

TEXTOUR

Social Innovation and **TE**chnologies for sustainable growth through participative cultural **TOUR**ism

WP6 Deliverable D 6.5

Policy recommendations, up-scaling and replication state



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No **101004687**

Contents

1	Technical description	4
1.1	About the project	4
1.2	Document information	5
1.3	Document dissemination level	7
1.4	Document history	7
1.5	Disclaimer	7
1.6	List of abbreviations and acronyms used	8
2	Executive summary	9
2.1	Referenced documents	10
3	Introduction to horizontal and vertical upscaling	12
3.1	Horizontal Upscaling Process	13
3.2	Vertical Upscaling Process	13
3.2.1	Vertical Upscaling: Results of the Survey	14
3.2.1.1	Benefits achieved	14
3.2.1.2	Vertical upscaling main strategies	15
3.2.1.3	Challenges	17
3.2.1.4	Risks	19
3.2.1.5	Pilots' stakeholder landscape	21
3.2.1.6	Stakeholder Engagement Barriers	23
3.2.1.7	Resources	24
3.2.1.8	Cost and revenue structures	26
3.2.2	Evaluation Framework and Upscaling Insights	26
3.2.2.1	Workshop results	26
3.2.2.2	Co-design Method	27
3.2.2.3	Participatory Process	28
3.2.2.4	Business Model Canvas	29
3.2.2.5	Action Definition	30
3.2.2.6	Business Plan and Marketplace	31
3.2.3	Vertical Upscaling recommendations	32

3.2.4	Vertical Upscaling Offerings	34
4	Economic Value Chain in Cultural Tourism	36
5	Exploitation Workshop	41
6	Policy Agenda Recommendations	44
7	References	46
8	Annexes	47

1 Technical description

1.1 About the project

Grant Agreement number	101004687
Project acronym	TExTOUR
Project full title	Social Innovation and TEchnologies for sustainable growth through participative cultural TOURism
Call	SOCIOECONOMIC AND CULTURAL TRANSFORMATIONS IN THE CONTEXT OF THE FOURTH INDUSTRIAL REVOLUTION (H2020-SC6-TRANSFORMATIONS-2018-2019-2020)
Topic	TRANSFORMATIONS-04-2019-2020 Innovative approaches to urban and regional development through cultural tourism
Type of action	Innovation Action (IA)
Lead beneficiary	Fundación Santa María la Real FSMLR
Other beneficiaries	<ul style="list-style-type: none"> ●UNINOVA-INSTITUTO DE DESENVOLVIMENTO DE NOVAS TECNOLOGIAS·ASSOCIACAO UNINOVA ●TECHNOLOGIKO PANEPISTIMIO KYPROU CUT ●FUNDACION CARTIF ●FONDAZIONE LINKS - LEADING INNOVATION & KNOWLEDGE FOR SOCIETY LINKS ●UNIONE REGIONALE DELLE CAMERE DI COMMERCIO, INDUSTRIA, ARTIGIANATO E AGRICOLTURA DELLA LOMBARDIA UCL ●NARVA LINNA ARENDUSE JA OKONOOMIKA AMET NARVA CITY ●NARVA GATE OU

- INSTYTUT EKOLOGII TERENOW UPRZEMYSLOWIONYCH **IETU**
- ARBEITSGEMEINSCHAFT DEUTSCHE FACHWERKSTADTE EV **ADF**
- VAROSKUTATAS (METROPOLITAN RESEARCH INSTITUTE) KFT **MRI**
- NETZ·MEDIEN UND GESELLSCHAFT EV **NETZ**
- ISTRAZIVACKI CENTAR ZA PROSTOR **CSR**
- GAIA-HERITAGE **GAIA**
- CULTURE AND TOURISM DEPARTMENT OF RIVNE REGIONAL STATE ADMINISTRATION**
- COA PARQUE· FUNDACAO PARA A SALVAGUARDA E VALORIZACAO DO VALE DE COA **CÔA PARQUE**
- ALMA MATER STUDIORUM - UNIVERSITA DI BOLOGNA **UNIBO**
- FONDAZIONE **ICONS**

1.2 Document information

Deliverable	WP.6 Deliverable D 6.5
Content	Policy recommendations, upscaling and replication state
Planned delivery date	M45 (2024 / 09 / 30)
Due date of deliverable	M45 (2024 / 09 / 30)
Lead beneficiary	FSMLR
Other beneficiaries	LINKS, MRI, ICONS, UCL, UNIBO, UNINOVA, CUT, CARTIF, NARVA M., IETU, RIVNE
Author (s)	Lucía Delenikas Ifantidis FSMLR

Contributor (s)

Hanna Szemzö **MRI**

Serena Cecere **LINKS**

Matteo Tabasso **LINKS**

Elena Bussolati **UCL**

Charlotte Michi **ICONS**

Nicola Vuolo **ICONS**

UNINOVA

CARTIF

NARVA M.

IETU

RIVNE

UNIBO

1.3 Document dissemination level

Type	Description
PU	Public
CO	Confidential, only for members of the consortium (including the Commission Services)
CI	Classified, as referred to in Commission Decision 2001/844/EC

1.4 Document history

Version	Date	Authors	Description
1	01/06/2024	Delenikas Ifantidis, L. FSMLR	First draft
2			
3			

1.5 Disclaimer

This document is the property of the **TeXTOUR** Consortium.

This document may not be copied, reproduced, or modified in whole or in part for any purpose without written permission from the **TeXTOUR** Coordinator with acceptance of the Project Consortium.

This publication was completed with the support of the European Commission under the Horizon 2020 research and innovation programme. The contents of this publication do not necessarily reflect the Commission's own position. The documents reflect only the author's views, and the Community is not liable for any use that may be made of the information contained therein.

1.6 List of abbreviations and acronyms used

Acronym	Description
CT	Cultural Tourism
CT-Labs	Cultural Tourism Laboratories
DoA	Document of Agreement
EC	European Commission
EU	European Union
FSMLR	Fundación Santa María La Real
GA	Grant Agreement
GDPR	General Data Protection Regulation
IA	Innovation Action
KER	Key Exploitable Result
WP	Work Package

2 Executive summary

The aim of this document is to detail out recommendations for Policy makers derived from the execution of the different WP6 (Exploitation & Upscaling) activities.

Based on the results achieved in previous WP6 – Exploitation & Upscaling - steps, a policy agenda has been drawn up and submitted to the attention of public decision-makers at local, national, and European levels. The development of an economic value chain, generated by cultural attractors and supported by the local entrepreneurial environment, must consider the presence of efficient infrastructure networks on the territory and the measurement of the impacts of the interventions on the local community. Consequently, the agenda is structured on two chapters:

1. Related to economic environmental and social aspects and
2. Dedicated exclusively to sustainability issues specifically focused on cultural sector.

The specific recommendations have been developed through the analysis of a survey, and the upscaling insights derived from such a survey are reported in **Chapter 3.2.1**. Additionally, the framework evaluation and upscaling insights workshop held in Trebinje during Steering Committee IV provided further insights, with the results reported in **Chapter 3.2.2**.

The up-scaling strategy includes both horizontal and vertical scale-up strategies and foresees training activities on alternative funding schemes. All of which is part of D6.3 – Interactive map of Scalable Territories – and further explained in **Chapter 3.1**.

Given the fact that the TExTOUR expected impacts are focused on five main pillars: research, social, economic, environment and sustainability aspects of developing CT, it is only logical that the recommendations for policy making are centred on them too.

CT policies play a pivotal role in the economic and social development of European regions and urban areas. Given the complex nature of intersecting policies and practices in urban and regional areas, original approaches are required to take advantage of the substantial amounts of information that confront policymakers.

To this end, TExTOUR is putting in place CT methodologies and technology on 14 Pilots (9 original ones and 5 new scalable territories). The more that these

methodologies and technology can be deployed, the better use of EU funding and the wider the reach of the project’s influence and positive impact.

We believe that first-hand feedback of the TExTOUR’s strategies deployment can be provided by the different CT-Labs in a collaborative approach, thus allowing for a better fine-tuning and application in potential further CT scenarios.

In that perspective, we collected the recommendations provided by all TExTOUR’s WPs, perform a survey among the Pilots out of their experience in deploying the methodologies and technology and thus provide what we consider fruitful input for decision makers.

To complete the objectives of this document, a specific TExTOUR Value Chain on CT is presented. This CT Value Chain has been developed guided by the generic entrepreneurial model and the one developed by the UNESCO.

Finally, the TExTOUR recommended policy agenda with the experience gathered during the execution of the project is incorporated.

2.1 Referenced documents

Document name	Reference number
TExTOUR – Annex 1 (part A): Description of the Action	Grant Agreement no. 101087596
Report on procedures, tools and strategies used to promote CT development	Deliverable D1.1
Road map for CT development	Deliverable D2.4
TExTOUR recommendation and guidelines for CT development	Deliverable D3.4
TExTOUR smart strategies & CIT requirements	Deliverable D3.5
Report on continuous monitoring and improvements	Deliverable D5.3
Exploitation Plan Validated	Deliverable D6.2
Business Plan Model	Deliverable D6.3
Interactive map of scalable territories	Deliverable D6.4
Report of dissemination events, workshops and webinar	Deliverable D7.7
Policy Recommendations version 1	Deliverable D7.11

Policy Recommendations version 2	Deliverable D7.12
----------------------------------	-------------------

3 Introduction to horizontal and vertical upscaling

Before engaging in the policy recommendation, it is our intent to set clear what types of upscaling we concentrated in during the project.

Horizontal = deploying expertise on new Scalable Territories

Vertical = how to deploy project's expertise long-term AFTER TExTOUR's end

All TExTOUR's Pilots could envision (after the project's timeline) a second phase of implementation of the project's initiatives, strategies, and models, which might include further exploitation of the methodology to improve existing activities. This phase aims to enhance the project's methodologies, strategies and tools within the Pilots and achieve improved results. By building upon the lessons learned and successes of the initial phase, the second phase can leverage the knowledge and experience gained to refine and optimize the project's strategies.

In this second phase of vertical upscaling, the Pilots can focus on identifying areas for improvement within the existing frameworks and activities. They can analyse the strategies' functioning and identify any shortcomings or areas where further enhancements are required. This could involve streamlining processes, increasing efficiency, or addressing any limitations that were encountered during the initial implementation. Additionally, the Pilots can explore the possibility of implementing additional methodologies, tools, and activities that enhance the performance of the strategies in accordance with their necessities.

Further upscaling presents an opportunity to build upon the achievements of the initial phase and drive further progress. It allows for continuous improvement, adaptation to changing circumstances, and the exploration of new possibilities to maximize the project's impact and sustainability.

The next sub-chapters concentrate mostly on vertical upscaling activities and insights gathered during the TExTOUR project.

3.1 Horizontal Upscaling Process

From a dimension point of view, upscaling horizontally in the TExTOUR Project has been performed at an administrative, operational and geographical level. That means that we have increased the number of Pilots (CT-Labs) in different (or new) locations. Thus, we can test and prove the methodologies developed.

In that respect, Task 6.3 - Identification of Scalable Territories and more specifically deliverable D6.4 – Interactive map of scalable territories amply covers the holistic replication process plan put in place to call for, decide, match and include new scalable territories in the TExTOUR environment. While upscaling horizontally usually requires more effort than vertical upscaling, it is easier to scale indefinitely once set up.

3.2 Vertical Upscaling Process

To further utilize the TExTOUR Framework within pilot initiatives after the project's conclusion, vertical upscaling aims to leverage insights, best practices, and lessons learned from project activities. The objective is to enhance and expand these achievements to meet higher standards of performance and impact. To analyze the vertical upscaling process, a **survey** was conducted among the pilot sites (**ANNEX I**), and an **in-person workshop** was held.

- **Vertical upscaling survey:** The survey reflects the 7 methodological steps instrumental to developing the final vertical upscaling framework. The survey covered different aspects, outlined in Figure 1. *The results of the survey and the vertical upscaling insights derived are presented in chapter 3.2.1.*
- **Evaluation Framework and vertical upscaling workshop:** The workshop, held in Trebinje during Steering Committee IV, aimed to derive insights, lessons learned, and recommendations for further upscaling the TExTOUR framework beyond its current boundaries. The analysis focused on assessing the strengths, weaknesses, opportunities, and threats of each part of the TExTOUR Framework associated with horizontal upscaling, providing a comprehensive understanding of how to effectively upscale the framework. *The results of the workshop are presented in Chapter 3.2.2.*

Besides this deliverable (D6.5), thorough documentation has already been gathered around this topic along the TExTOUR project:

- D2.4 - Road map for Cultural Tourism development
- D3.4 - TExTOUR recommendation and guidelines for CT Development
- D3.5 - TExTOUR smart strategies & CIT requirements
- D6.4 - Interactive Map of scalable territories
- D7.11 – Policy Recommendations 1
- D7.12 – Policy Recommendations 2

3.2.1 Vertical Upscaling: Results of the Survey

The survey covered different aspects, instrumental to deriving and developing sound strategies for the vertical upscale of CT activities within pilots. Figure 1 below gives an overview of the main aspects covered by the analysis.

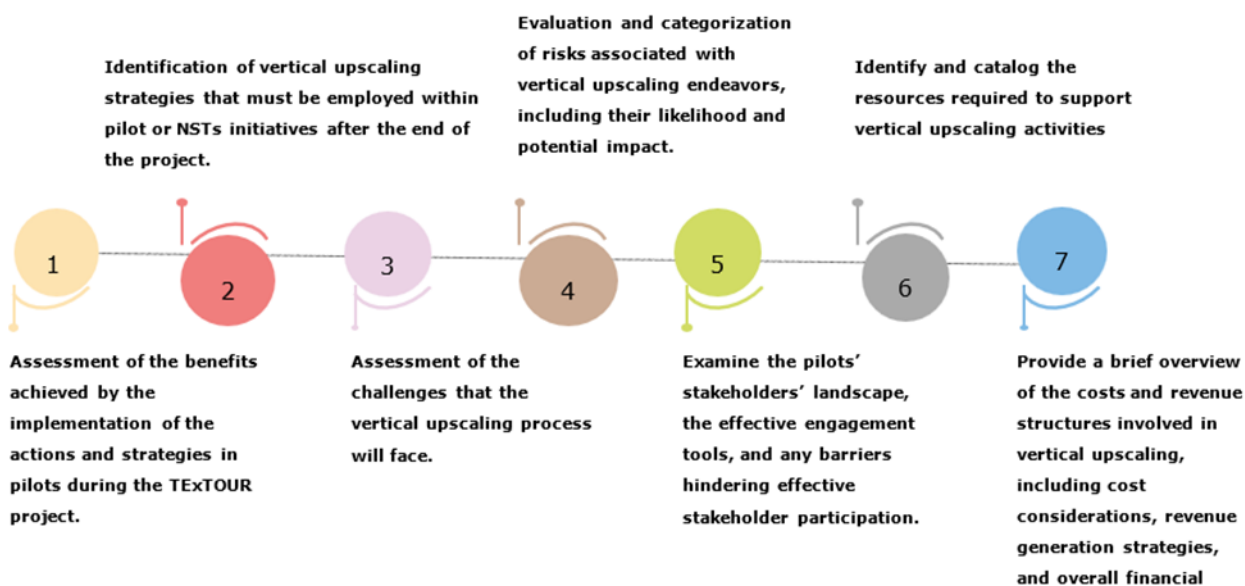


Figure 1- Vertical Upscaling Methodology

3.2.1.1 Benefits achieved

The analysis of pilots’ surveys has highlighted that through the TExTOUR framework, pilots achieved significant social, cultural, and economic benefits. The following table summarizes the benefits achieved by the pilots:

Table 1- TExTOUR Benefits in CT

Social Benefits	Cultural Benefits	Economic Benefits
<p>Increased knowledge of local and regional heritage among residents and stakeholders promoting its preservation.</p>	<p>Increased attractiveness of promotional offers for locals and visitors.</p>	<p>Increased job opportunities within local economic activities related to cultural tourism.</p>
<p>Involvement of children and youth, through the integration of youth-friendly educational offerings</p>	<p>Involvement of organizations in cultural activities, leading to a richer and more diverse cultural scene.</p>	<p>Increased interest in local offerings, resulting in stronger local businesses and economies.</p>
<p>Improved social inclusion, by ensuring that diverse community members participate in and benefit from cultural tourism activities.</p>	<p>Accessibility to culture, ensuring that cultural tourism is inclusive and representative of diverse community interests and backgrounds.</p>	<p>Financial support is received through the participation in the TExTOUR project, which can also enable further development and innovation.</p>
<p>Improved community dialogue and cooperation within communities.</p>	<p>Diversity and increase in cultural tourism events and offerings</p>	<p>Development of local products, improving the region's cultural tourism offerings, and supporting local artisans and producers.</p>
<p>Cooperation within the tourism industry, leading to more integrated and coordinated efforts in developing cultural tourism.</p>	<p>Promotional activities that increased cultural tourism offerings' visibility and attractiveness.</p>	
<p>Increased regional identification, through the highlighting of local architectural heritage and regional uniqueness strengthening people's identification with their heritage and region.</p>		

3.2.1.2 Vertical upscaling main strategies

To sustain and expand TExTOUR framework, vertical upscaling strategies have been identified, describing pilots' future directions for wider adoption. This section outlines

the strategies the pilot sites plan to pursue. The survey results reveal 4 main macro-categories of strategies outlined in the following bullets:

Project Continuation and Expansion

- Extending successful activities to nearby sites can amplify the impact of TExTOUR methodology in a horizontal manner to near regions, expanding the outreach of the project.
- Integration of the TExTOUR methodology and framework in national policies can ensure wider adoption and standardization of successful practices.
- The methodology can be leveraged through the application and initiation of new projects or follow-up projects.
- Continuation, adaptation, and upscale of activities within the pilot sites.

Increasing Visibility and Internationalization

- Increase the activities' visibility with intensive awareness-raising campaigns. This can highlight the benefits and successes of TExTOUR initiatives, attracting more visitors and stakeholders.
- Internationalization with collaboration among project partners can lead to the sharing of best practices and increased tourism flows.
- Development of joint actions with the Cultural Routes Programme, can provide additional visibility and credibility.

Utilization of Technology and Data-Driven Approaches

- Data monitoring can adapt tourism approaches and lead to more targeted and effective strategies.
- Technology implementation can enhance tourism experiences and attract technology-savvy audiences.

Capacity Building

- Increasing events can attract tourists, engage the community, and showcase cultural assets.
- Vocational training can ensure that local stakeholders are equipped with the necessary skills and knowledge, improving service delivery and management.

3.2.1.3 Challenges

Challenges refer to obstacles, difficulties, or complexities that hinder the achievement of desired objectives or results within the TExTOUR project. Unlike risks, challenges are typically known or anticipated factors that require proactive management and strategic approaches to overcome. Identifying and understanding these challenges is essential for effective vertical upscaling planning. To systematically address challenges, two key variables are considered:

Impact → This refers to the extent or magnitude of consequences resulting from the occurrence of a challenge. Impact assessment involves evaluating the potential ramifications of each identified challenge to determine its significance and prioritise mitigation efforts accordingly.

Probability → The likelihood or possibility of a challenge occurring in a given time frame. Understanding the likelihood of challenges allows the prioritization of management efforts by focusing on high-probability challenges that have a higher likelihood of occurrence and a greater potential impact on objectives.

The survey results reveal a spectrum of challenges, classified precisely according to their impact and probability. These findings provide a comprehensive understanding of the obstacles faced by the pilot sites and inform the development of effective strategies to overcome them.

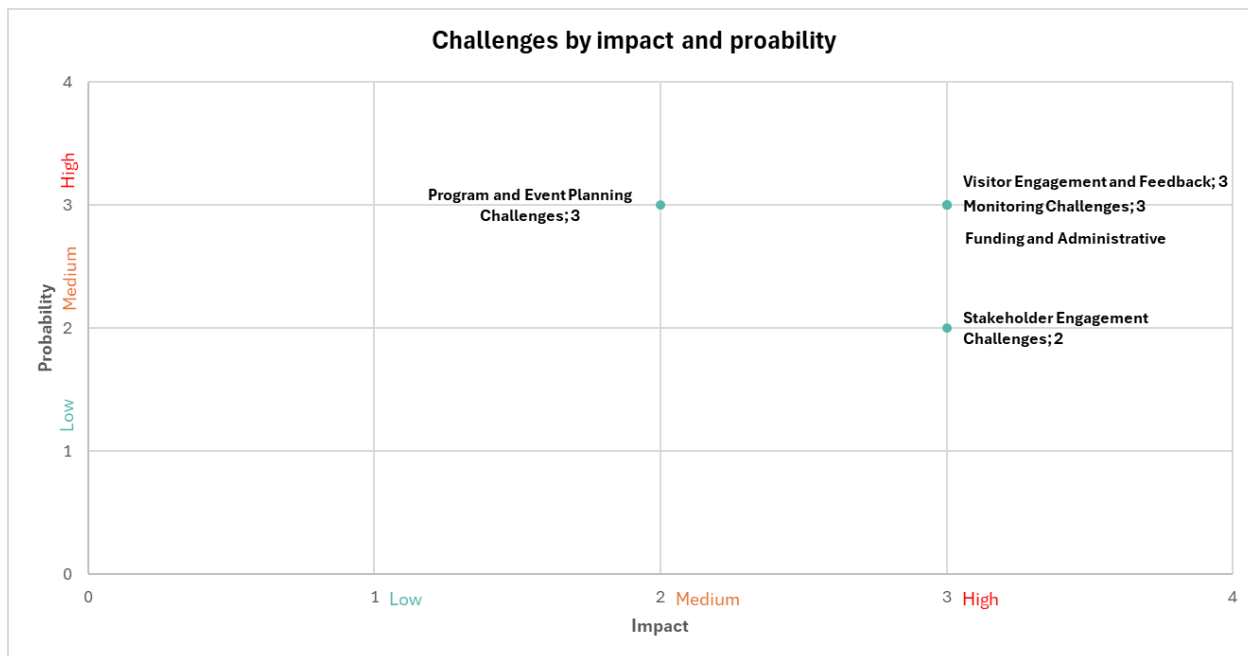


Figure 2- Pilots' Challenges Matrix

High impact, high probability

- Funding and administrative challenges:** Pilot sites should actively apply for funding, incorporate strategies for efficient resource allocation and utilisation, and ensure transparent and efficient use of funds. The simplification of bureaucratic obstacles is essential to maintain momentum and support for cultural tourism initiatives.
- Monitoring challenges:** Effective monitoring is essential for successful vertical upscaling, but it presents significant challenges. Problems include the need for regular monitoring periods, updating of data, and the lack of a shared data collection system in cross-border areas. To solve these problems, pilot sites should improve and plan the processes for the collection of key performance indicators (KPIs) and establish standardised monitoring protocols.
- Visitor engagement and feedback:** Involving visitors and collecting feedback is crucial for improving cultural tourism offers. Challenges in this area include the need for more interactive engagement tools, better investment in

data-driven decision-making, and effective feedback mechanisms. These elements are key to informing decision-making and prioritising initiatives that resonate with visitors.

High impact, medium probability

- **Stakeholder engagement challenges:** The involvement of key stakeholders is essential for the success of cultural tourism projects. Challenges include maintaining stakeholder interest and motivation and organising regular meetings. Pilot sites must ensure the involvement of key stakeholders and create structures that stimulate and support their motivation and active participation.

High impact, low probability

- **Capacity building and skill enhancement challenges:** Although they are less likely to occur, capacity development and skills enhancement challenges have a significant impact. Addressing them requires specialized training programs aimed at improving the skills and knowledge of the local community. Through building local capacity, pilot sites can ensure the long-term sustainability and effectiveness of cultural tourism initiatives.

Medium impact, high probability

- **Program and event planning challenges:** These challenges relate to ensuring the universality of actions and planning multiple on-site events that mix different pilot projects. High cultural tourism competition further complicates the issue. To mitigate these challenges, pilot sites should focus on creating unique and compelling programs that stand out in the competitive cultural tourism landscape.

3.2.1.4 Risks

Risks, unlike challenges, involve uncertain events or conditions that could negatively impact the attainment of objectives or desired outcomes. Identifying and mitigating these risks is crucial for the successful implementation of vertical upscaling strategies.

To assess the risks associated with vertical upscaling, the following two variables are considered:

Mitigation potential: This refers to the rate of obstacles encountered in effectively addressing or reducing the impact of the risks identified during upscaling activities. The level of mitigation potential indicates how easy it is to develop and implement strategies to effectively mitigate the identified risks.

Impact: This refers to the extent or magnitude of consequences resulting from the occurrence of a risk during the implementation of tourism actions. The impact assessment evaluates the severity and extent of the consequences associated with each identified risk.

The identified risks are categorized according to impact and mitigation potential, in the following graph:

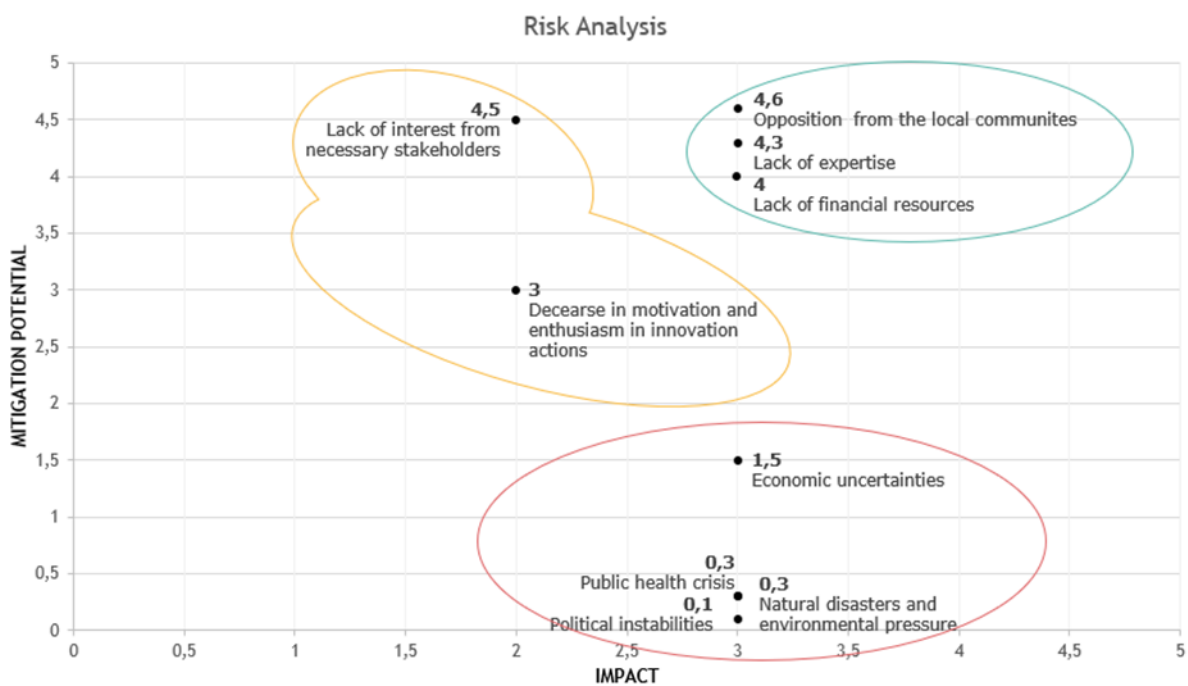


Figure 3- Pilots' Risks Matrix

Proper weight should be given to risks belonging to the **red cluster**, i.e. those with **low to medium mitigation potential**:

- **Economic uncertainties** can impact investment and visitor purchasing power, leading to a slowdown in tourism activities. Maintaining a diversified portfolio of revenue streams can cushion economic downturns.

- **Political instabilities** can affect regulations, investments, and stakeholder confidence, leading to activities’ cancellations and financial losses.
- **Public health crises:** Health crises, such as pandemics, can cause significant disruptions to tourism activities. Comprehensive health and safety measures must be implemented to protect visitors and staff. Developing flexible operational plans that can adapt to changes in health regulations is essential to minimize disruptions.
- **Natural disasters and environmental pressure:** These hazards can cause extensive damage to cultural heritage sites and infrastructure, severely hampering tourism activities.

3.2.1.5 Pilots’ stakeholder landscape

Understanding the importance and the impact of the various stakeholders drive the implementation and upscaling of cultural tourism initiatives. The graph below ranks stakeholders by their importance, from most to least:

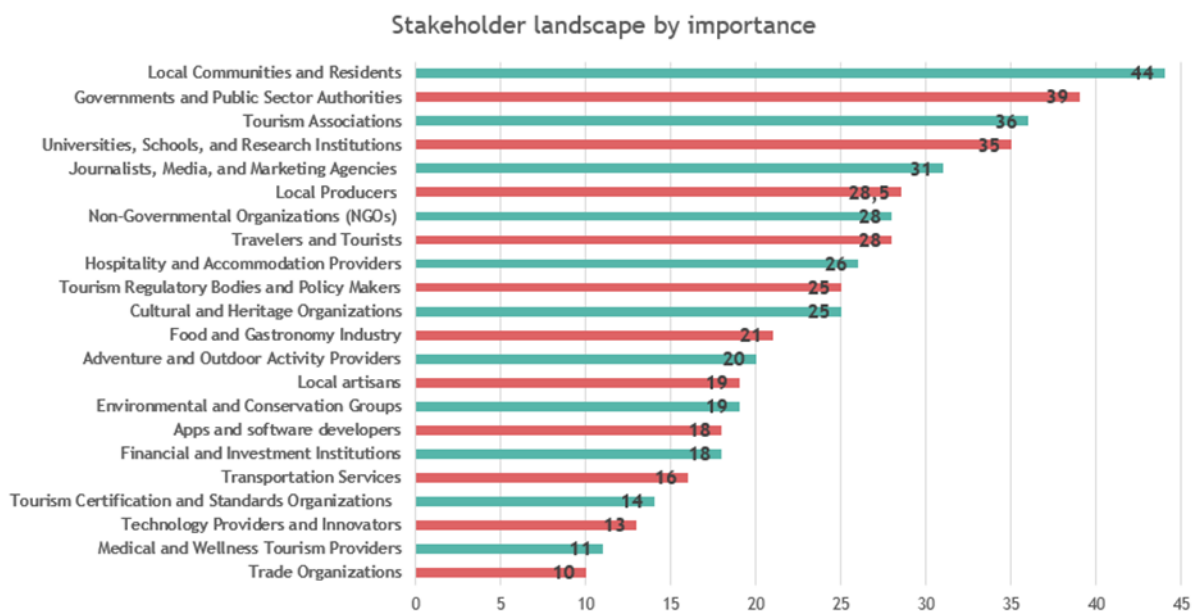


Figure 4- Pilots' Stakeholder Landscape

The numbers on the horizontal bars indicate the total scores assigned to the corresponding stakeholders in terms of their importance.

Recognizing the different roles and contributions of stakeholders allows for tailored approaches that align with their specific functions, fostering collaboration and achievement of project goals.

Stakeholders have been grouped and assigned specific roles based on their functions within the cultural tourism ecosystem.

Tourism service providers and local producers

This group includes medical and wellness tourism providers, local artisans, local producers, the food and gastronomy industry, adventure and outdoor activity providers, transportation services, hospitality and accommodation providers.

o **Role:** These actors are *service providers*. They provide the experiences abiding the culture of the destination and play a fundamental role in enriching the touristic offer. From local artisans preserving traditional crafts to hospitality providers offering authentic local experiences, each stakeholder contributes to the tourist ecosystem.

Technology and Research- related stakeholders

This group includes technology providers and innovators, apps and software developers, universities, schools, and research institutions.

o **Role:** These players are *technology and research providers*; they contribute with the provision of digital tools and innovative technologies enhancing the touristic experience and improving destination management and promotion. Their involvement is essential to implementing cutting-edge solutions that modernize cultural tourism activities and make them more accessible and engaging for a global audience.

Tourism certification bodies and regulatory authorities

This group consists of tourism certification and standards organization, tourism regulatory bodies and policy makers.

o **Role:** These entities are *enablers* and ensure that tourism activities meet industry standards for quality, safety, and sustainability. Due to their establishment and enforcement of standards, they help maintain the integrity of cultural tourism

initiatives, ensuring that they conform to best practices and contribute positively to the local and regional economy.

Environmental and conservation groups

This group’s members focus on the protection and conservation of the destination's natural and cultural environment.

- o **Role:** These stakeholders are *supporters* and can help preserving natural and cultural resources for future generations by balancing tourism growth with environmental protection.

Journalists, media, and marketing agencies

This group includes professionals responsible for project promotion and communication.

- o **Role:** Such stakeholders are *supporters*. Effective marketing and media strategies help attract visitors, enhance the destination's visibility, and support the upscaling process.

3.2.1.6 Stakeholder Engagement Barriers

Effective stakeholder engagement emerged as a fundamental element for upscaling TExTOUR framework, as it ensures collaboration, support, and sharing of project goals. However, some barriers may hinder the success of the strategies, these include:

Table 2- Stakeholder engagement barriers

Attitudinal barriers	Logistical barriers	Incentive-related barriers
<ul style="list-style-type: none"> • Lack of interest • Perception of high engagement effort • Previous negative experiences or perceptions • Conflicting interests, goals, or opinions 	<ul style="list-style-type: none"> • Lack of time • Language barriers • Limited access to or familiarity with technology platforms • Challenges in coordinating logistics for remote or dispersed stakeholders 	<ul style="list-style-type: none"> • Lack of economic incentive • Impact of the pandemic • Perception of an imbalance between effort and potential benefit • Economic constraints

To effectively engage stakeholders, different approaches have emerged as useful tools, here is a list of examples:

- **Consultation tables** and **focus groups** are also effective tools for gathering feedback and input from the community. The creation of consultation tables allows for open and constructive dialogue to address concerns and explore new ideas. Forming focus groups with key stakeholders provides a platform to delve into specific project-related topics, ensuring deeper understanding and consideration of different perspectives.
- **In presence** and **online workshops** would directly involve stakeholders in decision-making, facilitating hands-on activities and discussions that encourage participation and collaboration. These sessions not only engage stakeholders but also provide valuable opportunities for skill development and knowledge sharing.
- **Results-oriented communication**, utilizing active formats like presentations, demonstrations, and interactive displays, effectively conveys outcomes.
- **Regularity** of **meetings** with the **community** to maintain ongoing engagement and communication. Rotating meeting locations helps to reach a diverse audience and meet the various needs of the community.

3.2.1.7 Resources

The success of the vertical upscaling of TExTOUR in the pilot sites depends on the strategic acquisition and effective use of various resources. In fact, resources refer to the assets, inputs, and supports needed to effectively develop, implement, and upscale cultural tourism activities. These resources can be tangible, such as financial capital and physical infrastructure, or intangible, such as skills, community involvement, and regulatory support. Thanks to their understanding and classification, it is possible to address potential challenges and optimize the impact of future actions. To assess the resources landscape two variables are considered: -

- **Attainability** assesses the feasibility of acquiring the necessary resources for developing and scaling up tourism actions. This evaluation helps identify potential obstacles or challenges in acquiring resources.
- **Importance** measures the value of resources in supporting the development and increase of tourism actions. Prioritizing resources according to their importance ensures that essential needs are met effectively.

Based on the survey results, resources were classified into 4 clusters according to their attainability and importance:



Figure 5- Pilots' Resource Priority Matrix

Of strategic importance are the resources positioned within the **red circle**:

- **Technology and innovation:** Integrating advanced technologies and promoting innovation can significantly enhance cultural tourism initiatives. However, moderate reachability and importance suggest that while beneficial, these resources may require focused efforts to be acquired and used effectively.
- **Infrastructure and facilities:** Physical infrastructure and facilities support the practical aspects of tourism activities. Their moderate accessibility and importance indicate a balanced need, requiring strategic investments to develop and maintain essential infrastructure.

- **Regulatory support and policies:** Supportive regulatory frameworks and policies facilitate the implementation and scalability of tourism initiatives. These resources are moderately attainable and important, highlighting the need for ongoing advocacy and policy development.

3.2.1.8 Cost and revenue structures

The financial dynamics of vertical upscaling of the TExTOUR framework involve a complex interplay of various cost factors and revenue streams. Understanding these elements is critical for effective planning and sustainable development. Figure 6 below outlines the cost and revenue structure underlying the expansion and upscaling of cultural tourism activities within TExTOUR’s pilot sites. The cost structure includes all financial outlays required to implement and sustain cultural tourism initiatives, while the revenue structure refers to the various sources of income that fund these activities.

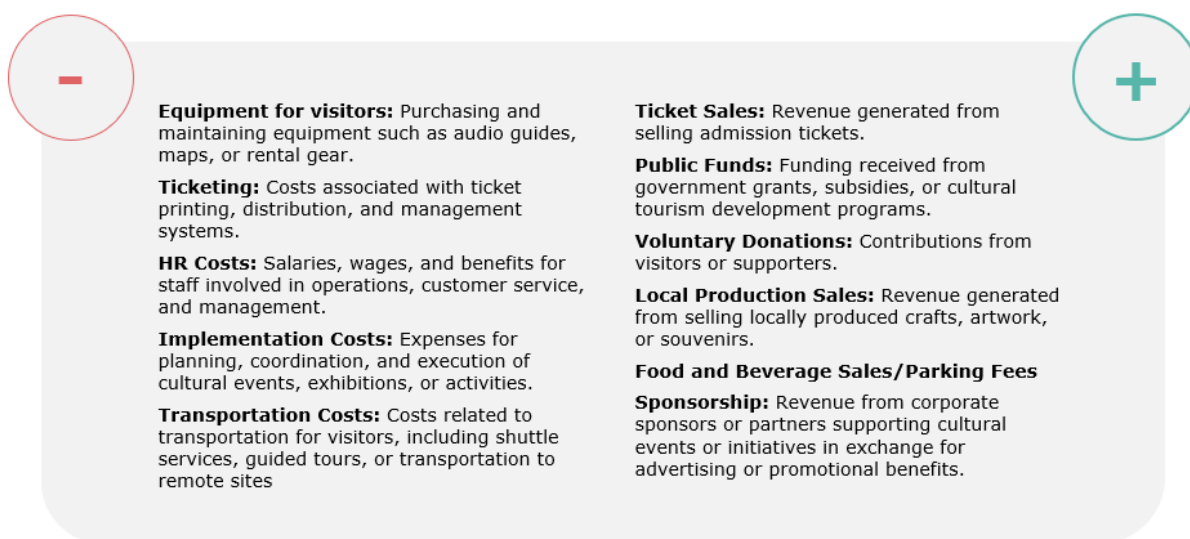


Figure 6- Cost and Revenue Structure

3.2.2 Evaluation Framework and Upscaling Insights

3.2.2.1 Workshop results

To derive insights, lessons learned and recommendations for further upscaling the TExTOUR framework outside its boundaries in a vertical perspective, an analysis of the framework was carried out to assess the strengths, weaknesses, opportunities, and threats that can emerge in the vertical upscaling of the framework.

This methodological approach gives the possibility to understand what the main points are to be addressed when applying and upscaling TExTOUR’s methodologies, methods and approaches after its end.

The analysis covers information retrieved from project’s partners, who contributed with their experiences and expertise throughout the project. The analysis covers the following 5 main pillars of the project:

- 1- Co-design method
- 2- Participatory process
- 3- Business model Canvas methodology
- 4- Actions definition
- 5- Business Plan and Marketplace

The next sub-tables summarise the main insights for each pillar.

3.2.2.2 Co-design Method

Table 3- Co-design Methodology SWOT Analysis

Strengths	Weaknesses
<p>Increased sense of ownership and engagement: active involvement in the design process fosters a sense of ownership and engagement among participants, supporting trust and cohesion. This commitment leads to more sustainable outcomes and stronger community support.</p> <p>Enhanced collaboration and networking among different stakeholders: local communities benefit from long-term stakeholder activity and established networks, which provide a strong foundation for collaboration, trust, and efficient resource utilization.</p> <p>Exchange of knowledge between stakeholders leading to enhanced skills and expertise:</p>	<p>Theoretical approach: The process tends to be theoretical, which can hinder practical application and progress. The benefits can be evident only in the long-term</p> <p>Diversity of stakeholders and opinions: Involving stakeholders from diverse backgrounds and managing differing opinions is challenging. Not all participants have the necessary skills or resources to fully contribute, and translating co-designed solutions into real-world implementations can be complex</p> <p>Geo-political factors: Geo-political instability, including the impact of war, poses significant threats to project continuity and stakeholder engagement. Political support is often unpredictable and inconsistent.</p>
Opportunities	Threats
<p>New business opportunities: The method encourages innovation and entrepreneurship while utilizing existing structures, fostering continuity and economic growth.</p> <p>Increased professional skills: The systemic approach of the method</p>	<p>Absence of shared visions: the method, by involving different stakeholders, can lead to an incoherent or fragmented strategy. This can result in disagreements among key actors, complicating coordination and resource allocation.</p>

enhances professionalism and visibility attracting more participants and resources, while sustainable tourism initiatives boost the local economy and attract tourists.

Bottom-Up Approach: Through the co-design method, pilots benefit from involving diverse participants, adopting bottom-up approaches, and leveraging local support to ensure acceptance and sustainability.

Absence of regular and regulated participation: without the structure of a formal project like TExTOUR, the management, organization and regular participation of local stakeholders might be challenging.

Unrealistic expectations: The method, by involving different stakeholders, can lead to setting expectations too high. This includes the challenge of incorporating many visions and ideas, which may result in potential disengagement if these expectations are not met.

3.2.2.3 Participatory Process

Table 4- Participatory Process SWOT Analysis

Strengths	Weaknesses
<p>Local involvement, social cohesion, and trust: The participatory process fosters social cohesion and trust by ensuring active community participation, including young people. This engagement builds community interest, promoting a strong sense of ownership and trust.</p> <p>Development and Innovation: The participatory process boosts development and innovation by encouraging mutual support in marketing projects and leveraging the youth's desire for change and confidence to attract business.</p> <p>Networking with different actors: The participatory process facilitates strong networking with different actors, including highly engaged regional stakeholders, fostering collaboration and enhancing the project's overall impact.</p>	<p>Internal management and implementation: The participatory process requires strong internal management and implementation. These include slow and resource-intensive processes that are time- and energy-consuming. The long delay between participation and visible results often leads to perceptions of ineffectiveness.</p> <p>Representation and engagement: The participatory process may face challenges in ensuring equitable representation, risking the marginalization of certain voices. Motivating participants and securing regular engagement is fundamental.</p> <p>Political support and external factors: The participatory process is vulnerable to factors like war, impacting its stability and continuity.</p>
Opportunities	Threats
<p>Addressing complex challenges through a flexible process: The participatory process excels in addressing complex challenges more effectively due to its flexibility and adaptability. The method can quickly adjust to new information, changing circumstances, and evolving needs by involving diverse stakeholders.</p> <p>Population commitment: The participatory process encourages private</p>	<p>Participation and Engagement: The participatory process faces threats such as language barriers and diminished individual significance in large study areas. Inconsistent participation and the need for regulated involvement, unstable political situations are threats to the success of the process.</p> <p>Methodological and Operational Challenges: The participatory process can</p>

commitment from the community, creating synergies among people and projects. This collective effort enhances overall support ensuring that initiatives are well-received and sustained by the local population.

Scalability and acceptance: The participatory process offers substantial scalability, enabling its expansion and replication in different contexts. It acts as a vehicle for sustainable development, promoting long-term, positive impacts on both the community and the environment.

face methodological and operational challenges, such as paralysis or competition among stakeholders. Difficulty in understanding the methodology can hinder effective participation.

Legitimacy and Representation: The participatory process faces legitimacy and representation issues when privileged stakeholders dominate and less competent individuals demand input. This can undermine the process's effectiveness and fairness.

3.2.2.4 Business Model Canvas

Table 5- Business Model Canvas SWOT Analysis

Strengths	Weaknesses
<p>Visual and Flexible Framework: The Business Model Canvas stands out due to its simple and visual framework, which makes understanding complex business concepts more accessible. This flexibility allows it to be adapted to a wide range of activities.</p> <p>Collaboration and Learning: The Business Model Canvas is a collaborative tool that enhances teamwork and collective learning among participants. It allows stakeholders to work together effectively, facilitating a shared understanding of business concepts and strategies.</p> <p>Strategic and Operational Advantages: The Business Model Canvas offers strategic and operational advantages by building on existing events and actions and providing a strong structure. It enables foresight into local stakeholder responses and supports the development of robust business models for project sustainability.</p>	<p>Details and Interpretation: The Business Model Canvas has limitations in detail, often failing to capture ongoing changes or dynamics. Additionally, interpretation can vary among users, leading to potential misunderstandings and inconsistencies in its application.</p> <p>Funding and Resource Constraints: The Business Model Canvas faces challenges due to funding shortages, lack of qualified human resources, difficulty in data collection, and poorly estimated budgets, particularly in regions with weak tourism.</p> <p>Community Involvement Challenges: The Business Model Canvas faces challenges in community involvement, including difficulty engaging members from diverse social backgrounds and a lack of knowledge among workshop participants.</p>
Opportunities	Threats
<p>Understanding and Planning: The Business Model Canvas fosters innovation and a deeper understanding by addressing the needs of target groups. It acts as a catalyst for innovative solutions and better strategic planning.</p> <p>Heritage and Regional Development: The canvas aids in the valorization and promotion of unique heritage, reinforcing regional commitment. It helps define new</p>	<p>Financial and Resource Constraints: The Business Model Canvas faces significant threats from financial and resource constraints, including the challenge of finding additional funding and responsible persons to manage activities. Securing ongoing financial support and attracting interest from investors can be difficult.</p> <p>Language barriers and political instability: The effectiveness and</p>

<p>indicators for regional development and improves planning for cultural heritage conservation.</p> <p>Leverage for income and financing funds: The Business Model Canvas provides access to a wealth of information on funding opportunities. It supports the increasing number of funding sources and the creation of new income streams, enhancing financial sustainability.</p>	<p>sustainability of the Business Model Canvas are also threatened by language barriers and political instability. These factors can disrupt communication and collaboration among stakeholders, leading to delays and potential failures in the implementation of the model.</p>
---	---

3.2.2.5 Action Definition

Table 6- Actions Definition SWOT Analysis

Strengths	Weaknesses
<p>Goal setting and performance management: The co-design process provides clarity in defining objectives, actions, and responsibilities. This alignment helps focus efforts on priority areas and enables effective progress tracking and performance evaluation.</p> <p>Focus on community needs and heritage: The method emphasizes community needs and heritage, ensuring actions are designed with local stakeholders and tailored to the local context. This fosters strong community participation and commitment.</p> <p>Knowledge sharing and collective learning: The co-design process promotes knowledge sharing and collective learning through a bottom-up approach. It clarifies project objectives and resources, fostering a collaborative environment that enhances participant understanding and engagement.</p>	<p>Stakeholder involvement and competing interests: The process can suffer from scarce involvement in deploying actions and competition among stakeholders, which can hinder collaboration and effective implementation.</p> <p>Complexity and resource limitations: The process can be overly complex and challenging due to limited resources and knowledge. Finding additional budgets and resources to implement actions is often difficult, further complicating the execution.</p> <p>Implementation and Consistency Challenges: There can be diverse views on tourism development, leading to inconsistencies in action implementation. Additionally, some theoretical and methodological elements may prove impractical and not implementable in real-world scenarios.</p>
Opportunities	Threats
<p>Continuous improvement and innovation: The actions definition method supports continuous improvement based on feedback and results. This iterative approach helps in identifying innovative solutions and approaches, ensuring the process evolves and adapts to new challenges and opportunities.</p> <p>Stakeholder integration and networking: The method facilitates the integration of new stakeholders and the development of a comprehensive network of</p>	<p>Organizational and operational challenges: Misunderstandings, duplication of efforts, or conflicts among stakeholders can arise, and there is a risk of focusing too much on short-term actions and goals. Defining extensive and difficult actions over a large region can be problematic, as it is challenging to limit the area of activity. Bureaucracy can also act as a significant barrier, hindering smooth implementation.</p> <p>Stakeholder engagement continuity: There may be a lack of interest from</p>

all actors involved. This broad stakeholder engagement enhances the overall impact and effectiveness of the actions, allowing for diverse perspectives and resources at disposal.

Community and tourism development: *The actions definition method promotes community and tourism development by offering an integrated tourist offer and promotion. Additionally, it creates new, interesting products for cultural and touristic offers, leveraging opportunities for young people and those in rural areas to contribute to and benefit from these initiatives.*

stakeholders once the project ends, and insufficient political will to support actions in the future. Additionally, a lack of interest among key local partners can further undermine the sustainability and effectiveness of the initiatives.

Economic resources and political instability/will: *Limited timeframes and the challenge of financing additional actions can hinder progress. A lack of economic resources for future implementation threatens the long-term viability of the actions, making it difficult to sustain momentum and achieve desired outcomes.*

3.2.2.6 Business Plan and Marketplace

Table 7- Business Plan and Market Place SWOT Analysis

Strengths	Weaknesses
<p>Sustainability and future-oriented: <i>The methodology emphasizes sustainability and future-orientation by leveraging existing structures, activities, and ideas for future use. It facilitates the easy implementation of low-budget activities, making it a practical tool for good planning. Additionally, it provides clear guidelines for scaling up actions, ensuring long-term viability and growth.</i></p> <p>Strategic Planning and Adaptability: <i>This methodology excels in strategic planning and adaptability. It offers clear goals, objectives, and actions, which help in identifying and mitigating potential risks. Effective resource allocation ensures that efforts are focused where they are most needed, while its flexibility allows for adaptation to changing market conditions, enhancing resilience and responsiveness.</i></p> <p>Replicability and cross-border application: <i>The methodology supports replicability and cross-border applications. It benefits from a cross-border network and support, enabling projects to extend their reach and impact beyond local boundaries. This fosters international collaboration and the sharing of best practices, enhancing the overall effectiveness and scalability of initiatives.</i></p>	<p>Practicality and Design Issues: <i>The methodology can be seen as more theoretical than practical, making it challenging to apply in real-world scenarios. Additionally, the plans can be perceived as too long and not well-designed for local actors, limiting their usability and effectiveness at the community level.</i></p> <p>Resource and Time Constraints: <i>The methodology can be time-consuming and resource-intensive, requiring significant investment of time and resources to implement effectively. There is often a need for further economic resources to support these initiatives, which can be challenging to secure, particularly in resource-limited settings.</i></p> <p>Economic and Service Sector Issues: <i>Several economic and service sector issues can hinder the effectiveness of this methodology. The deteriorating state of the service sector and inflation can negatively impact the implementation of planned actions. Moreover, some actions may not be economically oriented, reducing their potential impact and sustainability.</i></p>

Opportunities	Threats
<p>Scalability and long-term impact: <i>The methodology offers scalability for actions, that can lead to long-term economic and social benefits, particularly in rural areas. Additionally, the methodology encourages more young people to engage with actions, fostering generational involvement and sustainable growth.</i></p> <p>Market and collaborative growth: <i>Opportunities for market expansion, diversification, and growth are significant. The methodology fosters partnerships and collaborations with other organizations, enhancing overall impact and reach.</i></p> <p>Cross-border and digital opportunities: <i>Supporting both analog and digital options for cross-border cooperation, the methodology can increase local tourism by promoting shorter travel distances and the use of local products, fostering regional integration and mutual benefits.</i></p>	<p>Strategic and capacity planning: <i>The methodology faces threats from the lack of a strategic regional tourism plan, risk of destination saturation, and reduced carrying capacity. These factors can limit the effectiveness and sustainability of tourism initiatives.</i></p> <p>Regulatory and compliance issues: <i>Changes in regulations or government policies can pose compliance challenges and increase operational costs, threatening the smooth implementation of the methodology.</i></p> <p>Human resources and migration: <i>The search for responsible persons to manage future actions and the migration from rural regions present significant threats. These challenges can undermine the continuity, effectiveness and upscale of the actions.</i></p>

3.2.3 Vertical Upscaling recommendations

The aggregated analysis of the survey results, combined with insights from the workshop held to evaluate the TExTOUR framework and its up-scaling potential, has yielded a set of key recommendations. These insights are instrumental in ensuring the long-term sustainability and enhanced impact of the TExTOUR framework. The following list summarizes the main insights found:

1. Objective: Continuous Improvement and Innovation

- *Feedback Integration: Continuously gather and integrate feedback from stakeholders to refine and improve strategies and methodologies.*
- *Innovative Approaches: Identify and implement innovative solutions that can address emerging challenges and opportunities, ensuring the framework remains relevant and effective.*

2. Objective: Strategic Planning and Adaptability

- *Clear Goals and Objectives: Maintain clarity in defining goals, objectives, and actions to ensure alignment among team members and stakeholders.*

- *Risk Mitigation*: Proactively identify and mitigate potential risks through strategic planning and effective resource allocation.
- *Flexible Adaptation*: Keep using the flexible tools developed within the TExTOUR project, such as the co-design method, the participatory process, and the action definition process. These can adapt to changing market conditions and stakeholder needs.

3. Objective: Leveraging Community and Tourism Development

- *Local Engagement*: Continue to focus on community needs and heritage, ensuring actions are designed with local stakeholders and tailored to the local context.
- *Tourism Initiatives*: Promote integrated tourist offers and develop new, interesting cultural and touristic products to attract and engage both young people and the broader community.

4. Objective: Strengthening Stakeholder Integration and Networking

- *Broaden Stakeholder Base*: Integrate new stakeholders and expand the network of actors involved in the project, enhancing overall impact and effectiveness.
- *Collaborative Efforts*: Foster collaborations and partnerships with other organizations to share best practices and resources, promoting a more cohesive and supportive environment.

5. Objective: Enhancing Sustainability and Future-Oriented Planning

- *Leverage Existing Structures*: Utilize existing structures, activities, and ideas to facilitate easy implementation and ensure long-term viability.
- *Scalability*: Develop clear guidelines for scaling up actions, focusing on the long-term economic and social benefits for rural areas and other target regions.

6. Objective: Addressing Economic and Resource Constraints

- *Securing Funding*: Actively seek additional funding sources and responsible individuals to manage future actions and initiatives.
- *Resource Management*: Efficiently allocate resources and find ways to minimize costs without compromising the quality and impact of the projects.

7. Objective: Overcoming Regulatory and Compliance Challenges

- *Policy Adaptation:* Stay informed about changes in regulations or government policies and adapt strategies accordingly to maintain compliance and reduce operational costs.
- *Advocacy and Policy Development:* Engage in ongoing advocacy to develop supportive regulatory frameworks and policies that facilitate the implementation and scalability of tourism initiatives.

8. Objective: Mitigating Human Resources and Migration Issues

- *Retain Talent:* Implement strategies to retain skilled personnel and prevent migration from rural regions, ensuring a stable and capable workforce.
- *Capacity Building:* Invest in vocational training and capacity-building programs to enhance the skills and knowledge of local stakeholders, improving service delivery and project management.

3.2.4 Vertical Upscaling Offerings

- Process material and Process Templates

All TExTOUR Project “Public” Documentation have been made available to Scalable Territories long-term. Furthermore, an overview of the TExTOUR main concepts and all further material required to perform the TExTOUR methodological process are shared.

To achieve this, a special repository has been created for them in the TExTOUR SharePoint: [TExTOUR New Scalable Territories](#)

[TExTOUR Interesting information](#)

[TExTOUR Training Material](#)

[TExTOUR Templates](#)

- Knowledge-Transfer

To increase the new Scalable Territories understanding of the TExTOUR methodology, a set of training materials with the most important concepts have been made available, in some cases accompanied by explanatory webinars covering the following topics:

- Definition of KPI and their related values
- Co-creation / co-participation process
- Strategies and actions
- Access and offerings of the TExTOUR Platform
- Monitoring and measuring
- Ethic issues to consider

- **Visibility & Community networking offerings**

Additional help has been provided by the matching assigned CT-Labs. Bi-lateral meetings can be held as required with the WP Leaders. Great visibility through the project website and other TExTOUR dissemination activities.

Furthermore, Scalable Territories were invited to the online Pilot Forum sessions and the TExTOUR Monthly Meetings. Lastly, we have invited two of the Scalable Territories to participate in the final event of the project.

4 Economic Value Chain in Cultural Tourism

To build a comprehensive CT Value Chain, within TExTOUR we decided to look to the broader picture to try and understand all aspects: economic, social, environmental, and obviously cultural. Hence, we started with the standard entrepreneurial Value Chain Model, we then continued understanding the links between the Harvard Model (described below) the one developed by UNESCO and the different documents about circular economy developed by the UNTWO (<https://www.unwto.org/sustainable-development/circular-economy>). Once having collected all the expertise about the topic, and with the experience built during the TExTOUR project, we humbly present our view of a CT Value Chain.

According to Kaplinsky and Morris (2000), value chains can be defined as "the full range of activities which are required to bring a product or service from conception, production, delivery to final consumers, and final disposal". Furthermore, Harvard Business School professor Michael Porter has developed a Value Chain Model has become a normal practice in every day entrepreneurial life. It helps businesses evaluate their activities to improve their competitive advantage. The value chain analysis will also help determine costs, find activities adding the most value, outshine competitors, and improve the value of what is delivered to customers in general.

Every business should perform this analysis at some point by:

1. Defining the business’s primary activities.
2. Defining the business’s support activities.
3. Analysing the cost and value of each.
4. Discovering opportunities that allow you to gain a competitive advantage.

VALUE CHAIN						Margin / Benefits
Primary Activities	Internal Logistics	External Logistics	Operations	Marketing & Sales	Services	
Support Activities	Purchasing (Products or Services) Tecnology development (R+D, product design, etc.) HHRR (Selection, training, mobility, etc-) Infrastructure (Planning, funding, etc.)					

Figure 7 – Example of a Porter’s Value Chain Model

In line with the above, creative value chains start by an initial creative idea combined with other inputs to produce some cultural outcome, which goes through a series of stages before to finally arrive to a final consumer. Within this type of value chain analysis, not only the relevant activities but also actors have a vital role in the creation, production, dissemination, exhibition and preservation of the creative product or service. Both the product /service and the interrelation between those actors should be analysed.

However, in the case of the CT sector, the concept of (economic) value creation might not always be as straightforward. Cultural value chains therefore can have a different shape and behaviour than that of a production-based industry.

As derived from the excellent work of the EC around *Mapping the creative value chains* (2017), UNESCO developed in 2009 the concept of "culture cycle" to refer to the process of value creation in culture. This concept includes the following activities:

- **Creation:** the origination and authoring of ideas and content.
- **Production:** the making of cultural works, whether as one-off productions (e.g. crafts, paintings, sculptures) or as mass reproducible cultural forms (e.g. books, movies, TV programmes), as well as the manufacture of goods required to produce cultural works.
- **Dissemination:** the distribution of cultural products to consumer and exhibitors.
- **Exhibition/reception:** provisions of live and/or unmediated experiences to audiences through granting or selling restricted access to consume/participate in often time-based cultural activities (e.g. play, concerts, museum and gallery exhibitions, festivals).
- **Consumption/participation:** the activities of audiences and participants in consuming cultural products and taking part in cultural activities and experiences.

In addition to these five activities, UNESCO also defined three transversal domains – known as ancillary goods and services - that are not part of the culture cycle, but nevertheless play a key role in its different stages as they are "contributory processes

that enable the culture to be created, distributed, received, used, critiqued, understood and preserved”¹:

- Education and training
- Archiving and preservation
- Equipment and supporting materials

While the ancillary goods and services are not directly associated with cultural content, they help the creation, production, dissemination, or exhibition of cultural works (e.g. music instruments, electronic devices such as e-readers).

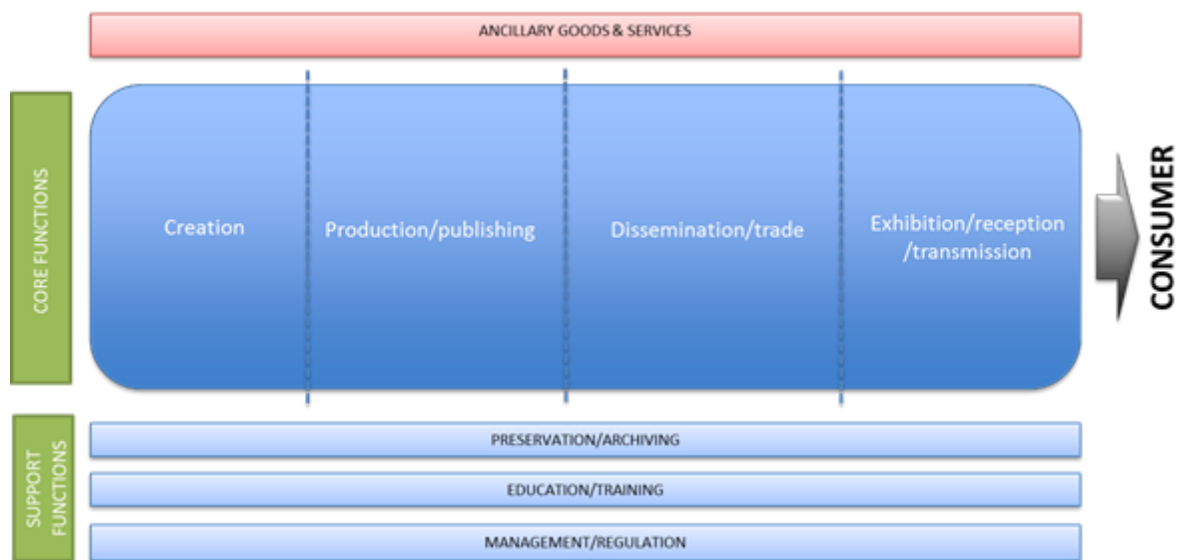


Figure 8 - Stylised Creative value chain model / Source *Mapping the creative value chains* (2017)

Applying the concept of a value chain to CT involves understanding and analysing the various stages and activities that contribute to the creation, delivery, and consumption of CT products and experiences.

Based on Figure 8 and our own experience in the development of the TExTOUR solution, we have taken the liberty of creating the TExTOUR Value Chain model by incorporating several features (highlighted in darker blue in Figure 9 below):

¹ See p.19. UNESCO FCS <http://www.uis.unesco.org/culture/Documents/framework-cultural-statistics-culture-2009-en.pdf>

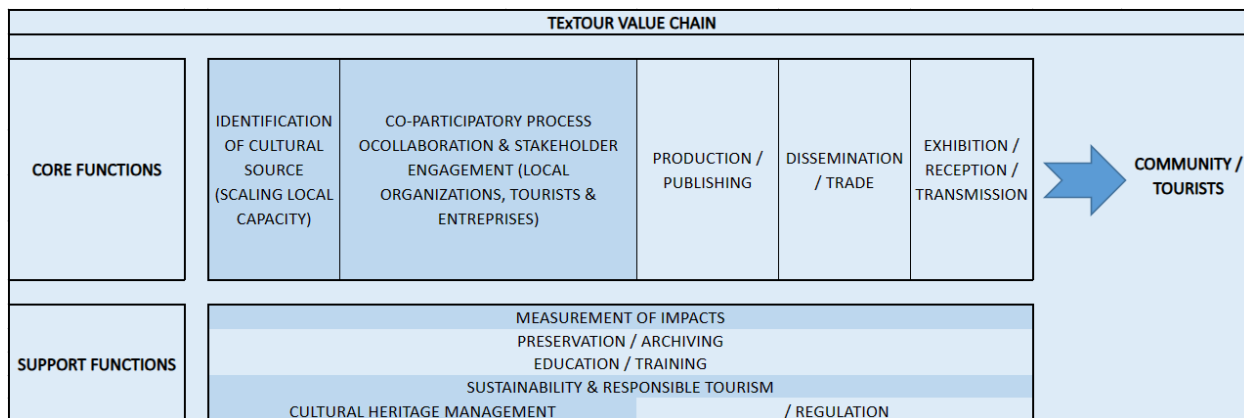


Figure 9 – The TeXTOUR Value Chain Model

Identification of Cultural Sources: in this respect, it is important to know the heritage assets available locally which will be the subject matter of any CT development going forward, defining quite wisely its scalability long-term to avoid massive tourism or issues in preserving the asset.

Collaboration and Stakeholder Engagement:

- **Public-Private Partnerships:** Collaboration between public and private entities to develop and manage cultural tourism destinations (as explained in Deliverable 2.4).
- **Community Involvement:** Engaging local communities in the development and promotion of cultural tourism to ensure sustainable practices and benefits for the community.
- **Visitor Experience Management:**
 - Customer Service: Ensuring a positive and memorable experience for tourists through quality services, information, and hospitality.
 - Accessibility: Making cultural sites and attractions accessible to a diverse range of visitors, including those with special needs.

Measurement of Impacts: to ensure proper implementation of activities, these need to be measured periodically related to pre-defined indicators. Measurements will allow prompt reaction to deviations in the execution.

Sustainability and Responsible Tourism:

- Environmental and Cultural Sustainability: Considering the impact of tourism on the environment and cultural heritage and implementing sustainable practices.
- Community Benefits: Ensuring that the economic and social benefits of cultural tourism are distributed fairly among local communities.

Cultural Heritage Management: Involves activities related to the preservation, conservation, and interpretation of cultural heritage assets.

Applying a value chain perspective to cultural tourism allows stakeholders to identify key activities, dependencies, and opportunities throughout the entire tourism process. This approach can contribute to the sustainable development of cultural tourism destinations and enhance the overall visitor experience.

The TExTOUR Value Chain Model has been widely to all stakeholders, CT-Labs and NST for them to make use of this valuable tool.

5 Exploitation Workshop

With all the exploitation knowledge gathered throughout TExTOUR’s operations, an Exploitation Workshop has been organized online in M33 to share among all partners the recommendations for exploitation.

The workshop was held on 30/03/2023, and involved 32 participants, including the project advisory board. The workshop gave the possibility to discuss and refined the Key Exploitable Results and Pilot actions (see D6.2 - Exploitation Plan Validated). Moreover, the Consortium discussed about IPR clinics and the platform exploitation. As already declared in D6.2 - Exploitation Plan Validated, the execution of the exploitation workshop allowed the achievement of MS4 [Exploitation Strategy design].

Table 8 – TExTOUR KERs and kind of asset

Key Exploitable Results	KER type*
KER1 - Framework for participatory co-design.	M/P
KER2 - Cultural Tourism Methodology for data collection & toolkit.	M/D
KER3 - Road map for CT development	P
KER4 - EU Action Plan for CT development.	P
KER5 - TExTOUR Platform.	S
KER6 – Business and Governance models for replication.	M
KER7 - Network of Pilot sites	P
KER8 - Vademecum for tourists and residents (Pilot 1-Crespi)	P

*Tangible assets: Hardware (H), Software (S), Data (D)

Intangible assets: Methodology (M), Policies/recommendations (P)

In that occasion, in the cases of KERs developed by more than one partner the Consortium has identified the following % of ownership estimated referring to each partner effort in the KER development.

Table 9 – Effort estimation by the project partners involved in the KERs development, as declared during the exploitation workshop

	KER1	KER2	KER3	KER4	KER5	KER6	KER7	KER8
01 FSMLR	5%	1%	100%				90%	
02 UNINOVA	5%	4%			90%			
03 CUT								
04 CARTIF		20%			5%			
05 LINKS						20%	10%	70%
06 UCL								20%
09 IETU	2,5%	70%			5%			
10 ADF	2,5%							
11 MRI		5%						10%
17 UNIBO	90%			95%				
18 ICONS				5%		80%		

The following table highlights the most relevant KERs emerging from the individual exploitation plans.

Table 10 – Estimation of effort for the development of the KERs by project partners involved in its development, as declared during the exploitation workshop

	KER1	KER2	KER3	KER4	KER5	KER6	KER7	KER8
01 FSMLR	X	X	X	X	X		X	
02 UNINOVA	X	X			X			
03 CUT		X		X	X	X		X
04 CARTIF		X						
05 LINKS		X		X	X	X	X	X
06 UCL	X	X	X	X	X		X	X
07 NARVA CITY				X		X		
08 NARVA G				X		X		
09 IETU		X			X		X	X
10 ADF	X	X	X	X	X		X	X
11 MRI	X	X				X		
12 NETZ			X					
13 CSR			X	X		X		
14 GAIA								

15 RIVNE	X	X	X		X			
16 CÔA PARQUE			X				X	X
17 UNIBO	X		X	X				
18 ICONS						X		

The workshop laid the groundwork for developing individual exploitation plans for each partner and helped identify the project outcomes on which to focus efforts.

6 Policy Agenda Recommendations

During the execution of the TExTOUR Project, we have learned that policy recommendations can come from the humblest level. In that respect, all WPs have gathered and produced recommendations presented in different deliverables.

First and foremost, the all-encompassing document that unites TExTOUR proposal is deliverable D2.4 - Road map for CT development – where the step-by-step process has been outlined

Ways to promote CT development were already made in deliverable D1.1 – Report on procedures, tools and strategies used to promote CT development – as soon as in M12.

The experiences gathered in the definitions and programming of the diverse actions put in place by our Pilots have been presented in deliverable D3.4 - TExTOUR recommendation and guidelines for CT development (M40). The ICT offerings of how to measure and follow-up on those actions (plus recommendations to a broader audience long-term) are proposed in deliverable D3.5 - TExTOUR smart strategies & CIT requirements -. The outcomes of the monitoring and their do's and don'ts are thoroughly covered in deliverable D5.3 - Report on continuous monitoring and improvements -.

It has been TExTOUR's intention that the solutions put in place live longer than the project timeline. In that respect, Pilots were requested to append a financial / economical proposal to each of their actions. Templates and different options were provided to adjust to all situations. This has been made available by deliverable D6.3 - Business Plan Model – and the different exploitation plans.

Moreover, the different Pilots gathered recommendations during the Local dissemination workshops that they have undertaken, and which are described in deliverable D7.7 – Report of dissemination events, workshops and webinar.

Furthermore and as already explained in deliverable D7.12 – Policy Recommendations version 2 -, a decision was made together with the Project Officer not to have a second roundtable just for TExTOUR over the last year of the project since most of the overall policy recommendations have already been presented in deliverable D7.11 – Policy Recommendations 1 – which explained that TExTOUR had

participated with other five Horizon 2020 projects (IMPACTOUR, SPOT, SmartCulTour, INCULTUM and Be.CULTOUR) in a process to define common recommendations by concurrent CT projects running under Horizon 2020 covering the period 2020 - 2023.

Thus, three lines of thought for the mentioned recommendations have been developed:

- EU Policy and Europeanisation
- Research and Innovation
- Sustainability and Infrastructure

The reason for not to run a second roundtable lays in the fact that just one single project would not attract the attention of policymakers in such a short time after the one held in June 2023.

7 References

European Commission, Directorate-General for Education, Youth, Sport, and Culture, Hoelck, K., Engin, E., Airaghi, E. (2017). *Mapping the creative value chains: a study on the economy of culture in the digital age: final report*, Publications Office. <https://data.europa.eu/doi/10.2766/868748>

Hill, M.D. (1990). What Is Scalability? *Computer Architecture News*, 18(4), 18-21. <https://doi.org/10.1145/121973.121975>

Kaplinsky, R., & Morris, M. (2000). *A handbook for value chain research* (Vol. 113). Brighton: University of Sussex, Institute of Development Studies. https://www.researchgate.net/publication/42791981_A_Handbook_for_Value_Chain_Research

Noonan, D.S., Rizzo, I. Economics of cultural tourism: issues and perspectives. *J Cult Econ* 41, 95–107 (2017). <https://doi.org/10.1007/s10824-017-9300-6>

8 Annexes

ANNEX I

MODULE1 - Vertical upscaling Questionnaire

A. The scope
1. In your opinion, to what extent the TExTOUR strategy can be further leveraged in the pilot for future activities?
B. Plan to use the TExTOUR approach for future actions
2. How exactly do you plan to further utilize the TExTOUR strategy in your pilot, to improve current initiatives, services, and tools implemented during the project?
3. How will you leverage the TExTOUR strategy and experience to guide new implementations and initiatives? Which types of implementations or initiatives?
C. Adaptation of the methodology
4. Considering the answers to questions 2 and 3, how can the strategy be improved, and which adjustments or adaptations are required to fine-tune the TExTOUR methodology according to these new needs?
D. Activities/actions
5. Which type of actions and activities are required to be carried out in relation to points 2 and 3?

E. Governance model
<p>6. What will be the governance model for the scaling up in relation to points 2 and 3? How will the pilot's leadership, partnerships, and overall coordination be structured to facilitate effective scaling and expansion?</p>
F. Potential risks
<p>7. What potential risks do you foresee in relation to the implementation of new activities and actions to scale up the TExTOUR strategies in your pilot? How can you mitigate such risks based on the lessons learnt in TExTOUR?</p>

MODULE 2 - Innovative Business Models Questionnaire

A. Objectives	
<p>1. To what extent have you achieved your objectives through the actions undertaken?</p> <p>Please rate on a scale of 1 to 5, (1 'not met,' 2 'partially met,' 3 'moderately met,' 4 'mostly met,' and 5 'fully met') only for the objective you were pursuing.</p>	
<p>Development of cultural tourism (Development of education offers; Transmission of cultural heritage through modern technologies; Promotion of the local identity; Development of the artistic scene; etc.)</p>	
<p>Development of inclusive tourism</p>	

<p>(Creation of opportunities for tourism for people with disabilities; Creation of opportunities for inclusiveness; etc.)</p>	
<p>Stimulation of the local economies (Creation of job opportunities; Promotion of local products; etc.)</p>	
<p>B. Strategies/Key actions</p>	
<p>2. What are the specific actions that proved to be the most impactful in advancing the objective you have indicated? How?</p>	
<p>C. Impact</p>	
<p>3. What specific Key Performance Indicators (KPIs) do you believe have most accurately measured progress toward the predetermined objectives?</p>	
<p>4. What were the challenges in identifying and monitoring the KPIs?</p>	
<p>5. What are the primary social advantages or positive impacts resulting from your actions? (e.g. Increased quality of life of inhabitants; improvement of social inclusion within the region; increased job opportunities; etc.)</p>	
<p>D. Stakeholder landscapes</p>	
<p>6. Identify the key stakeholders that significantly supported and contributed to accomplishing the objectives of your action. Explain why they were so relevant to your action's success.</p>	

Please select the most relevant stakeholders and indicate the reason in the right column. Add the stakeholders that are not listed in the cell "others".

Travelers and Tourists	
Local Communities and Residents	
Governments and Public Sector Authorities	
Tourism Regulatory Bodies and Policy Makers	
Tourism Associations	
Trade Organizations	
Financial and Investment Institutions	
Universities, Schools, and Research Institutions	
Apps and software developers	
Cultural and Heritage Organizations	
Hospitality and Accommodation Providers	
Transportation Services	
Technology Providers and Innovators	
Journalists, Media, and Marketing Agencies	
Environmental and Conservation Groups	

Adventure and Outdoor Activity Providers	
Food and Gastronomy Industry	
Local Producers	
Local artisans	
Medical and Wellness Tourism Providers	
Non-Governmental Organizations (NGOs)	
Tourism Certification and Standards Organizations	
Others:	
E. Engagement strategies	
7. According to your experience, what are the most effective strategies to engage the local community and the stakeholders?	
8. According to your experience, what were the main obstacles encountered to local community and stakeholder engagement?	
F. Key resources	
9. Among the following resources which have proved to be the more important for the implementation of the actions? Why?	
Please select the most relevant resources and explain why in the column on the right. Add the resources that are not listed in the cell "others".	
Financial resources	
Expertise and Knowledge	

Technologies and Innovation	
Community Engagement	
Partnerships	
Infrastructures and Facilities	
Marketing and Promotion	
Regulatory Support and Policies	
Monitoring and Evaluation Tools	
Others:	
G. Cost and revenue structures	
<p>10. What are the main unexpected cost sources that you needed to consider in carrying out your activities? (Do not provide numbers, only the sources of costs that mostly impact the development of your actions)</p>	
<p>11. What are the main financial mechanisms and revenue sources you can rely on when carrying out such actions? (Do not provide numbers, only the sources of revenues that your actions generate)</p>	
H. Barriers	
<p>12. What are the main barriers you encountered in developing your actions? How did you overcome them?</p>	
<p>13. What are the main barriers you think you will encounter in ensuring the sustainability and continuation of your action? How do you think you will overcome them?</p>	

14. Based on your experience, what recommendations would you provide to replicators attempting to develop actions aiming to achieve the same objective as you?