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HERITAGE AND TOURISM CHARTERS (1976, 1999, 2022)

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At the broadest level, cultural and natural heritage belongs to all mankind, everybody having the right and responsibility to understand, appreciate and conserve their universal values, because the particular heritage and collective memory of each community are irreplaceable and an important basis for present and future development. In the conditions of increasing globalization, very rapid technologization, changes in the needs and expectations of tourists, tour operators offer visitors a series of programs that focus on movable and immovable, cultural and natural heritage, which sometimes, due to negligence or carelessness, they damage. In this sense, ICOMOS and other international organizations with a role in protecting the heritage have adopted a series of Tourism Charters to regulate both heritage and cultural tourism issues, as well as to educate and change the behavior of tourists towards these universal values, common assets at a global level.

Keywords: *heritage, culture, protection, conservation, tourism charter, values.*

PATRIMONIUL ȘI CARTELE TURISMULUI (1976, 1999, 2022)

La cel mai larg nivel, patrimoniul cultural și natural aparține întregii omeniri, fiecare având dreptul și responsabilitatea de a înțelege, aprecia și conserva valorile sale universale, deoarece moștenirea particulară și memoria colectivă a fiecărei comunități sunt de neîndoielă și o importantă bază pentru dezvoltarea prezentă și viitoare. În condițiile globalizării crescânde, a tehnologizării foarte rapide, a modificării necesităților și așteptărilor turiștilor, operatorii din turism vin în întâmpinarea vizitatorilor cu o serie de programe care au în centrul lor patrimoniul mobil și imobil, cultural și natural, căruia uneori, din neglijență sau nesăbuință, îi aduc prejudicii. În acest sens, ICOMOS și alte organizații internaționale cu rol în protejarea patrimoniului au adoptat o serie de Carte ale turismului care să reglementeze atât problemele de patrimoniu și turism cultural, cât și educarea și modificarea comportamentului turiștilor față de aceste valori universale, bunuri comune mondiale.

Cuvinte-cheie: *patrimoniu, cultură, protejare, conservare, carte a turismului, valori.*

Introduction

The progress made by society at all its levels is a natural consequence of development, man occupying the central place in this long process, standing out both as a creative being and as a beneficiary of the products of his inventiveness and creativity but also not quite often as a destroyer of his own creations. Throughout history, many and various objects and monuments have been created, signs of the times and responses to the demands of the time or, not infrequently, avant-garde heralds of new trends and directions of development. Some were endowed with symbols and value from the very beginning while others acquired these attributes only after passing the test of time. Man has always had the tendency to return to the past, to a time he did not know, but about which he formed a certain image, often positive, to replace an often unsatisfactory present. Thus, the past was shrouded in mystery, romanticism, was idealized and beautified precisely to respond to subjective searches on the long road to self-awareness.

Through travel, man has discovered the world and himself, has passed from the Self to the Other, has internalized the world and has externalized himself in the world. The vestiges of the past have always attracted him because the quaint beauty of a forsaken world has opened unexpected doors of imagination, has helped him immerse himself in immemorial times and spaces. That is why, since ancient times, man has traveled, initially for economic, mercantile and military reasons, then for pleasure, and later the range of reasons increasingly diversified as man's material and especially spiritual needs have become more and more complex. Tourism, which has developed on this basis, is currently a real industry making profit and leading to economic development for many countries which boast a heritage unanimously recognized at the international level.

From an etymological point of view, the term „tourism” comes from the Greek term *turnos*, the Latin term *turnus* respectively, with the meaning of tour, later found in the French term *tour* which means travel, movement in the open air, walk, hiking tour, finally taken over by the English *to tour* (to travel, to wander in the sense of taking a trip) [1, without the page].

Since the tourist activity is highly complex, its definition falls within a rather wide range, with many points of view, hence the multitude of attempts to capture its essence, its conceptualization demonstrating precisely the social importance given to it, especially since the 19th century.

The exploitation of thermal waters in European countries in the 19th century set the tone for tourism as an activity, when a „new industry” emerged and when the first official documents appeared, such as the one relating to hotel activity in Switzerland (1883) or E. Guyer Freuler’s study, *Contributions to tourism statistics* (1896), which gave a first definition of tourism as “a phenomenon of modern times, based on the growing need to restore health and change the environment, to cultivate the feeling of receptivity towards the beauties of nature... a result of the development of trade, industry and means of transport” [2, p. 12].

The definition is important as it identifies the economic side of tourism, as well as some motivations for travelling. Other theorizations of tourism follow, the most important being the definition of the Swiss W. Hunziker, also adopted by K. Krapf, established as a benchmark in the specialized literature, which considered tourism as „the sum of the phenomena and relationships arising from the travel and stay of non-residents, insofar as they do not lead to permanent residence and are not connected with any earning activity” [3, p. 13].

A modern definition is given by the Dex, tourism representing „The sum of relationships and phenomena arising from the travel and stay of non-residents (such as spending a holiday or work leave, participating in various events, etc.)” or „A recreational or sports activity, consisting of traveling some distances on foot or by different means of transport, in order to visit picturesque regions, towns, cultural, economic, historical sights, etc.” [4, without the page].

The development of tourist activity has led to the emergence of several branches of tourism, the cultural one standing out in particular. Unlike other types of tourism, it involves attracting tourists with a higher level of education, with a broad horizon of culture and civilization that gives them the possibility of choosing destinations that satisfy their instructive-educational and cultural needs, as well as their curiosity to know new places and people.

In order for a trip to fall within the sphere of cultural tourism, it must meet three conditions: „to be determined by the desire for knowledge, for culture; to represent the consumption of a culturally significant tourist product (monument, work of art, show, exchange of ideas); to involve the intervention of a mediator – a person, a written document, an audio-visual material – that values and realizes the cultural product” [2, p. 86]. Once these conditions are met, we must also notice the transformations in cultural life that undoubtedly leave their mark on travel, its destinations and objectives and how they influence them. The relationship between cultural tourism and heritage elements, which affects the destinations to visit, is also noteworthy. Thus, the forms of tourism are materialized in: „*visiting the objectives of the cultural-historical heritage*: archaeological and historical vestiges, monuments, castles, religious buildings, urban and rural complexes, parks and gardens; *visiting museums*: art galleries, archeology, history, natural sciences, specialized or thematic, national or regional museums, botanical gardens, zoo parks; *participation in cultural events*: opera, ballet performances, theater, concerts, music, dance, film, folklore festivals, traditional holidays, exhibitions, fairs; *industrial and technical tourism*: visiting some economic (industrial) objectives, certain constructions (dams, viaducts, bridges, tunnels, canals), modern or traditional urban architectural complexes, knowledge of the organization of social life, etc.” [2, p. 87]. Hence, the conclusion that cultural tourism interferes with leisure tourism but also with business tourism, and by its economic nature it contributes to the development of local and regional sustainable economy.

Along with the positive aspects of cultural tourism, there are also negative ones that have damaged the heritage elements that are tourist sights. That is why, there is a legislative need to regulate cultural tourism and to limit as much as possible the material destruction caused by visitors or heavy traffic in these areas.

Cultural Tourism Charter (1976)

A first action in this sense is the *ICOMOS Cultural Tourism Charter* from 1976, adopted following the International Seminar on Tourism and Contemporary Humanism, held in Brussels between November 8 and 9, 1976. It is considered the first international document focused on the need for a responsible tourist approach to cultural heritage while also anticipating the recognition of sites and monuments as a source of economic benefit and cultural education [5, p. 2].

According to this Charter, „tourism is an irreversible social, human, economic and cultural fact... which aims, among other objectives, to discover sites and monuments”, recognizing both the positive impact on the heritage and the environment, as well as the negative impact, which imposes a concern for conservation and protection, as well as education in order to cultivate „respect for the cultural and natural world heritage, which must prevail over any other considerations, however justified they may be from a social, political or economic standpoint” [5, p. 2]. For this reason, between the organizations that represent tourism and those whose object is to protect the natural and monumental heritage, there must be a permanent collaboration both to protect and to value the cultural and natural heritage in order to obtain the greatest possible benefits, but only under the conditions of integrating cultural values and social objectives, as well as the economic aspects included in the planning of the resources of the countries, regions and local communities, ensuring full concordance between them [5, p. 3].

The Charter also places special emphasis on measures to raise awareness among tourists regarding the heritage in order to change their attitude towards the phenomena resulting from the massive development of tourism needs. This education ought to start in school, the youth being thus educated to understand and respect the sites, monuments and artistic heritage, with a great contribution from the written and audiovisual mass media [5, p. 4].

Considering pollution, as well as other destructive factors affecting the heritage, specialists, architects and scientists from all over the world are called upon to mobilize for its protection, using the world’s most advanced technological resources and initiating plans of development and tourist endowment aimed at protecting and preserving heritage elements [5, p. 4].

Through this Charter, the signatories state that they aim to „respect and protect the authenticity and diversity of cultural values both in developing and industrialized countries, the fate of mankind’s cultural heritage being, from the perspective of tourism development, in the greatest unity ” [5, p. 4].

International Charter of Cultural Tourism. The management of tourism in places of heritage importance (1999)

In October 1999, at the 12th General Assembly in Mexico, ICOMOS adopted another *International Charter of Cultural Tourism. The management of tourism in places of heritage importance*, with a generous Introduction, followed by the statement of the Objectives and six Principles, which places cultural tourism on a much firmer footing.

In the **Introduction**, the Ethos of the Charter brings into focus the more detailed definition of heritage understood as „a broad concept that includes both the natural and the cultural environment. It encompasses landscapes, historic places, sites and built environments, as well as biodiversity, collections, past and ongoing cultural practices, knowledge and life experiences. It records and expresses the long processes of historical development, forming the essence of various national, regional, indigenous and local identities, and is an integral part of modern life. It is a dynamic benchmark and a positive tool for growth and change. The particular heritage and collective memory of each locality or community are irreplaceable and are an important basis for development, both now and in the future” [6, p. 1].

The diversity and multitude of heritage elements in a world where the phenomenon of globalization is constantly growing requires not only their protection, conservation, interpretation and presentation, but also a good management that has proposed as its main objective “to communicate to the host community and the visitors the importance and the need for its conservation. Reasonable and well-managed physical, intellectual, and/or emotional access to the heritage and cultural development is both a right and a privilege. It entails a duty of respect for heritage values, the interests and equity of the current host community,

indigenous custodians or owners of historic properties, and for the landscapes and cultures from which that heritage has evolved” [6, p. 1].

The Charter outlines the dynamic interaction between tourism and cultural heritage, emphasizing the fact that domestic and international tourism, seen as one of the „most important vehicles of cultural exchange”, is of major importance both for offering special personal experiences and for the economic side of the heritage, which, well exploited, generates financial benefits, educating the community but also influencing politics, thus becoming an important factor of local, regional and national development.

The negative effects of tourism for the host communities are also mentioned, but they can be countered by a set of measures initiated by both political factors and representatives of local communities, tour operators, heritage specialists, owners.

As **objectives**, this Charter has set out to facilitate the accessibility of the host community and the visitors to the significance of the heritage, to encourage the promotion and management of tourism in ways that respect and enhance the heritage and living cultures of the host communities, to facilitate and encourage dialogue between the interests for heritage conservation and the tourism industry, to encourage the drawing up of plans and policies which, in the context of heritage use, aim to preserve it, to support international cooperation in maintaining the integrity of heritage management and conservation, while facilitating the implementation of the Principles according to their specific circumstances or the requirements of certain organizations and communities [6, p. 2].

The Charter enunciates six principles, as follows:

Principle 1 refers to the importance of understanding and awareness by host communities and the visitors of the significance of the heritage, of its various cultural values, aiming to educate them about the long-term survival of natural and cultural heritage;

Principle 2 reveals the dynamic of the relationship between heritage and tourism that generates both opportunities and challenges, but also possible conflicts, which, however, through effective management, leads to positive results, also meeting the needs, the visitors’ aspirations and expectations, as well as preserving the authenticity of heritage sites and elements;

Principle 3 underscores the requirement that tourism planning and conservation of heritage sites should provide the visitors with a useful, satisfying and enjoyable experience in order to make them return;

Principle 4 concerns the involvement of host communities and indigenous peoples in conservation and tourism planning, respecting their decisions to restrict or manage physical, spiritual or intellectual access to certain cultural practices, knowledge, beliefs, artifacts or sites;

Principle 5 states the priority of the host community to benefit from conservation and tourism activities, the involvement of local interpreters in promoting and presenting their own values, and that conservation, and that tourism management programs should include education and training opportunities for policy makers, planners, researchers, designers, architects, interpreters, conservationists and tour operators;

Principle 6 advocates that tourism promotion programs ought to protect and enhance natural and cultural heritage features so that their authenticity is protected, visitor expectations are met at the highest level, and there are reasonable economic and social benefits for host communities [6, pp. 3-7].

International Cultural Heritage Tourism Charter (2022)

The continued development of tourism under the circumstances of increasing globalization, especially considering the disorganization of world tourism, required the revision of the 1999 charter and imposed a new *ICOMOS International Cultural Heritage Tourism Charter (2022): Strengthening the protection of cultural heritage and resilience of populations through responsible and sustainable tourism management*, which was adopted in November 2022 by the annual ICOMOS General Assembly held in Bangkok, Thailand. In these conditions of tourist expansion and continuous pursuit of the highest possible profits, the cultural and natural heritage is subjected to increasingly serious degradation, which, not infrequently, endangers its integrity. Therefore, this Charter recognizes the heritage as a common resource, its governance and enjoyment constituting common rights and responsibilities, and advocates for responsible and diversified development and management of cultural tourism that contributes to the preservation of cultural

heritage, community empowerment, social resilience and well-being, as well as a healthy global environment [7, p. 1]. Thus, they plead for a responsible tourism assumed by everyone.

The Charter proposes **three objectives**:

1. - To place the protection of cultural heritage and community rights at the heart of cultural heritage tourism policy and projects, by providing principles that will inform responsible tourism planning and management for cultural heritage protection, community resilience and adaptation;

2. - To promote stakeholder collaboration and participatory governance in the stewardship of cultural heritage and management of tourism, applying a people-centered and rights-based approach, emphasizing access, education and accreditation;

3 - To guide cultural heritage and tourism management in supporting the UN Sustainable Development Goals and Climate Action policy [7, p. 2].

The Charter is aimed at governments, tour operators, tourism businesses, destination managers and marketing organizations, site management authorities, developers, heritage and tourism professionals, civil society and visitors alike, providing advice to heritage and tourism practitioners, professionals and decision-makers within governmental, international, national and local agencies, organizations, institutions and administrations and aims to be a benchmark for educators, academics, researchers and students involved in cultural heritage and tourism [7, p. 2].

The Charter sets out **seven principles**:

1. To place cultural heritage protection and conservation at the center of responsible cultural tourism planning and management;

2. To manage tourism at cultural heritage places through management plans informed by monitoring, carrying capacity and other planning instruments;

3. To enhance public awareness and visitor experience through sensitive interpretation and presentation of cultural heritage;

4. To recognize and reinforce the rights of communities, Indigenous Peoples and traditional owners by including access and engagement in participatory governance of the cultural and natural heritage commons used in tourism;

5. To raise awareness and reinforce cooperation for cultural heritage conservation among all stakeholders involved in tourism;

6. To increase the resilience of communities and cultural heritage through capacity development, risk assessment, strategic planning and adaptive management;

7. To integrate climate action and sustainability measures in cultural tourism and the management of cultural heritage. [7, pp. 5-6].

Social, cultural and technological changes have led to an exponential increase in tourism to heritage destinations, but also to a greater awareness within local communities of the value of their heritage, its importance for the quality of individual and community life, the interest of tourists and tourism for tangible and intangible heritage contributing to a large extent. Yet, this development of tourism based on the growing demand of tourists to travel to cultural destinations has led to the phenomenon of „overtourism” „characterized by widespread agglomeration and the unacceptable degradation of material and immaterial heritage, with social, cultural and economic impact. The promotion, commercialization and widespread use of cultural heritage have also caused commodification and gentrification, harming local populations and the cultural integrity and endangering irreplaceable assets” [7, p. 4]. In addition to these negative consequences related to planning and reckless development of tourism, we can also mention the destructive impact on many sites and places of cultural heritage, on indigenous peoples and host populations, the unfair sharing of benefits, the commercialization and overexploitation of local culture and heritage, etc. [7, p. 4].

Conclusions

The existence of a world heritage, property of several countries, spread over wide geographical areas, as well as people’s interest in it, has led to a progressive increase in cultural travel, which, in turn, has led to the emergence and development of a new industry, the tourism industry. Over time, a symbiotic relationship

has developed between heritage and tourism that has had both a positive and a negative influence, with dire consequences for the heritage, the environment and communities. The financial and generally economic benefits have led to an unprecedented development of tourism, causing the phenomenon of “overtourism” of nowadays, which, in turn, has caused significant destruction in many areas in addition to the development of the respective areas. Therefore, ICOMOS and other international bodies with the role of protecting cultural and natural heritage, but also tour operators, as well as political factors, taking into account the consequences of the increasing flows of tourists in heritage areas, have considered that both tourism and tourists/visitors need regulations aimed at protecting and conserving the heritage, and educating at the same time, changing people’s behavior towards the past and its vestiges. Thus, Charters of tourism signed by various countries have been elaborated, which jointly assumed a judicious management of the heritage in order to keep it in the best possible condition because it is considered an asset of mankind, regardless of whose property it is.

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