

Be.CULTOUR: “Beyond CULTural TOURism: human-centred innovations for sustainable and circular cultural tourism”



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Report on Challenge-driven innovation in Be.CULTOUR regions

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Dissemination Level

☒ **PU:** Public

☐ **CO:** Confidential, only for members of the consortium (including the Commission Services)

Abstract

The report on “Challenge-driven innovation” in Be.CULTOUR regions represents a preparatory document for the Be.CULTOUR co-design process aimed at the co-development of Action Plans for circular and sustainable cultural tourism in the six pilot heritage sites of the project, and more specifically it provides the initial context reflections and first orientation for the co-creation workshops organised at the local level. The report has multiple goals:

1. To offer a comprehensive understanding of the current state of play of all six pilot heritage sites cooperating in the Be.CULTOUR project, from a regional development and cultural tourism perspective;
2. To identify and understand site-specific challenges with respect to pilot heritage sites, from the point of view of the local partners;
3. To initiate a reflection process on how currently identified challenges can drive local actors towards innovation.

The regions analysed for the purpose of this report are those in which the Be.CULTOUR pilot heritage sites are located: Basilicata (Italy), Aragon (Spain), Västra Götaland (Sweden), Vojvodina (Serbia), Cyprus (Country level), as well as the cross-border territory formed by North-East Romania (Development) Region and the Republic of Moldova.

This document reports the results of the qualitative data collection and in-depth interviews conducted, and it is structured in three parts. The first part offers an introduction to the project and the present report, the second one describes the six pilot regions of the Be.CULTOUR project and the third presents first reflections about site-specific challenges and possible innovations identified. It focuses mainly on challenges related to regional development (geography, urban/territorial system, urban-rural linkages, accessibility, local economy, social and cultural context) as well as cultural tourism aspects (most-visited places, UNESCO sites, tourism potential, type of current tourism activities, seasonality), with a focus on circular economy strategies and policies already active in the pilot regions, which could be integrate to support Action Plans implementation for sustainable and circular cultural tourism. The report draws some reflections and recommendations on challenge-driven innovation for sustainable and circular cultural tourism as driver of sustainable development in the regions involved.

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1 Description of the Project

Be.CULTOUR stands for “**Beyond CULTural TOURism: heritage innovation networks as drivers of Europeanisation towards a human-centred and circular tourism economy**”. It expresses the goal to move beyond tourism through a longer-term *human-centred* development perspective, enhancing cultural heritage and landscape values.

Cultural tourism entails opportunities but also risks. Tourism as a whole can be a highly volatile economic sector. If not managed properly, cultural tourism can also easily turn into a “value extractive” industry, generating negative environmental, social and cultural impacts on local communities and ecosystems. This project will **develop specific strategies to promote an understanding** of cultural tourism, which moves away from a “stop-and-go” consumer-oriented approach towards one that puts humans and circular economy models at its centre, paying attention to nature, communities and cultural diversity. “**Place**”, intended as the *genius loci*, the ancient spirit of the site expressing its “intrinsic value” and “**people**” as **co-creators** of its uniqueness, culture, art, tradition, folklore, productivity, spirituality, as well as its “time space routine”, are the focus of Be.CULTOUR, which aims at realizing a longer-term development project for the pilot areas involved.

The overarching goal of **Be.CULTOUR** is to **co-create and test sustainable human-centred innovations for circular cultural tourism through collaborative innovation networks/methodologies and improved investments strategies**. Targeting deprived remote, peripheral or deindustrialized areas and cultural landscapes as well as over-exploited areas, local **Heritage innovation networks** will co-develop a long-term heritage-led development project in the areas involved enhancing **inclusive economic growth, communities’ wellbeing and resilience, nature regeneration** as well as **effective cooperation** at cross-border, regional and local level.

Wide and diversified partnerships of stakeholders from **18 EU and non-EU regions** of Northern-Central and Southern Europe, the Balkans, the Eastern neighbourhood and the Mediterranean, will be the driving force of the project. A **community of 300 innovators** (which includes regional authorities and municipalities, clusters and associations, museums and tourist boards, entrepreneurs, chambers of commerce, citizens, researchers, practitioners as well as project partners) in **6 pilot regions** will **co-create innovative place-based solutions for human-centred development through sustainable and circular cultural tourism**.

Collaborative “**Heritage innovation networks**” will be established in **6 European deprived remote, peripheral and deindustrialised areas and cultural landscapes** identified as “**pilot innovation ecosystems**”: committed to the project’s objectives, they have defined clear cultural tourism related challenges requiring innovation that will serve as the basis for the collaboration with **12 additional “mirror innovation ecosystems”**. Mutual learning and up-scaling of business solutions will be the objectives of the collaboration between pilot and mirror ecosystems, building the sustainability of the project’s results beyond its lifetime.

By adopting a human-centred quadruple/quintuple helix approach to co-design, **Be.CULTOUR will result in 6 community-led Action Plans, 18 human-centred innovative solutions and 6 close-to-market prototypes** of new cultural tourism integrated services and products: these will directly contribute to **inclusive economic growth, communities’ wellbeing and resilience, and nature regeneration** in pilot and mirror regions, **stimulating effective cooperation** at cross-border, regional and local level. The core partners of the Consortium will progressively build Be.CULTOUR sustainability by broadening the interregional collaboration, while anchoring it to relevant EU initiatives in the academic, business and institutional realms.

1.1 Be.CULTOUR specific objectives

The scopes of the Be.CULTOUR project will be achieved through a set of specific, measurable, achievable, realistic and time-constrained (SMART) specific objectives:

Objective 1 – To assess the impacts and market potential of sustainable and circular cultural tourism at national, regional and local level through multidimensional quantitative and qualitative indicators, innovative statistical methods and advanced smart data management systems;

Objective 2 – To build a Community of Practice of 6 pilot regional ecosystems and a Community of Interest with 12 “mirror ecosystems” in EU and non-EU countries actively engaged in knowledge-sharing and exploitation of Be.CULTOUR’s approach, methodology, tools, and innovative solutions for sustainable and circular cultural tourism;

Objective 3 – To co-develop 6 Action Plans for sustainable and circular cultural tourism by establishing collaborative “Heritage innovation networks” in 6 pilot regions in Northern-Central and Southern Europe, the Balkans, the Eastern neighbourhood and the Mediterranean;

Objective 4 – To co-develop, prototype and test human-centred and place-specific product, process and service innovations for sustainable and circular cultural tourism in pilot heritage sites;

Objective 5 – To provide policy recommendations for more effective use of European Structural Investment Funds (ESIFs) and other EU funds to support cultural tourism innovation ecosystems in pilot and mirror regions, and develop a proposal of evolution of ESIFs through synergies with other public funds;

Objective 6 – To contribute to deepen cultural Europeanisation through information and educational activities focused on the European history, identity and culture expressed in tangible and intangible cultural heritage and cultural landscapes, developing European Cultural Routes and European Heritage Labels in pilot heritage sites.

All partners have wide experience in developing and testing the Be.CULTOUR proposed approach, methodology and tools, ensuring the effective and time-constrained achievement of all the above-mentioned specific goals.

2 Introduction

The report on “Challenge-driven innovation” in Be.CULTOUR regions represents a **preparatory document** for the Be.CULTOUR co-design process aimed at the co-development of Action Plans for circular and sustainable cultural tourism in the six pilot heritage sites of the project, and more specifically it provides the initial context reflections and first orientation for the co-creation workshops organised at the local level. The report has multiple **goals**:

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The **regions** analysed for the purpose of this report are those in which the Be.CULTOUR pilot heritage sites are located: Basilicata (Italy), Aragon (Spain), Västra Götaland (Sweden), Vojvodina (Serbia), Cyprus (Country level), as well as the cross-border territory formed by North-East Romania (Development) Region and the Republic of Moldova. This regional approach was agreed upon in order to make sure the size and complexity of the regions studied are comparable. Specific analysis and reflections at the local level will be carried out in other deliverables, mainly related to Work Package 1¹.

This report is **addressed** mainly to project partners, and secondly to these actors and stakeholders who will directly or indirectly contribute to co-develop the Action Plans for sustainable and circular cultural tourism in the regions/sites involved in Be.CULTOUR project. The report analyses each pilot region/site based on qualitative information collected from local stakeholders and supported by official documentation, and reflects on regional challenges and related possible areas of innovation in line with the project framework. This report should be read as a complement to other Be.CULTOUR reports and articles published on the project website: www.becultour.eu. In order to keep the report concise and easy to read, some aspects had to be consciously left aside². Also, since regions are under constant transformation on many levels, it is important to remember that the current report reflects the reality perceived at the moment of writing and developing it (spring-summer 2021). Although some of the information and reflections provided will continue to be relevant in the long run, some quantitative and qualitative aspects might change in the course of the next months of project implementation.

The **methodology** used for data collection was developed in three stages. To begin, a preparatory questionnaire with thirty open-ended questions addressed to local stakeholders was developed. It focused mainly on qualitative information related to regional development, policy, governance, cultural tourism and circular economy. This qualitative data analysis prepares and complements the upcoming Deliverable D1.1 “Study on market potential, human capital and social

¹ Work Package 1 is focused on: Innovative statistical methods, tools and indicators for sustainable cultural tourism impacts assessment.

² Numeric values have been rounded up for most of the data (e.g., the population of Aragon: 1331280 was rounded up to 1,3 million inhabitants, Fruška Gora highest point 539 m was rounded up to 540 m, etc.) and a story-telling writing style was adopted.

impact of cultural tourism”³, which will analyse quantitative data collected under Work Package 1 on the regional and local context, focusing on the market potential of circular and sustainable cultural tourism strategies/solutions in pilot heritage sites. The preparatory questionnaire was shared with the Be.CULTOUR representatives of each region/pilot heritage site. A two-hour semi-structured interview took place with each regional representative to identify the key challenges and opportunities that should be analysed and presented more in-depth. Thus, during the interviews, the information provided in the questionnaire was further clarified and complemented. For Cyprus, the questionnaire was filled in by two different Be.CULTOUR local representatives, who jointly participated in the interview. For Västra Götaland and Vojvodina, two experts from two different organisations were present in the interview. For Moldova and North-East Romania, local representatives filled in separate questionnaires since the cross-border territory of Moldova and Romania is characterised by a high level of complexity. Because of their relative scale, Cyprus and Moldova have been addressed at the country level as study regions. Lastly, data collection was complemented where needed with information from other internal and external sources.

By engaging regional/pilot heritage site representatives, it is acknowledged that the views shared in this report reflect mainly their perspective and that different regional/local actors might have different perspectives. These will be addressed and further analysed through the co-creation process driven by the local Heritage Innovation Networks⁴. Therefore, this report is developed as a base for further discussions and reflections within the participative co-creation process of the Action Plans in pilot heritage sites, and is not intended as a definitive conclusion.

³ After publication the deliverable will also be made available on the official project webpage: <https://www.becultour.eu/results/>

⁴ See Deliverable D3.3 – Heritage innovation networks and Be.CULTOUR Community of Practice webpages, available in Be.CULTOUR website at the link: <https://www.becultour.eu/wp-content/uploads/2021/06/Be.CULTOUR-D3.3.Heritage-Innovation-Networks-and-Community-of-Practice-Webpages.pdf>

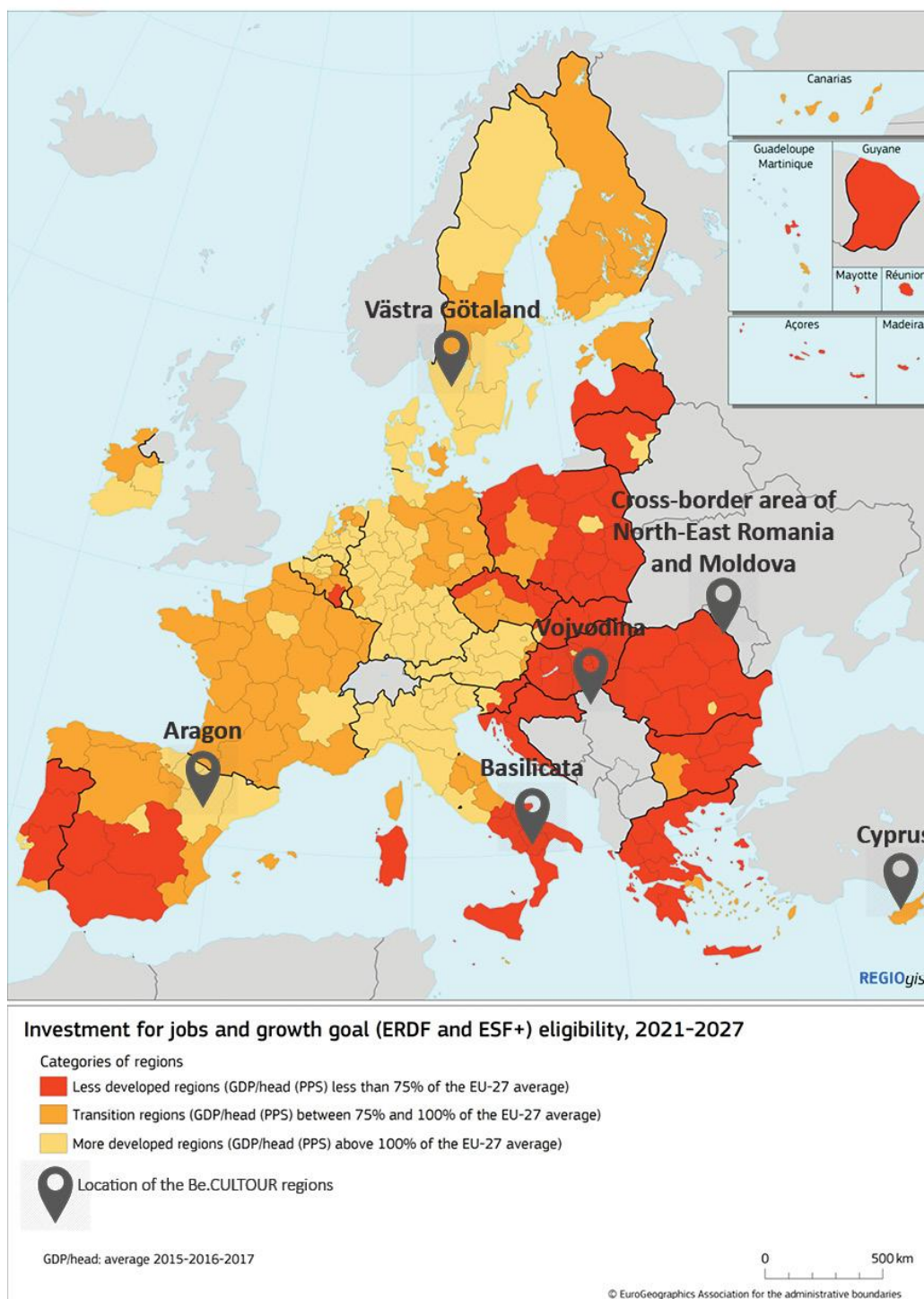


Figure 1 - Investment for jobs and growth goal (ERDF and ESF) eligibility, 2021-2027; Categories of regions and the six Be.CULTOUR regions

Source: https://ec.europa.eu/regional_policy/sources/graph/poster2021/eu27.png

2.1 Document structure

This document reports the results of the qualitative data collection and in-depth interviews conducted, and it is structured in three parts. The document is structured as follows:

- Section 1 and 2 offered an introduction to the project and the present report;
- Section 3 describes the results of the context analysis of six pilot regions of the Be.CULTOUR project;
- Section 4 presents first reflections about site-specific challenges and possible related innovations identified;
- Section 5 provides preliminary recommendations towards sustainable and circular cultural tourism development in Be.CULTOUR regions and pilot heritage sites.
- Section 6 concludes the report with final considerations for the next steps of the research.

The report focuses mainly on challenges related to regional development (geography, urban/territorial system, urban-rural linkages, accessibility, local economy, social and cultural context) as well as cultural tourism aspects (most-visited places, UNESCO sites, tourism potential, type of current tourism activities, seasonality), with a focus on circular economy strategies and policies already active in the pilot regions, which could be integrated to support Action Plans implementation for sustainable and circular cultural tourism.

3 Be.CULTOUR Regions: State of Play

This Section presents the results of the context analysis conducted through qualitative questionnaires and in-depth interviews to key stakeholders in Be.CULTOUR pilot regions, represented by project partners. The information provided were supported with official data and documentation to provide an overview of the state of play in pilot regions with a focus on regional development, cultural tourism and circular economy strategies and policies.



3.1 Basilicata (Italy)

3.1.1 Regional Development

“[Matera] was the most successful experience for the European Capital of Culture initiative, [...] in terms of the rate of growth for tourism [arrivals]”

Antonio Nicoletti – General Director APT Basilicata (Regional Tourism Promotion Agency of Basilicata)

Photo: Venosa Archaeological Park Source: APT Basilicata

The region of Basilicata is one of the 20 administrative regions of Italy. It covers a territory of approximately 10,000 km² and hosts a population of approximately 550,000 inhabitants, living in 131 municipalities. Compared to other Italian regions, it is a medium-sized region.

The territory is **geographically** very diverse. It is dominated by mountains (47%), steep valleys and four medium-sized rivers. The region also covers one coastline in the south and one in the west. Partly due to this geographical diversity, the territory is characterized by low density population and sparsely populated villages. Overall, existing localities form a **polycentric system** with two main attraction centres. In the central north part of the region, we find its capital: Potenza (66,000 inhabitants) and in the east, the city of Matera (60,000 inhabitants). Only nine cities are between 10,000 and 18,000 inhabitants, while more than 100 small towns and villages with populations of less than 5,000 inhabitants are located on top of hills and cliffs. Beyond the regional limits, there are two other important attraction poles: the city of Napoli in the north-west (1 million inhabitants) and the city of Bari in the north-east (325,000 inhabitants).

From an **accessibility** perspective, the two main cities of Potenza and Matera are closer to transport hubs, while most of the region can be characterised as “remote”, as most medium and smaller sized cities and villages have a low level of connection with the main transport hubs (high speed trains, airports, highways). Airlines servicing this area use the airports in Napoli (located in the Campania region) and Bari (located in Apulia region). The car infrastructure is dominated by freeways, regional and local roads, with just 80 km of highway, connecting mainly the city of Potenza with Napoli. Matera is not accessible by high-speed train or highway. Public transport by bus and train is unfortunately also considered weak and slow. This is partly due to the small density of the population which generates a weak demand for transportation, as well as the challenging terrain conditions. The region is served mainly by regional railway lines, apart from connections on the west coast and through the northwest-southeast axis, connecting the Tyrrhenian line to the city of Potenza and then to the southern coast line. As a result, mobility is strongly dominated by the use of privately owned cars.

Basilicata is considered a “Less Developed”⁵ region according to the European Commission (2017) and in comparison, to the other regions in Italy, it is one of the less developed ones, from a **social-economic** performance perspective. The **economic sector** is mainly comprised of the automotive industry, with a large hub in the city of Melfi, the furniture industry which includes Italian manufacturing excellences, relevant oil extraction activity, agriculture and tourism.

For the last decades, **Matera** has been the most dynamic city in the area, growing as an important economic and cultural centre, awarded in 2019 as European Capital of Culture (Matera2019). During the years 1990s-2000s, in the urban triangle system formed by Matera (located in Basilicata), Santeramo in Colle, and Altamura (both located in the Region of Apulia), a complex and successful network of small complementary businesses producing sofas and furniture emerged. This bottom-up development generated important economic growth and placed the region as a leading player in the global sofa market. From several perspectives and particularly in terms of income distribution, this development was considered a positive experience, however the 2008 economic crisis led to its collapse. The few entrepreneurs whose businesses survived were those who managed to change their production methods, innovate and concentrate on a high-end market. The economy of Matera progressively reinforced the tertiary sector, with growth in the last decade connected to the European Capital of Culture experience.

⁵ See Figure 1

The economy of **Potenza** is mainly based on services and attracts people commuting from nearby villages. In addition to this, Basilicata has two important industrial zones. A smaller one close to Potenza (Tito Industrial Zone) and one in the north, **San Nicola Industrial Zone** (in the area of Melfi), which is the main automobile production plant in the country. Almost 16,000 people used to work there in 2005, but due to the financial and economic crisis from 2008, the number of employees has decreased by around 50%. Moreover, at the time of writing, this car industry is undergoing a transformation process, the future of which is uncertain: It may conclude with decisions for further investments, potentially in the area of batteries and electric cars, or lead to more uncertainty. Complementary to the automotive industry, the economy of Basilicata also features industries active in oil extraction and production, holding the biggest stocks in continental Europe. Finally, in several areas of the region, a flourishing agricultural sector has inherited and innovated upon a very long rural tradition with many products recognized as typical/traditional and high-quality local food, showing remarkable capacity to merge product-quality and research.

From a **social perspective**, the region is suffering from a high degree of emigration, brain drain and depopulation. The migration trend is both towards other Italian regions, mainly toward northern Italy, but also towards other European regions. These interlinked trends represent by far the biggest and most complex challenge for the region.

During the **COVID-19 pandemic**, a noteworthy number of people working abroad or in northern Italy decided to return to live in Basilicata, exploiting the new opportunities offered by remote working (smart working). The social innovation movement of “South Working” promotes today the return of “brains” to Basilicata, repopulating cities and villages and bringing advanced skills and expertise back to the region.

The Smart Specialisation Strategies of Basilicata Region in the period 2014-2020 were focused on Automotive, Aerospace, Energy and Green Economy⁶, with a particular focus on the bioeconomy, energy, as well as cultural and creative industry and digital agenda / ICT. At regional level the **circular economy** is not explicitly mentioned, however some components (bioeconomy, energy) are present. Moreover, the National Recovery and Resilience Plan (PNRR) foresees relevant resources for the circular economy implementation in all Italian regions. The region of Basilicata is identified as one of the four less developed Italian regions, together with Campania, Apulia and Calabria. Therefore, additional financial resources are foreseen to support development projects with a particular focus on sustainability⁷.

3.1.2 Cultural Tourism

The region is considered very diverse and rich in terms of natural, historical, cultural and human resources. Nevertheless, these are also considered largely unknown or poorly known. The name of people from Basilicata is “Lucanians”⁸, which for some could add some confusion. The cultural touristic sector at regional level is not yet well established, while Matera2019 triggered the regeneration of local culture and cultural heritage as driver for regional sustainable development, including also the increase of tourism flows in the region, especially in the area of Matera city.

⁶ European Commission webpage on S3 Basilicata <https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/policy-document/smart-specialisation-strategy-basilicata>

⁷ La buona governance della Strategia Nazionale di Specializzazione Intelligente 2021-2027 http://europa.basilicata.it/2021-27/wp-content/uploads/2021/01/La_buona_governance_SNSI-2021-2027_10dic2020.pdf

⁸ In the Italian Language: “Lucani”, coming from the ancient name of the area, Lucania.

The most-visited areas in the region are the city of **Matera** and two **coastal areas**, “Metapontino” in the south-east and Maratea on the western coastline. Other places such as the **Vulture area** (a mountainous area formed by an old volcano) and **Mount Pollino** (2267 m altitude) have a great potential to attract tourism, but they are not well-known outside of Italy. Most of the tourists come to Basilicata from other parts of Italy and neighbouring regions⁹. In terms of services and economic activities, Hotel/Restaurant/Café (HoReCa) services are largely provided by local, small-scale family businesses, which brings a diffuse positive impact on the local economy, however the perceived quality of these services would need further investigation. A more developed tourism chain is visible on the southern coast, featuring larger tourism settlements.

As anticipated above, **Matera** was the **European Capital of Culture** (ECoC) in 2019 and this generated a considerable increase in visitors and stimulated the development of the touristic sector. Starting from 2005-2008 the local administration redesigned the economy of the city by focusing on culture and cultural heritage as a driver for sustainable development. As soon as Matera was announced as the ECoC 2019, numerous small investments were initiated, especially in B&B accommodations. Within five years, hundreds of family-held businesses were opened. The rate of growth that the economy and the tourism sector experienced was the most successful among ECoCs¹⁰. Notably, in the last ten years, tourist arrivals in Matera have increased by 250%.

The other important touristic area is the Ionian Sea **coast line**, from Metaponto to Nova Siri Scalo. This coastline has fine sand beaches and attracts tourists interested in sun and sea vacations. The tourist season is generally long and expands from June to September. In addition to this, the area has numerous archaeological sites and museums which complement the typical relaxation activities. The second coastline on the Tyrrhenian Sea covers just the city of Maratea, which offers a different landscape dominated by rocky coast and hills.

Potenza is located in a predominantly green area and is gradually considering developing tourism related to its surroundings. The city tourism potential is not yet translated into strategic goals or plans, but it is increasingly reinforcing its role as a gravitational pole for offering tourism services.

One of the highest less-known potential places for further cultural tourism development is considered to be in the “**Vulture-Alto Bradano**” **area** due to its unique combinations of natural green areas formed on the former volcano, with rich and certified agri-food production, as well as historical elements that date back to pre-history, the Romans and wealthy medieval times with the presence of the court of the Emperor Frederick II. In old times, this area was an important intersection of roads and river navigation routes, being a true crossroad between the central and Tyrrhenian part of Italy (i.e. the big cities of Rome and Naples), the Ionian area (with Greek settlements), and the Adriatic area (with harbours from where ships were sailing mainly to the eastern civilisations). The most famous Roman roads crossing the region are the Appia Road and Herculeia Road. Based on its peculiar characteristics and high potential for circular and sustainable cultural tourism development, the Vulture-Alto Bradano area, in which the two cities of **Venosa** and **Melfi** are located, is identified as the specific **pilot heritage site** in the Be.CULTOUR project.

In general, the tourism sector in Basilicata is expressing interest in the important efforts made towards **innovation**. This is partially related to the experience of Matera European Capital of Culture 2019, regional policies (e.g. regional Smart Specialization Strategy), and other public and private investments. For example, Matera was one of the five cities in Italy in which 5G technologies have

⁹ Il ruolo del turismo nello sviluppo economico della regione Basilicata https://www.sr-m.it/wp-content/uploads/2015/09/report_tur_bas.pdf

¹⁰ L'impatto economico di Matera Capitale Europea della Cultura 2019, https://www.matera-basilicata2019.it/images/valutazioni/2_Impatto_economico_Matera2019_ITA.pdf

been implemented during recent years, and interesting experiments have been introduced in the creative and cultural sector. Matera hosts the first national “House for the Emerging Technologies,” a flagship project of the Ministry of the Economy aimed at promoting 5G, IoT, blockchain and AI. At the regional level, the private-sector experience of “Destinazione Basilicata”¹¹, developed by the Italian innovative startup FacilityLive, is worth highlighting: It enables 100 Small-Medium sized Enterprises (SMEs) of the tourism sector to promote and sell their goods and services on an innovative web platform (www.lucanya.com). In **Venosa**, an augmented reality and gaming app has been developed in order to enhance the experience of visitors to the archeological site. Gaming is now being used in a new strategy by APT Basilicata for promoting tourism towards a broad new national and international audience.

¹¹ Destinazione Basilicata platform developed by FacilityLive, <https://flandz.eu/?t=lucanya>



3.2 Aragon Region (Spain)

“Rural territories are really dynamic and host the majority of the heritage but they [rural communities] have to fight against a strategy that has not been tested in rural proofing”¹²

Ms. Laura Gascón Herrero - Provincial Government of Teruel

Photo: Hiking routes in the canyons of the Martín River. Section of the Straits of Albalate Source: Cultural Park of Martín River

¹² Rural Proofing from global to national in Spain <http://www.fao.org/family-farming/detail/es/c/1394939/>

3.2.1 Regional Development

Aragon is one of the 17 autonomous communities of Spain located in the in the northeast of the country. It covers a territory of 48,000 km² and hosts a population of approximately 1.3 million people. Aragon is a diverse territory, dominated by the Pyrenees mountains in the north, the Ebro River, the Iberian System's canyons and various rock formations and hills in the centre, but the territory has no coast line.

The region forms a **monocentric urban system**. The territory generally, features low-density population with one important attraction centre: the regional capital of **Saragossa (Zaragoza)**. It is the biggest city (700,000 inhabitants) and dominates economic, social and cultural life in the region. The next main cities are considerably smaller in size: Huesca (50,000 inhabitants) in the north and Teruel (35,000 inhabitants) in the south. Because of their proximity, Huesca and Saragossa (45 minutes by car) manifest strong functional interlinkages. Teruel, on the other hand, has much stronger functional connections with Valencia (1,5 hours by car). The rural area located east of Alcañiz¹³ is dominated by Catalan-speaking communities, therefore this particular area, beyond being connected to Saragossa by proximity is also connected with Catalunya and Barcelona by proximity and culture. Overall, the rural areas have low density of population in an irregular distribution, which makes their administration challenging.

Inside the region there are two main **airports**: one near Saragossa is mainly used for logistics and considered a “dry port,” and one in Teruel which is dedicated entirely to aircraft maintenance and airplane parking. The airports located near Madrid, Valencia and Barcelona have considerably more passenger traffic and provide more airline destinations in Spain and abroad.

From a **mobility perspective**, the city of Saragossa represents a key node of infrastructure for the Iberian Peninsula. Overall, the region is crossed by key transport highways and railway lines, but these do not uniformly serve the region. The north and south-east of the region have less developed infrastructure and are therefore harder to reach. There are several main rail lines (including a high-speed line) linking Saragossa with Barcelona, Madrid and the Basque country, but the north and south-east areas have only one regional line. Teruel is the only provincial capital city with no direct train connection to the Spanish capital. The highways are more uniformly distributed and also connect Saragossa, Teruel and Valencia. In the rural areas, public transport is much weaker and, as a result, there is a high use of private cars.

In comparison with other autonomous communities in Spain, Aragon is considered to be positioned in the middle from a social-economic development perspective, and according to the European Commission (2017) it is classified as a “More Developed Region”¹⁴.

The main **economic sectors** are: agriculture (peach, olive oil and meat/ham), the automotive industry (GM, Seat) and tourism. Also important for the economy is the **WALQA industrial park** which focuses on technology and is located in the vicinity of Huesca. Additionally, the **public sector** is also an important engine of the economy. It provides a considerable number of jobs because it needs to cover the local services for many small communities. Three people are enough to consider opening a school, for example.

One of the strengths of Aragon and one of its great potential areas is related to **research and scientific talent**. In fact, scientific production and productivity is above average for Spain and the

¹³ Pronounced Alcañiz

¹⁴ See Figure 1

surrounding regions. However, this also relates to one of the region's weaknesses. There is little or no transfer of knowledge and technology from researchers to the business ecosystem, thus failing to generate an increase in innovation in the commercial sector. Unfortunately, trust, communication and cooperation between both public and private actors are problematic. The problem stems from the "atomization"¹⁵ of the industrial and business sectors, but also a tendency to work in silos and not integrate processes and data with the activities of the public administration.

From a **social perspective**, the region is suffering from rural ageing and depopulation. Migration processes are predominantly from rural areas to the capital of the province and country, and considerably less towards other regions in Europe. Additionally, the region is witnessing an increase in terms of social inequality, especially related to the gender gap and a growing digital divide.

Both the regional administration and the private sector suggest a high level of awareness and interest in the **circular economy** concept. The region developed a specific strategy for circular economy (Aragon Circular)¹⁶ and private companies are engaged in activities and processes that try to reuse and make synergies inside the material flow system. Examples range from partnerships between companies that collect bio waste, produce compost and sell it for agricultural purposes¹⁷ to companies that collect, repair and reuse home appliances, extending their useful life and reducing waste¹⁸. Furthermore, the "*Paradores*" are also considered an important component of the circular economy because of their adaptive and creative reuse of valuable buildings and sites.

3.2.2 Cultural Tourism

The cultural tourism sector is considered mature, well established and with a diverse offer, ranging from winter sports to thermal recreation (*hydrotherapy*) and diverse cultural experiences. The region has seven established cultural parks, out of which four are located in the Province of Teruel. All of them belong to the UNESCO World Heritage Site **The Rock Art of the Mediterranean Basin on the Iberian Peninsula (1998)**. The Cultural Park of the Martín River¹⁹ is of high value and is selected to be the **pilot heritage site** in the Be.CULTOUR project. The Cultural Parks are clearly defined by law and have the role to secure and implement sound management practices and protect heritage. These combine natural attractions with some excellent examples of cultural heritage. Other important touristic attractions are **the Pyrenees mountains**, the Universal Mountains (Montes Universales) **canyons** and **Albarracín**, considered to be one of the most beautiful villages of Aragon.

Most of the tourists visiting Aragon come from other parts of Spain and neighbouring regions. In terms of services and economic activities, **HoReCa services** are predominantly provided by local small-scale family businesses, which brings a positive impact on the local economy. Moreover, Aragon is a place with a tradition of quality hotels, including several "*Paradores*," which are high-class hotels developed in historical buildings such as castles and monasteries. They are part of the network *Paradores de Turismo de España*, a state-run business established in 1928, which aims to use and maintain valuable historic buildings. Overall, tourism and hospitality are considered crucial for the social-economic transition of the region.

¹⁵ From the word "atom". Experts working in isolation/ silos. Here should be understood as fragmentation.

¹⁶ Aragon Circular <https://aragoncircular.es/aragon-circular-2030>

¹⁷ Saica <https://www.saica.com/es/comunicacion/el-proyecto-sustrato-universal-seleccionado-ejemplo-de-buena-practica-de-economia-circular-por-el-ministerio-para-la-transicion-ecologica-y-el-reto-demografico/>

¹⁸ BSH Group <https://www.bsh-group.com/es/responsabilidad/medioambiente>

¹⁹ In the Spanish Language: Parque Cultural del Río Martín <https://www.parqueriomartin.com/en/>

The cultural tourism sector in Aragon benefits from two key aspects. On one hand, it is benefiting **from high-level scientific research and talent**, and on the other hand from a general trend toward and capacity for **internationalisation**. Of particular interest is the fact that the region decided to lead and coordinate, together with the regions of Tuscany (IT) and Western Greece (EL), the **Cultural and Creative Regional Ecosystems (CCRE-S3)**, the newly supported thematic area under the Strategy for Smart Specialisation (S3) Platform for Industrial Modernisation of the European Commission. It aims to generate new insets and opportunities related to culture and creativity by inviting stakeholders to use new technologies in the **Culture and Creative Industries (CCI)** sector. If managed well, this process could create synergy with the sustainability strategy that the tourism department of the region has been already implementing since 2020²⁰.

The most concerning weaknesses and threats are related to the location of the heritage assets and difficulties when it comes to collaboration between organisations. Most of the natural and cultural heritage assets of the region are located in the **unpopulated countryside**, where accessibility is limited. This makes it more challenging to preserve them compared with other heritage assets located in easily accessible areas. Additionally, there is a lack of **training of tourism sector employees** regarding the value of the local cultural heritage. The fact that the autochthonous population is not aware of local cultural heritage makes protection and valorisation efforts more challenging.

There is very limited or no **collaborative work being done** among, on one hand, culture & cultural heritage authorities and relevant projects and, on the other hand, tourism authorities and relevant projects. The sector is very fragmented and links among organisations and institutions are very weak.

Last, but not least, the **competition** among various cultural destinations is becoming stronger. The main competition in terms of tourism comes from other regions in the centre of Spain, since Aragon has no “sun and sea” tourism to offer. Moreover, there is a general lack of investment in the digitalisation of cultural heritage. This aspect is increasing the risk of Aragon being left out of the touristic catalogues and marketing fairs, if appropriate measures are not taken.

²⁰ See websites:

Strategy for climate change in Aragon <https://www.estrategiaaragonesacambioclimatico.es/turismo-sostenible/>;

Tourism in Aragon <https://www.turismodearagon.com/en/our-sites/>;

Sustainable Tourism in Aragon <https://www.turismodearagon.com/wp-content/uploads/2020/01/Estrategia-Aragon-Turismo-Sostenible-2030.pdf>



3.3 Cyprus

3.3.1 Regional Development

“A golden-green leaf thrown into the Sea”²¹

Laona Foundation and Anetel - September 2021.

Photo: Stavrovouni Monastery²² Source: Laona Foundation

²¹ Words of the Greek Cypriot poet Leonidas set to music by composer Mikis Theodorakis

²² Perched on a rocky peak, 750 metres above sea level, legend tells that Stavrovouni Monastery was founded in the 4th century by St. Helena, mother of Emperor Constantine the Great

Cyprus is an **island nation** in the eastern Mediterranean Sea, the third largest and third most populous island in Europe after Sicily and Sardinia.

In 1974, Cyprus was invaded by the Turkish Army, which imposed a division in the island, with the northern 35% of the territory (including the whole of Kyrenia District and the largest part of Famagusta District) remaining inaccessible since that time. This report is therefore concerned with the territory under the control of the Government of Cyprus, focusing on the Larnaca district, which is of interest to this project. The population in the government-controlled part amounts to 888,005 persons.

Cyprus has an area of 9.251km² and a diverse **geography**. If you see the island from above, it resembles a saucepan, with the handle extending north-eastward from the main part. To the more romantic, it resembles a green-golden leaf. The general pattern of its roughly 640km coastline is indented and rocky, with long, sandy beaches. The island is crossed by two mountain ranges, the Kyrenia range to the north, now under occupation, and the Troodos range. The latter, reaching a peak of 1,951m, is of great interest to geologists, being formed of igneous rock from molten rock beneath the deep ocean (Tethys), that once separated the continents of Eurasia and Afro-Arabia. The range stretches eastward to the 689m Stavrovouni peak, which lies within the Larnaca region (one of the last monastic communities that women cannot enter). Between the two ranges of Kyrenia and Troodos lies the Mesaoria Plain, which used to be the principal cereal-growing area on the island and stretches into Larnaca district.

The **climate** of Cyprus is hot and dry in summer with mild winters that are separated by short autumn and spring seasons. The island's **territory** is composed of districts, municipalities and communities. The national territory has been divided into six districts for administrative purposes, namely Famagusta, Kyrenia, Larnaca, Limassol, Nicosia and Paphos. Kyrenia, and part of Famagusta, remain outside government control.

The physical configuration of the island largely influenced its **settlement patterns**²³. The population is concentrated along the southern and eastern coast, in cities and tourism hot-spots, as well as in the non-mountainous inland areas around the capital, Nicosia. The rapid population decline of inland mountainous areas has contributed to their current low population densities. This demographic polarization between coastal and inland areas occurs even within commuting distance of urban areas and labour opportunities, showing that out-migration is strong, and that the perceived attractiveness of coastal areas as a living environment is a main determinant of population movements. There are two medium-sized urban agglomerations (Nicosia, Limassol) and two smaller ones (Larnaca, Paphos), centered around each of the island's four main municipalities. According to the most recent available estimates, the four urban agglomerations concentrate roughly 70% of the country's total population. However, the island's short distances and good road network imply that a much higher percentage of the population participates in the urban areas' economic activity and social life.

Travel to and from the EU is, in general, long and costly due to Cyprus' geographical position at the periphery (the easternmost point of the EU). Nonetheless, due to its location, the island is seen as a bridge between EU and the Middle East. With continuous efforts to improve air connectivity, new airlines are coming to Cyprus and announcing their plans to make it their base, offering new direct flights to Europe and the Middle East. There are two international **airports**, and the government operates a policy of motivating airlines to operate flights all year around, although due

²³ Republic of Cyprus National Report HABITAT III (2016) https://habitat3.org/wp-content/uploads/HABITAT-III_CYPRUS-REPORT_FINAL.pdf

to COVID-19, airline operations have been erratic. Additionally, the island benefits from two commercial **ports** receiving cruise liners, and several smaller ports (for fishing and marinas).

On land, **accessibility** is secured entirely by highways and roads since the island has no railway infrastructure. Public transport operates mainly in the big cities and offers limited routes outside. As a result, inhabitants, especially in rural areas, are considerably dependent on the use of the private car. Public transport is mostly used by tourists and migrants.

Cyprus has an open, free-market, service-based **economy** with some light manufacturing activity. Internationally, Cyprus promotes its geographical location as a "bridge" between East and West, along with its educated English-speaking population, moderate local costs, airline connections and telecommunications. The economy relies mostly on the service sector, which contributes 85,5% to GDP and employs more than 80% of the labour force²⁴. **Tourism** is an important factor of the island's economy, culture and overall brand development. With approximately 4 million tourist arrivals per year²⁵ and 2.7 billion in total revenue, Cyprus is one of the most popular European holiday destinations, and 40th most popular destination in the world.

While Cyprus benefits from a well-educated **population**, it does not suffer from brain drain as much as other regions in the south and east of the EU. Many young people who study abroad return to Cyprus after graduation. On the other hand, Cyprus is dependent on foreign workers. Hotels and restaurants, trade, construction, and private households depend to a very large extent on foreign labour. Furthermore, as mentioned, Cyprus is experiencing aging and depopulation in rural areas. In urban areas, people face less accessible housing. The lack of social housing, with the construction sector focusing mainly on luxury properties, are driving property prices up and pushing local people to the outskirts. Another particular challenge for Cyprus is related to supporting a high number of refugees and asylum seekers. The island has the highest number of arrivals in Europe when viewed per capita. According to the latest UNHCR data, a total of 13.200 people applied for asylum in 2021, comprising 1.5% of the population. Together with low-income migrants, they are considered the most vulnerable group in society.

The topic of **circular economy** is gradually addressed both in the public and private sector, even though its principles are yet to be implemented at a large scale. At least one national ministry has recently conducted research on the topic: The Study for the Promotion and Development of the Circular Economy in Cyprus includes a mapping of the current situation, and includes perspectives arising from the exploitation of the circular economy by Cypriot companies as well as a specific action plan with measures to support companies in taking advantage of this challenge and opportunity. This study was part of the preparations for the writing of the National Circular Economy Action Plan²⁶. Additionally, projects such as INCIRCLE²⁷, 'Support Insular and low-density areas in the transition towards a more Circular Tourism Economy' are activating local actors to reflect on circularity from the mobility, water and waste management, energy and tourism sector perspectives. Such projects brought to light several Cypriot initiatives, from which it is worth mentioning (^{28, 29}). The COOP-Green Cluster brings together experts from seemingly unrelated sectors, in a cluster that is supporting the transition of Cyprus towards a green and circular economy. Tiganokinisi is an educational

²⁴ IMF – World Economic Outlook Database, April 2021

²⁵ Historic number of tourist arrivals in 2018 with 3.93m visitors <https://cyprus-mail.com/2019/01/17/historic-number-of-tourist-arrivals-in-2018-with-3-93m-visitors/>

²⁶ Launched in the summer of 2021 <https://cypruscircular.org.cy/cyprus-action-plan-circular-economy/>

²⁷ See INCIRCLE website: <https://www.incircle-kp.eu/>

²⁸ Cyprus Best Practice on Green Cluster: <https://www.incircle-kp.eu/best-practices/coop-green-cluster/>

²⁹ Cyprus Best Practice on biofuel <https://www.incircle-kp.eu/best-practices/tiganokinisi-turning-domestic-used-cooking-oil-into-biofuel/>

programme which collects and recycles used cooking oil, from which biogas is later produced. The project was launched in 2011 and since then it has managed to collect and recycle 600,000 kg of used oil.

3.3.2 Cultural Tourism

Tourism in Cyprus is highly dependent on **sun and sea travel** which has been the driver of tourism development in the country³⁰. However, besides Sun & Sea, Cyprus has the possibility to offer a variety of attractions in other segments, such as culture, heritage, nature or outdoor activities. The most visited areas are the cities of Paphos, Polis (Latsi), Agia Napa and Protaras. The sector is dominated by large and/or luxury hotels that aim to keep tourists within their complex and provide them with all-inclusive services, so, tourists do not go out very often or spend money elsewhere. Since there are numerous such service providers with similar offers, the competition is increasing and becoming more and more price dependent.

The majority of **tourist arrivals** are from Europe³¹. More than 80% of visitors come from Northern, Western and Eastern Europe, with British tourists remaining the most numerous. Efforts are underway to boost arrivals from other countries. In line with contemporary geopolitical developments, Russian tourists have become the second largest group in terms of arrivals.

Beyond sun and sea, Cyprus has the **potential** to offer much more to its visitors. Considering the long and complex history of Cyprus, both the island and the region of Larnaca have hundreds of years of contrasting civilizations, architectural styles and cultural events. The district has been continuously inhabited on the same sites for more than 4000 years under a variety of rulers, with settled societies intermixing and influencing the cultural/historical evolution of their era; from Eteocypriots to Greeks, Romans, Byzantines, Franks, Venetians, Ottomans and British. Now, independent Cyprus is populated by Greek and Turkish Cypriots, along with minorities of Latin, Maronite, and Armenian origin. Most of the untapped potential is located in the rural and mountain areas of the island. There are numerous small towns and villages that are active in cultural offers of the region with their own annual festivals, museums, monuments and tourist attractions. These will also represent the Cyprus **Pilgrimage Heritage Site** the Be.CULTOUR project. Upland areas, including the **Larnaca Mountainous Area** (Orini Larnaca), are dotted with charming villages, where traditions and traditional handcrafts are still in practice. The most famous of them is the handmade lace embroidery of Lefkara (on UNESCO's List of Intangible Heritage). Additional UNESCO world heritage sites are the Neolithic settlement of Choirokoitia and the Church of Panagia Aggeloktisti (UNESCO tentative list).

Weaknesses and threats to start with, it is relatively expensive to reach the island compared to other destinations. Like most islands in the Mediterranean Sea, tourism also has a seasonal character. According to Hermes Airports, in 2019 5,95% of international tourists admit that Sun & Sea was their main reason for choosing Cyprus as destination, while 90% of visitors admit that during their holiday, Sun & Sea was the most practiced activity³². Although the warm climate generally represents an attraction factor for the island, there are growing indications that the rising temperatures could discourage visitors who are unused to them or who seek active holidays. The seasonal character is also generating a saturation of tourists, visual pollution and overexploitation of attractions. The new tourism strategy of Cyprus aims to develop year-long tourism, to offer

³⁰ Cyprus Tourism Strategy - Republic of Cyprus Document No. 27

³¹ Statistical Service of Cyprus – Data of 2019

³² Multiple choice question

memorable experiences to visitors and improve the quality of life of Cypriots. It also aims to ensure that tourism will contribute to the quality of life of the local population, while preserving the local identities and inspiring greater confidence in their future. The vision of the tourism strategy is for Cyprus to become, before 2030, a year-round sustainable destination receiving 4,8 million international tourists (40% of whom visit during November-April). To accomplish that, Cyprus needs a diversified offer and air connectivity all year around, to be continuously operational, competitive, profitable and sustainable, and to attract investments. However, this strategy often focuses on the 'Greek' part of the island's cultural heritage, minimizing non-Greek cultural elements, such as the 300-year history of the Franks in Cyprus, and the 150-year period of Venetian rule that followed and encompassed Cyprus in the Europe-wide blossoming of the Renaissance. This omission will be addressed through this project.

Regrettably, factors such as a lack of awareness and disinterest in cultural and natural heritage values, the existence of powerful lobby groups, and a general interest in quick financial gains create a backdrop of unsustainable development. This is particularly visible in rural areas, which are quickly losing their local character and personality. Town planning systems and real estate development are dominated by private sector interests, permissive local authorities and a lack of clear strategies. Strong support from local populations will be needed to resist this trend, and recognise their existing potential for more sustainable development.



3.4 Västra Götaland Region (Sweden)

3.4.1 Regional Development

“We see a trend that some young well-educated people choose to move to the countryside to have a richer life than in the big city. This means a great resilience in strengthening the power of innovation in rural areas.”

Björn Ohlén – Developer; Cultural Development Administration; Region Västra Götaland

Photo: Forsvik. Source: Cultural Development Administration; Region Västra Götaland

Out of all 21 regions of Sweden, Västra Götaland³³ is the largest one. It is located in the south-west of the country, covers approximately 25,000 km² and hosts 1.6 million people which represent 16% of the total population of Sweden. From an administrative perspective, it includes 49 local authorities and four municipal associations. Västra Götaland is a flat and low-altitude territory dominated by forests and numerous lakes. The region borders the North Sea to the West, where the Bohuslän archipelago is located, Norway to the north and the large lakes of Vänern and Vättern to the east.

The area is generally characterized by low density population with one important attraction centre: the city of Gothenburg. This aspect gives the region a **monocentric character**. The northern part of the region is entirely rural and the rest of the territory features peri-urban characteristics. Following an administrative reform which included a clustering of municipalities in the 1970s, the smallest ones have now around 5,000 inhabitants. Gothenburg is the second-largest city in Sweden (58,000 inhabitants) and fifth-largest in the Nordic countries. Therefore, it dominates not only the economic but also the social and cultural life of the region. The city represents the most important maritime connection to the North Sea. The next cities in terms of importance are Borås (110,000 inhabitants) in the south, Skövde (35,000 inhabitants) in the east, and the geographically and functionally linked cities of Trollhättan (59,000 inhabitants), Vänersborg (23,000 inhabitants) and Uddevalla (31,000 inhabitants) in the centre-north.

Traveling to Västra Götaland from the EU is relatively simple. The main airport for accessing the region is the Gothenburg Landvetter Airport. There are also other smaller airports in the region, but these serve very few, short flights. Gothenburg also hosts an important sea port, which makes it an essential logistics centre for the region. Additionally, Västra Götaland benefits from both road and rail infrastructure. The main highway follows the west coastline and connects Gothenburg with Oslo (3.5h north) and Malmö with Copenhagen (3-3.5h by car south). An additional highway connection led to Borås (45 minutes by car east). The main national railway infrastructure takes similar routes towards the northern, southern and eastern parts, while regional routes serve smaller communities. Even so, **accessibility** is not without its challenges. Public transportation in rural areas is considered weak. Since the territory is sparsely populated and distances are relatively large, public transport is overall limited and commuting possibilities reduced. The availability of work and the provision of services differs greatly depending on where in the region people live.

From a social-economic perspective, in comparison to the other regions in Sweden, Västra Götaland is considered to be one of the best-performing regions. At the same time, it is labelled “a more developed region”³⁴ at the EU level. Västra Götaland has an open **economy** with internationally active and competitive companies. One of the reasons for its success is the high level of language competence, especially English, among the general population. The economy is mainly driven by services and industry. The automotive industry, life sciences, chemistry, furniture production, textile production, fashion design and services represent the main sectors, while agriculture plays a considerably smaller role. Moreover, qualified IT services, the construction sector, as well as the tourism, culture and creative industries manifest the fastest growth. The automotive industry is currently exploring the possibility to develop electric cars and electric-related mobility and infrastructure components, including related digital solutions. Universities and advanced research centers are strong and play a key role in the region. There is a general interest in **innovation, research and developing** competences and skills at the governmental and political levels. Therefore, strong support, especially in the form of tax relief incentives undergird the research and

³³ Västra Götaland means Western Götaland and should not be confused with Gotland region which is an island

³⁴ See Figure 1

innovation ecosystem. One of the key areas of research is currently “life sciences and health”, while some Universities such as the University of Skövde experiment with game development. **In terms of challenges**, Västra Götaland is **dependent on exports** and strongly affected by global competition.

From a **social perspective**, the region is experiencing an ageing population, especially outside the main cities. On the other hand, there is a visible trend of young people deciding to relocate to rural areas due to perceived quality of life aspects, such as availability of affordable housing and overall healthier living conditions. Such trends represent unique opportunities for the redevelopment of peripheral communities. At the same time, Sweden is facing a particular problem in finding skilled professionals for its predominantly service-oriented economy. For many years, the country has been open to immigration trends by accepting a considerable number of refugees and immigrants. Recent observations³⁵ show an increased number of young people who abandon school with unsatisfactory grades. Some attribute this aspect to the extra effort and challenges, in terms of language and cultural integration, that some refugees and immigrants face in their new country. As a result, the Swedish economy is facing a mismatch between its work force and available jobs. The consequences of this trend are also present in Västra Götaland. Last but not least, more and more people in Västra Götaland are experiencing a widening of the socio-economic gap and are feeling left behind³⁶.

In January 2021, Sweden presented its national strategy for circular economy, which has a strong focus on recycling of waste. Moreover, **circular economy** is also one of the four priority areas of the new Västra Götaland regional development plan. Acknowledgement of the concept of a circular economy was made already several years ago, at which time it focused on the textile and furniture industry. Sustainable construction and sustainable redevelopment had also been tackled, but the focus was on energy efficiency, not adaptive reuse (of buildings). Re:textile³⁷ is an initiative that produces clothes that are designed to have a long period of use and production methods that allow them to be repaired, upgraded and reused. It aims to enable circular flows in the textile industry. Re:textile is located in Science Park Borås and brings together several textile and fashion industry companies. A second relevant example is the application and process developed by the Sajkla³⁸ initiative. The new application developed makes it easier for companies to acquire used office furniture, as an alternative to buying newly produced items, therefore encouraging companies to avoid disposal of their old furniture. Used furniture is therefore, collected, repaired and resold in collaboration with the furniture cluster in Tibro. A relatively high interest in a circular economy is also proved by the existence of the Circular Hub³⁹ which is a member organization that brings together companies from the furniture and textile sector with the aim to support them in making the transition to a more circular business model. Moreover, Västra Götaland region implemented a Local Action Plan for the adaptive reuse of cultural heritage in the perspective of the circular economy under the Horizon 2020 CLIC project⁴⁰ (2017-2021), identifying specific strategies to apply the circular economy model to cultural heritage sector.

³⁵ The Regional Development Strategy for Västra Götaland 2021 – 2030; <https://alfresco-offentlig.vgregion.se/alfresco/service/vgr/storage/node/content/workspace/SpacesStore/a77c514b-e23e-48a1-8f53-9566c9245517/Regional%20Development%20Strategy.pdf?a=false&quest=true>

³⁶ Idem

³⁷ Re:Textile website: <https://smarttextiles.se/>

³⁸ Sajkla initiative: <https://sajkla.se/>

³⁹ Circular Hub: <https://circularhub.se/>

⁴⁰ Horizon 2020 CLIC project “Circular models Leveraging Investments in Cultural heritage adaptive reuse” www.clicproject.eu

3.4.2 Cultural Tourism

Representing only 2.5% of the national GDP, tourism is currently a rather minor sector of the Swedish economy. Nevertheless, tourism is a fast-growing industry in the Västra Götaland region. Large urban centres with good accessibility nearby natural areas constitute key regional advantages, especially during a time when outdoor activities in nature, such as hiking and biking, are gaining popularity.

Overall, the cultural tourism sector is proving to be mature. There is already good infrastructure, which is paired with support mechanisms for tourism at the regional level, in close cooperation with the national tourism organisation - Visit Sweden⁴¹. Outside the main cities and popular areas, HoReCa services are provided mainly by small-scale family businesses, which support the local economy. Most of the tourists come from other parts of the country and neighbouring regions. The Nordic market is also strong, with numerous visitors coming from Norway, Denmark, Germany and the Netherlands.

The Bohuslän archipelago, located north-west of Västra Götaland, is the main touristic attraction of the region and renowned worldwide. The archipelago is crossed by many boat cruises and can become overcrowded during certain periods of the year. In addition to the Bohuslän archipelago, the **city of Gothenburg** also attracts many visitors due to its size and regional importance in the Nordic context. The only site located in Västra Götaland which is currently on the **UNESCO World Heritage** List is the **Rock Carvings in Tanum**, located 40 km from the Norwegian border. The site preserves carvings in stone depicting the beliefs and everyday life of the people that lived there during the Bronze Age (14,000 years ago). In addition to these main touristic attractions, Västra Götaland has significant potential related to its cultural and natural elements located in rural areas. Forsvik and Rydal, located respectively in the municipalities of Karlsborg (7,000 inhabitants) and Mark (34,000 inhabitants), are two of the most valuable industrial sites with important cultural and historical value and will be one of the **pilot heritage sites** in the Be.CULTOUR project. Forsvik is an old Mill Town and one of the first industrial sites in Sweden. A saw mill, an iron mill and an important mechanic workshop have functioned there since the 15th century. The Rydal Museum is home to the oldest working mill in Sweden, which is still functional and used to offer visitors demonstrations of the working process. The museum has national importance because it uncovers how the Borås area was the epicentre of textiles in Sweden.

Due to its Nordic position and climate, Sweden has a short touristic season spanning from June to August. This represents one of the main challenges faced by the region. Such a situation makes it hard for small companies and family-businesses to live on tourism on a yearly basis and pushes them to seek out supplementary incomes. As a result, many of the family tourism-related businesses are a side activity for the summer period and not a permanent activity or source of income. In order to tackle this reality, the Tourism Board is trying to create a **“New Season”** for tourism⁴² (in autumn and spring). This is not seen as an extension of the season, but as a totally new season with its own specific character. Two additional challenges faced by the region relate to the administrative context. First, the competence and resources in tourism between the municipalities vary greatly, and second,

⁴¹ Visit Sweden: <https://corporate.visitsweden.com/om-oss/en/>

⁴² Stepping up Sustainability West Sweden's tourism industry sets an example in the transition to a sustainable society. <https://hallbarhetsklivet.se/en/>

the division of roles and responsibilities between the political committees for regional development and culture is not always perfectly clear.



3.5 Vojvodina (Serbia)

3.5.1 Regional Development

“Vojvodina is truly multi[cultural] and intercultural! [...] And it is important to mention, you can get education in [...] six languages. Even in high schools. [...] So... these six languages are not just official languages, they really live there and you have neighbours of all these six languages and minorities”

Jermina Stanojev, Researcher, Uppsala University (and Serbian citizen) in dialogue with Aleksandra Vukmirovic, Head of Unit for EU Integration and International Cooperation and Igor Pucarevic, both from The Standing Conference of Towns and Municipalities of Serbia (SCTM).

Photo: Sremski Karlovci Source: The Standing Conference of Towns and Municipalities of Serbia (SCTM)

Vojvodina is one of the five regions of Serbia and an autonomous province located in the north of the country. It covers a territory of approximately 22,000 km² and hosts a population of approximately 1.8 million inhabitants. Vojvodina is a flat and low-altitude terrain crossed by numerous channels. The region is part of the Pannonian plain and shares its borders with three EU countries, Croatia in the west, Hungary in the north and Romania in the east. The Danube river and its tributaries, the Begej and Tamiš, constitute dominating geographical features, followed in the south-west by the Fruška Gora National Park. This park is a hilly area covered by forests with an altitude of up to 540 meters. In terms of political relations, Serbia expressed interest in joining the EU. As a preparatory step, Serbia signed a Stabilisation and Association Agreement with the EU⁴³ in 2009, and is already benefiting from an Instrument for Pre-accession Assistance (IPA)⁴⁴.

The territory forms a **polycentric system** of medium-sized cities and municipalities strongly influenced by the two largest cities in Serbia: Novi Sad (340,000 inhabitants) and the capital Belgrade (1.6 million inhabitants). Even though Belgrade is not part of Vojvodina, its proximity to Novi Sad (90km; 1h and 20 minutes by car) has led to many social, cultural and economic functions to be concentrated there in general, meaning that it plays a large influence in the region. Both cities are located on and shaped by the Danube River. The next cities in terms of importance are Subotica (98,000 inhabitants) in the north, Zrenjanin (76,000 inhabitants) in the centre, Sombor (47,000 inhabitants) in the north-west, and Kikinda (38,000 inhabitants) in the north-east.

Traveling from the EU to Vojvodina is relatively easy, both by air and land, due to its position in the Balkans and its vicinity to three EU countries. There are no airports located directly in Vojvodina, therefore most people will use the main national airport located near Belgrade. Additionally, those living near the border have the option to alternatively use the Osijek Airport in Croatia, and the Timisoara Airport in Romania. Vojvodina benefits from the north-south highway and railway linking Budapest with Belgrade and further south with Sofia (BG) and Skopje (North Macedonia) and the west-east connection linking Zagreb with Belgrade. The railway infrastructure also has additional routes, but is unfortunately not very convenient and reliable. Currently the railway between Belgrade and Budapest is under modernization, which is intended to improve traffic capacity and speed. In addition to air and road connections, Vojvodina is crossed by a complex network of water canals dominated by the Danube. The canal system Danube-Tisa-Danube represents one of the largest canal navigation networks in Europe, which, in addition to navigable canals, includes the canalized rivers Begej and Tamiš. They establish a connection with the Danube and the Tisza, through which they are further connected with the navigable the Rhine-Main-Danube highway, which connects the North and Black Seas, passing through 12 countries.

Vojvodina benefits from a large availability of quality land, being historically and currently dominated by agriculture. Additionally, the **economy** of the region includes the metal industry and a growing ICT sector. Unfortunately, the industry sector counts also relatively big number of potential pollutants. In terms of the relationship between universities, research and development institutions with the economy, connections are generally weak and not very productive. Overall, from a **social-economic perspective** the region is considered to be lagging behind, when compared to other regions in the area, and facing multiple challenges. On top of that, as in the rest of Western Balkans,

⁴³ Stabilisation and Association Agreement https://eeas.europa.eu/headquarters/headquarters-homepage/27547/serbia-and-eu_en

⁴⁴ Instrument for Pre-accession Assistance https://ec.europa.eu/commission/presscorner/detail/en/ip_21_2810

a “grey economy”⁴⁵ is occasionally observed, but compared to the rest of Serbia, Vojvodina has the lowest percentage (of gray economy volume) among registered economic entities, at 14.8%⁴⁶.

From a **social perspective**, Vojvodina is a multicultural space where several ethnicities, languages, religions, cultural patterns and traditions coexist. With more than 20 ethnic groups and six official languages, Vojvodina is one of the most heterogeneous regions of Europe. Serbs make up the largest ethnic group, approximately 67% of the total population. Hungarians make up approximately 13.0% and with a somewhat smaller proportion come the Slovaks, Croats, Roma and Romanians. In recent years the only ethnic group that increased in numbers was the Roma, while all other have decreased. During the war in Yugoslavia and its disintegration in the 1990s, Vojvodina was relatively a safe space and therefore received numerous refugees from other parts of the Balkans, the majority of them being Serbs. Since then, negative demographic characteristics occurred, such as negative natural increase, migration and emptying of border areas. Since 2015 Serbia is also a migration route towards the EU, but many of the migrants have remained stranded at the border with Hungary and Romania, living in improvised conditions in the border villages. This situation occasionally generates tensions with the local population. In what regards the available workforce, a deficit is observed. On top of that, young people in the area are considered a vulnerable group, as they do not have assets, they are under-employed and often depend on the help of parents.

In 2021, SCTM conducted research with the aim of finding out the degree to which the concept of a **circular economy** is understood by the representatives of local self-government⁴⁷ and if these are incorporated in their strategies. Following the research, SCTM developed a set of recommendations for practical policies at the local level. From these, it is worth mentioning the need for lobbying for inclusion of the concept in legal frameworks and the opportunity to use public procurement as a practical tool for promotion of the concept. Furthermore, since 2020 Serbia has had a Roadmap for Circular Economy in Serbia, developed under the project Circular Economy Platform for Sustainable Development in Serbia, which was implemented by the United Nations Development Program (UNDP)⁴⁸. The roadmap presents four priority sectors: (1) manufacturing industry, (2) agriculture and food, (3) plastic and packaging and (4) construction. The document links the important economic sectors of the country with circular processes and tries to indicate ways of aligning to EU standards for easier exports.

From a private-sector perspective, it is worth mentioning: The Eco Fungi⁴⁹ company, which is producing mushrooms grown on collected coffee waste (a zero-waste model) and Reteks, which combines a service of collections and donations of textile materials, and was developed as an initiative to solve the issue of textile waste generated in society, in combination with a project for economic empowerment.

⁴⁵ The grey economy includes any economic activity that is legal, but which is unrecorded and unregulated. More information about the definition is available here: <https://www.accountingtools.com/articles/2017/9/25/gray-economy>

⁴⁶ According to the Research “Grey Economy in Serbia 2017”, prepared by NALED. <http://uzmiracun.rs/htdocs/Files/01072/analiza-obima-sive-ekonomije-2017.pdf>

⁴⁷ Self-government (and not government) is the term used in Serbia for their local administrations. For more information see the Law on Local Self-Government available here <https://www.legislationline.org/documents/id/4327>

⁴⁸ Roadmap for circular economy in Serbia <https://www.rs.undp.org/content/serbia/en/home/library/mdg/roadmap-for-circular-economy-in-serbia.html>

⁴⁹ Eco Fungi company <https://www.systemekofungi.com/>

3.5.2 Cultural Tourism

Cultural tourism in Vojvodina is currently not well developed and its performance is modest. The most visited locations in Vojvodina are the Fruška Gora National Park and the various thermal water resorts in the region. Additionally, Novi Sad is famous for the internationally renowned EXIT music festival taking place every year. The first edition of the festival took place in 2000 and started as a student movement for democracy and freedom. Today the summer festival attracts between 150,000 and 200,000⁵⁰ visitors from all over Europe. In 2019, the city was elected the European Youth Capital⁵¹. In 2022, Novi Sad will also be one of the three European Capitals of Culture, a title which could offer increased visibility and attract higher visitor numbers.

In addition to these, the Vojvodina region has much more to offer. It is blessed with natural heritage characterized by a variety of species and genetic diversity as well as a complex historical heritage. The territory known today as Vojvodina was ruled by many powers across history, from which Romans, Turks, Austro-Hungarians left the biggest influence. Vojvodina has several typical cultural and historic assets such as: old towns, medieval towns, fortifications, villages, ethnographic parks, monasteries, churches and castles, all of which could be further valorized for cultural tourism activities. The **municipalities of Bač, Sremski Karlovci and Irig**, which constitute the **pilot heritage site** in the Be.CULTOUR project, are considered to have some of the highest potential in this regard, having in common a diversity of cultural/historic, religious and natural heritage. Bač and its surroundings present a complex **cultural landscape**, the reason for which it is currently on the UNESCO *tentative* Heritage List⁵². The landscape includes the Bač Fortress, the Franciscan Monastery, the Bodjani Monastery, the Turkish Bath and several water canals. One of its recognized natural spaces is “Backo Podunavlje” which is listed as the **UNESCO Biosphere Reserve**. The second valuable place is Sremski Karlovci located 10 km south-east of Novi Sad, also on the Danube River, along with the Marshes of Kovilj and Petrovaradin, which are on the IBA, ICPDR and Ramsar List of Wetlands of International Importance. This little town has a rich urbanistic, architectural, cultural and historical values and boasts numerous intangible heritage elements related to **wine and gastronomy** – in addition to **multireligious heritage** embodied in the Chapel of Peace where the so-called Karlovci Peace Treaty was signed in 1699 between Austria (and its allies the Holy League, Russia, Venice and Poland) and the Ottoman Empire – with England and Holland as negotiators.

A third municipality with high potential is Irig, located 20 km (25 minutes by car) south of Novi Sad, with most of its territory being part of the “Fruška Gora” National Park. Specific to Irig are the **spa resorts** and thermal rehabilitation potential in a rich cultural heritage setting. This setting includes, among others, the **old mine** in Vrdnik and the First Serbian Reading Library, all surrounded by 16 (out of 35) **Orthodox Monasteries** built between the 15th and 18th centuries (important dates for Serbian uprisal and preservation of culture). Fruška Gora is featured on the **European Culture Route**⁵³: Roman Emperors and Danube Wine Route - Middle Danube. Meanwhile, hile Serbia proposed to the UNESCO Cultural Heritage Tentative List “Frontiers of the Roman Empire – The Danube Limes”⁵⁴ in the year 2020.

⁵⁰ Per edition

⁵¹ Novi Sad European Capital of Culture winner <https://www.youthforum.org/european-youth-capital-winner-novi-sad-2019>

⁵² Cultural landscape of Bač and its surroundings <https://whc.unesco.org/en/tentativelists/6386/>

⁵³ Cultural Routes of the Council of Europe programme <https://www.coe.int/en/web/cultural-routes>

⁵⁴ Frontiers of the Roman Empire – The Danube Limes <https://whc.unesco.org/en/list/1604>

Most of the **tourists visiting** Vojvodina are locals or come from nearby regions. Although tourism in the region does not have a strong seasonal character that varies significantly through the year, the sector faces other considerable challenges. To start with, there is limited tourist infrastructure and poor distribution of accommodation facilities. The state budgets allocated for culture are limited and often cannot cover the basic maintenance and operational needs of museums and cultural institutions. Both public and private sector have a passive attitude towards cultural tourism and they are failing to recognize the importance of cultural tourism as a key driver of economic growth, more balanced regional development and increasing employment. Secondly, there is a general lack of trust and therefore cooperation between the public and private sectors. As a result, there is no clear leadership and consensus among stakeholders on key issues related to tourism development in the Autonomous Province of Vojvodina or the Republic of Serbia. Last, but not least, the agriculture sector is orienting itself to models of agricultural development that are not so easily compatible to sustainable tourism development.

On the other hand, Vojvodina has already identified an opportunity to increase its number of visitors. Since the Serbian highways are often used by central Europeans to travel to Greece for the summer holidays, the Autonomous Institutions of Vojvodina are trying to attract these travelers and encourage them to stay and experience the local attractions, even for a short time.

3.6 Cross-border territory of North-East Romania and Republic of Moldova

In the Be.CULTOUR project, the North-East Romania Development Region and Republic of Moldova represent a unique **cross-border territory**, including the cross-border touristic and cultural route of Stephan the Great, which is under development and is selected as one of the pilot heritage sites of the Be.CULTOUR project. The cultural route is the result of a collaboration between the Ministry of Tourism (Romania) and the National Agency for Investments (Republic of Moldavia). In order to allow a comprehensive understanding of the local realities and to reflect the differences generated mainly by diverse governance structures, laws and overarching national characteristics, the cross-border territory is here described separately for each region/country.

The unique character of the cross-border territory is defined by its geography, climate, culture and, in part, its history. The Prut River crosses the territory from north to south and represents the national border between Romania and Moldova. The rest of the geography is formed predominantly by hills with a mild climate. From a historical perspective, the territory was several times in history administrated as one entity, which is reflected in the predominant languages, religions, cultures and traditions that remain today. One of these historic periods was under the reign of Stephan the Great, who is known for setting the base for numerous religious buildings and communities, some of which now have national and/or world heritage status. This heritage, often located in unique cultural landscapes, are the base for the touristic and cultural route development.

The biggest challenges of the cross-border territory are related to demographics. The area is being strongly affected by brain drain and emigration, population ageing, abandonment and depopulation, in a context of weaker accessibility and lower-performing economies, compared to other European regions.



3.7 North-East Romania

3.7.1 Regional Development

“The Stephen the Great cultural route reconnects impressive historical, cultural and natural treasures from Eastern Europe, and tells the story of the great ruler.”

Roxana Slemco, The North-East Regional Development Agency (Romania) - interview June 2021

Photo: Royal Court, the city of Piatra Neamț. Image received from The North-East Regional Development Agency (Romania)

The North-East Development Region is one of the eight development regions of Romania. The entire region covers a territory of approximately 37,000 km² and hosts a population of 1.1 million people, making it the largest in terms of population and area. It borders Ukraine in the north and Moldova in the east, as well as two other Romanian regions.

The region is a **diverse territory**, dominated by the Carpathian Mountains in the west of the region, the Siret River in the centre and the Prut River as its east boarder. The region has a medium density population and forms a polycentric system of localities with a strong rural character. This system is dominated by the city of Iași (approx. 350,000 inhabitants), the fourth largest city in Romania, and to a smaller degree by the city of Bacău (approx. 145,000 inhabitants). Iași is located in the centre-east, just 20 km from the border between Romania and Moldova and use to be the capital of the Principality of Moldavia⁵⁵ for several centuries. It continues to play an important role in the economic, academic, social and cultural life of the region, and has therefore been considered since 2008 to be one of the seven Romanian growth poles. The official legal status of growth poles was offered, based on their characteristics, to the most important and largest seven urban centres and their Functional Urban Areas (FUA). Based on this status, they receive special governmental support and funding. Bacău is located in the south-west of the region at the contact between the Subcarpathian hills and the Siret River.

The North-East Development Region is served by three international **airports** located inside its borders: Iași, Bacău and Suceava airports, which offer predominantly low-cost flights to and from western and southern Europe, where a large part of the Romanian diaspora lives and/or works (seasonally or permanently). Data for the first three quarters, provided by the INS⁵⁶, show that passenger air transport decreased by 66% in the first 9 months of 2020, compared to 2019.

From a **mobility** perspective the region is generally well covered with more limited access in mountains area and the parts of the Botoșani and Vaslui.: Both the main road and railway axes cross the region centrally from north to south (towards Bucharest), linking two of the main cities (Bacau and Suceava). The link between the southern part of Ukraine and the Republic of Moldova with the central and western part of Romania and then the central part of Europe is crossing the region from East to West, both by road (through the city of Iasi and Neamt County) and by rail (through Iasi and Suceava). The region has just recently opened 16 km of highway which are part of A7 Highway Bucharest-Bacau-Suceava and function as a bypass for the city of Bacău. Highway construction in this region is facing delays as well as difficulties regarding the mountainous sections. The planned A7 highway is making the most progress, followed by A8 Highway which will connect the North-East region of Romania with the central and western part of Romania and Europe, as well as with the Republic of Moldova through a new bridge over the river Prut⁵⁷.

The lack of bypass roads for the most of the cities in the region represents a considerable challenge, causing, among other issues, considerable traffic, noise and air pollution. The railway infrastructure covers most of the region well, however, the lack of maintenance and investments makes train service overall less attractive and results in the service being considerably underused. Public transport is present in all large and medium-sized cities. Rural areas, on the other hand, are considerably underserved and as a result there is high use of, and dependence upon, privately owned cars.

In comparison to other development regions in Romania, North-East represents a more modest **social-economic development** performance, and according to the European Commission (2017)

⁵⁵ Also known as: "The Moldavian Country" (In the Romanian language "Țara Moldovei") This should not be confused with current day Republic of Moldova.

⁵⁶ The National Institut for Statistics of Romani <https://insse.ro/cms/>

⁵⁷ See website: www.cnadrn.ro

it is classified among the EU's "Less Developed Regions"⁵⁸, with lower average incomes. The economic structure of the region is concentrated around services, which generate over 65% of the economic value of the region (with 2% more than the national level), with Iasi in particular (and to a lesser extent Bacău) being important IT hubs that developed rapidly in the last years. Industry generates about 21% of the region's economic value, while the first sector (agriculture, forestry and fishing) generate about 7-12% of the economic value of the region⁵⁹.

The most dynamic and productive areas are the cities of Iași and Bacău and their respective FUA. In this regard, Iași benefits from the presence of a large and historic university. Within the region, there are considerable social and economic disparities, the county of Vaslui and Botoșani being considerably less productive and developed. In what concerns research and development, the regional performance is also, in spite of the considerable efforts made by the Regional Development Agency to develop the research sector. In 2017, Romania spent only 0,5% of the GDP on research and development (compared to 3% goal proposed in the Lisbon Strategy and Europe 2020), while the North-East region only spent 0,17%. On the other hand, only Iasi managed to reach over 1% of expenditures on research and innovation in 2015, followed by a decrease in following years⁶⁰. Moreover, the economy is impacted by the frequent changes to fiscal legislation.

From a **social perspective**, the region is suffering first and foremost from a high, continuous and increasing level of emigration of the active population, as well as an ageing population, and a low standard of living. These aspects create an insufficient skilled labour force and an unemployment level 4,8% which surpasses the national level 1,5% pints in 2018⁶¹. However, this regional value is 2,2 pointslower than the EU28 average. Only Vaslui County has higher unemployment values (8,6%), while Botosani and Iasi drop to 3% in 2018, well under the European, national and regional levels. Since 2013, the number of temporary emigrants has continued to increase slightly. The registered level of temporary emigrants from the North-East region in 2019 increased by 49.10% compared to 2013. In absolute terms this means an increase of 12,670 people⁶².

Although at the regional level, there are currently no specific **circular economy** plans being implemented, The North-East Regional Development Agency has been organising a circular economy advisory group since 2016. The aim of this group is to identify opportunities and take actions to support the adoption of circular economy approaches in the region. Inside the local entrepreneurial network, one community stands out as voluntarily applying some circular economy principles: Mai Bine⁶³ with its Urban Center for Good Initiatives (CUIB)⁶⁴ which combines a bistro/concept store with socio-cultural and educational events, centred around circular economy and community-based practices;

3.7.2 Cultural Tourism

The cultural tourism sector currently has a **modest contribution** to the economic sector, in spite of the region's significant cultural and natural heritage potential. The vast majority of the region's natural heritage is located in the mountain areas in the west of the region, and the cultural heritage

⁵⁸ See Figure 1

⁵⁹ North-East Regional Development Plan 2021-2027 (PDRNE) - <https://old.adnorddest.ro/user/file/pdr/2021/PDR%20NE%202021-2027%20vers.%20ianuarie%202021.pdf>

⁶⁰ Idem

⁶¹ PDRNE

⁶² PRAT https://adnorddest.ro/user/file/regional_prat/PRAT%20Nord-Est%202017%202023.pdf

⁶³ In the English Language: "Better"

⁶⁴ In the Romanian Language: Centrul Urban de Inițative Bune <https://incuib.ro/>

is concentrated in the north of the region with three distinct areas in Suceava, Neamț and Iași. Here one can find the second largest monastic community in Europe (after the one from Mount Athos in Greece). Eight of the monasteries located in this area are included in the UNESCO World Heritage List, grouped as “Churches of Moldavia”⁶⁵ because of their uniqueness and quality of preservation. From these, the Church of St George of the former Voronet Monastery and Church of the Holy Rood of Patrauti will also be part of the PHS. Moreover, in this area one can also find the “Vânători Neamț,” Natural Park which covers a predominantly old-growth and almost untouched forest.

Most of the tourists visiting the region come mainly from other parts of Romania and the Republic of Moldova. Only 11.5% of the tourist arrivals in the region in 2019 were from outside Romania⁶⁶. In terms of services and economic activities, accommodation and HoReCa services are predominantly provided by local small-scale businesses.

A considerable part of the tourism sector is driven, on one hand, by interest in history, tradition, religion, spirituality and pilgrimage, and on the other hand by nature and sport activities. Although tourism in these areas has a seasonal character, the regional administration is interested in developing the north-east as a year-round destination.

In recent years, the touristic sector is receiving more and **more attention** and has become one of the development priorities of the region. However, in order to become a leading sector, tourism has to overcome several challenges. To start with, accessibility is generally challenging since public transport at the regional level is poor, while several important historical areas/monuments are not connected to cities by public transport. Moreover, several heritage monuments are depredated and require renovation interventions. On the other hand, some sites are already included in restoration programs and have been transformed to be friendlier and more interactive touristic points (Suceava and Neamț fortresses, Probota Monastery, Golia Monastery, the Palace of Culture in Iași and others). Unclear legislation regarding the protection of the heritage buildings represents an additional challenge for investors. The existing legislation regarding the protection of heritage buildings (especially private property) is occasionally unclear. To this challenge, one can add deficient management, information and infrastructure of some tourist destinations and a limited number of integrated tourist packages⁶⁷. Moreover, due to the intense emigration processes, the region is facing a lack of trained and/or specialised labour force in the field of culture and tourism. Through programs like RePatriot⁶⁸ and Diaspora Start-Up⁶⁹ some of the Romanians that chose to move to another country are now coming back to start their own businesses, after acquiring skills and knowledge elsewhere.

A peculiar but concerning challenge identified in recent years is the **loss of authenticity** of rural areas. Firstly, the emergence of unfair competition from traders of import products, which are often sold as local authentic products, impacts the preservation of folk traditions and crafts⁷⁰. Secondly, unplanned construction activities in rural areas tend to lead to a loss of existing tangible and intangible cultural heritage. There have been initiatives at the national level by the Ministry of Culture

⁶⁵ These are: the Church of the Annunciation of the Monastery of Moldovița, Church of the Resurrection of Sucevița Monastery, Church of the Beheading of St John the Baptist of Arbore, Church of the Assumption of the Virgin of the former Monastery of Humor, Church of St George of the former Voronet Monastery, Church of the Holy Rood of Patrauti, Church of St George of Suceava, Church of St Nicholas and the Catholicon of the Monastery of Probota.

For more info see the Unesco webpage <https://whc.unesco.org/en/list/598>

⁶⁶ Tempo Online INS (<http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>, POP108D and POP106A) and PDRNE

⁶⁷ PDRNE 2021-2027 – page 273

⁶⁸ RePatriot <https://repatriot.ro/>

⁶⁹ Diaspora Start-up <https://diaspora-startup.ro/>

⁷⁰ See websites: <https://www.newmoney.ro/povesti-chinezesti-cum-a-ajuns-ia-traditionala-unul-dintre-cele-mai-piratare-produse-romanesti/> and <https://www.revistafermierului.ro/din-revista/satul-romanesco/item/4355-ia-romaneasca-made-in-china.html>

and by the Romanian Architects Order (OAR) to document, present and organize the traditional rural architecture of each cultural region of Romania. In this regard, a series of architectural guidelines⁷¹ for maintaining consistency with the locally specific features in rural areas have been elaborated and they will soon cover the entire territory. These guidelines and other initiatives at the European, national, regional and even local levels will help local communities to discover, acknowledge and promote local traditional features.

⁷¹ Architectural guidelines: <https://www.oar.archi/despre-oar/ghidurile-de-arhitectura-pentru-incadrarea-in-specificul-local-din-mediul-rural>



3.8 Republic of Moldova

3.8.1 Regional Development

“Moldova is well-known as a wine country. [...] and has wine cellars unique in the world”

Anatolie Risina – Verde E Moldova – preparatory questionnaire June 2021

Photo: Landscape at Orheiul Vechi. Image received from Anatolie Risina.

Moldova covers a territory of approximately 34,000 km² and hosts a population of 2.6 million inhabitants. The territory is dominated by hills (highest point reaches 430m in altitude), the river Prut (which marks the country's western border) and the river Dniester⁷² in the east. At its southernmost point, Moldova has approximately 500 meters of direct access to the Danube River, where the International Free Port of Giurgiulești is established. The country is a former territory of the USSR and currently shares its borders with Romania in the west and Ukraine in the east. Since 2001⁷³, the Republic of Moldova is administratively divided into 32 districts⁷⁴, five municipalities and two administrative-territorial units. Two of its six development regions have a special status: Autonomous Territorial Unit of Gagauzia (south) and the breakaway territory of Transnistria (east of the river Dniester). Between 1990 and 1992, a brief war took place between the Moldovan government and the separatist pro-Russian Transnistrian forces. Since then, there remains a frozen conflict, in which Transnistria has a complicated status that is disputed between the national government of Moldova and the breakaway administration (Directorate-General for External Policies- Policy Department, 2016). In terms of political relations, Moldova expressed interest in joining the EU and it is already a partner country of the Eastern Partnership⁷⁵ within the European Neighbourhood Policy⁷⁶. Moreover, in 2014 the country signed an Association Agreement with the EU⁷⁷.

Overall, Moldova is characterized by medium-density population and a strong rural character. The territory has a **monocentric system** of localities dominated by the capital, Chisinau (640,000 inhabitants), located in the centre of the country. Chisinau plays a key role in terms of the economic, academic, social and cultural life of the country. Since the cost of living is very high for the local population, especially housing, many people working in Chisinau choose to live in nearby localities. Strășeni (27 km by car) and Anenii Noi (36 km by car) are just some of the places from which people commute on a daily basis for work. Strong commuting processes also take place between the breakaway region of Transnistria and the rest of the territory of Moldova. Interestingly, approximately half of the working population in Transnistria works outside its borders.

Accessibility and transport infrastructure represent one of the biggest challenges Moldova faces. Its peripheral position east of the EU border makes it a distant destination for many EU citizens, accessible by only one international airport near Chisinau. If necessary, the airports near Iași (Romania) and Odesa (Ukraine) can also serve as transport nodes. Beyond that, the road, railway and public transport infrastructure is lagging behind, being poorly maintained and often in a state of degradation. To start with, Moldova has no highways. The quality of the infrastructure is even more problematic for the roads linking different rural areas. At the same time, although the country has railway infrastructure in place, its efficiency is very limited. Therefore, most of the railway capacity is used for freight and not passengers. International connections to the EU pose another challenge. The wheelbase infrastructure is different in Moldova, and therefore the wheels of the trains need to be changed when crossing the border. Regarding public transport, most of it operates in the large cities. Public transport routes between rural areas are few and slow and as a result, there is a high use of privately owned cars. In terms of water connections, although the Danube port of Giurgiulești is small, it can accommodate medium-sized ships, both for freight and passengers.

⁷² In the Romanian language: "Nistru"

⁷³ According to Law No. 764 as of 27.12.2021 on the administrative territorial organisation.

⁷⁴ In the Romanian language called "raioane"

⁷⁵ Eastern Partnership https://eeas.europa.eu/diplomatic-network/eastern-partnership_en

⁷⁶ European Neighbourhood Policy https://eeas.europa.eu/diplomatic-network/european-neighbourhood-policy-enp_en

⁷⁷ Association Agreement https://ec.europa.eu/commission/presscorner/detail/en/MEMO_14_430

The main **economic sectors** of Moldova are wine production, agriculture (due to its high-quality soil) and industry. **Wine production** has a very long history in Moldova, and is recognised at the international level via its exports. In Moldova, there are about 500,000 SMEs representing around 97% of the total enterprises, 50% of employment and generating more than 30% of the country's income.

Since 2005, Moldova has had a national programme through which seven **Free Economic Zones**⁷⁸ have been developed, in hopes of attracting international companies and stimulating the creation of jobs. These Zones have attracted numerous foreign companies (mainly in the manufacturing industry) which benefit from tax reductions. Since 2014, in the cities and villages located near the border, there are many seasonal workers who choose to come and work in Romania. This phenomenon is particularly strong in the south and west, e.g. in Ungheni. In the same period of time, in Gagauzia, Turkish businesses have created some new textile facilities. With the exception of these, most of the economic activity is related to agriculture. When Transnistria broke away in 1992, pro-Russian forces took control of most of the industry of the area. Today, part of that industrial infrastructure is unused, while accurate information about this sector is relatively difficult to obtain. In addition, a very important contribution to the national economy is the money sent from the Moldovan diaspora back to those living in the country. Currently it amounts to 1.7 billion US dollars and represents a significant percentage of the 37 billion US dollars national budget. This money is sent by Moldavians abroad as financial support to families and friends living in the country. A last point that poses a particular challenge for the Moldavian economy is the matter of human capital, marked by insufficient qualified workers in the field of management and the provision of quality services. Many public administrations, especially at the local level, are not able to find appropriately trained experts. The salary levels and available opportunities in other cities and regions of Europe are just some of the many reasons for this phenomenon.

The country is a member of the World Trade Organisation since 2001, and is the first former Soviet state to join this international organisation. Moldova also benefits from free or preferential trade with 43 countries. These economic-trade arrangements allow Moldova's resident companies to access markets that bring together more than 880 million potential customers.

From a **social perspective**, Moldova is an amalgam of **several nationalities, minorities and cultures** with diverse traditions, languages, folklore and gastronomy. The main minorities are Ukrainians (approximately 10%), Russians (approximately 7%), as well as Gagauz, Roma and Jewish communities. Worth noting is that Moldova is the main place where Gagauz people live today. Their ethnicity is originally Turkish and the main religion practiced is Orthodox Christianity.

One of the biggest challenges for the country is its **population decline**. For the last 30 years, Moldova has experienced constant population decline and aging, caused by low birth rates and especially high rates of emigration and brain drain. Current estimates indicate that 1 million people live and work in other countries, mainly in the west of the EU and in Russia. To these numbers, one must add several hundred thousand people who are seasonal workers. The main causes of migration are economically and financially motivated and are fuelled by political unpredictability and lost hopes for improvements of the standard of living. Even though Moldova registered economic

⁷⁸ For more information visit the official page of the Ministry of Economy and Infrastructure <https://mei.gov.md/en/content/free-economic-areas>

growth and progress in recent years, it remains one of the poorest countries⁷⁹, when compared to other parts of Europe.

In Moldova the concept of **circular economy** is mainly associated with green development and wastewater management. Since 2014, Moldova has implemented a National Climate Change Adaptation Strategy, and since 2018 a Waste Law. These policy and legislative improvements have been achieved as a result of the assistance provided by the EU integration of “green” economy principles. Although some discussions about the concept are taking place, such as the recent dialogue between several public institutions: “Waste Management - The transition to a circular economy in Moldova”⁸⁰ there isn't yet a high level of awareness or implementation of the concept.

3.8.2 Cultural Tourism

Tourism (and specifically cultural tourism), has currently a modest performance and contributes to a small percentage of the economy of Moldova. Winemaking is an integral part of Moldovan culture and is present in most aspects of life. The country benefits from approximately 150 wineries, from which several areas are included in the Protected Geographical Indications (PGI)⁸¹ label system. Mileștii Mici village is registered in the Guinness Book of Records for hosting the largest wine collection in the world⁸², counting about 1.5 million bottles, deposited inside its 200 km of galleries. In addition to this unique wine cellar, several others are linked by **touristic wine routes**. Other important attractions of Moldova include **religious heritage sites**, particularly the Orheiul Vechi monastery located on top of a hill overlooking the sharp and steep bend of the Răut River. Another such site is the Soroca Fort located in the city with the same name. The cultural landscape of Orheiul Vechi is currently on the UNESCO tentative Heritage List.

Beyond these well-known attractions, Moldova has additional cultural heritage that is worth mentioning. The special values of the **cultural practices** associated with the 1st of March celebrations (Mărțișorul) are recognised and listed as UNESCO Intangible Heritage, while the unique **biodiversity** of the Lower Prut located in the south-east of Moldova is recognized and listed in the UNESCO Man and Biosphere reserve. Furthermore, Moldova is predominantly a Christian Orthodox country with deep **religious traditions kept alive** until present day.

Most of the tourists visiting Moldova come from nearby regions of Romania, Ukraine, Russia and Bulgaria. Although tourism here does not have a strong seasonal character, other specific challenges are present. To start with, the legislation framework which covers the tourism sector is insufficient, outdated and parts of it do not align with European standards (e.g., Classification of accommodation by number of stars). Secondly, the country in general and its touristic offers are vastly unknown in the European market, since Moldova has thus far had limited international visibility and marketing campaigns. Moreover, tourist information about important heritage or touristic assets (such as info points, info panels and guides) are lacking or in disrepair. Accommodation facilities are in limited

⁷⁹ World Bank report on Poverty reduction and shared prosperity in Moldova: <https://documents.worldbank.org/en/publication/documents-reports/documentdetail/168451467995808859/poverty-reduction-and-shared-prosperity-in-moldova-progress-and-prospects>

⁸⁰ Report: Waste Management - The transition to a circular economy in Moldova <https://e-circular.org/uncategorized/dialog-online-tranzitia-spre-o-economie-circulara-in-republica-moldova/>

⁸¹ Protected Geographical Indications is one of the Quality schemes used for food and drinks in the EU. More info at: https://ec.europa.eu/info/food-farming-fisheries/food-safety-and-quality/certification/quality-labels/quality-schemes-explained_en#

⁸² Guinness World Records <https://www.guinnessworldrecords.com/world-records/largest-wine-cellar-by-number-of-bottles>

supply, especially in the rural areas. Finally, museums and cultural assets are lacking well-trained staff to serve an international audience.

4 Challenges and innovation opportunities

The aim of this section is threefold: first, to summarise and explain the most important and common challenges identified in the analysed regions (and their pilot heritage sites); second, to synthesize the preliminary observations on how these challenges can drive innovation; and third, to emphasize some actions which could be a source of inspiration for project partners and to actors and stakeholders who will directly or indirectly contribute to the co-development of local Action Plans for sustainable and circular cultural tourism in the Be.CULTOUR regions and their pilot heritage sites.

The interviews and analysis conducted brought to light several complex, intertwined and systemic **challenges** which Be.CULTOUR regions and their pilot heritage sites are facing: abandonment and depopulation; brain drain and migration; insufficient or lack of skilled workforce; population ageing; modest or lacking accessibility and services; loss of authenticity; low level of cooperation between institutions (lack of ecosystem building and partnerships) and high competition. Another important challenge is the negative impact generated by COVID-19 health crisis which clearly affected all of the regions analysed.

Being aware of these challenges and understanding what role they play in these regions is essential in the process of taking actions to improve regional development and cultural tourism. This is the case not only from the perspective of sustainability, but also through the lens of a circular economy, human-centred development and Europeanisation – all of which are in line with the Be.CULTOUR project objectives. The first four aforementioned challenges are related to **human capital**, as they are components of general demographic trends and are essential in understanding the local reality. In order to allow a quick comparison between the six regions and their specific challenges, an overview table is provided (Table 1).

The concept of a **circular economy** is briefly explained to allow for better reflection on the possible innovations that could be triggered⁸³. **Innovation** can emerge from diverse sources and appear in many unexpected ways. In the context of the regions analysed, inquiries regarding innovation have been made using the previously identified niche innovation areas and emerging trends⁸⁴. Spiritual travel experiences, nature as heritage and the contemporary meaning of heritage were determined to be the niche **innovation areas** which appear to be most easily related to the local reality in these cases, together with **emerging trends**: transformative travel, remote working destinations and post-cultural tourism. At the end of this section, several **inspiration examples** from the regions analysed are shared to trigger further discussions about possible innovation at the regional and pilot heritage site levels.

⁸³ Further clarification on how circular economy is implemented in the tourism / cultural tourism sector is included in Be.CULTOUR Deliverable D3.1 "Protocol/Methodology for human-centred innovation in sustainable cultural tourism (v1)"

⁸⁴ More information about "niche innovation areas" and "emerging trends" can be found on page 22 in deliverable D3.1 – Protocol / methodology for HC innovation in sustainable cultural tourism (v1) available here: <https://www.becultour.eu/results/>

4.1 Challenges

4.1.1 Demographic trends

Abandonment and depopulation

Two of the most common challenges identified are abandonment and depopulation. Many deprived, remote, peripheral and deindustrialised regions have lost or are losing economic activities, jobs, services, opportunities, competitiveness and as a result their population is shrinking. Such phenomena generate a complex negative spiral which ultimately can lead to entire villages (or large parts of them) being unused and in an ongoing process of degradation. In such situations, these villages first lose their intangible heritage, which is largely dependent on communities and individuals and then, in time, tangible heritage, which will face a lack of use, maintenance and/or restoration. In most cases, such processes take place gradually. Very often, such rural areas are located in places without functional connections to the economically productive urban centre(s) in their vicinity and where rural policies are ineffective, poorly thought out or non-existent. In the context of the Be.CULTOUR project, this is the case for most rural areas located in the mountains.

Brain drain and emigration

The second challenge observed concerns brain drain and emigration. Almost all six regions studied have demonstrated negative demographic trends. Moldova, Vojvodina, North-East Romania and Basilicata display the most accentuated and complex migration trends. For these, the emigration process includes: emigration to the EU and other European countries and migration inside the country, predominantly from villages and small towns to urban centres and to better performing regions. The motivation for migration is primarily economically and financially driven. It is caused by poor or insufficient work opportunities, lower income and lack of job stability. Many of these people feel that positive transformation in their communities is not taking place or is taking place very slowly, while others are hoping for a better business development environment elsewhere. Additional motivations for migration include better perceived educational and professional opportunities, such as better high schools and universities and better and more diverse services. These are characteristic mainly for the younger generations (approximately 18 – 40 years old). Many of the people who are a part of this pattern are highly qualified and well trained, therefore contributing to a brain drain phenomenon.

Many of these regions have witnessed emigration trends towards better performing regions and large urban centres. This is particularly visible in the case of Basilicata because of the considerable disparities between the north and the south of Italy, but it is also clear in three other regions involved in Be.CULTOUR: Moldova, Vojvodina, North-East Romania. Inhabitants from North-East Romania are emigrating predominantly to Bucharest, which, due to its size, represents one of the biggest economic centres in Eastern Europe⁸⁵, but also to the cities in the centre and west of the country which offer better prospects. Inhabitants from Vojvodina and Moldova are moving predominantly to their respective national capitals which are also the biggest national urban centres. Last but not least, these regions have seen movement of people from the rural spaces towards nearby towns and cities, though this trend is less dynamic than those previously mentioned.

⁸⁵ Marcel Ionescu, World Bank Expert, 2021 <https://buletin.de/bucuresti/marcel-ionescu-banca-mondiala-pib-ul-generat-de-bucuresti-este-mai-mare-decat-cel-al-serbiei-croatiei-sau-bulgariei/>

In Aragon, Cyprus and Västra Götaland, the main emigration trend is from rural areas towards nearby towns and cities. Migration to other European countries is a considerably weaker trend, especially in Västra Götaland. In parallel to this trend, these regions represent destinations in themselves for migrants from other regions and countries. Västra Götaland, Cyprus and Vojvodina have accepted (directly or indirectly) a considerable number of asylum seekers and refugees. Västra Götaland is, in general, an end destination while Vojvodina is predominantly affected as part of the Balkan migration route towards the EU's richer countries.

Population ageing

In addition to emigration trends, and partially as a result of it, the regions described in this report have undergone a trend of population ageing. This is visible in all six regions, but it is particularly apparent in Moldova, Vojvodina, North-East Romania, Basilicata and parts of Aragon. Population ageing is caused by many national and regional circumstances such as declining birth rates or emigration of younger populations, but it is certainly also a general European phenomenon related to increasing life expectancy. Here again, we will observe considerable differences between rural areas and urban centres. As expected, the most dynamic urban centres are also the places that attract younger people, as it is many of these are cities that host large and important national universities.

Insufficient or lack of qualified human resources

An interesting observation is that even the regions and places that have dynamic local economies are facing difficult work force challenges. The regions studied are facing, in one way or another, an insufficiency of qualified human capital (skilled workers), compared with other more dynamic regions. North-East Romania, Vojvodina and Basilicata have experienced difficulties in identifying appropriate skilled members of the workforce for existing jobs, including these from the cultural tourism sector. Therefore, local administrations and stakeholders are limited in how quickly they can develop the local economy and stimulate further investments. This reality adds additional pressures on an already challenging context.

4.1.2 Accessibility and services

Almost all studied regions are characterised by **poor accessibility** and a **high dependence on privately owned cars**. There are two exceptions, though: Västra Götaland, where railway infrastructure and public bus services offer comparatively better accessibility compared to the other regions; and Aragon, where there are considerable internal disparities between the areas directly served by the main highways and railway lines and the rest of the territory. The province of Teruel, for example, is served by just one regional railway line. Because of the local geography, reaching the capital city of Madrid is relatively challenging and requires a detour. The diverse and sometimes steep local geography (as in Aragon and Basilicata), the sparse distribution of communities and cultural factors related to car ownership generate overall a modest accessibility. This aspect has a strong impact upon visitors, their mobility possibilities and their capacity to visit multiple touristic sights in a limited period of time. In fact, many visitors are indirectly forced to rent cars to secure mobility.

The regions involved in Be.CULTOUR are also characterised by areas with **small population density**, which makes it challenging and very costly to access services. In Aragon, Basilicata and North-East Romania, for example, the particular administrative context (which includes numerous small and very small villages) makes it hard for public authorities to provide appropriate services and unattractive for private companies to invest in such infrastructure. In Aragon, for example, rural areas

feature the so-called “unit schools” that have to merge pupils of various ages into one classroom. Such small schools face particular challenges, which might also impact the effectiveness of the teaching process.

4.1.3 Loss of authenticity

The regions studied bring to light an additional challenge: the **loss of authenticity** of rural areas. This aspect is manifested in several ways. On the one hand, the existing touristic locations are witnessing import products sold as local authentic products. In North-East Romania and occasionally Moldova, for example, some traditional-looking clothing and traditional everyday objects are actually produced outside the country and outside Europe. These objects have no connection to the story they try to convey and create an unfair and problematic competition to authentic local products and craftsmen. This is in large part because they are often falsely described as handmade craft products. Moreover, these objects generate fake images about local products and distort the symbols and traditions that should be at the core of the traditional touristic offerings. In Cyprus, the loss of authenticity is caused by strong real estate development pressure. The existing policy context had led to the intensification of luxury construction that sometimes does not integrate well with the traditional values or context, and can distort the local “genius loci.”

Furthermore, **rural areas** are inevitably impacted by globalisation and are often not prepared or able to use it as a regeneration opportunity. In places where local values are not appropriately recognised, new interventions and uncontrolled developments might cause transformations that will negatively impact the existing natural and cultural heritage but also social and cultural values. This is particularly visible in the improper use of new materials, renovation techniques, architecture and design styles. Occasionally such changes are not just ignoring the existing traditional character of a place, but they are also directly or indirectly destroying it. Unfortunately, in Cyprus, North-East Romania, Moldova and Vojvodina such phenomena are present.

4.1.4 Low level of cooperation between institutions (ecosystem building and partnerships)

Another frequently emerging challenge is related to **trust and cooperation** between stakeholders. Cooperation proves in many regions to be challenging, not only between different types of organisations (public, private and civil society), but also across different levels and departments of the same institution. This situation came to be problematic in Aragon, because of its particularly complex administrative system and fragmented governance. In Cyprus, the challenge is generated by the powerful economic interests of the elite and from the disproportionate balance of power between the real estate developers’ organisations and the rest of the stakeholder network. There seems to be a need for support in facilitating and mediating processes for co-designing well-structured, well-functioning, inclusive and transparent governance models. In North-East Romania and Moldova, trust, communication and cooperation have been impacted by a particular shared history. The social distrust that emerged under communist dictatorships is still making communication and cooperation difficult and inconsistent. Its presence creates additional challenges in building democratic co-development processes in societies and communities in which critical thinking, debates and free elections were, until recently, disallowed by the political system.

4.1.5 High competition

Although not clearly and directly mentioned by the interviewees (with the exception of Cyprus' representative), the regional stories portrayed in this report bring to light that all regions in Europe, and therefore also the ones involved in Be.CULTOUR, are competing in order to attract and benefit from tourists' presence. In Larnaca (Cyprus) for example, because there are numerous tourist providers with similar offers, the competition is increasing and becoming more and more price-dependent. Europe remains one of the most attractive places to visit at global level, due to its abundance of cultural and natural heritage, short distances between places of interest and a safe environment. However, the **competition** in the tourism sector is intensifying and becoming fiercer, especially since travel patterns and tourists' expectations have been changed by the recent pandemic. Clearly understanding the local, regional, European and international competition and identifying target groups and visitors' profiles will be essential tasks that regions will need to take on if they want to develop successful cultural tourism destinations and services.

4.1.6 Covid-19 pandemic impacts

Since spring 2020, all regions in Europe have been strongly impacted by the COVID-19 pandemic and by some of the measures taken to combat it. **Travel restrictions** and a reduced level of social and economic activities were imposed everywhere, but their effect was not uniform. Cyprus, for example, which is dependent on international tourist arrivals, was strongly affected, experiencing a sharp drop in tourism arrivals in March 2020. That year, the island experienced an 84% decrease in tourism arrivals compared to 2019, which has caused huge negative impacts to the local economy. In Västra Götaland and North-East Romania the impact was more diverse. The major tourism providers such as hotel chains, which are primarily located in the urban centres and serve predominantly international visitors, have experienced considerable losses. On the other hand, smaller tourism HoReCa units located in rural areas have been experiencing an increase in activity since people looked towards areas and activities with less chances of infection and made shorter trips. Inevitably this meant rediscovering nearby places.

Table 1 - Overview of the most common challenges and their importance for that particular region

	Basilicata (IT)	Aragon (ES)	Cyprus	Västra Götaland (SE)	Vojvodina (RS)	Cross border territory of North-East Romania and Moldova	
						North-East RO	Moldova
Abandonment and depopulation							
Brain drain and migration			N/A	N/A			
Insufficient or lack of skilled workforce							
Population ageing							
Accessibility and services							
Loss of authenticity	N/A	N/A		N/A	N/A		
Low level of cooperation between institutions					N/A		
Covid-19 pandemic impact							
High competition	It is present at global level and therefore also affects all European regions.						

Legend: RED: high; YELLOW: medium; GREEN: low; N/A: not applicable

4.2 Circular Economy

The seeds of the circular economy concept emerged in the 1980s with the work of the Allen Kneese and his book: *The Economics of Natural Resources*. Since then, the debate and reflections on circular economy have grown exponentially and those advocating for a transition from a linear “take-make-dispose” economic model to a circular one increased. Today “circular economy refers to an industrial economy that is restorative by intention; aims to rely on renewable energy; minimizes, tracks, and eliminates the use of toxic chemicals; and eradicates waste through careful design” (The Ellen MacArthur Foundation, 2013). Even though awareness increased, the implementation of the concept in economic activities moves slowly and in an uneven manner.

The six regions of the Be.CULTOUR project indicate **awareness about the concept of a circular economy**, but with considerable **disparities regarding understanding or implementation**. In Västra Götaland, both policy-makers and local stakeholders indicate experience in implementing the concept, especially in sectors related to furniture and textiles. The implementation of the Horizon 2020 CLIC project⁸⁶ as pilot region resulted in advanced knowledge of the circular economy concept especially applied to cultural heritage adaptive reuse. As other regions did not implement circular economy strategies applied to cultural heritage, Västra Götaland appears to be at the forefront of this approach between project pilot regions, with a Local Action Plan already developed and adopted within the CLIC project. Strong policy interest in the concept is visible also in Aragon, Cyprus, Vojvodina and North-East Romania, but with a lower degree of implementation. Another interesting observation is that the private sector seems to be more advanced in implementing the concept, and in making it a competitive advantage or a distinctive market label.

4.3 Innovation

One of the first structured definitions of innovation was provided by the economist Joseph Schumpeter in his writings from the 1930s. According to Schumpeter (as cited in Shah et al 2014) innovation is a “*‘new combinations’ of new or existing knowledge, resources, equipment, and other factors*” (Shah et al 2014). A second essential definition is the one provided by OECD in the Oslo Manual⁸⁷. It describes “*innovation as the implementation of a new or significantly improved product (good or service), or process, a new marketing method, or a new organisational method in business practices, workplace organisation or external relations*” (OECD, 2009). These two definitions should be seen as the base for our reflection.

In the last two decades, the rise of digital technology, the Internet and big data has very often been the source of new discoveries and inventions. As a result, nowadays there is a tendency to think of, and sometimes confuse, **innovation** almost entirely with **technological breakthroughs**. Nevertheless, entrepreneurs, practitioners, academics and policy-makers should become aware of this bias and try to consider a broader perspective and a more diverse spectrum of what innovation can represent. Innovation can take many shapes and emerge in any field. In the framework of Be.CULTOUR, stakeholders are encouraged to consider innovation not just in terms of commercial products and/or new technologies but also in terms of public and private services, processes,

⁸⁶ Horizon 2020 CLIC project “Circular models Leveraging Investments in Cultural heritage adaptive reuse” www.clicproject.eu

⁸⁷ Oslo Manual 2018 edition <https://www.oecd.org/science/oslo-manual-2018-9789264304604-en.htm>

business models, organizational models, governance models, social models and environmental management. One of the reasons for fast-developing innovations in the ICT sector is linked to the potential for exponentially growing profits, which can emerge almost overnight. Driven primarily by profit, the world has seen in recent years numerous innovations that create new consumerism but considerably fewer innovations addressing important societal needs. That is because not all of these societal needs can be linked to solutions that will generate quick financial profits. For example, one can choose from thousands of (well-rated) online betting applications, but there are very few healthcare applications supporting the provision of health services in rural and remote areas.

Although innovation can simply emerge from coincidence, when it is structurally searched, it usually appears when and where challenges and needs are deeply understood. Therefore, it is important to develop actions that stimulate innovation addressing fundamental needs and challenges of a particular region and its local communities. Experts seeking to innovate should adopt a **human-centred and circular approach**, addressing the needs of local inhabitants and overcoming the identified challenges in a way that will allow these people to live within the planetary boundaries. As mentioned before, the most important challenges identified in the Be.CULTOUR regions are often **complex, intertwined and systemic**. Some of them are still hard to perceive or turn into opportunities, but others, at a more careful look, might be recognised as such. Parts of these challenges should be accepted as realities of the territory and branded as a distinctive character that might attract a niche of specific visitors. This approach could represent the first phase of a long-term strategy. It can support the local transformation until additional conditions are met to allow the initiation of the second phase (and so on) where more complex improvements can be implemented.

Recent reviews of innovation in the tourism sector have concluded that innovation in the area of tourism research “is highly influenced by conventional manufacturing industries” and that “there are few studies on the experience, which is the most important product of tourism” (Cem et al., 2019). Therefore, in the Be.CULTOUR project and its actions, the project consortium encourages project partners and stakeholders to **go beyond** the above limitation and incorporate reflections about the “**experiences**” that visitors can have, as a source for cultural tourism development.

For the six regions presented above, the **challenges** that also hide intrinsic **opportunities** are: low population density, (limited) accessibility, abandonment, depopulation, and partially population ageing. These characteristics generate an environment that can disconnect certain visitors from agglomeration, traffic, noise, distractions, digital overload, routine and general stress. These challenges are also associated with characteristics which can be special ingredients for the **innovation areas**⁸⁸ prime for incorporating unique experiences:

- **Spiritual travel experiences.** Spirituality requires introspection and reflection. For most people, these can be achieved more easily when there are limited or no distractions. When the environment is slowing down, is relaxing the mind and body, and is inspiring people to think at what matters most in life not just on ephemeral actions.
- **Nature as heritage.** Viewing the night sky (e.g. star-gazing, astro-tourism) and/or biodiversity observation is much easier in less inhabited and/or visited corners of Europe. Areas with small population density, (limited) accessibility, or abandoned and depopulated areas often have less air, water, soil, noise and light pollution, therefore creating the right conditions for the enjoyment of natural heritage and outdoor activities.

⁸⁸ See Deliverable D1.3 in Be.CULTOUR results webpage: <https://www.becultour.eu/results/>

- **Contemporary meaning of heritage.** It includes a contemporary interpretation of cultural heritage sites through artistic creation. Such experiences can take place by exploring the present and past of local heritage through various artistic forms. Abandoned and depopulated places can be exactly the types of space that certain art and creative industries need/search for (e.g. film, photography, video projections and light installations, theatre, dance, music, etc). They can make use of the heritage “intrinsic value,” its meanings and dynamics, while generating intense emotional and aesthetic experiences.
- **Rural co-living** offers the framework for authentic rural experiences in traditional cultural landscapes through homestays and hospitality, stimulating relationships between residents and visitors through their participation in traditional activities such as agricultural and landscape maintenance, as well as local arts & crafts. Such offers represent a modality to break the routine and to experience another way of living.
- **Sensorial heritage experiences** are immersive experiences of places combining new ways of enjoying and learning about intangible cultural heritage – such as local gastronomy, wine, crafts, music, language, history and traditional skills – with a more intimate and reflexive inner journey. Intangible heritage is often the result of a particular cultural environment, so to take part in this heritage in the place it originates is of unique value.
- **Industrial Heritage** allows the visitor to learn, reflect and partially reconnect with a specific moment in time, telling the history of European manufacturing. Very often remote, peripheral, abandoned and depopulated places hide valuable objects that sometimes survived exactly because the area did not experience certain transformative pressures that central and accessible places did (e.g. old village mills).

At the same time, the identified challenges can be reconsidered through the lens of particular **emerging trends**:

- **Transformative travel:** Transformation is stimulated by learning and educational experiences, self-reflection, self-discovery or re-discovery, and integrates the experiences enjoyed during the trip into the visitor’s daily life back home.
- **Remote working destinations:** This trend allows people to experience new places and simultaneously fulfil the duties of their profession and/or work. Remote working allows people to break the routine of their lives, regenerate physically and psychologically and experience different lifestyles closer to nature or “slow living.” Moreover, for some creative professions, such an environment could offer new perspectives and inspiration.
- **Proximity travel:** This trend refers to the so-called proximity tourism, also known as “staycation”: this is a practice that consists in travelling close-by to one’s daily environment. Citizens re-discover nearby cultural and natural sites, becoming “tourist at home”.
- **Post-cultural tourism:** This trend refers to people seeking to explore different forms of alternative travel which aim to discover authentic “unusual,” “un-exceptional” places and their ordinary / daily life, which are not included in conventional cultural tourism itineraries. (e.g. urban peripheries, industrial areas, “daily life” neighbourhoods)⁸⁹.

4.4 Inspirational examples from the Be.CULTOUR regions

The preparatory questionnaire and the interviews organised with the Be.CULTOUR representatives of the regions/pilot heritage sites brought to light several positive examples of practices which fit partially or entirely under some of the niche innovation areas considered in the project, and which make use of human-centred and/or circular approaches. These examples could be a good source of **inspiration** for any stakeholder interested in developing innovation actions at a local level.

Paradores⁹⁰ are high-class hotels developed in historical buildings such as former castles and monasteries, located in Spain. They are part of the network *Paradores de Turismo de España*, a state-run business established almost 100 years ago, which aims to use and maintain valuable historic buildings. This approach is generally considered a good example in the Aragon region. It stimulated the renovation of valuable heritage buildings and sites by giving them new functions and developing business models that allow them to be further used and maintained. By doing this, several challenges can be addressed. First, it can address **abandonment** of buildings and sites and therefore indirectly confront **depopulation**. Second, it can address the **loss of authenticity** of heritage buildings and third, it can contribute to the attractiveness and visibility of the building, site and area. The concept can be related to **Contemporary Meaning of Heritage** (niche innovation area) by reusing and interpreting cultural heritage sites through architectural interventions, linking the past of the place with new functions and spatial and aesthetic relationships and re-generating heritage “intrinsic value.”. The concept can be applied to industrial buildings and therefore can also fit under the **Industrial Heritage Experience**. Such a concept might be of relevance for the cross-border territory of North-East Romania and Moldova, Basilicata and Vojvodina.

Larnaka Storytelling Statue⁹¹, is a concept of telling the story of a historical figure by being “called” via a mobile phone application directly by the person being commemorated with that monument. The visitor is invited to scan a unique QR code allocated to a certain statue and listen to what that historical figure has to say about themselves and the period in which they lived. This concept links the past with the present by using modern technologies and engaging the audience of both residents and visitors in a new way. It uses gamification and virtual travel experiences to create an **immersive, hybrid digital-physical experience**. Such a concept can address the **loss of authenticity** by offering information about a certain valuable object or place in a more attractive way. Moreover, it can contribute to awareness and better marketing for the area. Such a concept might be of relevance especially for the cross-border territory of North-East Romania and Moldova, since it aims to develop a cultural route with a historic relationship. It can also be of use for the pilot heritage sites of Vojvodina.

Meet the Locals⁹² is a platform developed by the The West Sweden Tourist Board, where people living in the west of Sweden can register and propose diverse activities they are interested in doing with potential visitors. Some of the frequent activities proposed by locals are related to gardening, hiking, biking, fishing and cooking together. Similar platforms facilitating the interaction of locals and visitors of the area emerged in the last years and are more and more appreciated by certain niche groups. Such platforms fit under the **Rural Co-living, Sensorial Heritage Experiences** and partially under **Nature as Heritage** niche innovation areas. They promote and facilitate authentic rural

⁹⁰ <https://www.pueblosenarte.com/>

⁹¹ Larnaka Storytelling Statues video explanation <https://www.youtube.com/watch?v=EayLGWRb9f8>

⁹² <https://meetthelocals.se/>

experiences in traditional cultural landscapes by bringing locals and visitors together and by stimulating interaction and exchanges through participation in various activities. Moreover, such platforms can address the challenge posed by the loss of authenticity of rural areas and contribute to the attractiveness and visibility of the place. The concept can be applied easily in almost any regional or local context.

Living Human Treasures⁹³ is an Honorary Title offered by the Romanian National Commission for Safeguarding of The Intangible Cultural Heritage, and is offered to extraordinary people who keep alive through their knowledge, work and/or way of life a certain asset of intangible heritage. These can be, among others, techniques for painting religious icons, sewing of traditional cloths, interpretation of traditional music and dances and so on. The concept is a UNESCO initiative⁹⁴ to safeguard, preserve and share further intangible cultural heritage directly from the people that know them. The Human Living Treasure can address **the loss of authenticity** and can raise visibility for a certain area. The concept related to the **Sensorial Heritage Experiences** (niche innovation area) allowing new ways of enjoying and learning about intangible cultural heritage. Sensorial heritage experiences include learning and educational activities which help people to get in contact more deeply with the local culture and traditions. The concept might be of relevance for most Be.CULTOUR regions and might be linked and enhanced in conjunction with the Meet the Locals concept presented above.

Additionally, it is valuable to mention two inspirational cases of a different type. First, The **Unified Portal for the Cultural Heritage of the Republic of Serbia**⁹⁵, which under the format of a Heritage Browser helps visitors find and obtain essential information about digitized cultural heritage and also offers access to an interactive map of all cultural institutions in the country. Secondly, the **strategy and process put in place by the city of Matera** was created in preparation for the celebrations in the name of the 2019 European Capital of Culture⁹⁶ year. The strategy focused on cultural heritage, not just as a framework for cultural events, but as a driver for long-term economic development.

⁹³ In the Romanian Language: Tezaure Umane Vii <http://www.cultura.ro/tezaure-umane-vii>

⁹⁴ <https://ich.unesco.org/en/living-human-treasures>

⁹⁵ <https://culture.rs/>

⁹⁶ <https://www.matera-basilicata2019.it/en/>

5 Preliminary recommendations towards sustainable and circular cultural tourism development

The identification of the main challenges faced by Be.CULTOUR regions, as well as the exploration of possible innovation pathways, leads to a brief overview of (non-exhaustive) **recommendations for stakeholders/actors** that are, or will be, involved in regional development through cultural tourism. The partners of the Be.CULTOUR project and the local stakeholders involved in the co-development processes and action plans development should:

UNDERSTAND

- Try to identify and **understand** the global, European, national and regional **macro-trends** influencing your local context.
- Observe and reflect on how the **Internet, digitalisation and artificial intelligence** are rapidly and fundamentally changing our world.
- Be aware that **the future of work is largely unknown** and that many of the jobs needed in the future do/may not yet exist.
- Seek to **understand** the motivation and needs of different types of **visitors / users** and do not make general assumptions, as they are a uniform group.
- Clearly define and **understand the target group(s)** for proposed economic products and services, including those related to tourism.
- Avoid the trap of targeting “any” type of visitor/ tourist without careful consideration. Moreover, reflect clearly on what type of visitors can benefit from and can be beneficial to the community, without creating any unethical discrimination.
- Acknowledge the strong **global competition** in tourism and analyse the changing habits, motivations and behaviour of tourists in the global world market in the direction of searching for new experiences, attractions, products and preserved nature.

ACKNOWLEDGE

- Aim to **generate long-term strategies and actions** which have limited danger of leading later to mass tourism, seasonality, “stop-and-go” tourism and/or other unsustainable processes.
- Acknowledge that if they are not properly planned and managed, touristic activities can also generate **unintended consequences**.
- Acknowledge that **tourism alone cannot be a panacea** to solve all local challenges.
- **Identify other economic activities** which are/can be complementary and synergistic with tourism and can contribute to overcoming economic dependency on tourism by diversifying the local economy. These should reflect a developing mix of activities that can offer resilience and not depend on a unique activity.

DEFINE

- **Define** and refine the **challenges** faced at the regional and local level. Partners should carefully and objectively continue to observe and diagnose the spaces, stakeholders,

processes and phenomena taking place in their territory. No challenge can be overcome if it is not appropriately acknowledged and described.

- Try to **understand the relationships** between strengths, weaknesses, threats and opportunities and to identify ways in which they can be connected to generate integrated solutions.

ADOPT

- Adopt an integrated **human-centred approach** focused on **people, place, prosperity and resilience**⁹⁷, in order to achieve a successful cultural tourism (re)development.
- Make sure that **people and their needs** are at the centre of any development (and not profit-oriented or technology-driven approaches). The use of certain technologies/tools and the generation of profits should be a result of addressing the real needs of the people and not a central aim.
- Embrace the **circular economy** concept as a key component and embed **circular thinking** and approaches for all development actions.

COMMIT

- Engage and commit to a **long-term co-development, co-implementation and co-management process** in order to increase the chances for innovation to emerge.
- Be open to actively **listening to and involving stakeholders** from less obvious domains, since new perspectives are often inspirational⁹⁸ and widespread input inherently valuable.
- **Integrate** newly defined actions in (existing and new) programs, strategies and plans and contribute to existing objectives and other actions.
- Think in terms of **integrated regional/urban development** and not in isolated areas, topics or silos. Cultural tourism should be a mechanism to improve living conditions, address local needs and overcome challenges, and not a goal in itself.
- Think of how **regional development** components influence cultural tourism and vice versa.
- Try to build a **regional approach** for tourism based on complementarity and synergies and not an uncontrolled “zero sum game” (one person’s gain is another’s loss) competition based on the lowest price. Try to find out how a certain cultural tourism offering could generate a win-win environment for multiple local actors.
- Aim to create “**Places**” and not just spaces. “Places” are at their best when they display a their unique genius loci, the ancient spirit of a site expressing its “intrinsic value” and people as co-creators of its uniqueness, culture, art, tradition, folklore, productivity and spirituality.

⁹⁷ The key Components of the *The human-centred city: recommendations for research and innovation actions : report of the High-Level Expert Group on Innovating Cities*. Publications Office of the EU. <https://op.europa.eu/en/publication-detail/-/publication/b3e3431e-424a-11ea-9099-01aa75ed71a1/language-en>

⁹⁸ Henry Ford inspiration for its Ford assembly line, came from a meat-packing house and a grain mill conveyor belt, not from other expert on cars.

- Avoid “**cultural fossilization**”⁹⁹ whereby rural culture and the cultural offer in rural areas may be tailored to the perceived expectations of tourists associating rural culture with tradition and folklore, rather than contemporary forms of cultural expression.

GO BEYOND

- Move beyond tourism through a longer-term human-centred and circular development perspective, enhancing cultural heritage and landscape values.

⁹⁹ For more information explore the section “Better Mutual Understanding for Rural-Urban Synergies” developed in the Learning Hub Cultural Connections available here: <https://rural-urban.eu/learning-hub/cultural-connections>

6 Conclusions

The current report presents in a simple and concise manner the unfolding stories of the Be.CULTOUR regions, in which the pilot heritage sites are located. It aims to reflect on their challenges and to offer inspirational examples and preliminary recommendations to be further explored during Local Workshops, which will be convened to build Action Plans for sustainable and circular cultural tourism. The report sought to decode these local realities, with a considerable focus on challenges and linked potential innovation directions, in a way that makes it easy for interested stakeholders/actors to read and understand them, and to reflect on possible pathways for “challenge-driven innovation.” Inevitably, detailed information provided and some topics presented in the questionnaire¹⁰⁰ and during the interviews had to be omitted at this stage, however the analysis offers valuable insights to project partners and their local stakeholders for the local implementation of Be.CULTOUR activities in the next project phases.

Furthermore, by exclusively interviewing representatives of the Be.CULTOUR project, we are aware that the views shared in this report reflect mainly their perspective and that different regional/local actors might perceive certain aspects in different ways. Therefore, we reiterate that this report aims to be a base for further discussions and a starting point for further reflections and not a definitive conclusion. It serves as a first orientation and inspiration for all actors that would like to be involved in the local processes and the Action Plans which will be further initiated and developed under the Be.CULTOUR project.

¹⁰⁰ Preparatory questionnaire from Work Package 3

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Acronyms

[CCI]	[Culture and Creative Industries]
[CCRE-S3]	[Cultural and Creative Regional Ecosystems]
[ECOC]	[European Capital of Culture]
[FUA]	[Functional Urban Area]
[HoReCa]	[Hotel, Restaurant, Café]
[IPA]	[Instrument for Pre-accession Assistance]
[PGI]	[Protected geographical indication]
[PHS]	[Pilot Heritage Site]
[SME]	[Small-Medium sized Enterprises]
[UNDP]	[United Nations Development Program]
[SDGs]	[Sustainable Development Goals]
[WP]	[Work Packages]

Annex 1 - List of organisations interviewed

Region; Country	Participant organisation name	Short Name
Basilicata region; Italy	APT Basilicata	APT-BAS
Aragon region, Spain	Provincial Government of Teruel / Diputación Provincial de Teruel	PGT
Cyprus (national level)	Larnaca and Famagusta Districts Development Agency	ANETEL
	Laona Foundation	LAONA
Västra Götaland region	Västra Götaland region	VGR
	University of Uppsala	UU
Vojvodina, Serbia	The Standing Conference of Towns and Municipalities of Serbia (SCTM) / Stalna Konferencija Gradova I Opstina	SCTM
	University of Uppsala	UU
North-East Romania,	Agentia Pentru Dezvoltare Regionala Nord-Est	NERDA
Moldova (national level)	Verde e Moldova	VEM