in making decisions on the use of the Emblem:

a) The Emblem should be utilized for all projects substantially associated with the work of the Convention, including, to the maximum extent technically and legally possible, those already approved and adopted, in order to promote the Convention.

b) A decision to approve use of the Emblem should be linked strongly to the quality and content of the product with which it is to be associated, not on the volume of products to be marketed or the financial return expected. The main criterion for approval should be the educational, scientific, cultural, or artistic value of the proposed product related to World Heritage principles and values. Approval should not
routinely be granted to place the Emblem on products that have no, or extremely little, educational value, such as cups, T-shirts, pins, and other tourist souvenirs. Exceptions to this policy will be considered for special events, such as meetings of the Committee and ceremonies at which plaques are unveiled.

c) Any decision with respect to authorizing the use of the Emblem must be completely unambiguous and in keeping with the explicit and implicit goals and values of the *World Heritage Convention*.

d) Except when authorized in accordance with these principles it is not legitimate for commercial entities to use the Emblem directly on their own material to show their support for World Heritage. The Committee recognizes, however, that any individual, organization, or company is free to publish or produce whatever they consider to be appropriate regarding World Heritage properties, but official authorization to do so under the World Heritage Emblem remains the exclusive prerogative of the Committee, to be exercised as prescribed in these Guidelines and Principles.

e) Use of the Emblem by other contracting parties should normally only be authorized when the proposed use deals directly with World Heritage properties. Such uses may be granted after approval by the national authorities of the countries concerned.

f) In cases where no specific World Heritage properties are involved or are not the principal focus of the proposed use, such as general seminars and/or workshops on scientific issues or conservation techniques, use may be granted only upon express approval in accordance with these Guidelines and Principles. Requests for such uses should specifically document the manner in which the proposed use is expected to enhance the work of the *Convention*.

g) Permission to use the Emblem should not be granted to travel agencies, airlines, or to any other type of business operating for predominantly commercial purposes, except under exceptional circumstances and when manifest benefit to the World Heritage generally or particular World Heritage properties can be demonstrated. Requests for such use should require approval in accordance with these Guidelines and Principles and the concurrence of the national authorities of countries specifically concerned.
The Secretariat is not to accept any advertising, travel, or other promotional considerations from travel agencies or other, similar companies in exchange or in lieu of financial remuneration for use of the Emblem.

h) When commercial benefits are anticipated, the Secretariat should ensure that the World Heritage Fund receives a fair share of the revenues and conclude a contract or other agreement that documents the nature of the understandings that govern the project and the arrangements for provision of income to the Fund. In all cases of commercial use, any staff time and related costs for personnel assigned by the Secretariat or other reviewers, as appropriate, to any initiative, beyond the nominal, must be fully covered by the party requesting authorization to use the Emblem.

National authorities are also called upon to ensure that their properties or the World Heritage Fund receive a fair share of the revenues and to document the nature of the understandings that govern the project and the distribution of any proceeds.

i) If sponsors are sought for manufacturing products whose distribution the Secretariat considers necessary, the choice of partner or partners should be consistent, at a minimum, with the criteria set forth in the "Directives concerning UNESCO's co-operation with private extra-budgetary funding sources" and "Guidelines for mobilizing private funds and criteria for selecting potential partners" and with such further fund-raising guidance as the Committee may prescribe. The necessity for such products should be clarified and justified in written presentations that will require approval in such manner as the Committee may prescribe.

VIII.F Authorization procedure for the use of the World Heritage Emblem

Simple agreement of the national authorities

276. National authorities may grant the use of the Emblem to a national entity, provided that the project, whether national or international, involves only World Heritage properties located on the same national territory. National authorities’ decision should be guided by the Guidelines and Principles.

277. States Parties are invited to provide the Secretariat with the names and addresses of the authorities in charge of
managing the use of the Emblem.

Agreement requiring quality control of content

278. Any other request for authorization to use the Emblem should adopt the following procedure:

a) A request indicating the objective of the use of the Emblem, its duration and territorial validity, should be addressed to the Director of the World Heritage Centre.

b) The Director of the World Heritage Centre has the authority to grant the use of the Emblem in accordance with the Guidelines and Principles. For cases not covered, or not sufficiently covered, by the Guidelines and Principles, the Director refers the matter to the Chairperson who, in the most difficult cases, might wish to refer the matter to the Committee for final decision. A yearly report on the authorized uses of the Emblem will be submitted to the World Heritage Committee.

c) Authorization to use the Emblem in major products to be widely distributed over an undetermined period of time is conditional upon obtaining the manufacturer’s commitment to consult with countries concerned and secure their endorsement of texts and images illustrating properties situated in their territory, at no cost to the Secretariat, together with the proof that this has been done. The text to be approved should be provided in either one of the official languages of the Committee or in the language of the country concerned. A draft model to be used by States Parties to authorize the use of the Emblem to third parties appears below.

Content Approval Form:

[Name of responsible national body], officially identified as the body responsible for approving the content of the texts and photos relating to the World Heritage properties located in the territory of [name of country], hereby confirms to [name of producer] that the text and the images that it has submitted for the [name of properties] World Heritage property(ies) are [approved] [approved subject to the following changes requested] [are not approved]

(delete whatever entry does not apply, and provide, as needed, a corrected copy of the text or a signed list of corrections).

Notes:
It is recommended that the initials of the responsible national official be affixed to each page of text.

The National Authorities are given one month from their acknowledged receipt in which to authorize the content, following which the producers may consider that the content has been tacitly approved, unless the responsible National Authorities request in writing a longer period.

Texts should be supplied to the National Authorities in one of the two official languages of the Committee, or in the official language (or in one of the official languages) of the country in which the properties are located, at the convenience of both parties.

d) After having examined the request and considered it as acceptable, the Secretariat may establish an agreement with the partner.

e) If the Director of the World Heritage Centre judges that a proposed use of the Emblem is not acceptable, the Secretariat informs the requesting party of the decision in writing.

**VIII.G Right of States Parties to exert quality control**

279. Authorization to use the Emblem is inextricably linked to the requirement that the national authorities may exert quality control over the products with which it is associated.

a) The States Parties to the *Convention* are the only parties authorized to approve the content (images and text) of any distributed product appearing under the World Heritage Emblem with regard to the properties located in their territories.

b) States Parties that protect the Emblem legally must review these uses.

c) Other States Parties may elect to review proposed uses or refer such proposals to the Secretariat. States Parties are responsible for identifying an appropriate national authority and for informing the Secretariat whether they wish to review proposed uses or to identify uses that are inappropriate. The Secretariat maintains a list of responsible national authorities.
INTERNATIONAL CULTURAL TOURISM CHARTER
Managing Tourism at Places of Heritage Significance (1999)

Adopted by ICOMOS at the 12th General Assembly in Mexico, October 1999.

INTRODUCTION

The Charter Ethos

At the broadest level, the natural and cultural heritage belongs to all people. We each have a right and responsibility to understand, appreciate and conserve its universal values.

Heritage is a broad concept and includes the natural as well as the cultural environment. It encompasses landscapes, historic places, sites and built environments, as well as biodiversity, collections, past and continuing cultural practices, knowledge and living experiences. It records and expresses the long processes of historic development, forming the essence of diverse national, regional, indigenous and local identities and is an integral part of modern life. It is a dynamic reference point and positive instrument for growth and change. The particular heritage and collective memory of each locality or community is irreplaceable and an important foundation for development, both now and into the future.

At a time of increasing globalisation, the protection, conservation, interpretation and presentation of the heritage and cultural diversity of any particular place or region is an important challenge for people everywhere. However, management of that heritage, within a framework of internationally recognised and appropriately applied standards, is usually the responsibility of the particular community or custodian group.

A primary objective for managing heritage is to communicate its significance and need for its conservation to its host community and to visitors. Reasonable and well managed physical, intellectual and/or emotive access to heritage and cultural development is both a right and a privilege. It brings with it a duty of respect for the heritage values, interests and equity of the present-day host community, indigenous custodians or owners of historic property and for the landscapes and cultures from which that heritage evolved.

The Dynamic Interaction between Tourism and Cultural Heritage

Domestic and international tourism continues to be among the foremost vehicles for cultural exchange, providing a personal experience, not only of that which has survived from the past, but of the contemporary life and society of others. It is increasingly appreciated as a positive force for natural and cultural conservation. Tourism can capture the economic characteristics of the heritage and harness these for conservation by generating funding, educating the community and influencing policy. It is an essential part of many national and regional economies and can be an important factor in development, when managed successfully.

Tourism itself has become an increasingly complex phenomenon, with political, economic,
social, cultural, educational, bio-physical, ecological and aesthetic dimensions. The achievement of a beneficial inter-action between the potentially conflicting expectations and aspirations of visitors and host or local communities, presents many challenges and opportunities.

The natural and cultural heritage, diversities and living cultures are major tourism attractions. Excessive or poorly-managed tourism and tourism related development can threaten their physical nature, integrity and significant characteristics. The ecological setting, culture and lifestyles of host communities may also be degraded, along with the visitor's experience of the place.

Tourism should bring benefits to host communities and provide an important means and motivation for them to care for and maintain their heritage and cultural practices. The involvement and co-operation of local and/or indigenous community representatives, conservationists, tourism operators, property owners, policy makers, those preparing national development plans and site managers is necessary to achieve a sustainable tourism industry and enhance the protection of heritage resources for future generations.

ICOMOS, the International Council on Monuments and Sites, as the author of this Charter, other international organisations and the tourism industry, are dedicated to this challenge.

**Objectives of the Charter**

The Objectives of the International Cultural Tourism Charter are:

- To facilitate and encourage those involved with heritage conservation and management to make the significance of that heritage accessible to the host community and visitors.

- To facilitate and encourage the tourism industry to promote and manage tourism in ways that respect and enhance the heritage and living cultures of host communities.

- To facilitate and encourage a dialogue between conservation interests and the tourism industry about the importance and fragile nature of heritage places, collections and living cultures, including the need to achieve a sustainable future for them.

- To encourage those formulating plans and policies to develop detailed, measurable goals and strategies relating to the presentation and interpretation of heritage places and cultural activities, in the context of their preservation and conservation.

In addition,

- The Charter supports wider initiatives by ICOMOS, other international bodies and the tourism industry in maintaining the integrity of heritage management and conservation.

- The Charter encourages the involvement of all those with relevant or at times conflicting interests, responsibilities and obligations to join in achieving its objectives.

- The Charter encourages the formulation of detailed guidelines by interested parties, facilitating the implementation of the Principles to their specific circumstances or the requirements of particular organisations and communities.

**PRINCIPLES OF THE CULTURAL TOURISM CHARTER**

**Principle 1**

*Since domestic and international tourism is among the foremost vehicles for cultural exchange, conservation should provide responsible and well managed*
opportunities for members of the host community and visitors to experience and understand that community's heritage and culture at first hand.

1.1

The natural and cultural heritage is a material and spiritual resource, providing a narrative of historical development. It has an important role in modern life and should be made physically, intellectually and/or emotively accessible to the general public. Programmes for the protection and conservation of the physical attributes, intangible aspects, contemporary cultural expressions and broad context, should facilitate an understanding and appreciation of the heritage significance by the host community and the visitor, in an equitable and affordable manner.

1.2

Individual aspects of natural and cultural heritage have differing levels of significance, some with universal values, others of national, regional or local importance. Interpretation programmes should present that significance in a relevant and accessible manner to the host community and the visitor, with appropriate, stimulating and contemporary forms of education, media, technology and personal explanation of historical, environmental and cultural information.

1.3

Interpretation and presentation programmes should facilitate and encourage the high level of public awareness and support necessary for the long term survival of the natural and cultural heritage.

1.4

Interpretation programmes should present the significance of heritage places, traditions and cultural practices within the past experience and present diversities of the area and the host community, including that of minority cultural or linguistic groups. The visitor should always be informed of the differing cultural values that may be ascribed to a particular heritage resource.

Principle 2

The relationship between Heritage Places and Tourism is dynamic and may involve conflicting values. It should be managed in a sustainable way for present and future generations.

2.1

Places of heritage significance have an intrinsic value for all people as an important basis for cultural diversity and social development. The long term protection and conservation of living cultures, heritage places, collections, their physical and ecological integrity and their environmental context, should be an essential component of social, economic, political, legislative, cultural and tourism development policies.

2.2

The interaction between heritage resources or values and tourism is dynamic and ever changing, generating both opportunities and challenges, as well as potential conflicts. Tourism projects, activities and developments should achieve positive outcomes and minimise adverse impacts on the heritage and lifestyles of the host community, while responding to the needs and aspirations of the visitor.

2.3

Conservation, interpretation and tourism development programmes should be based on a
comprehensive understanding of the specific, but often complex or conflicting aspects of heritage significance of the particular place. Continuing research and consultation are important to furthering the evolving understanding and appreciation of that significance.

2.4

The retention of the authenticity of heritage places and collections is important. It is an essential element of their cultural significance, as expressed in the physical material, collected memory and intangible traditions that remain from the past. Programmes should present and interpret the authenticity of places and cultural experiences to enhance the appreciation and understanding of that cultural heritage.

2.5

Tourism development and infrastructure projects should take account of the aesthetic, social and cultural dimensions, natural and cultural landscapes, bio-diversity characteristics and the broader visual context of heritage places. Preference should be given to using local materials and take account of local architectural styles or vernacular traditions.

2.6

Before heritage places are promoted or developed for increased tourism, management plans should assess the natural and cultural values of the resource. They should then establish appropriate limits of acceptable change, particularly in relation to the impact of visitor numbers on the physical characteristics, integrity, ecology and biodiversity of the place, local access and transportation systems and the social, economic and cultural well being of the host community. If the likely level of change is unacceptable the development proposal should be modified.

2.7

There should be on-going programmes of evaluation to assess the progressive impacts of tourism activities and development on the particular place or community.

Principle 3

Conservation and Tourism Planning for Heritage Places should ensure that the Visitor Experience will be worthwhile, satisfying and enjoyable.

3.1

Conservation and tourism programmes should present high quality information to optimise the visitor's understanding of the significant heritage characteristics and of the need for their protection, enabling the visitor to enjoy the place in an appropriate manner.

3.2

Visitors should be able to experience the heritage place at their own pace, if they so choose. Specific circulation routes may be necessary to minimise impacts on the integrity and physical fabric of a place, its natural and cultural characteristics.

3.3

Respect for the sanctity of spiritual places, practices and traditions is an important consideration for site managers, visitors, policy makers, planners and tourism operators. Visitors should be encouraged to behave as welcomed guests, respecting the values and lifestyles of the host community, rejecting possible theft or illicit trade in cultural property and conducting themselves in a responsible manner which would generate a renewed welcome, should they return.

3.4
Planning for tourism activities should provide appropriate facilities for the comfort, safety and well-being of the visitor, that enhance the enjoyment of the visit but do not adversely impact on the significant features or ecological characteristics.

**Principle 4**

**Host communities and indigenous peoples should be involved in planning for conservation and tourism.**

4.1

The rights and interests of the host community, at regional and local levels, property owners and relevant indigenous peoples who may exercise traditional rights or responsibilities over their own land and its significant sites, should be respected. They should be involved in establishing goals, strategies, policies and protocols for the identification, conservation, management, presentation and interpretation of their heritage resources, cultural practices and contemporary cultural expressions, in the tourism context.

4.2

While the heritage of any specific place or region may have a universal dimension, the needs and wishes of some communities or indigenous peoples to restrict or manage physical, spiritual or intellectual access to certain cultural practices, knowledge, beliefs, activities, artefacts or sites should be respected.

**Principle 5**

**Tourism and conservation activities should benefit the host community.**

5.1

Policy makers should promote measures for the equitable distribution of the benefits of tourism to be shared across countries or regions, improving the levels of socio-economic development and contributing where necessary to poverty alleviation.

5.2

Conservation management and tourism activities should provide equitable economic, social and cultural benefits to the men and women of the host or local community, at all levels, through education, training and the creation of full-time employment opportunities.

5.3

A significant proportion of the revenue specifically derived from tourism programmes to heritage places should be allotted to the protection, conservation and presentation of those places, including their natural and cultural contexts. Where possible, visitors should be advised of this revenue allocation.

5.4

Tourism programmes should encourage the training and employment of guides and site interpreters from the host community to enhance the skills of local people in the presentation and interpretation of their cultural values.

5.5

Heritage interpretation and education programmes among the people of the host community should encourage the involvement of local site interpreters. The programmes should promote a knowledge and respect for their heritage, encouraging the local people to take a direct interest in its care and conservation.
Conservation management and tourism programmes should include education and training opportunities for policy makers, planners, researchers, designers, architects, interpreters, conservators and tourism operators. Participants should be encouraged to understand and help resolve the at times conflicting issues, opportunities and problems encountered by their colleagues.

**Principle 6**

*Tourism promotion programmes should protect and enhance Natural and Cultural Heritage characteristics.*

6.1

Tourism promotion programmes should create realistic expectations and responsibly inform potential visitors of the specific heritage characteristics of a place or host community, thereby encouraging them to behave appropriately.

6.2

Places and collections of heritage significance should be promoted and managed in ways which protect their authenticity and enhance the visitor experience by minimising fluctuations in arrivals and avoiding excessive numbers of visitors at any one time.

6.3

Tourism promotion programmes should provide a wider distribution of benefits and relieve the pressures on more popular places by encouraging visitors to experience the wider cultural and natural heritage characteristics of the region or locality.

6.4

The promotion, distribution and sale of local crafts and other products should provide a reasonable social and economic return to the host community, while ensuring that their cultural integrity is not degraded.
<table>
<thead>
<tr>
<th>THE ICOMOS CHARTER FOR THE INTERPRETATION AND PRESENTATION OF CULTURAL HERITAGE SITES</th>
<th>CHARTE ICOMOS POUR L'INTERPRETATION ET LA PRESENTATION DES SITES CULTURELS PATRIMONIAUX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared under the Auspices of the ICOMOS International Scientific Committee on Interpretation and Presentation of Cultural Heritage Sites</td>
<td>Préparée sous les auspices du Comité scientifique de l'ICOMOS sur l'interprétation et la présentation des sites patrimoniaux</td>
</tr>
<tr>
<td>Ratified by the 16th General Assembly of ICOMOS, Québec (Canada), on 4 October 2008</td>
<td>Ratifiée par la 16e Assemblée Générale de l'ICOMOS, Québec (Canada), le 4 octobre 2008</td>
</tr>
</tbody>
</table>

**PREAMBLE**

Since its establishment in 1965 as a worldwide organisation of heritage professionals dedicated to the study, documentation, and protection of cultural heritage sites, ICOMOS has striven to promote the conservation ethic in all its activities and to help enhance public appreciation of humanity’s material heritage in all its forms and diversity.

As noted in the Charter of Venice (1964) “It is essential that the principles guiding the preservation and restoration of ancient buildings should be agreed and be laid down on an international basis, with each country being responsible for applying the plan within the framework of its own culture and traditions.” Subsequent ICOMOS charters have taken up that mission, establishing professional guidelines for specific conservation challenges and encouraging effective communication about the importance of heritage conservation in every region of the world.

These earlier ICOMOS charters stress the importance of public communication as an essential part of the larger conservation process (variously describing it as “dissemination,” “popularization,” “presentation,” and “interpretation”). They implicitly acknowledge that every act of heritage conservation—within the world’s cultural traditions - is by its nature a communicative act.

From the vast range of surviving material remains and intangible values of past communities and civilisations, the choice of what to preserve, how to preserve it, and how it is to be presented to the public are all elements of site interpretation. They represent every generation’s vision of what is significant, what is important, and why material remains from the past should be passed on to generations yet to come.

The need for a clear rationale, standardised terminology, and accepted professional principles for Interpretation and Presentation* is evident. In recent years, the dramatic expansion of interpretive activities at many cultural heritage sites and the introduction of elaborate interpretive technologies and new economic strategies for the marketing and management of cultural heritage sites have created new complexities and aroused basic questions that

---

* See definitions on page 3.
* Voir les définitions en page 3.
are central to the goals of both conservation and the public appreciation of cultural heritage sites throughout the world:

- What are the accepted and acceptable goals for the Interpretation and Presentation of cultural heritage sites?
- What principles should help determine which technical means and methods are appropriate in particular cultural and heritage contexts?
- What general ethical and professional considerations should help shape Interpretation and Presentation in light of its wide variety of specific forms and techniques?

The purpose of this Charter is therefore to define the basic principles of Interpretation and Presentation as essential components of heritage conservation efforts and as a means of enhancing public appreciation and understanding of cultural heritage sites*.

### DEFINITIONS

For the purposes of the present Charter,

**Interpretation** refers to the full range of potential activities intended to heighten public awareness and enhance understanding of cultural heritage site. These can include print and electronic publications, public lectures, on-site and directly related off-site installations, educational programmes, community activities, and ongoing research, training, and evaluation of the interpretation process itself.

**Presentation** more specifically denotes the carefully planned communication of interpretive content through the arrangement of interpretive information, physical access, and interpretive infrastructure at a cultural heritage site. It can be conveyed through a variety of technical means, including, yet not requiring, such elements as informational panels, museum-type displays, formalized walking tours, lectures and guided tours, and multimedia applications and websites.

**Interpretive infrastructure** refers to physical installations, facilities, and areas at, or connected with a cultural heritage site that may be specifically utilised for the purposes of interpretation and presentation including those supporting interpretation via new and existing technologies.

**Site interpreters** refers to staff or volunteers at a cultural heritage site who are permanently or temporarily engaged in the public communication of information relating to the values and significance of the site.

**Cultural Heritage Site** refers to a place, locality, natural landscape, settlement area, architectural complex, archaeological site, or standing structure that is recognized and often legally protected as a place of historical and cultural significance.

---

* Although the principles and objectives of this Charter may equally apply to off-site interpretation, its main focus is interpretation and presentation at, or in the immediate vicinity of, cultural heritage sites.

* Voir les définitions en page 3

ICOMOS – 16th AG / 16th GA – Québec 2008 – Interpretation and presentation of cultural Heritage Sites / Interprétation et présentation des sites culturels patrimoniaux – p. 2
<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>OBJECTIFS</th>
</tr>
</thead>
<tbody>
<tr>
<td>In recognizing that interpretation and presentation are part of the overall process of cultural heritage conservation and management, this Charter seeks to establish seven cardinal principles, upon which Interpretation and Presentation—in whatever form or medium is deemed appropriate in specific circumstances—should be based.</td>
<td>En reconnaissant que l’interprétation et la présentation sont partie intégrante du processus général de conservation et de gestion du patrimoine culturel, cette Charte vise à établir sept principes cardinaux sur lesquels l’interprétation et la présentation devraient être basés, quels que soient les moyens et formes les plus appropriés selon les circonstances.</td>
</tr>
<tr>
<td><strong>Principle 1: Access and Understanding</strong></td>
<td><strong>Principe 1 : Accès et compréhension</strong></td>
</tr>
<tr>
<td>1. Facilitate understanding and appreciation of cultural heritage sites and foster public awareness and engagement in the need for their protection and conservation.</td>
<td>1. Faciliter la compréhension et l’appréciation des sites culturels patrimoniaux et promouvoir la prise de conscience publique et l’engagement de la nécessité de leur protection et de leur conservation.</td>
</tr>
<tr>
<td>2. Communicate the meaning of cultural heritage sites to a range of audiences through careful, documented recognition of significance, through accepted scientific and scholarly methods as well as from living cultural traditions.</td>
<td>2. Communiquer le sens des sites culturels patrimoniaux à des audiences diverses par une reconnaissance approfondie et bien documentée de la signification, au moyen de méthodes reconnues d’analyses scientifiques et les recherches ainsi que des traditions culturelles vivantes.</td>
</tr>
<tr>
<td>3. Safeguard the tangible and intangible values of cultural heritage sites in their natural and cultural settings and social contexts.</td>
<td>3. Sauvegarder les valeurs matérielles et immatérielles propres aux sites culturels patrimoniaux dans leur environnement culturel, naturel et leur contexte social.</td>
</tr>
<tr>
<td>4. Respect the authenticity of cultural heritage sites, by communicating the significance of their historic fabric and cultural values and protecting them from the adverse impact of intrusive interpretive infrastructure, visitor pressure, inaccurate or inappropriate interpretation.</td>
<td>4. Respecter l’authenticité des sites culturels patrimoniaux en communiquant l’importance de leurs matériaux historiques et la portée de leurs valeurs culturelles et en les protégeant contre les effets adverses d’infrastructures d’interprétation mal venues, des pressions venant du public, d’une interprétation imprécise et inadéquate.</td>
</tr>
<tr>
<td>5. Contribute to the sustainable conservation of cultural heritage sites, through promoting public understanding of, and participation in, ongoing conservation efforts, ensuring long-term maintenance of the interpretive infrastructure and regular review of its interpretive contents.</td>
<td>5. Contribuer à la conservation durable des sites culturels patrimoniaux par la promotion de la compréhension et de la participation du public des efforts de conservation en cours, en assurant la maintenance à long terme des équipements et services d’interprétation et une révision régulière de son contenu interprétatif.</td>
</tr>
<tr>
<td>6. Encourage inclusiveness in the interpretation of cultural heritage sites, by facilitating the involvement of stakeholders and associated communities in the development and implementation of interpretive programmes.</td>
<td>6. Encourager la participation dans l’interprétation des sites culturels patrimoniaux en facilitant l’implication active des acteurs et communautés associées dans le développement et l’implémentation de programmes d’interprétation.</td>
</tr>
<tr>
<td>7. Develop technical and professional guidelines for heritage interpretation and presentation, including technologies, research, and training. Such guidelines must be appropriate and sustainable in their social contexts.</td>
<td>7. Développer des normes techniques et professionnelles pour l’interprétation et la présentation du patrimoine, incluant les technologies, la recherche et la formation. De tels normes doivent être appropriées et durables dans leur contexte social.</td>
</tr>
<tr>
<td>PRINCIPLES</td>
<td>PRINCIPES</td>
</tr>
<tr>
<td>------------</td>
<td>-----------</td>
</tr>
<tr>
<td><strong>Principle 1:</strong> Access and Understanding</td>
<td><strong>Principe 1 :</strong> Accès et Compréhension</td>
</tr>
<tr>
<td>Interpretation and presentation programmes should facilitate physical and intellectual access by the public to cultural heritage sites.</td>
<td>Les programmes d’interprétation et de présentation devraient faciliter l’accès physique et intellectuel des sites culturels patrimoniaux auprès du public.</td>
</tr>
<tr>
<td>1. Effective interpretation and presentation should enhance personal experience, increase public respect and understanding, and communicate the importance of the conservation of cultural heritage sites.</td>
<td>1. Une interprétation et une présentation efficaces devraient enrichir l’expérience personnelle, accroître le respect et la compréhension du public et mettre en évidence l’importance de la bonne conservation du site culturel patrimonial.</td>
</tr>
<tr>
<td>2. Interpretation and presentation should encourage individuals and communities to reflect on their own perceptions of a site and assist them in establishing a meaningful connection to it. The aim should be to stimulate further interest, learning, experience, and exploration.</td>
<td>2. L’interprétation et la présentation devraient inciter les personnes individuelles et les communautés à réfléchir sur leurs propres perceptions du site et sur leur relation avec lui. Elle cherche à stimuler un prolongement de l’intérêt, de l’étude, de l’expérience et de l’exploration.</td>
</tr>
<tr>
<td>3. Interpretation and presentation programmes should identify and assess their audiences demographically and culturally. Every effort should be made to communicate the site’s values and significance to its varied audiences.</td>
<td>3. Les programmes d’interprétation et de présentation devraient identifier et analyser leur public du point de vue démographique et culturel. Tous les efforts sont à déployer pour que l’interprétation et la présentation du patrimoine culturel communiquent effectivement avec les divers auditoires d’un site.</td>
</tr>
<tr>
<td>4. The diversity of language among visitors and associated communities connected with a heritage site should be taken into account in the interpretive infrastructure.</td>
<td>4. La diversité des langues parlées par les visiteurs et les communautés en relation avec le site patrimonial devrait être prise en considération dans les équipements et les services d’interprétation.</td>
</tr>
<tr>
<td>5. Interpretation and presentation activities should also be physically accessible to the public, in all its variety.</td>
<td>5. Les programmes d’interprétation et de présentation devraient être accessibles à un public large, dans toute sa diversité, y compris les personnes à mobilité réduite.</td>
</tr>
<tr>
<td>6. In cases where physical access to a cultural heritage site is restricted due to conservation concerns, cultural sensitivities, adaptive re-use, or safety issues, interpretation and presentation should be provided off-site.</td>
<td>6. Au cas où l’accès physique à un site culturel patrimonial est limité, pour des raisons de conservation, de sensibilités culturelles, d’aménagements adaptés ou d’exigences de sécurité, une interprétation et une présentation devraient être proposées en dehors du site.</td>
</tr>
<tr>
<td><strong>Principle 2:</strong> Information Sources</td>
<td><strong>Principe 2 :</strong> Sources d’Information</td>
</tr>
<tr>
<td>Interpretation and presentation should be based on evidence gathered through accepted scientific and scholarly methods as well as from living cultural traditions.</td>
<td>L’interprétation et la présentation devraient reposer sur les preuves recueillies par les méthodes scientifiques et de recherche communément admises ainsi que sur les traditions culturelles vivantes.</td>
</tr>
<tr>
<td>1. Interpretation should show the range of oral and written information, material remains, traditions, and meanings attributed to a site. The sources of this information should be documented, archived, and made accessible to the public.</td>
<td>1. L’interprétation devrait présenter l’éventail des informations orales et écrites, des vestiges matériels, des traditions et des sens attribués à un site. Les sources de cette information devraient être documentées, archivées, et rendues accessibles au public.</td>
</tr>
<tr>
<td>2. Interpretation should be based on a well researched, multidisciplinary study of the site and its surroundings. It should also acknowledge that meaningful interpretation necessarily includes reflection on alternative historical hypotheses, local traditions, and stories.</td>
<td>2. L’interprétation devrait être basée sur une étude multidisciplinaire approfondie du site et de son environnement. L’interprétation devrait également reconnaître et inclure les hypothèses historiques alternatives, les traditions et les histoires locales.</td>
</tr>
<tr>
<td>3. At cultural heritage sites where traditional storytelling or memories of historical participants provide an</td>
<td>3. Dans les sites patrimoniaux où des récits ou les souvenirs d’acteurs historiques fournissent une</td>
</tr>
<tr>
<td>Principle 3: Context and Setting</td>
<td>Principe 3 : Le Contexte et l’Environnement</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>The Interpretation and Presentation of cultural heritage sites should relate to their wider social, cultural, historical, and natural contexts and settings.</td>
<td>L’interprétation et la présentation des sites patrimoniaux devraient mettre en lumière la relation plus large des sites avec leur contexte et leur environnement social, culturel, historique et naturel.</td>
</tr>
</tbody>
</table>

1. Interpretation should explore the significance of a site in its multi-faceted historical, political, spiritual, and artistic contexts. It should consider all aspects of the site’s cultural, social, and environmental significance and values.

2. The public interpretation of a cultural heritage site should clearly distinguish and date the successive phases and influences in its evolution. The contributions of all periods to the significance of a site should be respected.

3. Interpretation should also take into account all groups that have contributed to the historical and cultural significance of the site.

4. The surrounding landscape, natural environment, and geographical setting are integral parts of a site’s historical and cultural significance, and, as such, should be considered in its interpretation.

5. Intangible elements of a site’s heritage such as cultural and spiritual traditions, stories, music, dance, theater, literature, visual arts, local customs and culinary heritage should be considered in its interpretation.

6. The cross-cultural significance of heritage sites, as well as the range of perspectives about them based on scholarly research, ancient records, and living traditions, should be considered in the formulation of interpretive programmes.

important source of information about the significance of the site, interpretive programmes should incorporate these oral testimonies—either indirectly, through the facilities of the interpretive infrastructure, or directly, through the active participation of members of associated communities as on-site interpreters.

4. Visual reconstructions, whether by artists, architects, or computer modelers, should be based upon detailed and systematic analysis of environmental, archaeological, architectural, and historical data, including analysis of written, oral and iconographic sources, and photography. The information sources on which such visual renderings are based should be clearly documented and alternative reconstructions based on the same evidence, when available, should be provided for comparison.

5. Interpretation and presentation programmes and activities should also be documented and archived for future reference and reflection.

important source d’information à propos de la signification du site, les programmes d’interprétation devraient inclure ces témoignages oraux, soit indirectement, dans les équipements et les services d’interprétation, soit directement, par la participation active de membres des communautés associées en tant que guides de sites.

4. Les reconstructions visuelles, par dessins d’artistes, par des architectes ou par ordinateur, devraient être basées sur une analyse détaillée et systématique des données environnementales, archéologiques, architecturales et historiques, en ce compris l’analyse des sources écrites, orales, iconographiques et photographiques. Ces sources d’information sur base desquelles les éléments visuels sont basés devraient être clairement documentées et les reconstructions alternatives basées sur les mêmes preuves, lorsqu’elles sont disponibles, devraient être fournies afin de permettre la comparaison.

5. Les programmes et les activités d’interprétation et de présentation devraient également être documentées et archivées pour servir de référence et de réflexion dans le futur.
Principle 4: Authenticity

The Interpretation and presentation of cultural heritage sites must respect the basic tenets of authenticity in the spirit of the Nara Document (1994).

1. Authenticity is a concern relevant to human communities as well as material remains. The design of a heritage interpretation programme should respect the traditional social functions of the site and the cultural practices and dignity of local residents and associated communities.

2. Interpretation and presentation should contribute to the conservation of the authenticity of a cultural heritage site by communicating its significance without adversely impacting its cultural values or irreversibly altering its fabric.

3. All visible interpretive infrastructures (such as kiosks, walking paths, and information panels) must be sensitive to the character, setting and the cultural and natural significance of the site, while remaining easily identifiable.

4. On-site concerts, dramatic performances, and other interpretive programmes must be carefully planned to protect the significance and physical surroundings of the site and minimise disturbance to the local residents.

Principle 5: Sustainability

The interpretation plan for a cultural heritage site must be sensitive to its natural and cultural environment, with social, financial, and environmental sustainability among its central goals.

1. The development and implementation of interpretation and presentation programmes should be an integral part of the overall planning, budgeting, and management process of cultural heritage sites.

2. The potential effect of interpretive infrastructure and visitor numbers on the cultural value, physical characteristics, integrity, and natural environment of the site must be fully considered in heritage impact assessment studies.

3. Interpretation and presentation should serve a wide range of conservation, educational and cultural objectives. The success of an interpretive programme should not be evaluated solely on the basis of visitor attendance figures or revenue.

4. Interpretation and presentation should be an integral part of the conservation process, enhancing the public’s awareness of specific conservation problems encountered at the site and explaining the efforts being taken to protect the site’s physical integrity and authenticity.

5. Any technical or technological elements selected to become a permanent part of a site’s interpretive infrastructure should be designed and constructed in a manner that will

Principe 4 : Authenticité

L'interprétation et la présentation des sites patrimoniaux doivent respecter leur authenticité dans l'esprit de la Déclaration de Nara (1994)

1. L’authenticité concerne aussi bien les communautés humaines que les vestiges matériels. La conception d'un programme d'interprétation patrimoniale devrait respecter les fonctions sociales traditionnelles d'un site, les pratiques culturelles et la dignité des résidents et des communautés associées.

2. L’interprétation et la présentation devraient contribuer à la conservation de l'authenticité d'un site culturel patrimonial par la communication de sa signification, sans avoir d'incidences adverses sur ses valeurs culturelles ou des altérations physiques irréversibles.

3. Tous les équipements et services d'interprétation visibles (tels que kiosques, sentiers, panneaux d'information) doivent s'intégrer harmonieusement dans le site, respecter son caractère, son environnement et ses valeurs culturelles et naturelles, tout en étant facilement repérables.


Principe 5 : Caractère durable

Le plan d'interprétation d'un site patrimonial doit être attentif à son environnement culturel et naturel. Son caractère durable à long terme est un objectif majeur, aux plans sociaux, financiers et environnementaux.

1. L’élaboration et la mise en œuvre d'un programme d'interprétation et de présentation devraient relever à part entière du plan général de programmation et de gestion d'un site patrimonial.

2. L’incidence possible d'un équipement d'interprétation et d'une fréquentation par de nombreux visiteurs sur les valeurs culturelles, les caractéristiques physiques, l'intégrité et l'environnement naturel d'un site fera l'objet d'études préalables approfondies.

3. L’interprétation et la présentation devraient servir un large éventail d’objectifs éducatifs et culturels. L’accroissement du nombre de visiteurs et des recettes de fréquentation ne devrait pas être le seul critère de succès d'un programme d'interprétation.

4. L’interprétation et la présentation devraient faire partie intégrante du processus de conservation, accroissant la conscience du public pour les problèmes de conservation rencontrés sur le site et expliquant les efforts faits pour protéger l’intégrité physique du site.

5. Tout élément technique ou technologique choisi pour être un élément permanent de l’infrastructure d’interprétation d’un site devrait être conceptualisé et construit de manière à assurer une maintenance...
The Interpretation and Presentation of cultural heritage sites must be the result of meaningful collaboration between heritage professionals, host and associated communities, and other stakeholders.

1. The multidisciplinary expertise of scholars, community members, conservation experts, governmental authorities, site managers and interpreters, tourism operators, and other professionals should be integrated in the formulation of interpretation and presentation programmes.

2. The traditional rights, responsibilities, and interests of property owners and host and associated communities should be noted and respected in the planning of site interpretation and presentation programmes.

3. Plans for expansion or revision of interpretation and presentation programmes should be open for public comment and involvement. It is the right and responsibility of all to make their opinions and perspectives known.

4. Because the question of intellectual property and traditional cultural rights is especially relevant to the interpretation process and its expression in various communication media (such as on-site multimedia presentations, digital media, and printed materials), legal ownership and right to use images, texts, and other interpretive materials should be discussed, clarified, and agreed in the planning process.

5. Interpretive programmes should aim to provide equitable and sustainable economic, social, and cultural benefits to all stakeholders through education, training and employment opportunities in site interpretation programmes.

6. Interpretive programmes should aim to provide equitable and sustainable economic, social, and cultural benefits to all stakeholders through education, training and employment opportunities in site interpretation programmes.

**Principle 6: Inclusiveness**

L'interprétation et la présentation des sites culturels patrimoniaux doivent être le résultat d’une collaboration efficace entre professionnels du patrimoine, communautés associées et autres acteurs.

1. L’expertise pluridisciplinaire des chercheurs, des experts en conservation, des autorités publiques, des gestionnaires et des interprètes de sites, des opérateurs touristiques et autres professionnels devraient être intégrée dans la formulation de programmes d'interprétation et de présentation.

2. Les droits traditionnels, les responsabilités et les intérêts des propriétaires et des communautés associées devraient être pris en compte et respectés dans l'élaboration des programmes d'interprétation et de présentation des sites.

3. Les projets d'expansion ou de révision des programmes d'interprétation et de présentation devraient être ouverts aux commentaires et à une implication du public. Chacun a le droit et la responsabilité de faire connaître ses opinions et ses perspectives.

4. En raison de l'importance de la propriété intellectuelle et des droits culturels traditionnels dans les démarches d'interprétation et du recours aux divers media (tels que les présentations multi media in situ, les supports électroniques et les imprimés), la propriété légale et le droit d'usage des images, textes et autres documents d'interprétation devraient être discutés, clarifiés et approuvés dans le processus de programmation.

**Principle 7: Continuing Research, Training, and Evaluation**

L'interprétation des sites patrimoniaux est une entreprise progressive et évolutive de compréhension et d'explication, qui requiert des activités continues de recherche, de formation et d'évaluation.

1. L'interprétation d'un site ne devrait pas être considérée comme aboutie au moment de la mise en fonction d'un équipement et de services d'interprétation spécifiques. Il importe qu'une recherche et des consultations continues fassent progresser la compréhension et l'appréciation des valeurs d'un site : elles devraient être des activités inhérentes à tout programme d'interprétation du patrimoine.

2. Les programmes et les équipements d'interprétation devraient être conçus et réalisés de manière à faciliter la révision de leur contenu et / ou leur expansion.

3. Un suivi permanent et une évaluation continue sont nécessaires pour analyser les programmes
4. Every interpretation programme should be considered as an educational resource for people of all ages. Its design should take into account its possible uses in school curricula, informal and lifelong learning programmes, communications and information media, special activities, events, and seasonal volunteer involvement.

5. The training of qualified professionals in the specialised fields of heritage interpretation and presentation, such as content creation, management, technology, guiding, and education, is a crucial objective. In addition, basic academic conservation programmes should include a component on interpretation and presentation in their courses of study.

6. On-site training programmes and courses should be developed with the objective of updating and informing heritage and interpretation staff of all levels and associated and host communities of recent developments and innovations in the field.

7. International cooperation and sharing of experience are essential to developing and maintaining standards in interpretation methods and technologies. To that end, international conferences, workshops and exchanges of professional staff as well as national and regional meetings should be encouraged. These will provide an opportunity for the regular sharing of information about the diversity of interpretive approaches and experiences in various regions and cultures.

4. Chaque programme d’interprétation et de présentation devrait être considéré comme une ressource éducative pour personne de tout âge. Sa conception devrait être prise en considération dans son usage possible dans les programmes scolaires, dans des programmes d’études informelles et des programmes d’éducation et de formation tout au long de la vie dans les média de communication incluant l’Internet, les activités spécifiques, les événements et l’implication saisonnière des volontaires.

5. La formation de professionnels qualifiés dans les domaines spécialisés de l'interprétation patrimoniale, comme la création de contenus, la gestion, les nouvelles technologies, les visites guidées et l'éducation, est un objectif essentiel. Par ailleurs, les programmes académiques de base en matière de conservation devraient inclure des modules de formation à l'interprétation et la présentation.

6. Des programmes de cours et de formation devraient être proposés, sur le site même, en vue de la formation continue et du perfectionnement du personnel chargé de la gestion du site et de son interprétation ainsi que des communautés associées et locales, ceci, afin de suivre les progrès et les innovations dans le domaine.

7. La coopération internationale et le partage d'expérience sont essentiels à l'élaboration et au maintien de normes dans les méthodes et les techniques d'interprétation. À ces fins, il conviendrait d'encourager l’organisation de conférences internationales, d’ateliers, de réunions au niveau national et local et l’échange des professionnels. Ceci afin d’offrir la possibilité d’un partage régulier d’informations sur la diversité des approches et des expériences d’interprétation dans les diverses régions et cultures du monde.
Preamble

Considering the International Charter for the Conservation and Restoration of Monuments and Sites (Venice 1964), and the Resolutions of the 5th General Assembly of the International Council on Monuments and Sites (ICOMOS) (Moscow 1978), the Burra Charter was adopted by Australia ICOMOS (the Australian National Committee of ICOMOS) on 19 August 1979 at Burra, South Australia. Revisions were adopted on 23 February 1981, 23 April 1988 and 26 November 1999.

The Burra Charter provides guidance for the conservation and management of places of cultural significance (cultural heritage places), and is based on the knowledge and experience of Australia ICOMOS members.

Conservation is an integral part of the management of places of cultural significance and is an ongoing responsibility.

Who is the Charter for?

The Charter sets a standard of practice for those who provide advice, make decisions about, or undertake works to places of cultural significance, including owners, managers and custodians.

Using the Charter

The Charter should be read as a whole. Many articles are interdependent. Articles in the Conservation Principles section are often further developed in the Conservation Processes and Conservation Practice sections. Headings have been included for ease of reading but do not form part of the Charter.

The Charter is self-contained, but aspects of its use and application are further explained in the following Australia ICOMOS documents:

• Guidelines to the Burra Charter: Conservation Policy;
• Guidelines to the Burra Charter: Procedures for Undertaking Studies and Reports;
• Code on the Ethics of Coexistence in Conserving Significant Places.

What places does the Charter apply to?

The Charter can be applied to all types of places of cultural significance including natural, indigenous and historic places with cultural values.

The standards of other organisations may also be relevant. These include the Australian Natural Heritage Charter and the Draft Guidelines for the Protection, Management and Use of Aboriginal and Torres Strait Islander Cultural Heritage Places.

Why conserve?

Places of cultural significance enrich people's lives, often providing a deep and inspirational sense of connection to community and landscape, to the past and to lived experiences. They are historical records, that are important as tangible expressions of Australian identity and experience. Places of cultural significance reflect the diversity of our communities, telling us about who we are and the past that has formed us and the Australian landscape. They are irreplaceable and precious.

These places of cultural significance must be conserved for present and future generations.

The Burra Charter advocates a cautious approach to change: do as much as necessary to care for the place and to make it useable, but otherwise change it as little as possible so that its cultural significance is retained.
Articles

Article 1. Definitions

For the purposes of this Charter:

1.1 *Place* means site, area, land, landscape, building or other work, group of buildings or other works, and may include components, contents, spaces and views.

1.2 *Cultural significance* means aesthetic, historic, scientific, social or spiritual value for past, present or future generations.

Cultural significance is embodied in the place itself, its fabric, setting, use, associations, meanings, records, related places and related objects.

Places may have a range of values for different individuals or groups.

1.3 *Fabric* means all the physical material of the place including components, fixtures, contents, and objects.

1.4 *Conservation* means all the processes of looking after a place so as to retain its cultural significance.

1.5 *Maintenance* means the continuous protective care of the fabric and setting of a place, and is to be distinguished from repair. Repair involves restoration or reconstruction.

1.6 *Preservation* means maintaining the fabric of a place in its existing state and retarding deterioration.

1.7 *Restoration* means returning the existing fabric of a place to a known earlier state by removing accretions or by reassembling existing components without the introduction of new material.

1.8 *Reconstruction* means returning a place to a known earlier state and is distinguished from restoration by the introduction of new material into the fabric.

1.9 *Adaptation* means modifying a place to suit the existing use or a proposed use.

1.10 *Use* means the functions of a place, as well as the activities and practices that may occur at the place.

1.11 *Compatible use* means a use which respects the cultural significance of a place. Such a use involves no, or minimal, impact on cultural significance.

1.12 *Setting* means the area around a place, which may include the visual catchment.

1.13 *Related place* means a place that contributes to the cultural significance of another place.

Explanatory Notes

The concept of place should be broadly interpreted. The elements described in Article 1.1 may include memorials, trees, gardens, parks, places of historical events, urban areas, towns, industrial places, archaeological sites and spiritual and religious places.

The term cultural significance is synonymous with heritage significance and cultural heritage value.

Cultural significance may change as a result of the continuing history of the place.

Understanding of cultural significance may change as a result of new information.

Fabric includes building interiors and subsurface remains, as well as excavated material.

Fabric may define spaces and these may be important elements of the significance of the place.

The distinctions referred to, for example in relation to roof gutters, are:

- maintenance — regular inspection and cleaning of gutters;
- repair involving restoration — returning of dislodged gutters;
- repair involving reconstruction — replacing decayed gutters.

It is recognised that all places and their components change over time at varying rates.

New material may include recycled material salvaged from other places. This should not be to the detriment of any place of cultural significance.
1.14 Related object means an object that contributes to the cultural significance of a place but is not at the place.

1.15 Associations mean the special connections that exist between people and a place.

1.16 Meanings denote what a place signifies, indicates, evokes or expresses.

1.17 Interpretation means all the ways of presenting the cultural significance of a place.

Conservation Principles

Article 2. Conservation and management

2.1 Places of cultural significance should be conserved.

2.2 The aim of conservation is to retain the cultural significance of a place.

2.3 Conservation is an integral part of good management of places of cultural significance.

2.4 Places of cultural significance should be safeguarded and not put at risk or left in a vulnerable state.

Article 3. Cautious approach

3.1 Conservation is based on a respect for the existing fabric, use, associations and meanings. It requires a cautious approach of changing as much as necessary but as little as possible.

3.2 Changes to a place should not distort the physical or other evidence it provides, nor be based on conjecture.

Article 4. Knowledge, skills and techniques

4.1 Conservation should make use of all the knowledge, skills and disciplines which can contribute to the study and care of the place.

4.2 Traditional techniques and materials are preferred for the conservation of Significant fabric. In some circumstances modern techniques and materials which offer substantial conservation benefits may be appropriate.

Explanatory Notes

Associations may include social or spiritual values and cultural responsibilities for a place.

Meanings generally relate to intangible aspects such as symbolic qualities and memories.

Interpretation may be a combination of the treatment of the fabric (e.g. maintenance, restoration, reconstruction); the use of and activities at the place; and the use of introduced explanatory material.

The traces of additions, alterations and earlier treatments to the fabric of a place are evidence of its history and uses which may be part of its significance. Conservation action should assist and not impede their understanding.

The use of modern materials and techniques must be supported by firm scientific evidence or by a body of experience.
### Article 5. Values

5.1 Conservation of a place should identify and take into consideration all aspects of cultural and natural significance without unwarranted emphasis on any one value at the expense of others.

5.2 Relative degrees of cultural significance may lead to different conservation actions at a place.

### Article 6. Burra Charter process

6.1 The cultural significance of a place and other issues affecting its future are best understood by a sequence of collecting and analysing information before making decisions. Understanding cultural significance comes first, then development of policy and finally management of the place in accordance with the policy.

6.2 The policy for managing a place must be based on an understanding of its cultural significance.

6.3 Policy development should also include consideration of other factors affecting the future of a place such as the owner’s needs, resources, external constraints and its physical condition.

### Article 7. Use

7.1 Where the use of a place is of cultural significance it should be retained.

7.2 A place should have a compatible use.

### Article 8. Setting

Conservation requires the retention of an appropriate visual setting and other relationships that contribute to the cultural significance of the place.

New construction, demolition, intrusions or other changes which would adversely affect the setting or relationships are not appropriate.
Article 9. Location

9.1 The physical location of a place is part of its cultural significance. A building, work or other component of a place should remain in its historical location. Relocation is generally unacceptable unless this is the sole practical means of ensuring its survival.

9.2 Some buildings, works or other components of places were designed to be readily removable or already have a history of relocation. Provided such buildings, works or other components do not have significant links with their present location, removal may be appropriate.

9.3 If any building, work or other component is moved, it should be moved to an appropriate location and given an appropriate use. Such action should not be to the detriment of any place of cultural significance.

Article 10. Contents

Contents, fixtures and objects which contribute to the cultural significance of a place should be retained at that place. Their removal is unacceptable unless it is: the sole means of ensuring their security and preservation; on a temporary basis for treatment or exhibition; for cultural reasons; for health and safety; or to protect the place. Such contents, fixtures and objects should be returned where circumstances permit and it is culturally appropriate.

Article 11. Related places and objects

The contribution which related places and related objects make to the cultural significance of the place should be retained.

Article 12. Participation

Conservation, interpretation and management of a place should provide for the participation of people for whom the place has special associations and meanings, or who have social, spiritual or other cultural responsibilities for the place.

Article 13. Co-existence of cultural values

Co-existence of cultural values should be recognised, respected and encouraged, especially in cases where they conflict.
Conservation Processes

Article 14. Conservation processes

Conservation may, according to circumstance, include the processes of: retention or reintroduction of a use; retention of associations and meanings; maintenance, preservation, restoration, reconstruction, adaptation and interpretation; and will commonly include a combination of more than one of these.

Article 15. Change

15.1 Change may be necessary to retain cultural significance, but is undesirable where it reduces cultural significance. The amount of change to a place should be guided by the cultural significance of the place and its appropriate interpretation.

15.2 Changes which reduce cultural significance should be reversible, and be reversed when circumstances permit.

15.3 Demolition of significant fabric of a place is generally not acceptable. However, in some cases minor demolition may be appropriate as part of conservation. Removed significant fabric should be reinstated when circumstances permit.

15.4 The contributions of all aspects of cultural significance of a place should be respected. If a place includes fabric, use, associations or meanings of different periods, or different aspects of cultural significance, emphasising or interpreting one period or aspect at the expense of another can only be justified when what is left out, removed or diminished is of slight cultural significance and that which is emphasised or interpreted is of much greater cultural significance.

Article 16. Maintenance

Maintenance is fundamental to conservation and should be undertaken where fabric is of cultural significance and its maintenance is necessary to retain that cultural significance.
Articles

Article 17. Preservation

Preservation is appropriate where the existing fabric or its condition constitutes evidence of cultural significance, or where insufficient evidence is available to allow other conservation processes to be carried out.

Explanatory Notes

Preservation protects fabric without obscuring the evidence of its construction and use. The process should always be applied:

• where the evidence of the fabric is of such significance that it should not be altered;
• where insufficient investigation has been carried out to permit policy decisions to be taken in accord with Articles 26 to 28.

New work (e.g. stabilization) may be carried out in association with preservation when its purpose is the physical protection of the fabric and when it is consistent with Article 22.

Article 18. Restoration and reconstruction

Restoration and reconstruction should reveal culturally significant aspects of the place.

Article 19. Restoration

Restoration is appropriate only if there is sufficient evidence of an earlier state of the fabric.

Article 20. Reconstruction

20.1 Reconstruction is appropriate only where a place is incomplete through damage or alteration, and only where there is sufficient evidence to reproduce an earlier state of the fabric. In rare cases, reconstruction may also be appropriate as part of a use or practice that retains the cultural significance of the place.

20.2 Reconstruction should be identifiable on close inspection or through additional interpretation.

Article 21. Adaptation

21.1 Adaptation is acceptable only where the adaptation has minimal impact on the cultural significance of the place.

21.2 Adaptation should involve minimal change to significant fabric, achieved only after considering alternatives.

Article 22. New work

22.1 New work such as additions to the place may be acceptable where it does not distort or obscure the cultural significance of the place, or detract from its interpretation and appreciation.

22.2 New work should be readily identifiable as such.
Article 23. Conserving use

Continuing, modifying or reinstating a significant use may be appropriate and preferred forms of conservation.

Article 24. Retaining associations and meanings

24.1 Significant associations between people and a place should be respected, retained and not obscured. Opportunities for the interpretation, commemoration and celebration of these associations should be investigated and implemented.

24.2 Significant meanings, including spiritual values, of a place should be respected. Opportunities for the continuation or revival of these meanings should be investigated and implemented.

Article 25. Interpretation

The cultural significance of many places is not readily apparent, and should be explained by interpretation. Interpretation should enhance understanding and enjoyment, and be culturally appropriate.

Conservation Practice

Article 26. Applying the Burra Charter process

26.1 Work on a place should be preceded by studies to understand the place which should include analysis of physical, documentary, oral and other evidence, drawing on appropriate knowledge, skills and disciplines.

26.2 Written statements of cultural significance and policy for the place should be prepared, justified and accompanied by supporting evidence. The statements of significance and policy should be incorporated into a management plan for the place.

26.3 Groups and individuals with associations with a place as well as those involved in its management should be provided with opportunities to contribute to and participate in understanding the cultural significance of the place. Where appropriate they should also have opportunities to participate in its conservation and management.

Article 27. Managing change

27.1 The impact of proposed changes on the cultural significance of a place should be analysed with reference to the statement of significance and the policy for managing the place. It may be necessary to modify proposed changes following analysis to better retain cultural significance.

27.2 Existing fabric, use, associations and meanings should be adequately recorded before any changes are made to the place.
Article 28. Disturbance of fabric

28.1 Disturbance of significant fabric for study, or to obtain evidence, should be minimised. Study of a place by any disturbance of the fabric, including archaeological excavation, should only be undertaken to provide data essential for decisions on the conservation of the place, or to obtain important evidence about to be lost or made inaccessible.

28.2 Investigation of a place which requires disturbance of the fabric, apart from that necessary to make decisions, may be appropriate provided that it is consistent with the policy for the place. Such investigation should be based on important research questions which have potential to substantially add to knowledge, which cannot be answered in other ways and which minimises disturbance of significant fabric.

Article 29. Responsibility for decisions

The organisations and individuals responsible for management decisions should be named and specific responsibility taken for each such decision.

Article 30. Direction, supervision and implementation

Competent direction and supervision should be maintained at all stages, and any changes should be implemented by people with appropriate knowledge and skills.

Article 31. Documenting evidence and decisions

A log of new evidence and additional decisions should be kept.

Article 32. Records

32.1 The records associated with the conservation of a place should be placed in a permanent archive and made publicly available, subject to requirements of security and privacy, and where this is culturally appropriate.

32.2 Records about the history of a place should be protected and made publicly available, subject to requirements of security and privacy, and where this is culturally appropriate.

Article 33. Removed fabric

Significant fabric which has been removed from a place including contents, fixtures and objects, should be catalogued, and protected in accordance with its cultural significance.

Where possible and culturally appropriate, removed significant fabric including contents, fixtures and objects, should be kept at the place.

Article 34. Resources

Adequate resources should be provided for conservation.

Words in italics are defined in Article 1.
The Burra Charter Process
Sequence of investigations, decisions and actions

1. Identify place and associations
   Secure the place and make it safe

2. Gather and record information about the place sufficient to understand significance
   Documentary  Oral  Physical

3. Assess significance

4. Prepare a statement of significance

5. Identify obligations arising from significance

6. Gather information about other factors affecting the future of the place
   Owner/manager’s needs and resources
   External factors  Physical condition

7. Develop policy
   Identify options
   Consider options and test their impact on significance

8. Prepare a statement of policy

9. Manage place in accordance with policy
   Develop strategies
   Implement strategies through a management plan
   Record place prior to any change

10. Monitor and review

The process is iterative. Parts of it may need to be repeated. Further research and consultation may be necessary.
ÉVORA
PLANO DE USO PUBLICO

TERMOS DE REFERÊNCIA

Acordo estabelecido entre os seus subscritores, com o objetivo de desenvolver e aplicar um Plano de Uso Publico para Évora, estabelecendo as respetivas expectativas e responsabilidades partilhadas.

PRESSUPOSTOS

Este documento foi construído tendo em atenção os seguintes pressupostos:

1. Évora é uma cidade, inscrita na lista do património mundial em 25 de Novembro de 1986, sendo capital de um território onde se podem encontrar um conjunto vasto de vestígios e elementos de elevado interesse e importância sob o ponto de vista cultural, patrimonial e turístico;
2. A gestão do sítio, confinado ao Centro Histórico, é partilhada com outras entidades, a diferentes níveis e responsabilidades, mas todas elas parte integrante deste acordo;
3. Por outro lado, também a oferta cultural, patrimonial e turística disponível é disponibilizada por diferentes parceiros, pelo que qualquer decisão respeitante à sua gestão terá de ter em atenção esse aspeto;
4. Neste contexto, a gestão financeira possível será aquela que resultar do compromisso de todos e cada um dos parceiros em prol dos projetos definidos e acordados, não pondo de parte a possibilidade de aceder a fundos disponíveis, através de candidaturas ou outros meios que se venham a revelar possíveis e interessantes;
5. Os destinatários que a aplicação desta metodologia visa alcançar são os visitantes, sendo que por visitante se entende o que visita, o que naturalmente inclui os habitantes e os forasteiros;
6. Da aplicação do Plano de Uso Publico, se esperam reflexos relevantes no dia-a-dia dos habitantes da cidade de Évora e de uma forma mais alargada na população do concelho, quer pela presumível redução de possíveis impactos negativos do Turismo, quer pela facilitação no acesso ao usufruto do património cultural, quer ainda pelo possível aumento do reconhecimento público da cidade e da importância do seu património;
7. O desenvolvimento desta metodologia conta com a assistência técnica da UNESCO / Turismo de Portugal, durante a construção e implementação da versão 1.0 até outubro de 2012 e após este período com a colaboração benévolã do consultor Sr. Jon Kohl;
8. A participação ativa dos parceiros (que se entende como “parceria” nos termos da escala de participação) na construção / implementação da metodologia é considerada um fator crítico preponderante de sucesso.

PRINCÍPIOS

O Plano de Uso Publico de Évora será baseado em propósitos de conservação dos recursos mais relevantes; identificando valores culturais, patrimoniais, históricos, arquitetónicos, educacionais, sociais e económicos; garantindo as condições essenciais para a manutenção do estatuto de património mundial.
Tal desiderato implica um esforço de colaboração e de união de esforços entre todas as entidades parceiras e sectores de atividade envolvidos.

Isto pressupõe:
1. O respeito pelos documentos reguladores aprovados, e em vigor, nomeadamente: o Plano Diretor Municipal, o Plano de Urbanização;
2. O Plano de Uso Publico será articulado com o Plano de Gestão;
3. De igual modo se procederá em relação aos restantes instrumentos de regulação e/ou proteção em desenvolvimento, como a Zona Especial de Proteção (Zona Tampão) do Centro Histórico e o Plano de Salvaguarda.

POLÍTICAS GERAIS

1. Promover, facilitar e participar no desenvolvimento do turismo sustentável, tendo por base uma administração, planeamento e gestão responsáveis, e utilizando critérios e processos de tomada de decisão compatíveis com as políticas de conservação de recursos naturais e culturais;
2. Elaborar todo o tipo de materiais de apoio científico e técnico à conservação dos recursos protegidos do sítio;
3. Manter equilibradas as exigências de conservação e as de visita ao sítio;
4. Contribuir para o desenvolvimento económico das comunidades residentes através da promoção do turismo sustentável;
5. Desenvolver o compromisso e o sentido de pertença de todas as partes interessadas do sítio para melhorar a sua gestão e proteção.

OBJETIVOS

1. Estabelecer programas de acolhimento turístico que garantam a conformidade com a mais correta gestão dos visitantes e com os objetivos de desenvolvimento;
2. Promover, facilitar e apoiar os esforços da comunidade em prol de atividades turísticas que incentivem a conservação, valorização e a utilização responsável dos recursos patrimoniais;
3. Estabelecer e reforçar os canais de comunicação e a coordenação entre entidades para o desenvolvimento da atividade turística;
4. Promover e estabelecer infraestruturas adequadas aos visitantes e disponibilizar as informações e logísticas necessárias para que estes possam compreender o sítio e desfrutar do património cultural;
5. Efetuar o controlo permanente para recolher indicadores claros e atualizados do estado dos serviços oferecidos aos visitantes, por forma a facilitar a tomada de decisões adequadas à melhoria da gestão.
6. Promover o turismo de forma que as informações prestadas sejam precisas, atuais e fundadas em objetivos de conservação e utilização responsável dos recursos naturais e culturais.
7. Consolidar práticas de trabalho em comum com os parceiros identificados e subscritores deste documento.

METODOLOGIA

De forma a alcançar os objetivos previstos, é definido o seguinte cronograma de ações a empreender, assumindo as datas propostas como limite para a conclusão das respectivas tarefas:
<table>
<thead>
<tr>
<th>Módulo</th>
<th>Descrição</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Módulo 1: Aprovar os Termos de Referência</td>
<td>30 Outubro 2012</td>
</tr>
<tr>
<td>2.</td>
<td>Módulo 2: Definição das mensagens</td>
<td>30 Outubro 2012</td>
</tr>
<tr>
<td>5.</td>
<td>Módulo 5: Produtos de Uso Publico</td>
<td>30 Dezembro 2012</td>
</tr>
<tr>
<td></td>
<td>Primeira Revisão dos Resultados</td>
<td>30 Fevereiro 2013</td>
</tr>
<tr>
<td>7.</td>
<td>Módulo 7: Plano de Monitorização</td>
<td>30 Março 2013</td>
</tr>
<tr>
<td>8.</td>
<td>Módulo 8: Reg. / Acordo de funcionamento</td>
<td>30 Março 2013</td>
</tr>
<tr>
<td></td>
<td>Segunda Revisão dos Resultados</td>
<td>31 Maio 2013</td>
</tr>
<tr>
<td>11.</td>
<td>Módulo 11: Preparação para a Implementação</td>
<td>31 Junho 2013</td>
</tr>
<tr>
<td>12.</td>
<td>Plano de Uso Publico - Versão 1.0</td>
<td>31 Julho 2013</td>
</tr>
<tr>
<td>13.</td>
<td>Aprovação e lançamento “On line”</td>
<td>Setembro 2013</td>
</tr>
<tr>
<td>14.</td>
<td>Inauguração do PUP Versão 1.0</td>
<td></td>
</tr>
</tbody>
</table>

**COMUNIDADES ESTRATÉGICAS**

As comunidades estratégicas a envolver serão.
1. Os habitantes do Centro Histórico de Évora;
2. As pessoas que têm a sua atividade diária no Centro Histórico (comerciantes, hoteleiros/empresários, trabalhadores no comércio e serviços, etc.);

**PARTICIPANTES NOS MÓDULOS**

1. Os parceiros identificados, intervenientes no desenvolvimento da metodologia e na sua aplicação;
2. A equipa técnica nomeada para o desenvolvimento do projeto;

**RESPONSABILIDADES**

**Câmara Municipal de Évora**

1. Correspondendo ao convite da UNESCO e do Turismo de Portugal, liderar o processo de implementação da metodologia “Public Use Plan”, garantindo a necessária coordenação e monitorização da mesma;
2. Providenciar as condições técnicas, logísticas e administrativas necessárias à implementação e desenvolvimento do PUP;
3. Disponibilizar apoio técnico e facilidades administrativas, como definido no capítulo relativo às questões logísticas, em colaboração com o facilitador, Sr. Jon Kohl;
4. Desenvolver, planear e dinamizar mecanismos de planeamento de uso público em articulação com os parceiros, no sentido de preparar um documento PUP;
5. Apresentar periodicamente à UNESCO e ao Turismo de Portugal o resultado dos trabalhos desenvolvidos e dos resultados alcançados.

**Parceiros**

1. Participar nos trabalhos de execução dos módulos, bem como em Workshops, ou reuniões e atividades para a preparação do PUP;
2. Integrar o calendário PUP no respetivo Plano de Atividades;
3. Ler e rever cada resultado ou produto de cada um dos módulos;
4. Propor as alterações que considerem apropriadas;
5. Aprovar os produtos de cada módulo e o Plano de Uso Público.

**Eleito com responsabilidade de Direção política do projeto**

1. Participar nos trabalhos de execução dos módulos, bem como em Workshops, ou reuniões e atividades para a preparação do PUP;
2. Ler e rever cada resultado ou produto de cada um dos módulos;
3. Monitorizar o processo de desenvolvimento do PUP;
4. Integrar o calendário PUP no Plano de Atividades do Município;
5. Submeter os produtos dos módulos e o Plano de Uso Público a aprovação do Sr. Presidente do Município.

**No contexto da UNESCO / Turismo de Portugal**

1. Os responsáveis pelo projeto providenciarão assistência técnica para o desenvolvimento do Plano de Uso Público;
2. Após a conclusão do projeto, Jon Koll continuará a oferecer assistência técnica, remota, “pro bono” se necessário, se a cidade de Évora continuar a implementação do PUP.

**Coordenação**

Nomeada pelo eleito da Câmara Municipal de Évora, com responsabilidades de direção técnica do projeto, será responsável pelo planeamento, pela organização de todos os eventos, pela sua facilitação, coordenando todos os passos, compilando e distribuindo os resultados, aconselhando sobre a redação do documento, editando e produzindo documentos, redigindo os Termos de Referência e os resultados de todos e de cada um dos módulos. Deverá fazer cumprir os prazos estabelecidos no cronograma.

**Equipa Interna**

Os membros da equipa, também eles nomeados pelo eleito com responsabilidades de direção política do projeto, serão responsáveis por delinear os conteúdos do plano a ser discutidos/negociados no seio da parceria alargada. Devem participar nas reuniões, nas visitas ao terreno e na apresentação final.

**COMISSÕES CONSULTIVAS**

**Comissão de Acompanhamento**

Comissão Municipal de Arte, Arqueologia, Defesa do Património
Terão a tarefa de apreciar e dar parecer sobre o PUP

APROVAÇÃO DO PLANO DE USO PÚBLICO

A aprovação do PUP deverá ocorrer módulo a módulo, por consenso dos parceiros participantes, à medida que se conclui cada uma dessas unidades de planeamento. A aprovação final compete ao Presidente da Câmara.

Entidades parceiras:
Câmara Municipal de Évora – Presidente
Direção Regional de Cultura do Alentejo – Diretora
Universidade de Évora –
Fundação Eugénio de Almeida –
Arquidiocese de Évora –
Turismo do Alentejo – Presidente
Associação Comercial – Presidente
Associação de Diretores de Hotéis –
AGIA – Associação de Guias Interpretes –
AHRESP – Associação de Hotéis Restaurantes e Similares de Portugal –
APECATE – Associação de Empresas
Coleção B – José Alberto Ferreira
CENDREV – José Russo
Pé de Xumbo – Ana Martins
Eborae Mvsica
Associação Do Imaginário

ESTRUTURA DE APOIO LOGÍSTICO

As estruturas de apoio logístico disponibilizadas pela Câmara Municipal de Évora incluem:

- Espaço de trabalho e respetivo mobiliário;
- Sistema de projeção de imagens;
- Impressões e papel;
- Quadro informativo de gestão;
- Sala de reuniões;
- Material de escritório.

Mecanismos de trabalho interno:

- Durante o processo de planeamento, a coordenação PUP apresentará um relatório de progresso trimestral, ao eleito com responsabilidades de direção política do projeto;
- Quinzenalmente decorrerão reuniões entre os coordenadores e Jon Koll;
- Uma reunião de avaliação envolvendo os membros da equipa interna deverá ocorrer após a conclusão de cada módulo.
- De cada reunião de trabalho serão elaboradas atas que serão enviadas a todos os participantes e deverão ficar disponíveis “on line”, através de meio a disponibilizar;
- Após a conclusão de cada módulo, serão enviados “drafts” ao facilitador para avaliação e problematização;
- À medida que resultados forem sendo alcançados, serão partilhados com os outros sítios piloto, com a UNESCO e o Turismo de Portugal;
QUESTÕES GERAIS

- O Plano de Uso Publico deverá ser avaliado periodicamente, pelo menos quadrimestralmente no primeiro ano e semestralmente nos anos seguintes;
- O calendário de atividades PUP, deverá ser integrado na programação de cada parceiro, na medida em que o afete;
- Com a aprovação, o PUP torna-se um documento oficial e implementável;
- Qualquer alteração as estes Termos de Referência terão que ser aprovadas pelos parceiros;
- Qualquer questão que ponha em causa estes Termos de Referência deverá ser alvo de discussão e aprovação dos abaixo assinados parceiros do PUP / Évora.

SUBSCRITORES

Câmara Municipal de Évora –
Sr Presidente
Assinatura…………………………………………………………….. Data__/__/____

Direção Regional de Cultura do Alentejo – Diretora
Prof. Aurora Carapinha
Assinatura ……………………………………………………………….. Data__/__/____

Universidade de Évora –
Reitor
Assinatura ……………………………………………………………….. Data__/__/____

Fundação Eugénio de Almeida –
Sr.
Assinatura ……………………………………………………………….. Data__/__/____

GAPAE – Gabinete de Arquitetura e Património da Arquidiocese de Évora
Arqt.ª Estela Safara Cameirão
Assinatura ……………………………………………………………….. Data__/__/____

Turismo do Alentejo – Presidente
Dr. Ceia da Silva
Assinatura ……………………………………………………………….. Data__/__/____

Associação Comercial – Presidente
Sr.
Assinatura ……………………………………………………………….. Data__/__/____

Associação de Hotéis de Portugal
Sr
Assinatura ……………………………………………………………….. Data__/__/____

AGIA – Associação de Guias Interpretes –
Sr
Assinatura ……………………………………………………………….. Data__/__/____
AHRESP – Associação de Hotéis Restaurantes e Similares de Portugal –
Sr
Assinatura ................................................................. Data__/__/___

APECATE – Associação de Empresas
Dr.ª Ana Barbosa
Assinatura ................................................................. Data__/__/___

Colecção B
Prof. José Alberto Ferreira
Assinatura ................................................................. Data__/__/___

CENDREV –
José Russo
Assinatura ................................................................. Data__/__/___

Pé de Xumbo –
Dr.ª Ana Martins
Assinatura ................................................................. Data__/__/___

Eborae Mvsica –
Dr.ª Helena Zuber
Assinatura ................................................................. Data__/__/___

Associação do Imaginário –
Wladimiro Garrido Guerra
Assinatura ................................................................. Data__/__/___
ANNEX 9. b) Pilot Sites Documents: Terms of reference Fort Jesus

TERM OF REFERENCE
THE PREPARATION OF PUBLIC USE (PU) PLAN
IN FORT JESUS NATIONAL MONUMENT
2012-2013

This document serves as agreement between the signed parties to develop a Public Use (PU) Plan in Fort Jesus National Monument and to establish expectations and responsibilities during the preparation of the Public Use Plan in Fort Jesus National Monument.

GENERAL ASSUMPTION

The TOR was prepared with some assumptions as follows:
1. Fort Jesus WHS is an institution under the National Museums of Kenya which has the capacity to collect funds, under Public Use Planning (PUP), and reinvest the funds collected for conservation and community projects.
2. Further Fort Jesus will receive technical assistance from PUP during planning and implementation of Version 1.0 of the PUP.
3. The active involvement and participation of the stakeholders will facilitate the implementation of the PUP.

PRINCIPLES

Public Use Planning in Fort Jesus National Monument will be based on the conservation purpose of the Fort Jesus National Monument’s significant resources in terms of identified values which includes historical, architectural, educational, social and economic, and to preserve and maintain its status as a UNESCO World Heritage Site. Public Use Planning in Fort Jesus National Monument will be framed within the Planning Framework which includes:-

1) The purposes of Fort Jesus National Monument,
2) Relevant laws and policies, especially the Management Plan of Fort Jesus National Monument,
3) The interpretive framework of Fort Jesus National Monument.

The Public Use Plan will be integrated into Fort Jesus National Monument’s Management Plan aimed at sustainable utilization of the heritage resource and its surrounding heritage landscape for social, economic and political benefits of its communities, especially the Mombasa Old Town Community. This means that PUP will help operationalize the overall interpretation of Fort Jesus WHS which is an integral objective in the management plan.

OBJECTIVES

1. The implementation of Version 1.0 of Public Use Plan in 2012.
2. Capacity building of Fort Jesus National Monument staff, through training workshops, in the field of public use management through the involvement of representatives from all divisions which includes: Education, Administration, Finance, Procurement, Research, Audio Visual, Marketing and Conservation.

3. The establishment of a fundraising mechanism for generation and retention of funds which will be defined during the PUP process, in Fort Jesus National Monument by the end of 2012.

   The conservation fund will be used as follows:
   - To carry out site interpretation and presentation.
   - To undertake conservation works within the Fort.
   - To control erosion on the seaward section.

METHODOLOGY

In order to achieve the objectives, Public Use Planning alongside the integrated management plan (where similar objectives emerge) which is currently being implemented, will be carried out simultaneously in Fort Jesus WHS with detailed time line as follows.

<table>
<thead>
<tr>
<th>Module</th>
<th>Title</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Module 1: Planning Terms of Reference</td>
<td>01 May,2012</td>
</tr>
<tr>
<td>3</td>
<td>Module 3: Directory of Touristic Attractions</td>
<td>30 May,2012</td>
</tr>
<tr>
<td>4</td>
<td>Module 4: Zones and Sectors</td>
<td>15 June,2012</td>
</tr>
<tr>
<td>5</td>
<td>Module 5: Public Use Products</td>
<td>15 July,2012</td>
</tr>
<tr>
<td></td>
<td>First Review of Results</td>
<td>15 August,2012</td>
</tr>
<tr>
<td>7</td>
<td>Module 7: Monitoring Plan</td>
<td>22 August,2012</td>
</tr>
<tr>
<td>8</td>
<td>Module 8: Regulations</td>
<td>15 September,2012</td>
</tr>
<tr>
<td>9</td>
<td>Module 9: Calendar of Activities</td>
<td>30 September,2012</td>
</tr>
<tr>
<td></td>
<td>Second Review of Results</td>
<td>25 October,2012</td>
</tr>
<tr>
<td>11</td>
<td>Preparation for Implementation</td>
<td>25 November,2012</td>
</tr>
<tr>
<td>12</td>
<td>Public Use Plan Version 1.0</td>
<td>30 November,2012</td>
</tr>
<tr>
<td>13</td>
<td>PUP document approval and launching (hard copy or online)</td>
<td>30 November,2012</td>
</tr>
<tr>
<td>14</td>
<td>Inauguration of PUP Version 1.0</td>
<td></td>
</tr>
</tbody>
</table>

STRATEGIC COMMUNITY AND MODULE PARTICIPANTS

The strategic communities who will be involved are:
1. The Mombasa Old Town Community, that forms the buffer zone of Fort Jesus WHS.
2. Other stakeholders include; relevant government departments, local municipal council, Old Town tour guides, tour operators, business entities and Friends of Fort Jesus.
3. The core planning team, apart from the curator Mr. Mbarak Abdulkadir, Mr. Rashid Galgalo and Mrs. Saadu Hashim, who will be involved in the planning are as follows:

   1. Mr. Michael Mureithi – Kenya Association of Tour Operators (KATO)
   2. Ms. Marlene Raid – Friends of Fort Jesus (FOF)
   3. Mr. Al-Amin Mohamed – Old Town Representative
   5. Mr. Raphael Igombo – Fort Jesus WHS
   6. Mr. Patrick Abungu – Fort Jesus WHS

RESPONSIBILITIES

The Organization/Management of Fort Jesus WHS

1. Provide support for the implementation and development of public use planning as an integral part of Fort Jesus National Monument management plan.
2. Provide technical support and office facility as agreed in Logistical Arrangement Section.
3. Develop and support a Public Use Planning working mechanism between Public Use Coordinator and Fort Jesus National Monument staff as decided in Logistical Arrangement.
4. Assign/establish small team of the site management/organization to work with the Public Use Coordinator to prepare the public use plan document.
5. Provide technical assistance in collaboration with PUP facilitator Mr. Jon Kohl, to develop a fund raising mechanism for conservation from public use activities in Fort Jesus National Monument.

Fort Jesus WHS Curator

1. Participate in the execution of modules, workshops or meetings and activities related to the preparation of public use plan.
2. Read and review every result or product from all of public use planning modules.
3. Monitor the process of Public Use Plan development.
4. Integrate the public use plan calendar of activities into the Fort Jesus National Monument annual operational plan.
5. Approve all products of every public use planning modules
6. Approve the document of public use plan for Fort Jesus National Monument

In the context of UNESCO/Turismo de Portugal activities

1. The Project organizers, through Mr. Jon Kohl, will provide technical assistance to develop public use plan.
2. In collaboration with site management, provide technical assistance to develop fund raising mechanism for conservation from public use activities.
3. Together with Fort Jesus Curator, review up to three (3) drafts of all products from every Public Use Planning module.
4. After conclusion of the project in October 2012, Jon will continue to offer remote technical assistance, pro bono if necessary, if the Museum enters into and continues its implementation as per the spirit of PUP.

Core Planning Team
Members of Core Planning Team are expected to:
a. Read PUP background information and the PUP module materials i.e. modules 1-11 as highlighted in the table on page 3 of this document.
b. Participate in at least 70% of preparation and work meetings
c. Sign this TOR

The activities of the Core Planning Team include:
1. Coordinate all preparation necessary for public use planning process.
2. Facilitate and carry out all modules of Public Use Planning.
3. Compile results from each meeting of Public Use Planning and distribute as proceedings to parties involved in corresponding modules.
4. Communicate processes and results to NMK Director General through the Curator, UNESCO and PUP facilitator Jon Kohl (after October 2012).
5. Coordinate with stakeholders in preparing/writing the Public Use Plan document.
6. Deliver all materials so far produced to UNESCO by the end of August.
7. Evaluate and update the Public Use Plan periodically according to the Calendar of Activities.
8. Facilitate the implementation of a virtual PUP plan that will be flexible to manage and modify. This will be done by integrating the PUP in the already existing NMK website.
9. Facilitate the implementation of version 1.0 of PUP and subsequent modifications as need be in future.

PUBLIC USE PLAN DOCUMENT APPROVAL

Public Use Plan document will be approved by the following parties/entities:
1. Director General National Museums of Kenya
2. Principal Curator Fort Jesus WHS
3. Core Planning Team members
This will be done through signing of the PUP officially.

THE DETERMINATION, COLLECTION AND USE OF CONSERVATION FUND

The Fort Jesus Conservation Fund will use public use-derived monies to fund projects that directly conserve the authenticity and integrity of the Fort Jesus National Monument. The figure of the conservation fund will be decided by Fort Jesus WHS Management Team in consultation with the Core Planning Team through liaison with the Director General of the National Museums of Kenya.

BUDGET

The budget for the development of public use plan will be covered by National Museums of Kenya through Fort Jesus World heritage Site, Core Planning Team and stakeholders, i.e. budget to cover planning meetings, modules discussions, etc. as we develop the PUP.
For the implementation of products resulting from public use plan, National Museums of Kenya, development partners and parties interested in the conservation of Fort Jesus National Monument can provide their contribution.

LOGISTICAL ARRANGEMENT

Office facilities provided by the management of Fort Jesus National Monument include:
- office space and furniture (desks, chairs and book case/cabinet)
- lap top computer and projector
- printer and papers
- information board
- meeting room
- stationery

Internal working mechanism:
- Public Use Coordinator will report all progress during the public use planning process, in a monthly report as well as semi-annual report to Curator of Fort Jesus National Monument.
- After the Fort Jesus National Monument Curator has recommended on the report, it will be submitted to all core planning team members, UNESCO and Jon Kohl (after October), on behalf of the Management of Fort Jesus National Monument.
- Coordination meeting between the Site Curator, Jon Kohl, and Public Use Coordinator will be held at least once every two weeks.
- An evaluation meeting which involves monument staffs as previously mentioned in Objectives section will be held upon the accomplishment of workshop of every module.

GENERAL ARRANGEMENTS

Public use planning will be evaluated periodically at least once in three months in the first year and every six months in the following years. The public use plan calendar of activities will be integrated into the annual operating plan of Fort Jesus National Monument management.

By approving the public use plan document in 2012, PUP will become official and implementable in Fort Jesus.

Any alteration to these Terms of Reference should be made in consultation with the Management of Fort Jesus WHS and UNESCO.

Any matter that infringes the Terms of Reference and requires attention should be discussed between undersigned parties to find the solution.

Depending on availability of funds, both hard copy and virtual version of the Fort Jesus Public Use Plan will be available. Any new developments in the plan will be integrated in a continuous planning system and published as the latest version i.e. Version 1.0, Version 2.0, etc.

SIGNATORIES

DIRECTOR GENERAL, NATIONAL MUSEUMS OF KENYA
Dr. Idle Farah
SIGN…………………DATE………………

PRINCIPAL CURATOR, FORT JESUS WORLD HERITAGE SITE
Mr. Mbarak Abduqadir
SIGN………………... DATE………………

CORE PLANNING TEAM
1. Mr. Michael Mureithi – Kenya Association of Tour Operators (KATO)
   SIGN………………... DATE………………

2. Ms. Marlene Raid – Friends of Fort Jesus (FFJ)
   SIGN………………... DATE………………

3. Mr. Al-Amin Mohamed – Old Town Representative
   SIGN………………... DATE………………

   SIGN………………... DATE………………

5. Mr. Raphael Igombo – Fort Jesus WHS
   SIGN………………... DATE………………

6. Mr. Patrick Abungu – Fort Jesus WHS
   SIGN………………... DATE………………
Dear Madam/Sir,

The Education Department, Fort Jesus Museum is conducting a survey to establish which areas are considered as attractions by our visitors and how we can improve on our site so as to make it more attractive to our visitors. We kindly request a few minutes of your precious time to answer the questions below. Our sincere appreciation for taking part in this crucial exercise.

Name: ................................................................. (Optional)  Sex: F /M  Country: ............................

1. Age group:
   A. 10-20 years old.  B. 21-30 years old.  C. 31-40 years old.  D. 41-50 years old.
   E. 51-60 years old.  F. 61-70 years old.

2. Is this your first visit to Fort Jesus?  Yes / No

3. From your visit, which part of the fort attracted you the most? .................................................................

4. Why did it attract you the most? ...............................................................................................................

5. Give suggestions on how we can improve our site to make it more attractive and visitor friendly.

...........................................................................................................................................................................

...........................................................................................................................................................................

...........................................................................................................................................................................

Thanking you.

Education Department
October 2012.
Fort Jesus, Mombasa is an exceptional symbol of the interchange of cultural values and influences between and among peoples, of African, Arab, Asians, Turkish, Persian and European origin, whose lives have been touched by the presence and role of this imposing structure. Built by the Portuguese at the end of the 16th Century and used by them for over 100 years, Fort Jesus Mombasa bears testimony to the first successful attempt by western civilization to control the Indian Ocean trade routes which had remained under Eastern influence over several millennia.

The Fort was used by various world powers as a stronghold to safeguard their interests along the East African coast. In this way Fort Jesus, Mombasa was at the centre of the then emerging political, commercial and cultural globalization. In the process the Fort experienced conflicts and contestations. However, unlike many other Forts where contestation was usually between European powers, Fort Jesus, Mombasa was a source of conflict between diverse peoples and powers that converged there.

For more information contact:
National Museums of Kenya
Fort Jesus National monument
P.O Box 82412-80100
Nkrumah Rd, Mombasa

Tel: 254 41 2220058, 2222425, 2225934
Email: fortjesus@museums.or.ke
Website: www.museums.or.ke

• Corporate events hire
• Sound & Light show
• Educational Tours

OUTSTANDING UNIVERSAL VALUE

OTHER ACTIVITIES

FORT JESUS NATIONAL MONUMENT
The plan of the Fort consists of a central court with bastions in the four corners and a rectangular gun platform facing the sea. It was designed in such a way that it was virtually impregnable during any siege and it included basic facilities such as chapel, cistern, well and Captain’s house all covering an area of two acres. All these except the cistern and the L-shaped building in S. Matias were destroyed in the course of the 18th Century and are now survived by ruins. The Fort has one main gate and two other passages facing the sea. Other features include parapet walks, firing steps, watchtowers and gun ports. There were barrack rooms on the north and south sides and guardrooms leading back from the main gate.

The original materials used in the construction of the Fort are coral, lime, sand and clay. The facades have been finished with a pigmented yellow ochre plaster. The Fort has managed to retain much of its features since its construction in the 16th century.
A lista que se apresenta de seguida não pretende ser um levantamento exaustivo de todas as atrações turísticas existentes no território do Parque Arqueológico do Vale do Côa (PAVC) tendo sido selecionadas para inclusão apenas as consideradas mais relevantes. Para além disso, embora a região possua diversos tipos de atrações turísticas, apenas aquelas localizadas dentro do território do PAVC foram apreciadas. Por outro lado, existem atrações que, apesar de também se situarem no território do Parque, pela sua extensão geográfica (o rio Douro, por exemplo cuja paisagem vinhateira é, como a arte rupestre do Côa, património Mundial) são de difícil caracterização numa lista com estas características dedicada a um território concreto e relativamente diminuto (a área do PAVC é de cerca de 200 kms²). Deve ainda ser ainda sublinhado que o território do Parque possui outros atrativos que por serem sazonais e comuns a uma mais vasta região são também de caracterização problemática numa lista deste género. Tais são os casos da “Amendoeira em Flor”, das “Vindimas” ou dos tons outonais da queda de folhas das videiras. Por outro lado, o território do PAVC possui valores naturais interessantes. No entanto, foi achado conveniente sinalizar o valor do património natural através da inclusão nesta lista da Reserva da Faia Brava.

Relativamente aos sítios de arte rupestre do Vale do Côa foi decidido incluir na lista apenas aqueles que se encontram em visita pública: Núcleos de Arte Rupestre da Penascosa, da Canada do Inferno e da Ribeira de Piscos. Neste preciso momento, conhecem-se cerca de 70 sítios com arte rupestre no território do PAVC e suas imediações. A exclusão de todos estes sítios que não são mostrados ao público justifica-se pela prudência que o PAVC pôe na gestão do património que lhe foi confiado. Não divulgando a sua localização exata tenta-se evitar problemas de vandalismo, roubo ou mesmo destruição de todo este património. Assim, não sendo oferecida aos turistas que demandam a região a possibilidade de visitar todos estes sítios que estão em reserva, não faria sentido aqui listá-los como atrações. Os já mencionados três sítios abertos ao público bem como o polo de atração constituído pelo Museu do Côa, também presente nesta lista, representam assim a oferta de visita ao património de arte rupestre do Vale do Côa.
Finalmente deve ser referido que a visita aos três sítios de arte rupestre abertos ao público obedece a certas normas específicas. Estas visitas apenas são operadas pelo PAVC ou pelas 7 empresas privadas autorizadas para o efeito. Dado que existe, por razões de conservação e preservação, um limite no número de visitantes diários diferente para cada um destes três sítios, pois cada uma possui características bem particulares, o Parque recomenda a marcação prévia da visita. De qualquer modo, em alternativa à visita às gravuras, o Museu do Côa tem capacidade para acolher, em simultâneo, centenas de visitantes. Mais informações sobre o sistema de visita aos três sítios abertos ao público pode ser encontrada em

Descrição da atração


Pontuação: 1 de 17.


É uma relativamente extensa praia fluvial com três núcleos diferentes de gravuras. Os visitantes têm oportunidade de visionar 5 rochas gravadas com motivos paleolíticos pertencentes a um dos núcleos acima mencionados. As visitas são orientadas por guias do PAVC ou de empresas privadas certificadas pelo Parque. No geral, pode qualificar-se o estado de conservação do sítio como muito razoável. Do ponto de vista legal, para além de ser Património Mundial, a Penascosa constitui-se como Monumento Nacional, de acordo com a Lei do Património portuguesa.

Barreiras: Para além do próprio Rio Côa que bordea o sítio, este encontra-se totalmente vedado existindo ainda uma cancela no caminho agrícola de acesso. O sítio é guardado 24 horas por dia por vigilantes contratados para o efeito. Estes guardas certificam-se que as visitas organizadas pelo Parque ou pelas empresas privadas autorizadas a operar no sítio decorrem com normalidade. Sublinhe-se ainda que este é o único sítio preparado para receber visitantes com necessidades especiais, sejam ao nível motor, de audição ou visão.

Uso Turístico Corrente: Este é o sítio de arte rupestre mais visitado do Parque e, devido às suas características espaciais, o único que recebe visitas escolares. Pode num único dia receber mais de 50 visitantes. A gestão de visitas é feita de modo a que estas tenham um impacto natural diminuto. Uma habitação frugal em ruínas foi reconstruída para abrigo dos guardas que vigiam o sítio e prestar apoio aos visitantes. Em ocasiões de lua cheia, é ainda possível fazer a visita noturna a este sítio.

Objetivo de Conservação: Manter o atual estado de conservação.
Descrição da atração
Nome: Núcleo de Arte Rupestre da Ribeira de Piscos, freguesia de Muxagata, concelho de Vila Nova de Foz Côa.

Localização: Sítio localizado na margem esquerda da Ribeira de Piscos junto à sua confluência com o Côa e na margem esquerda deste rio. O acesso processa-se através da aldeia da Muxagata. Esta aldeia encontra-se a 7 kms de Vila Nova de Foz Côa, acedendo-se pela EN 102, em direção à Guarda. A partir de Muxagata, o acesso é feito através de caminhos agrícolas.
Pontuação: 2 de 17.


Neste sítio conhecem-se 33 rochas gravadas, 25 das quais com representações paleolíticas, situadas na margem esquerda da ribeira e em torno da sua foz, junto do Côa. O percurso de visita inclui cinco rochas. É necessário caminhar cerca de 1100 metros até à última das rochas visitadas. A caminhada é compensada por alguns dos mais importantes exemplares de gravura paleolítica em todo o vale do Côa. Entre eles salientam-se os cavalos enlaçados da rocha 1 ou, na rocha 2, uma das raras figuras humanas de cronologia paleolítica conhecidas no vale, o já famoso Homem de Piscos. O percurso apresenta também enorme beleza paisagística e grande riqueza a nível da fauna e flora. Do ponto de vista legal, para além de ser Património Mundial, a Canada do Inferno constitui-se como Monumento Nacional, de acordo com a Lei do Património portuguesa.

Barreiras: O Rio Côa e a Ribeira de Piscos bordejam o sítio. Ao contrário do que sucede nos outros dois sítios abertos ao público, Núcleo de Arte Rupestre da Ribeira de Piscos não se encontra vedado. Por outro lado, o sítio é guardado 24 horas por dia por vigilantes contratados para o efeito. Estes guardas certificam-se que as visitas organizadas pelo Parque ou pelas empresas privadas autorizadas a operar no sítio decorrem com normalidade.

Uso Turístico Corrente: Este é dos três sítios abertos ao público, aquele que recebe menor número de visitantes. Uma ruína foi recuperada e transformada em abrigo para os guardas que vigiam o sítio prestando ainda apoio aos visitantes.

Objetivo de Conservação: Manter o atual estado de conservação.
Descrição da atração

Nome: Núcleo de Arte Rupestre da Canada do Inferno, freguesia e concelho de Vila Nova de Foz Côa.


Pontuação: 3 de 17.


Devido às obras de construção da abandonada barragem do Côa, este é o sítio de arte rupestre do Côa cuja paisagem sofreu maior perturbação. De qualquer modo, as cicatrizes deixadas pela construção da barragem são também um testemunho experienciado pelos visitantes da batalha travada pela preservação da arte do Côa. Das 46 rochas existentes, 6 rochas são mostradas aos visitantes pelos guias do PAVC ou de empresas privadas certificadas pelo Parque. No geral, pode qualificar-se o estado de conservação do sítio como razoável, pese embora as marcas na paisagem da abandonada construção da barragem. O percurso final até às gravuras é de cerca de 400 metros e é feito a pé por trilho estreito mas arranjado.

Do ponto de vista legal, para além de ser Património Mundial, a Canada do Inferno constitui-se como Monumento Nacional, de acordo com a Lei do Património portuguesa.

Barreiras: Para além do próprio Rio Côa que bordea o sítio, este encontra-se totalmente vedado. Tal como a Penascosa, este sítio é guardado 24 horas por dia por vigilantes contratados para o efeito. Estes guardas certificam-se que as visitas organizadas pelo Parque ou pelas empresas privadas autorizadas a operar no sítio decorrem com normalidade.

Uso Turístico Corrente: Dos três sítios abertos ao público, a Canada do Inferno é o segundo em número de visitantes recebidos. Existe uma estrutura provisória de apoio ao guarda. A estrada de acesso ao sítio sofreu recentemente melhorias e vislumbra-se a possibilidade de no futuro próximo dotar o sítio de infraestruturas de carácter permanente de modo a que o sítio possa receber mais visitantes.

Objetivo de Conservação: Manter o atual estado de conservação.
Descrição da atração

Nome: Museu do Côa, freguesia e concelho de Vila Nova de Foz Côa.

Localização: Localiza-se no topo dum monte sobranceiro à confluência do rio Côa com o rio Douro, a cerca de 4 kms da cidade de Vila Nova de Foz Côa. O acesso é feito por estrada asfaltada devidamente sinalizada em vários pontos de Vila Nova de Foz Côa.

Pontuação: 4 de 17.

Descrição: O Museu do Côa é um equipamento do Parque Arqueológico do Vale do Côa. Foi inaugurado em 30 de Julho de 2010 e recebeu até Setembro de 2012 mais de 73.000 visitantes. Im planta-se sobranceiro à confluência do Côa com o Douro, perfeitamente integrado numa paisagem de grande beleza natural. O edifício foi concebido por Camilo Rebelo e Tiago Pimentel, uma dupla de arquitetos do Porto. Mais do que um museu de arqueologia, o Museu do Côa é também um museu de arte. A museografia foi concebida, dentro do rigor científico, como uma mostra explicativa dos ciclos de arte rupestre do Baixo Côa e Douro superior. Que se iniciam no Paleolítico superior, há mais de 25.000 anos, e chegam até aos nossos dias. Com obras quer dos caçadores-artistas do Gravettense, quer dos últimos molheiros rupestres da Canada do Inferno, o Museu do Côa explana todo um catálogo de sensibilidades que se contêm na rudeza dos painéis de xisto que há milhões de anos moldam a geomorfologia regional. Claro que o verdadeiro museu é o vale que contém mais de 1000 rochas decoradas cuja síntese se apresenta no Museu. O Museu e o PAVC são administrados atualmente por uma Fundação de direito privado que tem como objetivo uma gestão integrada dum projeto de arqueologia que contribua para o desenvolvimento regional através da convergência de 3 fatores: cultura, turismo e ambiente.

Barreiras: A única barreira de acesso é o horário de abertura ao público já que o edifício obedece a todas as normas europeias sobre acesso de cidadãos portando dificuldades motoras. Sublinhe-se que é recomendada a visita orientada de modo a que o visitante possa usufruir e assimilar totalmente os conteúdos, alguns de certa complexidade científica.

Uso Turístico Corrente: O Museu foi idealizado e concebido para dar a conhecer a todos os visitantes que demandam a região a grande riqueza patrimonial que o verdadeiro Museu (o trecho final do rio Côa) encerra. Não pretendendo substituir a visita aos Sítios de Arte Rupestre abertos ao público, esta é uma estrutura preparada para receber cerca de 800 visitantes por hora. Possui bengaleiro, loja, auditório, sala de atividades educativas e restaurante. É também a sede do PAVC que gere, protege e organiza para visita pública os sítios de arte rupestre do Vale do Côa. Principiam aqui, as visitas ao sítio da Canada do Inferno.

Objetivo de Conservação: Sensibilizar o público e comunidade envolvente para a necessidade e boas práticas de conservação do património em geral e da arte do Côa em particular.
Descrição da atração

Nome: Monte e Capela de São Gabriel, freguesia de Castelo Melhor, concelho de Vila Nova de Foz Côa

Localização: Localiza-se junto da aldeia de Castelo Melhor e o acesso faz-se através de estrada em calçada a partir da EN 222, encontrando-se o seu início bem sinalizado.

Pontuação: 5 em 17.

Descrição: A pequena capela, construída no século XIX, encontra-se no cimo de uma elevação natural. Tem um nicho em granito, num recinto assente sobre um afloramento em xisto. Dali se desfruta uma vista panorâmica sobre toda a região, desde a Serra da Marofa, com Figueira de Castelo Rodrigo no sopé, até Espanha, na zona de Freixo de Espada à Cinta, vendo-se também terras do outro lado do Douro, como Urros, Peredo dos Castelhanos e ainda Almendra, Vila Nova de Foz Côa, Santo Amaro, Nª Sr.ª da Assunção (Vilas Boas, Vila Flor), a Lousa e por fim uma panorâmica de conjunto sobre a antiga localidade de Castelo Melhor e o seu Castelo.

A uma distância de aproximadamente 1 Km da capela, encontra-se o ponto mais alto do monte de S. Gabriel (654m), local de onde é possível ter uma fabulosa vista panorâmica sobre todo o vale do Côa. Daqui são visíveis os concelhos de Torre de Moncorvo, Meda, Trancoso, Pinhel, Figueira de Castelo Rodrigo, Freixo de Espada à Cinta e as fronteiriças terras de Castela (Espanha).

Barreiras: Apesar do acesso à Capela ser público, o topo do monte é propriedade privada sendo que o proprietário não permite o acesso às suas terras. Junto à Capela situam-se as antenas de comunicação rádio do PAVC.

Uso Turístico Corrente: Por ser um miradouro de excelência sobre toda região, o monte de S. Gabriel é demandado por inúmeros turistas. A Comissão Fabriqueira de Castelo Melhor, que gere o espaço da capela, criou uma zona de piqueniques com bancos e mesas de pedra bem como caixotes do lixo. Anualmente, na Segunda-Feira de Páscoa, cumpre-se a tradicional romaria à Capela, procedendo-se, depois das cerimónias religiosas, a um farto e participado piquenique ao ar livre em que convivem pessoas de toda a região.

Objetivo de Conservação: Manter o atual estado de conservação.
Descrição da atração

Nome: Reserva Natural da Faia Brava, freguesias de Algodres e Vale de Afonsinho, concelho de Figueira de Castelo Rodrigo, e freguesia de Cidadelhe, concelho de Pinhel

Localização: A reserva ocupa uma área de cerca de 800 ha em ambas as margens do rio Côa já no limite sul do PAVC. As aldeias mais próximas são Cidadelhe, Pinhel, e Algodres, Figueira de Castelo Rodrigo.

Pontuação: 6 em 17.

Descrição: A Reserva Natural da Faia Brava (abrangendo áreas nos concelhos de Figueira de Castelo Rodrigo e Pinhel), engloba um dos núcleos nacionais mais importantes de aves rupícolas e abrange parte da mancha de sobreiros mais extensa do Distrito da Guarda. Tem como missão conservar, valorizar, conhecer e divulgar o património natural do Nordeste de Portugal, pela via da sustentabilidade e com a participação da comunidade, através da gestão e da proteção de áreas naturais.

Os projetos implementados pela detentora dos terrenos a ONG Associação Transumância e Natureza (ATN) destinam-se exclusivamente à conservação de habitats e espécies mais característicos e ameaçados da região do Nordeste, contam com o apoio de cerca de 30 colaboradores locais (agricultores) e têm incidido em 4 áreas-piloto, que correspondem a propriedades rurais situadas em zonas de elevada importância ecológica, algumas das quais foram adquiridas pela ATN. A Faia Brava foi recentemente classificada pelo Instituto de Conservação da Natureza e Biodiversidade (ICNB) como a primeira Área Protegida Privada do país.

Barreiras: A reserva é gerida pela ATN de forma a minorar os impactos humanos na área pelo que as atividades turísticas são restringidas.

Uso Turístico Corrente: Apesar das restrições acima evocadas, a ATN promove regularmente atividade de visita, observação de aves e participação, através de voluntariado, em trabalhos de limpeza, vigilância de fogo estivais ou alimentação da avifauna destinadas ao público em geral, até porque esta é mais uma forma de financiamento. A Faia Brava funciona como polo de demonstração nas áreas da agricultura sustentável, proteção florestal, silvo-pastorícia, educação ambiental e ecoturismo, envolvendo a comunidade local e escolar. É também uma área-piloto do projeto europeu Rewilding Europe, para a criação de áreas naturais silvestres e de desenvolvimento de turismo de natureza na Europa (http://rewildingeurope.com/).

Objetivo de Conservação: De acordo com a associação, desde 2000, a ATN tem reforçado a sua presença especialmente na ZPE do Vale do Côa, onde hoje é proprietária de cerca de 800 ha de terreno, gerido exclusivamente para a conservação da biodiversidade. O conjunto destas propriedades forma um contínuo de cerca de 5 km ao longo do rio Côa, abrangendo ambas as margens, precisamente onde nidifica grande parte da avifauna rupícola do rio Côa e onde existe a maior mancha de sobreiro do distrito da Guarda (mais de 2000 hectares).
Descrição da atração

Nome: Aldeia de Cidadelhe, freguesia de Cidadelhe, concelho de Pinhel

Localização: Situa-se num estreito enclave delimitado pelo rio Côa e a ribeira de Massueime já muito próximo do limite sul do PAVC. Acede-se pela Estrada Municipal 607 desde Pinhel, Figueira de Castelo Rodrigo ou outras localidades próximas.

Pontuação: 7 em 17.

Descrição: Cidadelhe destaca-se pelas incríveis paisagens naturais que se podem observar. Situa-se a norte de Pinhel, num monte a mais de 500 metros de altura, entre o Massueime e o Côa. É por muitos considerada como uma das mais belas aldeias de Portugal e é vista como Aldeia Histórica devido às muitas casas tradicionais de construção em granito, as quais estão hoje, na sua maior parte, em ruínas. Como importantes pontos de interesse a nível paisagístico, natural e arqueológico são de se destacar o Castelo dos Mouros e o Poio do Gato. A reserva da Faia Brava (também referida nesta lista) engloba Cidadelhe pelo que se pode observar várias espécies selvagens, nomeadamente a avifauna rupícola. O escritor português e prémio Nobel José Saramago imortaliza esta aldeia no seu livro Viagem a Portugal, na qual caracteriza a sua beleza. Cidadelhe é apelidada pela população da região de "calcanhar do mundo", pelo facto de se encontrar no extremo norte do concelho pinhelense. A igreja matriz de Cidadelhe é uma reconstrução setecentista de uma igreja de época anterior sobre a qual subsistem raras informações. Mas a matriz de Cidadelhe é anterior, e a data de 1646 que se encontra na sineira de apoio ao templo contribui para fazer recuar a sua construção, pelo menos, à primeira metade do século XVII.

Barreiras: O mau estado da única estrada e o facto da aldeia se situar numa localização remota, resultam num afluxo limitado de visitantes à aldeia. Não existem unidades residenciais de turismo e o único café (comunitário) só se encontra aberto quando existe disponibilidade de algum habitante local para o abrir. Por outro lado, a grande maioria das casas típicas de granito está em ruínas sendo necessária alguma cautela aquando da visita, além de ser obviamente razoável considerar que estas são propriedade privada.

Uso Turístico Corrente: Apesar de receber poucos visitantes, a aldeia tem grandes potencialidades turísticas (nomeadamente no chamado turismo rural residencial) pela tipicidade da sua arquitetura vernacular, beleza das paisagens e modo tradicional de vida das suas (poucas) gentes. Assim, a Câmara Municipal de Pinhel, em parceria com o PAVC, recuperou uma destas ruínas para se constituir como Centro Difusor de Cidadelhe, uma espécie de posto de turismo para receber visitantes.

Objetivo de Conservação: Providenciar melhores condições de vida aos habitantes e promover a recuperação das casas em ruínas de modo a atrair novos moradores que possam contribuir para a perpetuação do modo de vida tradicional, em moldes ajustados ao Século XXI.
Descrição da atração

Nome: Quinta de Santa Maria de Ervamoira, freguesias de Muxagata e Chãs, concelho de Vila Nova de Foz Côa.

Localização: Localiza-se nas freguesias de Muxagata e Chãs, concelho de Vila Nova de Foz Côa e é imediatamente fronteira ao rio Côa em cuja margem esquerda se situa. O acesso é feito através de diversos caminhos agrícolas, quer a partir da aldeia da Muxagata quer da aldeia de Chãs.

Pontuação: 8 em 17.

Descrição: Integrando o complexo arqueológico do vale do Côa, inscrito na lista de Património Mundial da UNESCO (1998), a Estação arqueológica da Quinta de Santa Maria da Ervamoira está situada numa área isolada da margem esquerda do vale do Côa, em plena região de viticultura duriense, integrada no PAVC. O sítio apresenta inúmeros vestígios datáveis da presença romana nesta zona do atual território português, a par de evidências reportáveis ao período medieval, abarcando uma cronologia compreendida entre o Baixo Império e a Baixa Idade Média, numa eventual associação a uma via tardo-romana situada nas suas imediações. Em termos genéricos, a estação é constituída por uma estrutura de planta rectangular, identificada pela presença de muros aparelhados na matéria-prima mais abundante na região, o xisto, tendo sido provavelmente coberta, na origem, a *tegulae* e *imbrices*, elementos que, no conjunto, suportarão a tese defendida por alguns autores, que a têm interpretado como se tratando de um provável *mutatio*, isto é, uma albergaria para descanso de viajantes. Junto a esta, foi localizado um segundo edifício, de menores dimensões, mas de planta igualmente rectangular, um possível exemplar de *taberna*, a designação latina para o entendimento atual de casa comercial, pelo menos a julgar pela quantidade e tipologia de fragmentos cerâmicos encontrados no seu interior. Entretanto, os proprietários da Quinta instituíram, na antiga casa, datada do século XVIII, o Museu da Ervamoira, ao mesmo tempo que um circuito de visita, constituindo mais um polo de atração do Vale do Côa, onde se congrega o património edificado com o natural e antropológico. Do ponto de vista legal, para além de ser Património Mundial, a Quinta de Santa Maria de Ervamoira constitui-se como Monumento Nacional, de acordo com a Lei do Património português.

Barreiras: Visita apenas a pequenos grupos e por marcação prévia.

Uso Turístico Corrente: O pequeno Museu de Sítio pode ser visitado, mediante marcação prévia, por grupos de turistas. É também possível juntar à visita o almoço na Quinta. As atividades turísticas são organizadas pela proprietária da Quinta, a empresa de vinhos Ramos Pinto.

Objetivo de Conservação: Manter o atual estado de conservação.
Descrição da atração

Nome: Igreja Matriz de Vila Nova de Foz Côa, freguesia e concelho de Vila Nova de Foz Côa.

Localização: Localiza-se na Praça do Município, em pleno coração da cidade de Vila Nova de Foz Côa.

Pontuação: 9 em 17.


No interior, o templo divide-se em três naves por uma arcaria de volta plena, sustentada por robustas colunas. As naves apresentam teto abobadado e pintado, resultado de uma intervenção efetuada no terceiro quartel de Setecentos. Animam ainda as naves os altares colaterais e laterais, com as suas talhas douradas barrocas. O altar lateral direito contém uma escultura do século XVI de Nossa Senhora do Rosário. Na capela-mor encontramos a escultura de Nossa Senhora do Pranto, do século XVII, exposta num retábulo setecentista de talha dourada, talha que se estende aos caixotões da abóbada preenchidos com pinturas e às paredes laterais, emoldurando tábuaas pintadas. Nos painéis da abóbada representam-se episódios da vida de Cristo e da Virgem. Nas paredes laterais, as pinturas versam, na parte superior, sobre passos da Paixão de Cristo.

Barreiras: Para além do horário normal em que a Igreja está aberta, a realização de cerimónias religiosas pode constituir-se como uma natural barreira a uma visita por parte do público em geral.

Uso Turístico Corrente: Este é o mais importante monumento na cidade de Vila Nova de Foz Côa e como tal o mais visitado. A praça do Município, onde se localiza a Igreja, é um animado ponto central da cidade e possui ainda um Pelourinho.

Objetivo de Conservação: Manter o atual estado de conservação.
Descrição da atração

Nome: Pelourinho de Vila Nova de Foz Côa, freguesia e concelho de Vila Nova de Foz Côa.

Localização: Localiza-se na Praça do Município em Vila Nova de Foz Côa.

Pontuação: 10 em 17.

Descrição: A localidade de Foz Côa, situada numa região de remotíssima ocupação humana, terá integrado, nos primeiros tempos da sua povoação pós-Reconquista, um reguengo. Recebeu várias mercês das mãos de D. Dinis, que lhe concedeu o primeiro foral em 1299, tendo-se seguido outro logo em 1314. A vila recebeu foral novo de D. Manuel I, em 1514, na sequência do qual se terá erguido o presente pelourinho, de acordo com a sua feição quinhentista. Ergue-se na vizinhança da Igreja Matriz da vila, cuja fachada é igualmente manuelina, e dos Paços do Concelho.

O pelourinho é constituído por um soco de quatro degraus octogonais, sendo o térreo de feitura mais rude e de aresta viva, ao modo de plataforma, e os três superiores de rebordo boleado, sobre os quais se levanta base, fuste, capitel e remate, sem grimpa. A base consta de duas plataformas octogonais molduradas e escalonadas, baixas e largas, de tal forma que se diria constituírem outros dois degraus. Sobre estas levanta-se um pilar de secção quadrada, esculpido em cada face como as ombreiras de um portal, e composto por dois troços unidos por moldura central. O pilar é moldurado e escalonado na base, e cada troço é decorado com quatro colunelos nos ângulos, mediados por ornatos em forma de fuso, florões, esferas e vieiras nas faces. A larga moldura central é decorada com laçadas e um torçal, este último repetido no topo, sob o capitel. O capitel é quadrado, com ornatos vegetalistas nos ângulos, e florões nas faces, sendo novamente rematado por um encordoado largo. Sobre este, o remate é formado por uma original combinação; em cada canto do capitel levanta-se um pináculo cónico, com decoração distinta, entre vegetalista, geométrica ou heráldica. No centro levantam-se quatro pináculos menores, também distintos entre si, compostos por sobreposições de peças de diversa configuração. Sobressai, talvez em substituição de uma grimpa, um pináculo coroado por esfera armilar e flor-de-lis. O conjunto, que causa uma certa perplexidade, assemelha-se a um tabuleiro com peças de xadrez. Alguns temas decorativos evocam obra românica, o que representa um anacronismo importante na arte manuelina. Classificado como Monumento Nacional de acordo com a Lei do Património portuguesa.

Barreiras: Sem restrições.

Uso Turístico Corrente: Visitado pelos turistas que percorrem a pé a zona histórica de Vila Nova de Foz Côa.

Objetivo de Conservação: em bom estado de conservação.
Descrição da atração

Nome: Pelourinho de Muxagata, freguesia de Muxagata, concelho de Vila Nova de Foz Côa

Localização: Localiza-se na praça central da aldeia de Muxagata, acessível, através de Vila Nova de Foz Côa, da EN 102.
Pontuação: 11 em 17.

Descrição: A localidade de Muxagata, com referências tão antigas como o século X, é primeiramente designada como conselho no documento de extinção da Ordem do Templo, que havia recebido os territórios como doação de Fernão Mendes, senhor de Bragança, casado com uma irmã de D. Afonso Henrique. Pouco mais tarde, em 1328, as Inquirições Dionisinas voltam a referir o concelho, que pode ter recebido primeiro foral da recém-constituída Ordem de Cristo, herdeira dos bens dos Templários. Certa é apenas a outorga do Foral Novo, por D. Manuel, na data anteriormente citada, que antecederá em pouco tempo a edificação do atual pelourinho.

Este ergue-se num largo muito central, empedrado e com bastante inclinação, onde também se situa a antiga Casa da Câmara, Tribunal e Cadeia da Comarca. O soco, semi-embebido no pavimento desnivelado, é formado por sete degraus poligonais (oitavados), sendo apenas quatro destes visíveis na cota mais alta. Apenas os três degraus superiores possuem rebordo (curvo), sendo os restantes de feitura mais singela, e o último muito rústico, sendo provável que tivesse estado totalmente enterrado. A coluna, oitavada e de faces lisas, assenta diretamente sobre os degraus, embora o fuste possua um chanfrão, ao modo de base, na parte inferior. A cobertura da gaiola, piramidal, é encimada por uma esfera armilar com haste em ferro, esta última já moderna. O remate em gaiola, visível igualmente em outros pelourinhos da região (Trancoso, Almendres, Vilar Maior, Castelo Rodrigo e Fornos de Algodres, entre outros), é particularmente curioso por reproduzir a "gaiola" medieval onde se encerrariam os condenados em exposição pública, prática que em Portugal se supõe rara; este tipo de pelourinhos conserva, no entanto, a evocação deste forte símbolo da aplicação da justiça municipal. Classificado como Imóvel de Interesse Público de acordo com a Lei do Património portuguesa.

Barreiras: Sem restrições.

Uso Turístico Corrente: Ponto de interesse fulcral da aldeia de Muxagata juntamente com a contígua Casa do Município hoje recuperada e reconvertida como Centro de Acolhimento dos visitantes do PAVC que realizam o percurso de visita da Ribeira de Piscos.

Objetivo de Conservação: Foi recentemente objeto de obra de conservação e restauro.
Descrição da atração

Nome: Castelo de Castelo Melhor, freguesia de Castelo Melhor, concelho de Vila Nova de Foz Côa.

Localização: Localiza-se num monte sobranceiro à aldeia de Castelo Melhor, na freguesia do mesmo nome, concelho de Vila Nova de Foz Côa.

Pontuação: 12 em 17.

Descrição: O castelo de Castelo Melhor é um dos melhores exemplos de fortaleza medieval secundária, erguida numa das zonas mais periféricas dos reinos peninsulares. A obra original é leonesa e remonta aos inícios do século XIII, altura a que corresponde uma intensa fortificação da linha de Riba-Côa, zona constantemente disputada pelos monarcas português e castelhano. Foi neste contexto que Afonso VII, em 1209 ou 1210, mandou construir a fortaleza, dando-lhe simultaneamente foral, numa tentativa de consolidação populacional e militar, que se veio a revelar de relativa importância nos dois séculos seguintes. Menos de um século depois, com o Tratado de Alcanices (1297), Castelo Melhor passou para a coroa portuguesa, integrando, a partir daí, a raia nacional. D. Dinis, como prova de afirmação do novo espaço, empreendeu obras e dotou a vila de um novo quadro administrativo, mas a verdade é que Castelo Melhor não cessou de desempenhar um papel secundário e periférico, mesmo na linha de reforço militar de Riba-Côa. A história posterior do Castelo de Castelo Melhor é a de uma progressiva decadência. Castelo Melhor chegou aos nossos dias como uma das nossas mais impressionantes ruínas medievais de caráter militar. À margem das grandes intervenções restauracionistas da primeira metade do século XX, constitui um dos poucos castelos não adulterados pelas vagas de restauro. Níveis de ocupação da Idade do Ferro foram também identificados em sondagens arqueológicas realizadas no Castelo que está classificado como Imóvel de Interesse Público de acordo com a Lei do Património português.

Barreiras: O ingresso ao Castelo faz-se por uma tortuosa e íngreme ladeira, o que poderá dificultar o acesso a pessoas como dificuldades de locomoção. O estado delicado de conservação deve levar também os visitantes a prestar atenção a secções da muralha menos estabilizadas.

Uso Turístico Corrente: O Castelo, apesar de ser um ponto de interesse da aldeia de Castelo Melhor, não é muito visitado devido aos motivos enunciados no parágrafo anterior. Por outro lado, apenas existe um painel informativo que apresenta dados sumários acerca do Castelo e que portanto não faz jus à sua rica história.

Objetivo de Conservação: Por estar em delicado estado de conservação, obras de conservação e restauro são necessárias a curto prazo.
Descrição da atração

Nome: Igreja Matriz de Almendra, freguesia de Almendra, concelho de Vila Nova de Foz Côa.

Localização: Localiza-se no Largo da Igreja na aldeia de Almendra.
Pontuação: 13 em 17.

Descrição: Embora se conheçam referências documentais à existência de um templo em Almendra cerca de 1320, a Igreja de Nossa Senhora dos Anjos foi construída no terceiro quartel do século XVI, estando a obra de reedição concluída possivelmente em 1565. Nas centúrias seguintes, a estrutura do edifício foi alterada por algumas campanhas construtivas, nomeadamente no interior, com a edificação de capelas laterais. O templo maneirista desenvolve-se em planta longitudinal composta por três naves rectangulares e capela-mor quadrangular, esta com contrafortes exteriores e remate em platibanda com gárgulas de canhão formando uma espécie de torreão. A fachada principal, de linhas sóbrias e gosto erudito, é rasgada ao centro por portal de volta perfeita enquadrado em alfiz com pilastras e rematado por frontão triangular com medalhão ao centro, onde foi gravada a data 1565. Este conjunto é ladeado por dois contrafortes e encimado por óculo. Do lado direito da fachada foi edificada a torre sineira.

No interior, as naves dividem-se em quatro tramos marcados por arcos de volta perfeita que assentam sobre colunas, sendo a nave central coberta por abóbada de madeira e as laterais por abóbada de aresta. Possui púlpito de talha e presbitério com teia de madeira. O arco triunfal de volta perfeita abre para a capela-mor, cujo espaço é coberto por abóbada estrelada. Ao fundo foi edificado retábulo de talha dourada e policromada, de estilo rococó. Classificado como Imóvel de Interesse Público de acordo com a Lei do Património portuguesa.

Barreiras: Para além do horário normal em que a Igreja está aberta, a realização de cerimónias religiosas pode constituir-se como uma natural barreira a uma visita por parte do público em geral.

Uso Turístico Corrente: Visitada de forma esporádica pelos turistas que percorrem a região.

Objetivo de Conservação: Em estado aceitável de conservação.
Descrição da atração
Nome: Casa de Almendra, freguesia de Almendra, concelho de Vila Nova de Foz Côa.

Localização: Localiza-se na aldeia de Almendra.
Pontuação: 14 em 17.

Descrição: De planta rectangular, a Casa de Almendra inscreve-se no modelo da denominada casa comprida, que caracterizou a arquitetura civil do nosso país no século XVIII, e que se pauta por um desenvolvimento em comprimento, materializado numa longa fachada, apenas dinamizada pelos elementos decorativos, que lhe emprestam uma imagem cenográfica própria do barroco. De acordo com os dados disponíveis, a obra de edificação da casa teve início em data próxima de 1743, mas foi interrompida em 1758, não chegando nunca a ser concluída. As vicissitudes que envolveram a história do solar conheceram novos desenvolvimentos com a instalação das tropas napoleónicas, responsáveis pelo incêndio que em 1810 destruiu boa parte do imóvel, que só viria a ser reconstruída a partir de 1895.

Edificada em blocos de granito, sem reboco, a casa desenvolve-se em dois pisos, cujas fachadas são abertas por vãos regulares e simétricos. Estes, caracterizam-se pelos aventais e lintéis decorados com enrolamentos e concheados rococó, repetindo o mesmo modelo, que apenas se diferencia entre o piso térreo e o andar nobre, este último mais complexo. É, no entanto, na fachada principal, que se concentra a mais importante decoração, pelo dinamismo e movimento que a composição imprime ao edifício. O ritmo dos vãos converge, ao centro, na secção definida por pilastras, e rematada pelo telhado de linhas onduladas, em cujo timpano se inscreve o brasão, que não apresenta qualquer elemento heráldico. O portal, flanqueado por duas colunas, é encimado pela varanda de planta contracurvada, com balaústreada que antecede a porta de moldura profusamente trabalhada. Classificado como Imóvel de Interesse Público de acordo com a Lei do Património portuguesa.

Barreiras: Ver próximo parágrafo.

Uso Turístico Corrente: Não visitável pois está ao abandono por falta de capacidade dos proprietários.

Objetivo de Conservação: Recuperação da Casa de modo a torná-la mais um polo de atração da região quer seja pela sua transformação em unidade de turismo rural ou Museu dedicada a um dos vários temas ligados à vida local tais como sejam a vida agrícola, o cultivo da vinha ou a ecologia regional.
Descrição da atração

Nome: Pelourinho de Almendra, freguesia de Almendra, concelho de Vila Nova de Foz Côa.

Localização: Localiza-se na aldeia de Almendra.

Pontuação: 15 em 17.

Descrição: O foral de Almendra foi concedido por D. Manuel em 1510, em documento que refere a existência de um foral antigo, mas que aparentemente nunca terá existido. O pelourinho datará dos anos seguintes à atribuição do foral manuelino, de acordo com a sua feição quinhentista. Ergue-se num largo central da povoação, diante da antiga Casa da Câmara e cadeia comarcã. Sobre um soco de quatro degraus octogonais, de pedra aparelhada, acrescidos de um quinto que forma a base do fuste, levanta-se o conjunto da coluna, capitel e remate. A coluna possui fuste oitavado e liso, e é rematada por uma moldura decorativa igualmente oitavada a pouca distância do topo, criando uma espécie de colarinho, ou arremedo de capitel, encimado por abacaxí oitavado. O remate é em gaiola, constituída por oito colunelos entre dois troncos de pirâmide oitavados, sendo o da base invertido. Esta mesma base, moldurada, é decorada com elementos vegetalistas e cabecinhas de anjos. Os colunelos são cilíndricos, assentos em pequena mísulas, e rematados por cogulhos no topo; o chapéu da gaiola, em pirâmide oitavada de faces lisas, assenta num colunelo central, também cilíndrico e liso. O coroamento é feito por uma pequena esfera armilar, encimada por uma diminuta peça terminal. Este pelourinho é muito semelhante a vários outros no distrito, tal como os de Aguiar da Beira, Carapito, Algodres, Almendra, Castelo Mendo, Castelo Rodrigo, Moreira de Rei, Muxagata, Trancoso, Marialva (este mais singelo), Alverca da Beira, Aveloso, Cedovim (restaurados), entre outros. Classificado como Imóvel de Interesse Público de acordo com a Lei do Património portuguesa.

Barreiras: Sem restrições.

Uso Turístico Corrente: Visitada de forma esporádica pelos turistas que percorrem a região.

Objetivo de Conservação: Em estado aceitável de conservação.
Descrição da atração

Nome: Igreja Matriz de Algodres, freguesia de Algodres, concelho de Figueira de Castelo Rodrigo.

Localização: Localiza-se na aldeia de Algodres.

Pontuação: 16 em 17.

Descrição: De fundação românico-gótica, a igreja matriz de Algodres encerra, na sua estrutura arquitetônica, as várias campanhas de obras de que foi objeto desde os séculos XIII-XIV, integrando, nas intervenções a que foi sujeita, vários elementos de épocas anteriores. A fachada principal termina em empena interrompida, sobre a qual se ergue o campanário com duas sineiras, rematado por três pináculos. É marcada pela abertura do portal de volta perfeita, ao centro. O portal Sul, originalmente em ogiva, foi entaipado já no século XVIII e substituído por um outro em arco abatido. Na verdade, as intervenções posteriores alteraram a configuração original do templo, de que a cachorrada interrompida é um dos exemplos mais evidentes. A torre, à esquerda, é uma construção bem posterior, como indica a lápide com a data de 1777 e os seus motivos decorativos concheados e em volutas, que enquadram a janela.

No interior, o espaço é marcado pela cobertura em duas águas e pelos arcos diafragma quebrados, com contrafortes no exterior. É possível que tenha sido objeto de obras de conservação ou reestruturação, pois num dos arcos encontra-se gravada a data de 1627. O arco triunfal, com três arquivoltas, mantém a mesma configuração, e é flanqueado por retábulos colaterais do início do século XVIII, dispostos em ângulo. A capela do lado da Epístola encontra paralelo no altar do lado oposto. Quanto à capela-mor, o retábulo de talha dourada é de traçado maneirista, com telas representando santos, e a cobertura de caixotões, com motivos geométricos. Classificado como Imóvel de Interesse Público de acordo com a Lei do Património português.

Barreiras: Para além do horário normal em que a Igreja está aberta, a realização de cerimónias religiosas pode constituir-se como uma natural barreira a uma visita por parte do público em geral.

Uso Turístico Corrente: Visitada de forma esporádica pelos turistas que percorrem a região.

Objetivo de Conservação: Em estado aceitável de conservação.
Descrição da atração

Nome: Quinta de Chão d’Ordem, freguesia de Longroiva, concelho de Meda.

Localização: Localiza-se junto à EN 102, a cerca de 10 kms de Vila Nova de Foz Côa.
Pontuação: 17 em 17.

Descrição: A Quinta de Chão d’Ordem Unidade de turismo rural localizada numa ampla quinta que pertenceu aos cavaleiros da Ordem do Templo. Vários abusos dos cavaleiros do Templo levaram o Papa João XXII, a pedido do Rei D. Dinis, a consentir que os bens, direitos e honras dos Templários passassem para a recém-nascida Ordem de Cristo. Esta Ordem, de origem portuguesa, prestou a sua melhor atenção a estas terras e às suas fortificações, pagando-lhes o povo, por seu lado, com cereais, azeite, vinho e outros produtos da melhor qualidade. Alguns lugares, como Quintãs, Quintas da Relva e Canameira, no termo de Longroiva, retribuíam com géneros a sua proteção. Poucos lugares eram por eles explorados diretamente, mas entre esses se contava a Quinta do Chão de Ordem, cuja denominação ainda hoje se mantém. Com a extinção das Ordens Religiosas e Militares, as propriedades que pertenciam a estas instituições foram alienadas, passando para a posse de algumas casas familiares da região.
Dispõe de oito quartos decorados com requinte, duas salas de estar, um pequeno bar, biblioteca, sala de refeições, campo de ténis e uma piscina exterior. Encontra-se rodeada por extensas vinhas e uma zona para pastoreio. A Quinta do Chão D'Ordem integra-se num tipo de paisagem onde a placidez da Beira se casa com a dignidade do Alto-Douro, qualidades naturais que já os Cavaleiros Templários e depois os da Ordem de Cristo aqui souberam descobrir e apreciar. A parte habitacional da Quinta tem uma traça simples e convidativa. A escada que conduz ao primeiro andar continua pela varanda, como quem envolve os visitantes num único abraço. A nobreza do acolhimento revela-se naturalmente no piso superior, mas, à boa maneira dos antigos, a maior franqueza tem lugar ao nível do piso térreo.
Barreiras: A Quinta é propriedade privada.
Uso Turístico Corrente: Constitui-se como uma unidade de turismo rural.
Objetivo de Conservação: Manter o atual estado de conservação.
<table>
<thead>
<tr>
<th>Atrações</th>
<th>Atratividade</th>
<th>Concorrência</th>
<th>Resistência</th>
<th>Acessibilidade</th>
<th>Adequação às mensagens</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Catedral de Évora</td>
<td>9</td>
<td>5</td>
<td>4</td>
<td>2</td>
<td>5</td>
<td>25</td>
</tr>
<tr>
<td>2 Capelo dos Ossos</td>
<td>8</td>
<td>5</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>24</td>
</tr>
<tr>
<td>3 Templo Romano</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>30</td>
</tr>
<tr>
<td>4 Cromoleque dos Almendres</td>
<td>7</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>21</td>
</tr>
<tr>
<td>5 Praça do Giraldo</td>
<td>6</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>25</td>
</tr>
<tr>
<td>6 Universidade/Colégio Espirito Santo</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>5</td>
<td>22</td>
</tr>
<tr>
<td>7 Muralhas</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>22</td>
</tr>
<tr>
<td>8 Museu de Évora</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>9 Alto de S. Bento/Cástris/Aqueduto</td>
<td>8</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>24</td>
</tr>
<tr>
<td>10 Paisagem arqueo-ambiental de Montemuro</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>5</td>
<td>23</td>
</tr>
<tr>
<td>11 Ecopista</td>
<td>3</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>22</td>
</tr>
<tr>
<td>12 Área de Sto. António/Cartuxa Valbom</td>
<td>7</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>13 BIME</td>
<td>9</td>
<td>5</td>
<td>2</td>
<td>1</td>
<td>5</td>
<td>22</td>
</tr>
<tr>
<td>14 Fórum Eugénio de Almeida</td>
<td>8</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>23</td>
</tr>
<tr>
<td>15 Feira de S. João</td>
<td>3</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>3</td>
<td>21</td>
</tr>
<tr>
<td>16 Rota dos sabores</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>4</td>
<td>17</td>
</tr>
<tr>
<td>17 Teatro e cinema de rua</td>
<td>2</td>
<td>2</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>18</td>
</tr>
<tr>
<td>18 Jornadas de música da Sé de Évora</td>
<td>7</td>
<td>5</td>
<td>5</td>
<td>3</td>
<td>5</td>
<td>25</td>
</tr>
<tr>
<td>19 Rota dos vinhos</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>22</td>
</tr>
<tr>
<td>20 Festival &quot;Évora Classica&quot;</td>
<td>6</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>24</td>
</tr>
</tbody>
</table>

Evora – List of Identified Attractions in and around the World Heritage site.
ANNEX 9. g) Pilot Sites Documents: Map of the recreational opportunity spectrum of Côa Park
# Product Description Sheet

<table>
<thead>
<tr>
<th>Name of Product:</th>
<th>Principal Activity (-ies)</th>
<th>Attraction(s)</th>
<th>Sector(s)</th>
<th>Zones</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Landscape:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Attraction:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial Objective</th>
<th>Product Description (itinerary, experience opportunities, activities, and services)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Objective(s)</td>
<td></td>
<td>---</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Message(s):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Barriers</td>
<td>Solutions</td>
</tr>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td>3.</td>
<td>3.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description of Services (only high priority services)</th>
<th>Service Providers/Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td>3.</td>
<td>3.</td>
</tr>
<tr>
<td>4.</td>
<td>4.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Needs: Training, Equipment, Management Capacities</th>
<th>Visitor Profiles (present/future)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td>3.</td>
<td>3.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Info sources:</th>
<th></th>
</tr>
</thead>
</table>

| Sheet Authors: | Date: |
Strategies and Guidelines for Maximizing the Benefits of Tourism

In this section, we illustrate the practical ways in which tourism benefits could be maximised and directed towards heritage and the local community.

Maximising Tourism Benefits for Heritage

The following are a few of many ways that heritage guides can benefit heritage:

1. Ensure authenticity of interpretation. This is perhaps the most important contribution that can be made to a heritage site. The main purpose of protecting a heritage site is to connect present generations with the past and ensure that the message of a heritage site is passed on to future generations. Therefore, if interpretation is not authentic, the reasons for protecting the site are unclear.

2. Develop partnerships with the local community. This will make community members more aware of the values of a heritage site. This can also bring economic benefit to the local community.

3. Develop partnerships with heritage managers. By organising and coordinating visitor activities with heritage managers, heritage guides can make direct economic contributions to the site.

4. Encourage economic activities that help heritage sites and their settings. Heritage guides, for example, can promote local crafts to visitors and emphasise the authenticity of such crafts. Through this, heritage guides can help to foster the development of local crafts and local businesses.

5. Discourage harmful development. Indiscriminate tourism related development can have a very negative impact on heritage. Insensible development can have a very negative impact on heritage sites. By pointing this out, heritage guides can discourage visitors from supporting these facilities. This, in turn, can discourage the local community from engaging in such development.

6. Withdraw support from businesses that depend on supplies or services from outside the local community.

7. Emphasise the importance of economic sustainability. By doing this, visitors can be made aware of this very important requirement for the survival of a heritage site. This awareness may lead to the creation of a support group or individual donations to the site.

8. Voice concerns. By simply voicing concerns related to a site’s protection in different forums or in the media, a significant contribution can be made towards safeguarding a heritage site.

Maximising Tourism Benefits for Local Communities

Heritage guides can help communities by contributing towards their economic and socio-cultural development. They can also contribute by reducing some of the negative impact of tourism.

The following are a few of the many ways in which heritage guides can share benefits with local communities:

1. Involve local communities in the planning and management of heritage interpretation. Through such involvement, community needs and aspirations can be included.

2. Whenever possible, employ or include members from the local community in your activities.

3. When possible, get supplies or services from the local community.

4. Create opportunities for cultural exchange between local communities and visitors. This develops better understanding between different cultures and in the long run leads to better appreciation of different cultures. However, this does not mean local people should perform for visitors.

5. Respect local traditions and values. Avoid including anything in site interpretation that could trivialise and/or commercialise a community’s deeply held traditions and values. Respect the wishes of a community if it does not want visitors.

6. Brief visitors on appropriate behaviour to minimize impact on local communities.