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# Heritage, tourism and local development in peripheral rural spaces: Mértola (Baixo Alentejo, Portugal)

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**Abstract:** In the context of multiple repurposing of rural spaces, tourism represents a path for development, with the potential to revitalize these areas. The conservation and restoration of heritage, and its promotion through tourism, can become an opportunity for local development, in which a range of stakeholders fulfil different roles in the carrying out of the processes involved. The aim of the study was to analyse the process and results of channelling heritagisation through tourism in Mértola (Baixo Alentejo, Portugal). A series of interviews with the chief stakeholders in the process was conducted, from which the contexts and conceptualisations of development were determined. On the basis of secondary data (statistics), an analysis of the impacts of the process of heritagisation and the development of tourism was undertaken. The objectives of this study consisted in determining: a) the importance of the process of heritagisation in Mértola; b) the viability of the project, given the cost and lack of comprehensive conservation, in creating a unified whole; d) the performance of, and power relationships between, the various stakeholders; e) the limited participation of locals due to disaffection with the project; f) the correlation between heritage, rural tourism and local development.

**Keywords:** Peripheral areas, local development, heritagisation, sustainable rural tourism, stakeholders.

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## 1. Introduction

Rural areas have experienced a deepening crisis as a result of the effects of globalisation, economic cycles, new production practices, and sociological and cultural changes, all of which have forced local development to adopt multifunctional approaches [1,2] and economic diversification [3]. These processes have been particularly acute in “lagging rural regions” [4] (p. 347), which characteristically lack the critical mass to be able to compete. They also suffer from the decline of traditional activities [4], and a marked peripheralisation [5]. Consequently, growth within these communities is highly dependent on their capacity for adaptive [2] and innovative [6] strategies which overcome the restrictive centre-periphery model [4].

By this means rural areas can become “locations for the stimulation of new socio-economic activity” [4] (p. 347) through diversification [1,4]: leisure, rural tourism, catering establishments, biodiversity conservation, housing expansion, and utilization of the natural and cultural heritage. This is not to say, however, that traditional activities, such as agriculture, agro-industry, crafts, quality products and so on, cannot be reinterpreted [4,7].

Two perspectives of the rural landscape and its resources have emerged [8]: a) as a recreational space which needs to be regulated if it is to be preserved and enjoyed (the external view); b) as a habitable space, the legislation concerning which acts as a barrier to the everyday activities and practices of the population (the internal view). Residents tend to take a utilitarian and pragmatic (production) perspective view of rural spaces, often at odds with environmental regulation of its natural resources, while visitors and tourists tend towards a more aesthetic (consumer) perspective

which favours legislating its uses [9]. These considerations certainly inform the EU's policies on rural development. Directives in this respect promote diversification and improvement in agricultural production, the prevention of rural depopulation, and the generation of employment and wealth. Rural communities have thus seen their social and cultural capital become their main heritage asset [10,11].

Rural areas on the periphery base their strategies for development on traditional activities [4]. In such a context tourism becomes a challenge [12] and takes on a dual role as: a) an agent of diversification and regeneration of the traditional way of life [13]; and b) a means of strengthening the processes of local development [14]. Control over these processes on the part of local residents enables them to ensure that this development is both sustainable and beneficial [15]. Nevertheless, it is possible for tourism to be overvalued as a panacea for the decline in rural conditions [12,16], as the political and popular discourses testify, and for an area's limitations in terms of development to be pushed to the background [17] while its resources and potential are foregrounded [18]. The fact that not all locations are equally open to the development of tourism, enjoy the same degree of popularity, or have the same advantages is often forgotten, thus fuelling the contrary viewpoint that regards transformation in the name of tourism as a commodification of the rural environment [19].

To this can be added an additional layer of complexity with regards to studies into rural tourism. There is currently a wide variety of models, activities and types of accommodation which in turn are often in need of a "new generation" of rural tourism, based on the management of smart, virtually-oriented destinations [20,21], a deeper understanding of the market, and fully integrated professional management systems oriented towards sustainability [22]. The phrase "rural tourism" is frequently employed as an umbrella term defined by geographical location, whereby activities coming within its scope have nothing in common beyond the fact that they take place in a rural context, as opposed to an urban one [23]. Although rural tourism places a premium on existing heritage to create value, it is nevertheless a rapidly evolving area, with significant challenges and business opportunities [24]. Consequently, theoretical accounts and policy decisions highlight the importance of a grassroots approach to rural development, the active involvement of the local community, and the development of small-scale projects underlining "tradition, character and culture" [25] (p. 108). Also fundamental to improving the perspectives of the sector is the involvement of local political leaders in mapping out processes, putting essential services in place and improving the business environment.

Indeed, in peripheral areas, which have seen a decline in traditional activities [12] and where opportunities are scarce, "any economic diversification is likely to be welcomed" [15] (p. 532) and "tourism is a desirable diversifier" [11] (p. 391). For the "boring peripheries" and in-between areas [26] (p. 740), tourism represents a new means of regional development [27], although it is yet to be seen whether the equation  $\text{tourism} = \text{development}$  is more than wishful thinking [12,18]. Much will depend on the local and temporal context, the political will, the cultural and socioeconomic resources available in the territory, and stakeholder commitment. All the foregoing aspects will be dealt with in this case study, in which additionally, a dialectic will be established between 'heritagisation' and the exploitation of heritage for the purposes of tourism.

Tourism activities in the periphery can be a viable option for achieving economic development as an effective source of income and employment [12,28], tackling the problems of access whilst rejuvenating and retaining the population [6,18]. In this respect tourism is often regarded as a "catalyst for innovative local development" [11] (p. 383), and a potential means of reducing regional disparities [18]. But at the same time the peripheries can turn out to be overexploited and fragile [29]. In addition to this, the more outlying rural areas can perform poorly despite substantial funding [18], as a result of poor management [30]. By contrast, areas within easy driving range of major conurbations often achieve a more marked development [18]. Therefore, the degree of periphery determines the tourist flow, distinguishing between remote disconnected destinations [31], and intermediate destinations [26], which have good road access [32] and are thus often denominated "self-drive tourism" or "rubber tire traffic" [33]. Where a peripheral area is able to attract sufficient tourist interest, it can become an established destination with unique products worth the effort to visit and enjoy the experience [32]. However, as the degree of remoteness increases, so "the scale of attraction must increase as must its uniqueness factor if it is to achieve and maintain viability" [6] (p. 379). Frequently, however, attractions are not enough in themselves for tourist development to take

root [32], and it is the conservation of the resource which creates the potential for developing other tourism activities [34].

In these cases, the preservation, intervention and recuperation of heritage, and the value this brings to an area, become an opportunity for sustainable local development [35], contributing through tourism projects which seek to “design new spaces” [36] (p. 290), in which different stakeholders take part. The process of “heritagisation” focuses on those elements which are unique to a particular rural area, rooted in its history, and identifiable as a “marker of regional identity” [36] (p. 275). However, the sheer range and scale of heritage makes it difficult to conserve and promote, particularly if the economic resources are limited [37]. Nor is this aided by the confusion between the notions of resource and product (the latter meeting demand and having a price) [36]. The process by which heritage resources in rural areas are converted into tourism products needs to be located in a post-Fordist context [38]. It is a process which, since the early 90s and as recognised by ICOMOS [39], has witnessed an expansion into the cultural space [40].

The conjunction of cultural heritage and tourism has been widely studied [40,41,42], as it opens up possibilities for the economic development of places with a depth of heritage, although at the same time it creates challenges for the management of attractions [42,43]. Such is its importance that it is institutionalised in public policy and local development [44], creating an interdependence between heritage conservation and the development of tourism [41], although this relationship is not without contradictions and conflicts [42]. In this manner, both positive and negative effects derive from the conjunction, most of which are common to rural and heritage tourism.

Integrated Rural Tourism (IRT) is an approach that seeks to avoid, or at least to mitigate, the problems associated with tourism in rural areas. In this endogenous model, local actors are important because they “benefit from policies that empower them and enhance their long-term well-being” [4] (p. 363). By contrast, cultural tourism is promoted as a means of economic and social diversification [32]. However, in terms of the institutional context, the management of heritage differs from those organisations which regard resources more as assets for tourism [41]. The emphasis is on protecting and preserving heritage rather than ensuring that it returns a profit [42] (p. 33). In order to satisfy advocates of these opposed perspectives, it is necessary to investigate points of contact between them [42].

Of fundamental importance to planning tourism is the coordination and collaboration between stakeholders [45,46,47], essential to which is the collaborative focus at all levels between those responsible for managing heritage and all that goes with it, and those responsible for tourism and all its resources [42]. All interested parties should be involved in the process [48] as success depends on their commitment. Further, according to community participation theory, the inclusion of local residents in the decision making process is also important [42], as their involvement in the development of projects has a significant impact [45,49]. There is, too, the issue of leadership and the delegation of responsibilities among the stakeholders [46] in determining the social relationships underlying the construction of a tourist territory [50]. The relationship between management and sustainable tourism should also be taken into account [51].

In this regard, the case study of the town of Mértola (Baixo Alentejo, Portugal) is particularly relevant as it embodies the elements and processes discussed above. It is a small town with a population of around 6,000, located in a rural area, which has been in demographic and economic decline since the middle of the 20<sup>th</sup> century due to the loss of traditional activities. In 1978 a process of markedly ideological heritagisation was initiated to stimulate local development, which was supplanted at the beginning of the 21<sup>st</sup> century by a project to expand tourism.

The main objective of the paper is to carry out a diachronic study into the processes involved in heritagisation, from a tourism and local development perspective, and to undertake an analysis of their social, political and institutional contexts [52]. The study focuses on a singular location in the rural periphery, which has been overlaid, like a *palimpsest*, with an archaeological and material conception of heritage, foregrounding local resources as elements of identity and awareness of the past. This decision to develop [referring to the CAM/ADPM] tourism was necessitated by the economic recession, and is notable because the area in question is one of the least visited by tourists in Portugal. Analysis of the processes involved in this shift to rural tourism includes the roles and background of the stakeholders, the measures, instruments and actions implemented in the course of heritagisation and implantation of cultural tourism, and a critical assessment of the successes,

failures, results and overall impact. Consideration is also given to the lessons which can be drawn from the Museum Town of Mértola Project, and which can be transferred to other locations with significant cultural heritage and committed involvement of the stakeholders.

## 2. Materials and Methods

Studying local development through the complex relationships between heritage/tourism and the stakeholders is best achieved by use of a case-study approach, by means of collecting in-depth data from a variety of sources [53]. The paradigm has been widely applied to studies of tourism [54], in particular the processes and management of heritagisation [55], roles and relationships between stakeholders and governance [11,28,42,56,57], local/rural development and tourism [25,58], and tourism in the periphery [18,32].

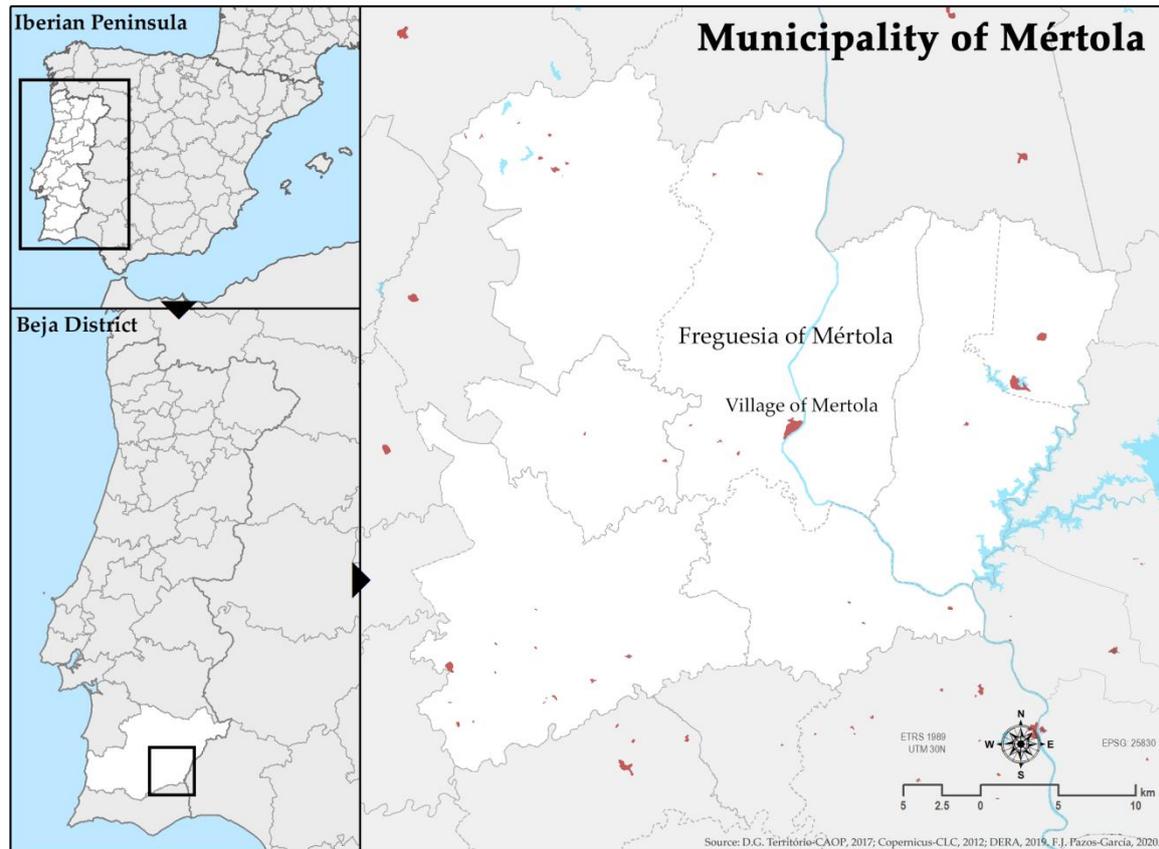
The methodology employed was qualitative, based on interviews intended to collate different opinions and perceptions from the principal actors [56], to identify social networks and respective power structures [59], and to determine the effects of heritagisation, the foregrounding of tourism and the problems deriving from these processes [32,56]. The interviews were semi-structured [60], consisting of open questions which allowed for digression into related topics of interest [61]. In total five interviews were conducted with actors involved in the processes of heritagisation and the promotion of tourism:

- Interview 1 (Int1): political representative of the Town Council, vice-president of the Mértola Municipal Chamber de (CMM).
- Interview 2 (Int2): Museology and Heritage specialist for the CMM; also a member of the Mértola Archaeological Site (CAM).
- Interview 3 (Int3): archaeologist, director of the CAM.
- Interview 4 (Int4): archaeologist, director of the CAM.
- Interview 5 (Int5): local business woman, representative of the tourism sector.

The data obtained from the interviews was complemented by intensive territorial reconnaissance (valuation of the heritage environment, accessibility study, informal interviews with local business interests and residents) and secondary sources centred on: a) heritage characterisation, the heritagisation process, and tourism promotion in Mértola (published sources and planning documents); b) the prevalent discourses in the conjunction heritage-tourism (published and unpublished research on Mértola); c) official statistical information for analysing results (Statistics Portugal, INE) and official databases (National Tourism Register, RNT) [62].

## 3. The Mértola Case Study

The municipality of Mértola is located in the SW of the Iberian Peninsula, in the Beja district (Baixo Alentejo province) of Portugal (Map 1). It is the sixth largest municipality in Portugal, at 1,293 km<sup>2</sup>, and is divided into 7 smaller areas or *freguesias* (parishes) (Map 1).



**Map 1.** Area of the study, location and the administrative structure.

It is a peripheral area, whose borderland status has caused the crisis to be keenly felt [63]. Because the land is unsuitable for arable farming, the main traditional activities have been forestry, animal husbandry and hunting, distributed among large private estates. In 1995 the Guadiana Valley Natural Park (PNVG), covering 47.39% of the municipality, was created to protect its outstanding natural beauty and ecological wealth.

Closure of the mines and the agricultural crisis in the mid-20<sup>th</sup> century precipitated a period of decline and rural exodus. In 2018 there were 6,202 residents, a loss of 76.17% of the 1960 total. It is also an aging population (58.59%  $\geq$  65), with a very low demographic density (4.80 inhabitants/km<sup>2</sup>) [64] dispersed over 98 population nuclei [65].

Mértola is equidistant (120km) from the towns of Faro (Portugal) and Huelva (Spain), and likewise from the major cities of Lisbon and Seville (220km). The nearest sizeable town is Beja (53km). Increase road connectivity from the mid-20<sup>th</sup> century onwards caused the demise of river transport, relegating the town even further to the backwaters, although improved access to the Algarve and Spain at the beginning of the 21<sup>st</sup> century went some way to counteract this.

The Alentejo is the least visited region of Portugal [30], especially Baixo Alentejo, which has seen very little investment. In spite of this, there are several attractions in Mértola worthy of tourist interest, in the form of cultural heritage (the Muslim “vila” of the museum town), the natural environment (the PNVG), and industrial heritage (the São Domingos Mine, a disused open-cast ‘Victorian’ copper mine on the western fringes of the Iberian Pyrite Belt).

The town of Mértola itself is a walled hilltop city on the right bank of the Guadiana River, the choice of location being determined by its navigability (at 72 km from the river mouth), defensibility, abundance of water, and polymetallic deposits [66]. Within the walls, the town is today typical of modern Portuguese architectural style over an Islamic stratum [67] of considerable historic and aesthetic interest [67]. This heritage began to be valued at the end of the 1970s in the form of the “Mértola Museum Town” Project, and since the start of the new millennium, the tourism dimension

has been foregrounded. In 2017, Mértola was added to Portugal's Tentative List (TL)<sup>1</sup> for inclusion on the World Heritage List.

#### 4. Results and discussion

##### 4.1. Processes

Three buildings in Mértola have been declared National Monuments: the church 'Igreja Matriz'<sup>2</sup> and the 'Torre del Rio'<sup>3</sup> (misleadingly known as the 'Old Bridge' in English, though it is neither a tower nor a bridge), both in 1910, and the 'Castelo de Mértola'<sup>4</sup> in 1951 [70]. Although the buildings were protected under the scheme, no practical interventions or plan for preservation of the monuments came about as a result [71]. With the restoration of democracy to Portugal (1974) the notion of heritagisation was popularised and the concept of 'historical value' began to take root [71].

The first democratic municipal elections in Mértola (1976) brought the Portuguese Communist Party (PCP)<sup>5</sup> to power, and the new Mayor set about recovering the town's historical, cultural and natural heritage [72] with the guidance of researchers from the University of Lisbon [73].

The process of heritagisation would be carried out in a social, political and ideological context [74]. The notion of "integrated development founded on heritage resources" [73] (p. 32) was taken up, in which heritage was understood as "collective memory", and the overall objective was local development through the involvement of the community [75]. At the same time, social and cultural capital were recognised as the foundations on which the project was built [10,11].

In 1980 the not-for-profit "Mértola Heritage Preservation Association" (ADPM) was established with the aim of conserving and promoting the town's heritage [74]. Facing the need to invest in infrastructure and services, the municipal authority delegated this role to the ADPM, both parties sharing political and ideological affinities [73]. In 1988 projects being undertaken nationally required the ADPM to be split in two, resulting in the "Mértola Archaeological Site" (CAM) being formed to deal with the material cultural heritage, while the ADPM took responsibility for the natural and ethnographic heritage. Interaction between public and private institutions – the Mértola Municipal Chamber (CMM) on the one hand and the CAM and ADPM on the other – was a complex process. The sheer scale of the conservation involved became a major challenge [24], particularly in view of the lack of ongoing funding [42]. The CMM jointly funded activities, the museum and provision of space, while the CMM, CAM and ADPM sought external funding at regional, state or community level [76] for intervention/research projects [77].

The specialist scientific support supplied by CAM to the heritagisation strategy is channelled through the "Mértola Museum Town Project" (PMVM) [71]. The foundations for the project was an intricate museographic project based on the notion of a "community museum" [32] (p. 1), envisioned as an educational tool for exploring identity and heritage at the service of humankind now and into the future [78]. According to this plan, the 'vila', to give the town its historical appellation, was conceived of as an open-air museum [74], incorporating a wealth of archaeological

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<sup>1</sup> This should not be confused with UNESCO's "World Heritage List" (WHL) of sites with World Heritage status. The "Tentative List" is the result of UNESCO's recommendation for member States to "submit their Tentative Lists, properties which they consider to be cultural and/or natural heritage of outstanding universal value and therefore suitable for inscription on the World Heritage List." [68]. Inclusion on the Tentative List is a prerequisite for being declared a World Heritage Site, but does not guarantee inscription on the WHL.

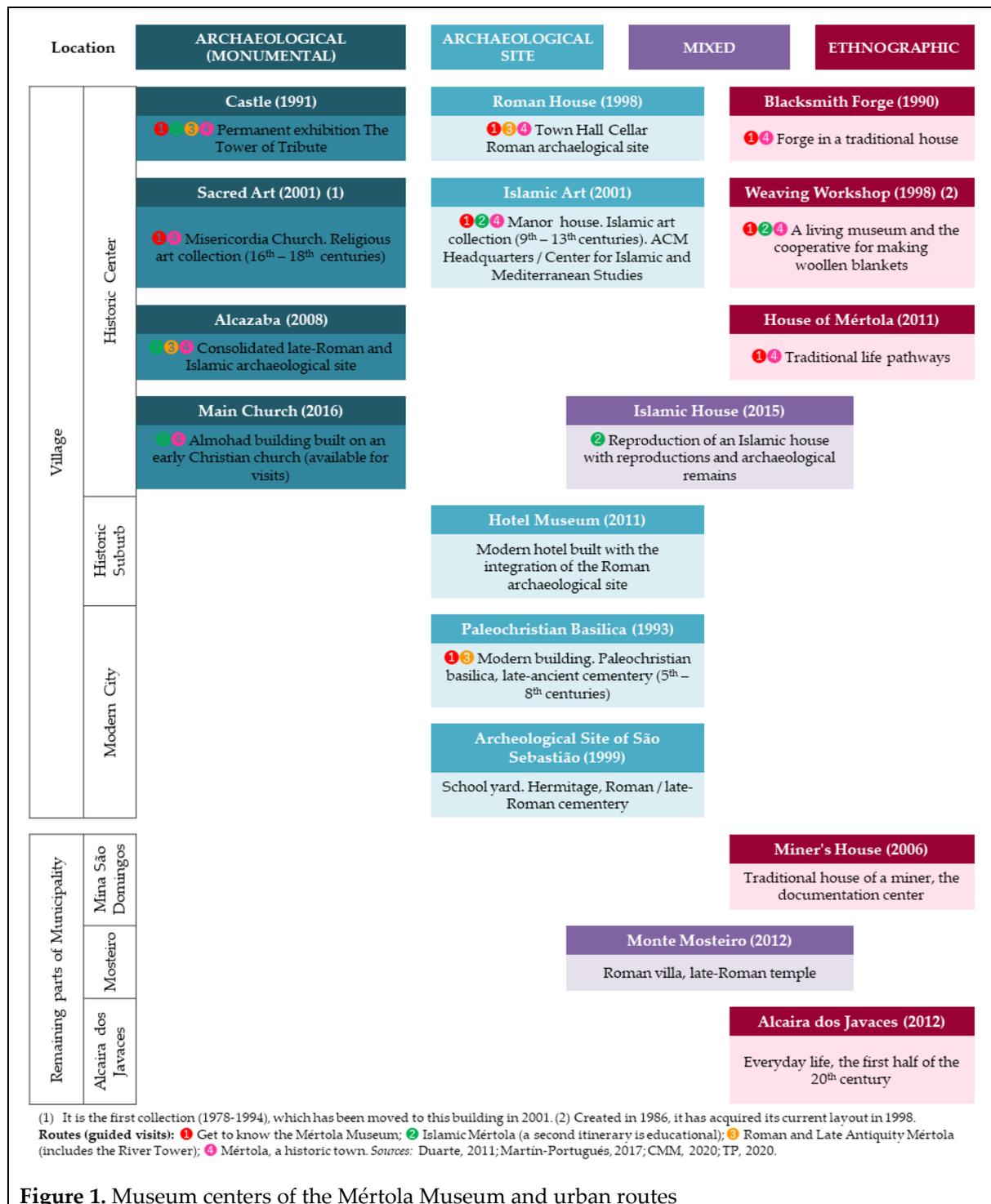
<sup>2</sup> Almohad mosque (12<sup>th</sup> century), constructed on an early Christian church (6<sup>th</sup> century), and consecrated after the Reconquista (13<sup>th</sup> century) [69].

<sup>3</sup> Ancient wharf and fortified port structure (5<sup>th</sup> century), unique in Portugal, controlling access to the port and the movement of goods [67].

<sup>4</sup> The Muslim fortress (12<sup>th</sup> century) was remodelled after the Christian Reconquista (13<sup>th</sup> century) [66].

<sup>5</sup> The Party continues to take a role in local coalitions to this day.

and architectural elements into a route around the centre [71]. In this way the entirety of the town was deemed a single resource [79] (p. 236), gradually incorporating new elements (museum nodal points) into the whole (Figure 1). Wherever possible these nodal points are housed in restored buildings [79] at the site of the archaeological finds [73].



**Figure 1.** Museum centers of the Mértola Museum and urban routes

The PMVM received recognition [72] for its good practice, and attracted considerable national and international attention as a result of its scientific content (beyond the university system), methodology, endogenous orientation, the inclusion of local residents and their concerns, and the divulgation of the results [79,80]. It also took on the task of training locals [75], beginning with courses for specialist personnel sponsored by the ADPM (1978-1985) [73].

In 2002, after 25 years of PCP ascendancy, the Socialist Party (SP) came to power in the CMM and a period foregrounding the value to tourism of Mértola's heritage was initiated. This process

was based on the conservation and recovery of heritage (involving high costs and low profits). In a peripheral territory incorporating different elements – natural park, cultural heritage and outstanding landscapes – it was deemed necessary to create, promote and sell products [32], overcoming the limitations imposed by its location on the periphery so as to make these viable [6]. The CMM's cultural and tourism policy focussed on [83]:

- a) Stimulation of tourism packages around different approaches (heritage, nature, active lifestyles/sport, gastronomy, industrial/mining heritage and hunting).
- b) Expansion of initiatives throughout the municipality, not only the town.
- c) Creation of quality-focussed products and image for commercialization.
- d) Increased involvement of local population.
- e) Active search for private investment.

Although its museological underpinnings were initiated years earlier, the Museum of Mértola was formally established in 2004 by the CMM, in response to abnormalities in the management structure which prevented its inclusion in the Portuguese Museum Network [71], with scientific-specialist responsibility being delegated to the CAM [80]. Efforts to diversify the range of offers from the museum were set in motion from 2006 (Figure 1). Although the museum was doubtlessly the maximum expression of heritagisation, and the 'villa' its most important resource, from a visitor perspective it was recognised as of limited interest [84], with preservation and research taking precedence over tourism [32]. It did, however, embody a variety of diverse perspectives (socio-cultural, religious, military) and activities (research centre, traditional crafts) which together enhanced its potential as an attraction [40].

In 2001 (that is, before the political shift of power in municipality), the Islamic Festival of Mértola (IMF) was inaugurated, organised by the CAM under the auspices of the CMM. A biennial festival taking place over 3-4 days in May, it was an innovative proposition aimed at promoting the town's local history in general and Islamic heritage in particular [85,86], through a series of cultural and artistic activities and scientific conferences, all of which were held within the town walls to revitalize the historic centre and involve residents. Community-based events such as this are important to the life of peripheral areas [32,87], and can become important cultural attractions [40]. With the accession of the PS, the FIM became an important element getting the town noticed on the tourist circuit, with the help of media promotions and links to similar events [71].

The tourism-oriented heritage organised within the town included guided visits and themed walks around the centre leading from node to node of the outdoor museum (Figure 1). The routes were managed by the Tourist Information Centre (PIT), which was dependent on the CMM [88], in collaboration with the CAM. The establishment of these routes around town helped to reinforce the idea of a unified collection of elements [89], although their physical dispersion made it difficult to integrate all of them into a whole.

2004 saw the creation of Merturis, a publically owned enterprise with the objective of making the most of tourism opportunities with the municipality through the development of products, the projection of an image, and the implantation of strategies to attract, incentivize and retain tourism oriented businesses, which would consequently provide local employment [90]. Public company auditing by the Portuguese government led to its dissolution in 2015, without having achieved its objectives.

Following the dissolution of Merturis, the promotion of Mértola passed to the "Visit Mértola" web portal, a collaboration between the CMM, the Serrão Martins Foundation (in representation of the São Domingos mines), the Mértola Museum and Visit Portugal, to the exclusion of the remaining local actors, focussed on advertising the range of tourist activities around the municipality. To date, the platform has not managed to sufficiently increase private capital investment [91], establish any kind of public/private collaborative venture [57], or create an identifiable image or brand [92,93].

The most notable initiative of the CMM has been the nomination of Mértola for inclusion in the "Tentative List of World Heritage Sites in Portugal" (LIPMP) drawn up by the National Commission for UNESCO, as a first step towards recognition as a UNESCO World Heritage Site (WHS). Mértola's candidacy was based on three of UNESCO's ten selection criteria (following UNESCO's own numbering and descriptions) [67]:

- ii. “to exhibit an important interchange of human values” (cultural exchange): the evidence of diverse civilisations in Mértola, visible in the organisation, architecture, archaeological remains and traditions of the ‘vila’ (with special emphasis on the Roman, late antiquity and Islamic periods).
- iii. “to bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared”: early Christian remains.
- iv. to be an outstanding example of a type of building, architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history: the remarkable strategic location of the town in terms of defence and river transport (the castle, city walls, and ‘Torre del Río’).

The proposal was presented to the National Commission in June 2016, and was initially rejected (Int2). Nevertheless, their recommendations were taken as a positive response (Int1, Int2, Int4), and on 1<sup>st</sup> July 2017, without these being taken up, Mértola’s candidacy was accepted and the town was included in the LIPMP [67]. In the period of preparation for its candidacy which followed, the town pursued its bid to become a WHS in the hope that such a declaration would kick-start tourism in the area [94]. The view of the CAM was that the approach represented a political project (concerned with promotion) rather than a technical one (Int2, Int4), and pointed out the lack of a strategy, whilst acknowledging its potential.

#### 4.2. *Conflicting perspectives*

The town of Mértola itself is a walled hilltop city on the right bank of the Guadiana River, the choice of location being determined by its navigability (at 72 km from the river mouth), defensibility, abundance of water, and polymetallic deposits [66]. Within the walls, the town is today typical of modern Portuguese architectural style over an Islamic stratum [67] of considerable historic and aesthetic interest [67]. This heritage began to be valued at the end of the 1970s in the form of the “Mértola Museum Town” Project, and since the start of the new millennium, the tourism dimension has been foregrounded. In 2017, Mértola was added to Portugal’s Tentative List (TL)<sup>6</sup> for inclusion on the World Heritage List.

Each of the actors has their own and “constructed reality” [95] (p. 79) interests [45], given voice by the prevailing discourse and shaped by a representative framework [96]: the CAM takes a conservationist position while the CMM follows a more commercial view. In short, the conflicting interests represent the classic trade-off between heritage, conservation/curatorship and tourism [42]. Each discourse aligns itself with particular ideological projects and modes of understand progress: heritagisation (safeguarding the cultural identity of the local inhabitants) and promotion of tourism (bringing tangible economic benefits to locals).

For the CAM, their conservationist position is motivated by ideological beliefs clustered around collectivism and egalitarianism [71]. Both public (CMM) and private (CAM/ADPM) initiatives should be aligned with issues of cultural identity [97], for which heritagisation is the means to an end while contributing to “community development”. In this view, cultural values should always prevail and the tenets of tourism are disparaged as commercialism, where profit is prized above the inherent value of heritage [98], and there is a reluctance to fix prices [41,99]. Although this discourse has developed over time [73], tourism remains a result rather than an end in itself, something that could contribute to maintaining the local inhabitants [71] and their identity [77,97]. The interests of the CAM are not in tourism but in heritagisation. But as this needs to be financed (Int2), they opt for small-scale initiatives “so as to avoid multinational hotel chains” [77] (p. 1).

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By contrast, the commercialist discourse of the CMM is linked to a view of local development as a coming together of endogenous and exogenous, public and private forces; endogenous foundations with an outwards projection (searching for investors and finance). The emphasis is on tourism as generator of wealth, with the role of the CMM being that of curating and promoting while private enterprises take responsibility for tourism initiatives. In this vision tourism becomes a development strategy for stimulating cash flow and bringing in sufficient returns to finance heritage conservation, but always on the principle that the “user pays” [41]. Nevertheless, the tourism-focused view of development “runs the risk of neglecting other important factors and processes” [26] (p. 740). Although politicians insist that tourism could reduce regional disparities, expectations tend to be over-optimistic [18,30].

The CMM’s local policies regarding the process [90] have generated informal agreements between public and private actors, with hegemonic discourses that “can constitute a ‘regime’ that in turn shapes local policy-making” [57] (p. 25). A balance needs to be reached between the policies of heritagisation and tourism without losing sight of the issue of sustainable growth [100] and creative construction/destruction [101].

Stakeholders can play a significant role. They can become empowered and improve well-being over the long-term [4], acquiring agency as a result of their own influence and through the relationships developed among themselves [46,94]. Collaboration between stakeholders has thus become a major issue [48].

The main stakeholders in the heritagisation process are the CMM and the CAM (previously the ADPM). They act at the same level, each has its area of expertise, but they share the same discourse, ideological programme and interests, in which the principles of cooperation [45] and collaboration [27,102] are paramount. An early issue was that of leadership [103], a role initially filled by the first democratically elected mayor (Int3, Int4), who carried out the role of managing relationships between the interested parties [4]. After the death of the mayor in 1982, the ADPM (replaced by the CAM in 1988 and thereafter) took on the scientific/intellectual leadership, their authority being recognised by the CMM. The cooperation successfully initiated a large-scale process of heritagisation (PMVM).

When the socialists were voted in to govern the CMM in 2002, the conflicting perceptions and issues of discourse [56,96] between the political parties and their leaders (Int2) produced a rift. This led to a change in relations between the agencies, and hierarchies began to appear (the CMM taking over the leadership) alongside rivalries and disagreements [56]. In 2004 the CMM put into action a plan to amplify the number of stakeholders (to include Merturis and the Serrão Martins Foundation<sup>7</sup>), limiting the power of the CAM/ADPM and acting as a counterweight. At the same time, the CMM enlarged its own power by taking over the running of the Mértola Museum, albeit deferring to the authority of the CAM in scientific matters (Int4). These tensions manifested themselves in the interruption of the heritagisation process, the halt to the training programme and the poor outcomes in terms of tourism.

When in 2008 the Socialist mayor left the post, contact between the CMM and CAM/ADPM was resumed, and although there remained a gap between their viewpoints, “there was a new injection of life in the heritage question” (Int4). The rapprochement between the two sides reinvigorated performance and the achievement of objectives [42,46], reactivating the processes of heritagisation and promotion of tourism, and setting in motion again the training programme under the stewardship of a new entity (the ALSUD Training School) [104]. The renewed impetus to attract tourism brought a new stakeholder in to the frame, the Association of Business Owners (Int5).

Criticism of the leading figures within the CMM by the CAM includes “not being up to the task ... conservation is not a course of action” (Int2) and “wanting to live only off tourists” (Int4). The CAM also underlines that “the CMM shouldn’t be doing everything ... and the private sector [referring to the CAM/ADPM] should also be a part of things” (Int2). For its part, the CMM maintains that “the primary objective is the scientific [heritagisation], on the basis of which tourism

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<sup>7</sup> Foundation set up for the conservation and projection of the São Domingos Mine visitor centre which is a short drive from Mértola.

can be developed, and then in its turn local development” (Int1). The discourse does not attempt to delegitimize the CAM; it recognises its expertise and good practice [83], and its authority in scientific matters (Int1), but it claims for the CMM a role in the management and promotion of tourism, and, given the similarities with electoral campaigning, the projection of the town to the wider world (Int1).

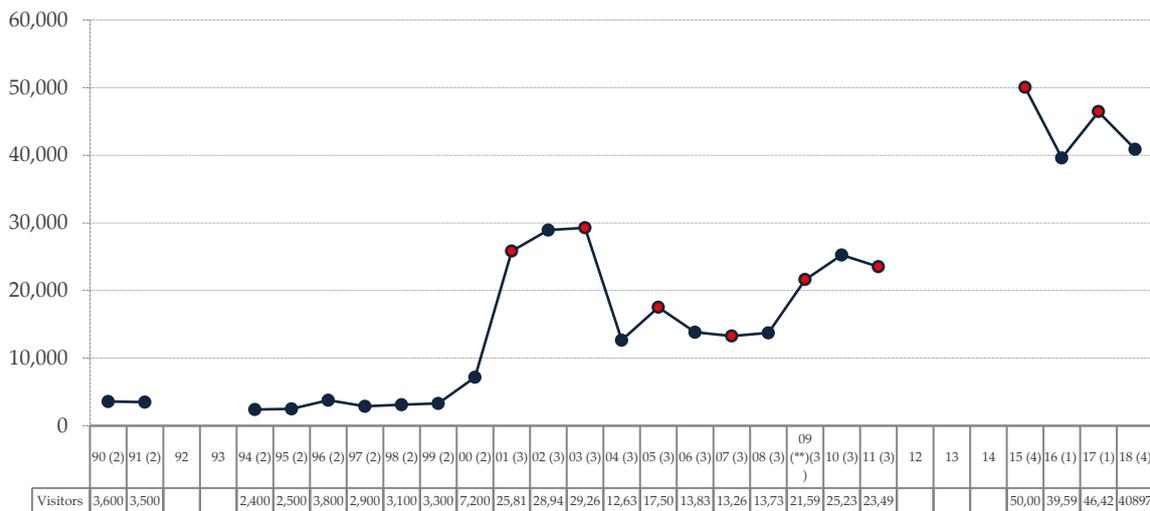
The actors were aware of the dangers inherent in a lack of coordination and collaboration, and recognised partisanship as the main obstacle to achieving this [83]. It was clear that strategies for improving relations were needed [45], along with a network for facilitating decision-making in matters concerning the development of tourism [105,106], but neither side it seemed was willing to take the first step towards opening up the dialogue [42]. The business sector sensed a political/ideological impasse which “meant that [tourism] didn’t work” (Int5). According to Da Rosa [104], actors themselves should not be foregrounded, but rather the result of their collaboration, but in this instance the recommendation fell on deaf ears [50]. In some cases, such as that of the FIM, the existence of common interests strengthened relationships, but in others, such as that of the LIPMP project, it amplified rivalries [57].

One thing which appeared in the objectives and discourse of more than one of the actors (Int1, Int3) was the importance of the participation of local residents, given that this was considered crucial to the whole process of development, and a means of avoiding conflict and bringing stability to the projects [107,108]. It lay at the heart of the question of identity, and was considered to be closely connected to education and awareness (Int1, Int2, Int4), and to reinforcing the community’s confidence to manage its heritage [42,107]. At the start of the heritagisation process, the political affinities of those involved led to the involvement of young people in the project [73], and their participation in the ADPM/CAM (Int4), which can be viewed as kinds of “community heritage groups” [55] (p. 459). In fact, Duarte [71] underlines local empowerment in two respects: a) the diversification of cultural facilities; b) the implementation of mechanisms for the promotion and participation of different social agents. Despite this, starting from 2002, a gradual disaffection of the locals with the archaeological activity, the heritage and museums began to be noted [71,104]. The CAM put this shift down to “a departure from the original idea on the part of the PS” (Int4), while the CMM blamed it on the fact that the results of the process were not sufficiently visible [83]. A deeper look at the causes is required (discourse, unfulfilled expectations, stakeholder attitude and so on).

The heritagisation process included certain objectives stated in the PMVM, but the CMM did not develop any specific objectives for strengthening tourism beyond “local development”. There was no plan outlining the strategies to be followed, as testified by the absence of an official heritage declaration for the complex and the existence of a Plan de Ordenación (town planning document), revised in 2017 [109] and focused solely on housing. In order to create a model of governance which enhances tourism sustainability while mitigating negative effects [15], developing viable and temporally and environmentally sustainable attractions [6] it is necessary to define objectives, formulate strategies [56], and implement measures and actions through a participative process. Such a model would also enable the search for finance to palliate the negative effects of peripherality [6], at the same time that innovations in the tourism sector generated new interactions and improved relations between stakeholders, implementing institutional changes [11]. The inclusion on the LIPMP could contribute to this, although it would require a thoroughgoing study.

#### *4.3. Effects and impacts*

Taking the number of visits as an indicator of the success of the PMVM, the Mértola Museum has experienced ups and downs (Graph 1). The turning point is the first FIM (2001) which saw the number of visitors increase by 72.10%. The standoff between the CAM and the CMM led to a period of stagnation (2004-2008), with growth returning once relations had been re-established. No increase in visitor numbers can be detected as a result of the town’s inclusion on the LIPMP. The Mértola Museum receives more visits than any of the 24 museums in Baixo Alentejo, representing 32.92% of the total within the sub-region in 2018, and 62.46% in 2017 (a FIM year), underlining its importance as a heritage destination [32].

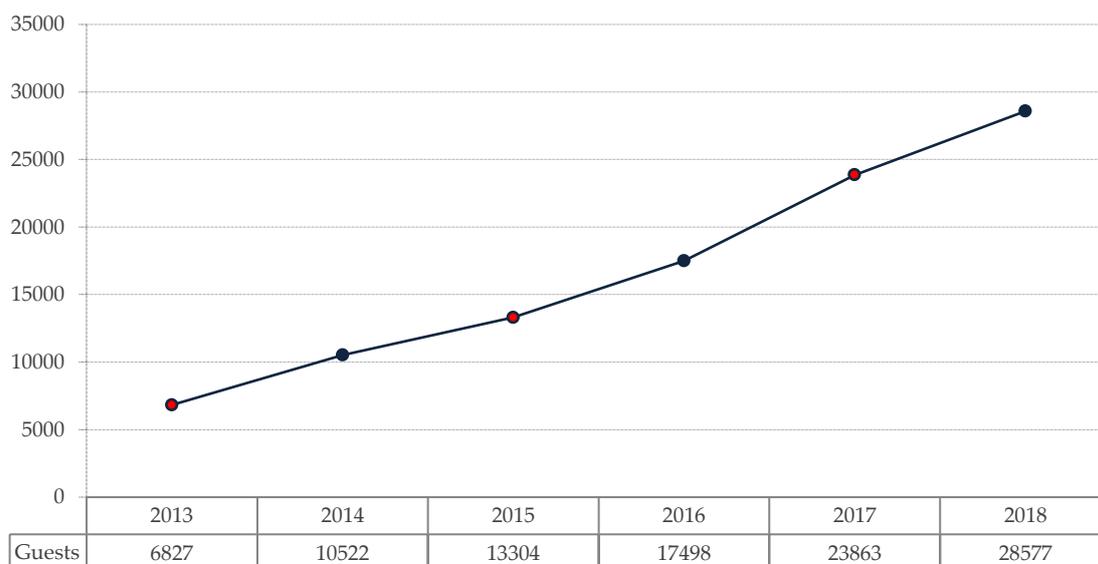


(\*) The "registered visitors" do not coincide with the real ones, since it is an open set, but it has 3 registration points: Main Church (1), PIT (2), The Tower of Tribute (3). Historical set (4). (\*\*) Until September. In years indicated in red the FIM is celebrated. Source: CMM visitor data taken from: [73,80,83,110,111].

**Graph 1.** Visitors to the Mértola Museum, 1990-2018 (\*)

The income estimated for the Mértola Museum is 1.11€/visitor in 2012 [83], which represents 3.70% of the CMM's spending in culture and sport (including the museum) [110].

The pattern of tourism over time is reflected in the official statistics [18] (p. 1788). The number of nights spent in tourist accommodation in the municipality shows a steady growth (Graph 2) between 2013 and 2018 [110], peaking in the years in which the FIM is held and 2018 (in which the number of guests reaches 69.88% of museum visits), which could be due to the inclusion on the LIPMP. Its share of overnight stays within the sub-region goes from 6.11% (2013) to 14.11% (2018), taking the municipality from fifth place to second. The average length of stay is 1.8 days (2018), with a marked seasonal variation [32], the summer months generally being the most popular (38.3% in 2018), with the exception of the FIM years, when May is peak month. This tendency is a disincentive for businesses [12], although a trend away from incidental visits towards more purposeful visits can also be detected [32].

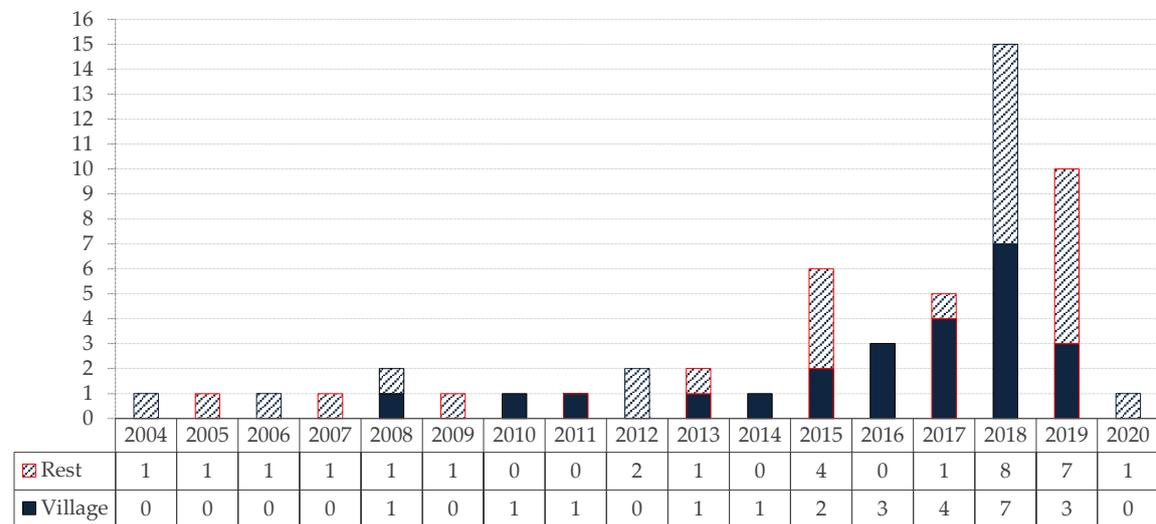


In years indicated in red the FIM is celebrated. Source: [110].

**Graph 2.** Guests in accommodation in the Municipality of Mértola, 2013-2018

At the start of the implantation of the PMVM there was no tourism infrastructure. The promotion of tourism by the CMM began in 2002 [112] reaching 24 places of accommodation in 2020, the first of which was registered in 2008 (Graph 3) [62], when the CMM and the CAM

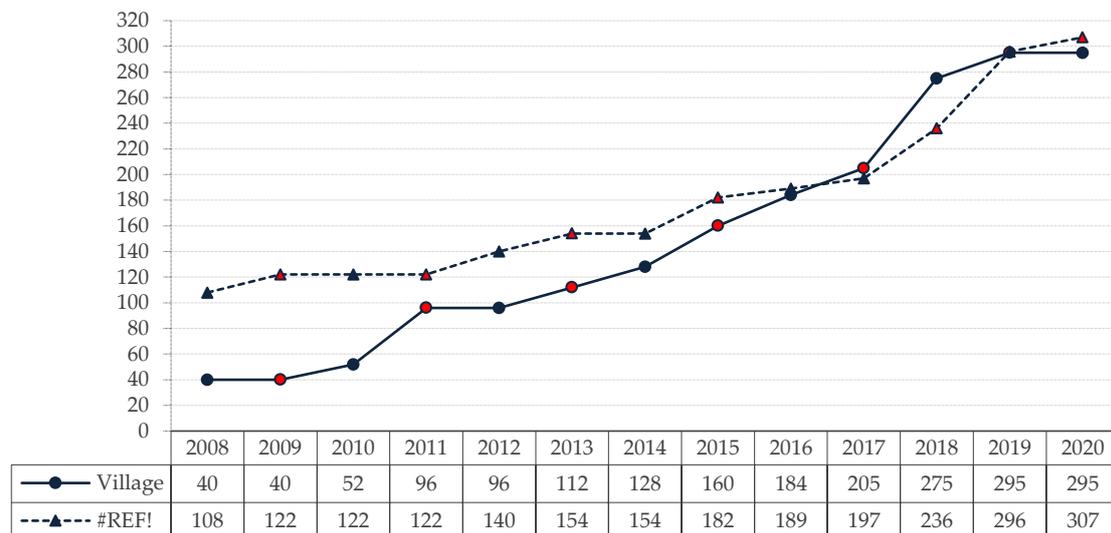
renewed relations. The majority of new registrations take place in the years when the FIM is held. The year 2018 is significant for the expectations created by the inclusion on the LIPMP. A range of accommodation options become available [62]: 15 local accommodation points; 7 companies in the rural tourism sector; 2 hotel establishments, accounting for 32.54% of places. There is a degree of adaptation to cater for different markets [24], although the predominant accommodation is without quality assurance [27].



In years indicated in red the FIM is celebrated. Source: [62]

**Graph 3.** Evolution of the tourist accommodation register in the village and in the rest of the municipality of Mértola, 2008-March 2020

In total, there are 295 beds available in the town (Graph 4). Only the hotels are able to cater for large groups ( $\geq 44$ ), so visits are largely organised at the individual level using private transport [33,113], making distance and accessibility key factors [32].



In years indicated in red the FIM is celebrated. Source: [62]

**Graph 4.** Evolution of the number of places in tourist accommodation in the village and in the rest of the Municipality of Mértola, 2008-March 2020

In order to attract and retain visitors, and so generate income, it is important to be able to offer a range of activities [114]. Merturis was first to do so in 2004, although its offer became competition for the private companies (Int5). At the time of writing, in 2020, there are 7 companies based in the town (6 focussing on tourist activities and one travel agency), 5 of which offer cultural activities – 3 solely cultural and 2 in combination with other types. Once again the effect of the years in which

the FIM takes place can be seen in the increased demand, alongside the impact of inclusion on the LIPMP (specifically, the founding of 2 companies in 2017).

Gastronomy is a vital factor in rural and cultural destinations [115]. There are 20 restaurants of varying types in the town (55.56 of the total in the municipality) with 1,138 seats (60.34% of the municipal total) [82]. A total of 12 establishments have a seating capacity  $\geq 50$  (1,083 seats). The number of restaurants is boosted by through traffic breaking up the journey at roadside establishments [32], which again introduces the problem of seasonality.

An increase in the number of shops selling artisanal products and/or souvenirs (4) can be noted at points of access to the historical old town and in workshops within its walls (2), manifestations of heritagisation (training courses for recovering traditional crafts) (Int4).

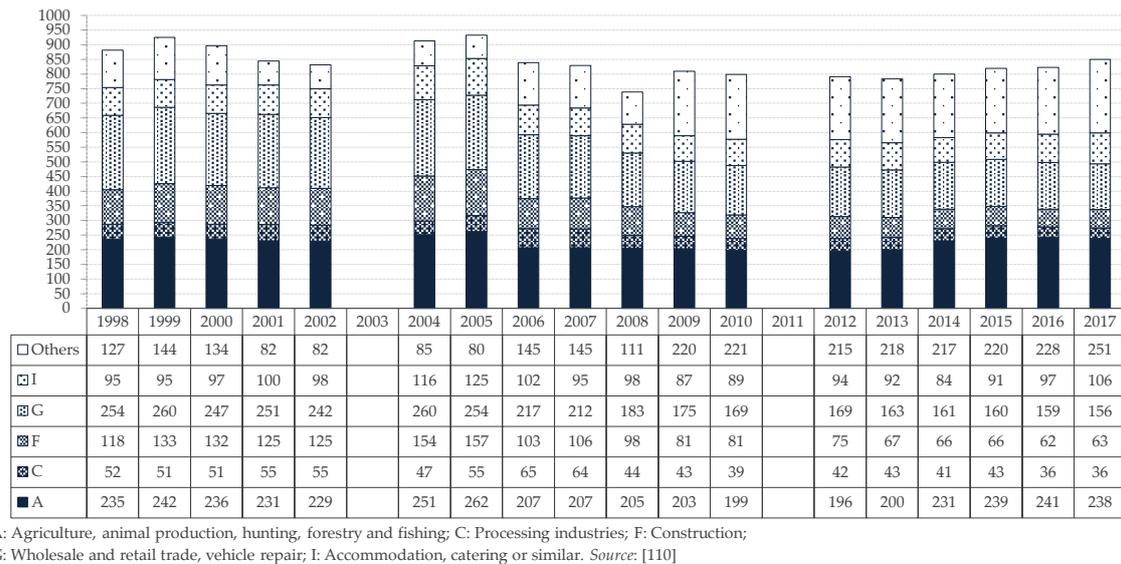
The institutional context is viewed favourably as a key to development by the companies (Int5), which highlight the promotional efforts of the CMM, and the simplification of administrative and legislative procedures. The companies involved in heritage and tourism can be divided into three types (Int4, Int5):

- Entrepreneurship: small start-ups with no background in the field (specialist public employees) or self-employment deriving from training (professional/university).
- Sectorial diversification/income supplement: small-scale initiatives aimed at diversification (typical products) or non-corporate employment (local accommodation).
- Investment: internal investment in hospitality/accommodation by agents in other productive sectors setting up separate businesses, and by outside companies (investment funds, real estate). These are companies with complex business structures.

Of the three types, it is entrepreneurship which is the most dynamic, driving the range of activities available (leadership), and opening up new opportunities in the relatively underdeveloped rural tourism sector [116], where there is a little business culture [12]. Nevertheless, some 51.72% of business volume connected with accommodation and activities is concentrated in the hands of 4 groups (2 entrepreneurs with a variety of ventures, a hotel company and a foreign-owned real estate business).

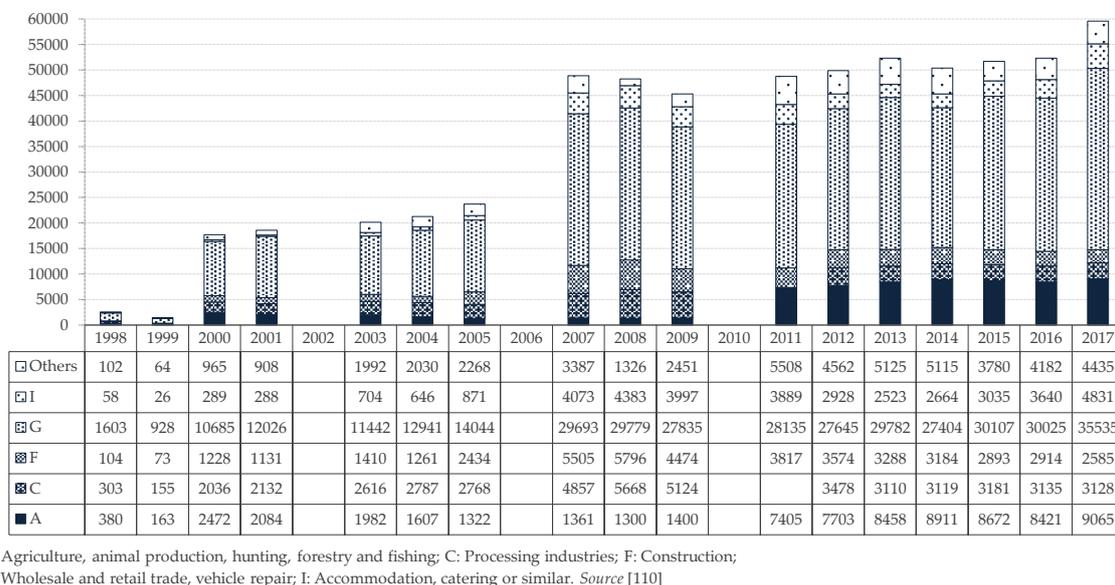
The situation of deprived areas on the periphery make a flow of investment necessary [117] in an sector of high costs and low returns [12], and where the local public initiative focuses on revitalization/promotion (Int1). There is a predominance of personal investment (Int1, Int4, Int5), and the co-financing of initiatives with European grants managed by local action groups is scarce, and generally limited to institutionally managed investment (such as the CMM, CAM and ADPM) (Int4). Some specific projects have been financed, with 7 initiatives in town receiving support between 1996 and 2015 (4 connected to tourist accommodation, 2 restaurants and 1 tourism activities business). The tendency is to finance investment projects beyond the reach of local entrepreneurs. Financial and specialist technical support is essential in the long term [12,27] to avoid/limit the ingress of capital from outside.

Tourism is diversifying the Mértola economy (Graph 5). The two sectors with the highest number of companies are the primary and service sectors. The “accommodation, restaurant and similar businesses” represented 12.47% in 2017, demonstrating a higher degree of stability than other areas. An in-depth study is required to explore the relationships between business activities and the impact of the processes of heritagisation and the promotion of tourism.



**Graph 5.** Evolution of the number of companies by type of activity in the Municipality of Mértola, 1998-2017

In terms of business volume (Graph 6), it is notable that the service sector has increased while the primary sector has stagnated. After a period of slowdown brought on by the international economic crisis, the hospitality sector (chiefly accommodation and restaurants) saw significant growth from 2014, with an accumulated increase of 81.34% between 2014 and 2017. Total income per tourist bedroom in 2017 (an FIM year), rose to 1,474€, and increase of 80.19% over 2013, while the average spending of guest/day was 10.26€ [110], due to the abundance of local accommodation available.

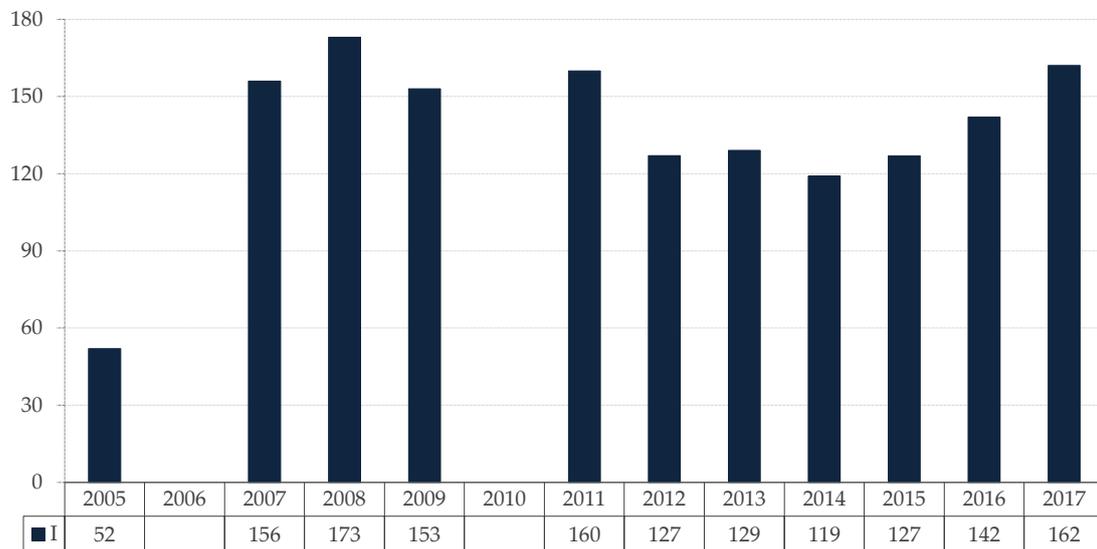


**Graph 6.** Evolution of business volume (thousands of Euros) of companies by type of activity in the Municipality of Mértola, 1998-2017

According to the head offices of the companies involved, outside investment in local real estate has been growing over the last few years, which has had a negative effect on capital accumulation [18]. In addition, the growth in online platforms for managing accommodation is displacing local involvement to the detriment of the available options [118], and depleting the value added. On the plus side, the platforms make the process of booking rural locations far easier, but the dominance of external operators remains a challenge [12].

Although heritage and tourism represent direct and indirect employment opportunities, as well as self-employment [22], one of the chief objectives of rural tourism [116], the structure of

tourism may not be so attractive to the local population [12] due to the limited number of jobs it creates. In 2017, the hospitality sector employed 11.88% of the total workforce. The trend since 2014 has been upwards (a 26.54% increase) although it is still not the major sector in terms of employment (Graph 7). Jobs are being created within the sector, at the same time that the primary sector workforce is diminishing [32], with an average of 1.53 workers per company, although this varies according to the type of establishment and its capacity.



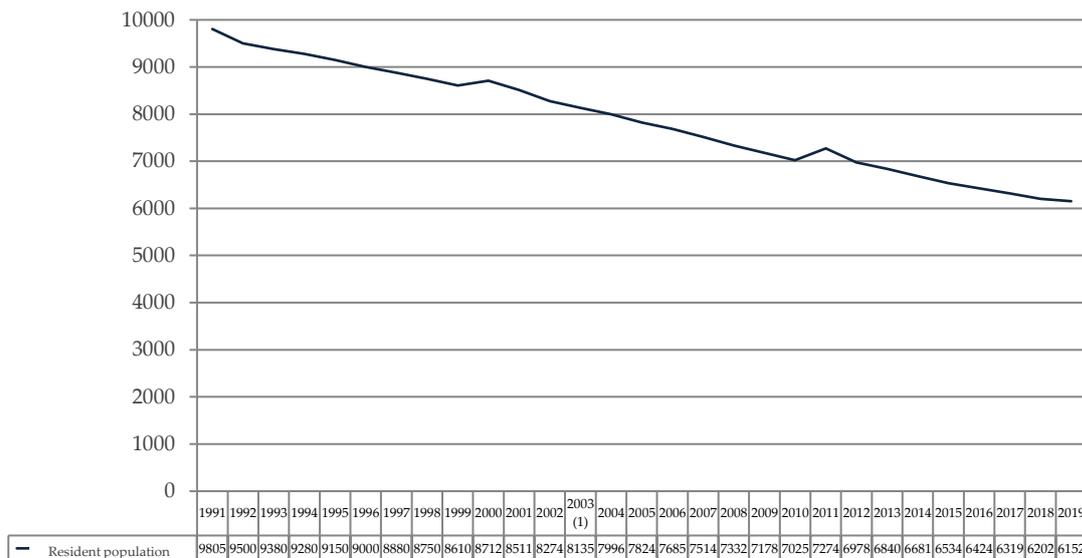
Source: [110]

**Graph 7.** Evolution of employment in accommodation and catering companies in the Municipality of Mértola, 2005-2017

The largest single employer in the municipality is the CMM, which has 316 employees [119], or about 10% of the local workforce. Eleven of these employees work in the area of culture (representing 3.48% of the CMM total) and 14 in the area of tourist information and museums (4.43% of the total) [119]. It is not possible to give the corresponding number of workers for the CAM as this is variable (according to projects) and the incorporation of workers and researchers is seasonal. The skilled workforce, university graduates and technical specialists, is employed mainly in the CMM and CAM. The qualifications are in part the result of the training programmes (EPJBC, ALSUD) [79]. Efforts in this respect have managed to partially fill the lack of essential skills [12], but there remains a need for more qualified workers in the tourism sector.

Employment in this sector is especially susceptible to the effects of seasonality [87], which can be particularly felt in the smaller companies [120]. Problems connected to the lack of a business culture and a prevailing agricultural mentality can also be noted (Int4, Int5), and there are human resources recruitment problems (Int5). Another problem that has been noted is the uprooting of the workforce [15], as many companies are controlled by external groups, although they do create employment. The available data do not indicate whether it is among the most disadvantaged groups that employment is created [121], whether there is any hidden employment and what the repercussions are for the labour market and unemployment. Exploring these issues would increase our understanding of the processes of local development and power relationships [122].

Rural tourism is conceived of a means of attracting and anchoring a stable population [6,9,18,32]. According to the statistics, the rural exodus continues, with a decrease of 37.26% in the population between 1991 and 2019 (Graph 8). However, the decrease slackened off between 2010 and 2019, with the period 2018-19 showing the least loss across the yearly intervals (-0.81%). The net balance is negative, but the rate is reduced from 2015, going from -1.15% to -0.38 in 2018. This might be related to the impulse provided by tourism, but in order to establish correlations an in-depth analysis is necessary.



(1) Estimate. *Source:* [110]

**Graph 8.** Resident population in the Municipality of Mértola, 1991-2019

The process of heritagisation has taken place at the same time that residents moved out of the historical town centre to take up residence in the new part of town or to leave altogether. This outflow contributed to the deterioration of the centre, which is taking considerable time, money and effort to restore. Tourism has awakened interest in the centre, with the restoration and adaptation of traditional buildings (Int2, Int4) as tourist accommodation (13) and second residences [112,123,124], but this has resulted in further depopulation and a process of touristification [112]. There is a risk of theming such as can be observed in other comprehensive heritage projects, such as that of Óbidos [71]. Comparative studies would help to correlate the causes and consequences of this type of heritagisation. In order to prevent the emptying of the historical centre and to encourage people to return, the CMM established a package of measures to support the rehabilitation of local heritage [80], aimed at: a) restoring buildings for use by the municipal services, such as the CAM, the Museum and so on; b) the promotion of events and economic activities (the FIM and similar celebrations); c) social housing. This has resulted in the process of gentrification being inversely mirrored by one of ghettofication (Int5), making it difficult to strike an appropriate balance.

Among the positive cultural impacts which are worth noting are the reappraisal of the town's heritage which had been lost or undervalued [125], the cultural capital [126], and the authenticity and preserving of identity [71,127,128]. However, the degree of authenticity in the process of foregrounding tourism should be identified as "attraction-based identity" [129]. The disjoint between the project and local residents is leading to the "deliberate" construction or adaptation of identity around the cultural experience [129] (p. 39), prioritising what the tourist is perceived to want above what the heritage might truly be (banalisation). A clear example of this is the FIM, which mixes the local with the universal, is not centred on the participants and their experiences, and leaves the local population feeling detached from their roots (Int1). There is, too, the ongoing debate about the commodification of rural space [130] and culture [58,123], and the converting of authenticity (identity) into merchandise, both of which call into question the development processes [136].

Since the 1990s, the issue of sustainability has been an additional construct in the debate over rural tourism [132] and cultural tourism [51,133,134]. In the regard, the most serious questions concern how to manage visitors to an area, how to control numbers and how to establish limits [29], especially when there is a peak in demand for events (FIM), or a marked seasonality, issues which require further study in order to establish reliable indicators of sustainability.

The institutional discourse, encapsulated in the document, "Profitability, activation and sustainability, thinking of ways to generate wealth and further energize the local economy" [83] (p. 102) argues a contrary view to the capping of capacity, establishing a positive correlation between

the number of visitors and development [135]. Nor does sustainability appear in the discourse of the business interests (Int5). Concern in this respect has only been voiced in the CAM, which fixes the maximum number of attendees at the FIM at 40,000 [75]. Indeed, there barely seems any awareness of the purely mathematical limits with respect to providing services: the town can accommodate 295 people/day and the catering service can provide 9,104 meals (with a turnover of 8 services per seat), while the maximum capacity of the rest of the municipality is no larger (307 people/day in terms of accommodation and  $\geq 6,000$  meals).

It is evident that the rate of growth puts pressure on sustainability, as the ADPM noted in 2007 [90], and the effects of the town's inclusion on the LIPMP also need to be taken into account. The implications of potentially being declared a WHS could be manifold, and it is quite possible that they do not match expectations [42,136].

**Acknowledgments:** The authors are especially grateful to Susana Gómez Martínez, of the CAM, for her valuable assistance in arranging interviews and making available essential documentation.

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