

WORKING METHODOLOGY REPORT

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GLOSSARY OF TERMS

Term	Description
Cultural heritage	Cultural heritage represents the totality of the values of a certain area. It encompasses tangible and intangible goods, forms and phenomena of human creativity in the past of artistic, historical, paleontological, archaeological, anthropological and scientific significance. It has monumental properties which are protected and preserved.
Cultural and creative industries	Cultural and creative industries include and combine culture, creativity, skills and talents, and the production and commercialization of cultural and creative content. These elements make the basis for the valorisation and creation of new economic values, the creation of jobs and the exploitation of intellectual property. These industries include cultural institutions and various elements of culture, marketing, architecture, arts, crafts, design, fashion design, film and video, software and computer games, music, performing and visual arts, publishing, television and radio.
Green tourism	Green tourism is part of the concept of sustainable tourism development. It emphasizes the ecological sustainability of tourism and the reduced negative impact of tourism on the nature (circular economy, efficient waste and water management, renewable energy sources, etc.). In addition, green tourism is focused on cultural and social sustainability, i.e., the preservation of cultural and social values of the local community in their natural environment (ambience and lifestyle, identity, traditional crafts, events and rituals, etc.).
Local Communities of Practice	Local Communities of Practice (LCP) include relevant stakeholder groups from the narrow area in which the tourism product is being developed. The possibility of involving stakeholders from a wider area (region or country) is not excluded, if their actions directly affect the observed area. The LCP includes local and regional government (public sector), the tourism industry (private sector), the civil sector (NGOs) and the scientific community (academia which explores the geographical area and heritage on which the tourism product is based).
Natural heritage	Natural heritage consists of natural values of the certain climate (area), which have been placed under protection by state acts, in order to preserve its original natural and monumental values. Legal or other protection also exists because of the rarity, uniqueness, or beauty of natural heritage, as well as its value to the science and understanding of nature.
Regional stakeholders	Regional stakeholders are relevant groups of stakeholders from the wider area where the tourism product is being developed (region, county, province or district). The possibility of involving stakeholders at the national level is not excluded, if their actions directly affect the observed area. Regional stakeholders include local and regional government (public sector), the tourism industry (private sector), the civil sector (NGOs) and the scientific community (academia which explores the geographical area and heritage on which the tourism product is based).
Smart action plan	Smart action plan defines goals, activities and ways of acting to achieve them. It is usually adopted for a shorter period (1-3 years) and has an operational character, which plans activities in detail to implement the set goals. By their character goals must be Specific, Measurable, Attainable, Relevant and Time-Bound (SMART). The smart action plan also specifies tasks and responsible persons, helps to allocate resources, identifies priorities, enables the implementation of projects in phases, allows the implementation of activities in different time periods and creates a framework for control and supervision.
Smart specialization	Smart specialisation is an innovative approach that aims to boost growth and jobs in Europe, by enabling each region to identify and develop its own competitive advantages. Through its partnership and bottom-up approach, it brings together local authorities, academia, business spheres and the civil society, working for the implementation of long-term growth strategies supported by EU funds. Smart specialisation identifies the region's own strengths and comparative assets (SMART), prioritises research and innovation investment in competitive area (SPECIALISED) and defines a shared vision for regional innovation (STRATEGIC).

Smart specialization strategies	Smart Specialisation Strategies (S3) contribute to the Europe 2020 objectives of smart, sustainable and inclusive growth by enhancing EU regional and national potential in research and innovation. They respond to complex development challenges by adapting the policy to the regional context, they focus policy support and investments on key national/regional priorities, challenges and needs for knowledge-based development, they build on each country/region's strengths, competitive advantages and potential for excellence, they support technological as well as practice-based innovation and aim to stimulate private sector investment, they get stakeholders fully involved and encourage innovation and experimentation, they are evidence-based and include sound monitoring and evaluation systems.
Smart tourism	Smart tourism is a tourism that uses innovative, sophisticated and smart technological achievements in managing a tourism destination and its sustainable development, development and implementation of tourist products and services, reducing the negative effects of tourism in a destination, efficient traffic in a destination, creating special tourist experiences and more.
Slow tourism	Slow tourism is a concept of tourist travel based on a special experience which tourist realizes in interaction with the local community, their natural environment, culture, tradition, customs, gastronomy, etc. Slow tourism is considered in the context of sustainable and responsible tourism because it respects the specifics and needs of the local community, unlike mass tourism which most often neglects it.
Sustainable tourism	Sustainable tourism is a concept of tourism development based on the preservation of three pillars of sustainability – environmental, socio-cultural and economic. The main goal of sustainable tourism is to preserve the socio-cultural identity of the local community, improve their quality of life and raise well-being, while creating sophisticated and quality products which will provide special experience to tourists, all with rational use of resources and environmental protection that would generate all mentioned in the future.
UNESCO	United Nations Educational, Scientific and Cultural Organization
Value chain	Value chain encompasses a range of activities from the creation of an idea and development of a product/service, through their implementation and distribution in the market. It shows how the product/service moves from its development to the end user. The aim of the value chain is to identify all phases and activities covered by the value chain, the entities involved, the factors influencing the product/service that is a subject of the value chain, and the impacts and effects of the product/service on the internal and external environment.

1. INTRODUCTION

The methodology for the assessment of cultural and natural heritage is intended for all relevant stakeholders who are with various socio-economic activities (direct and indirect) connected to the area in which the subject cultural and natural heritage is located. The methodology has been developed based on the latest literature and experiences from previous research in the field of interest, with the aim of defining unique criteria for the management of cultural and natural heritage. Cultural and natural heritage management refers to the local and regional level and is focused on the needs of local communities and tourism. From that aspect, management is considered in the socio-cultural context of local communities, but also in the economic context of the tourism destination in whose area the cultural and natural heritage is located.

The methodology sets the framework for the analysis and assessment of cultural and natural heritage. In the first part, the basic determinants of cultural and natural heritage are established with the aim of unifying terminology and initial categories of analysis. Furthermore, the methodology identified groups of relevant regional stakeholders, groups of representative local stakeholders or Local Communities of Practice (LCP) and target stakeholder groups for which the specific results (products) of this project are intended. The central part of the methodology identifies and clarifies the basic categories of management with the associated elements that need to be included in the analysis of the state and assessment of cultural and natural heritage. According to the given categories and corresponding elements, based on secondary data, it is necessary to analyse and assess the state of cultural and natural heritage. They also serve as a designed guide (questionnaire, reminder) for discussion with local stakeholders (LCPs) in order to obtain information from the field. In addition, the level of tourist development of the area where the subject cultural and natural heritage is analysed has been determined, which is the basic premise of the implementation of tourist products based on cultural and natural heritage. Individual elements in the categories have been assigned certain parameters, that is reference values within which the occurrence of individual elements moves. Therefore, the occurrence of individual elements should be determined and described by the factual state based on secondary data, as well as primary data collected by research and through meetings with relevant local stakeholders (interviews, focus groups, surveys, meetings, etc.). Also, the occurrence of individual elements can be considered from several levels (national, regional and local), depending on the specifics of legislation and regulatory conditions. After defining the relevance of an individual heritage and its potential for value chain development, five (5) key heritage elements, that can be used to create sustainable, green and smart tourism products through the process of technology transfer and smart specialization are selected.

Given categories with associated elements also serve as a basis for conducting research in the next phase of the project, as well as defining policies, measures and action plans aimed at implementing specific tourist products based on cultural and natural heritage, which is the subject of the analysis. In the analysis phase, it is necessary to evaluate the currently valid strategic documents in the selected pilot area. Accordingly, it is necessary to list strategic and operational documents related to the subject of the project at all levels and analyse their content and functionality. The methodological framework for strategic action is given in Chapter 7 of this document.

This methodology serves as an instrument that any tourism destination can accept and implement without special training. It sets a framework that can be expanded or narrowed depending on the needs of the tourism destination, the interest of local stakeholders and the specific characteristics of the destination. This means that certain elements in the categories need to be expanded, i.e. some elements do not need to be processed significantly if they are not relevant or do not exist in the subject area. Ultimately, this methodology contributes to the sustainable management of cultural and natural heritage in tourism, through: 1) defining clear and uniform management criteria; 2) insight into the condition, possibilities and restrictions of use; 3) determining priorities and actions; 4) the possibility of monitoring and measuring results; 5) timely risk management; 6) more active participation of the local community and other relevant stakeholders; and 7) higher obtained value and user experience.

The analysis of strategic and development documents is the basis on which local government and self-government units will be able to devise smart action plans. In order to facilitate the process of developing smart action plans, a methodological manual for their development will be developed. The goal of the action plans should be the preservation and management, but also the application of heritage (which is based on the way of life of the community) in (sustainable) tourism products. The smart action plan should include projects of smart specialization strategies (S3), tourism, cultural and creative industries (CCI), heritage, etc., that is their activities that encourage innovation, research and development in tourism. In that context, it is necessary to define the time frame for the implementation of activities and ways to monitor the quality of the implementation of activities. The most important element is the cooperation and coordinated action of the public and private sectors and the scientific community with a common goal: increasing the availability of heritage and heritage-based products/services.

A smart action plan defines how the activities will be implemented, when and who will implement them:

Table 1. Regional stakeholders and their functions

Regional stakeholders (D4.1.1)	Scientific community (academia)	Public sector	Private sector
FUNCTION	Heritage research	Heritage management	Creating heritage-based products
ACTIVITIES/PROJECTS	* scientific research * testing, measurement and evaluation	* increasing heritage availability * marketing and promotion	* certification of products / services * clusters

2. BASIC DETERMINANTS OF CULTURAL AND NATURAL HERITAGE

In order to unify the criteria for the analysis and consideration of cultural and natural heritage, first it is necessary to define their basic determinants. In doing so, it is necessary to consider the specifics of the legislation that defines and regulates the cultural and natural heritage in a territory of states and/or regions. This means that there may be certain differences in the definition and treatment of cultural and natural heritage between the countries of Croatia and Italy, but also the regions within these countries. In this sense, each project partner, when developing a tourist product, must consider the specifics of cultural and natural heritage management in its area.

Heritage is one of the bearers of the identity of the community in which it was created, i.e., which inherited it and which the community continuously creates. Cultural heritage is the totality of material and spiritual creativity of individuals or groups inherited by ancestors, and which is important to preserve for future generations (not only within the community in which it originated, but also for visitors). Heritage is most often divided into two categories:

- a) natural heritage
- b) cultural heritage

Natural heritage is the totality of the natural values of the climate (area). UNESCO (2009) defines natural heritage as “natural features, geological and physiographical formations and delineated areas that constitute the habitat of threatened species of animals and plants and natural sites of value from the point of view of science, conservation or natural beauty. It includes private and publically protected natural areas, zoos, aquaria and botanical gardens, natural habitat, marine ecosystems, sanctuaries, reservoirs etc.”

Cultural heritage for partners in the Republic of Croatia within the Act on the Protection and Preservation of Cultural Goods (NN 69/99, NN 151/03; NN 157/03) consists of:

- “movable and immovable objects of artistic, historical, paleontological, archaeological, anthropological and scientific significance,
- archaeological sites and archaeological zones, landscapes and their parts that testify to the presence of man in space, and have artistic, historical and anthropological value,
- intangible forms and phenomena of human spiritual creation in the past as well as documentation and bibliographic heritage and
- buildings, i.e., spaces in which cultural goods and documentation about them are permanently stored or exhibited.”

Cultural heritage is most often divided into two categories:

a) tangible cultural heritage

- immobile
- movable

b) intangible cultural heritage

Immovable cultural heritage is defined by the same law as:

- town, village, settlement or part thereof,
- building or its parts, and the building with the environment,
- elements of the historical equipment of the settlement,
- area, place, monument and landmark in connection with historical events and persons,
- archaeological site and archaeological zone, including underwater sites and zones,
- area and place with ethnological and toponymic contents,
- landscape or its part containing historically characteristic structures, which testify to the human presence in space,
- gardens and parks,
- technical facility with devices and other similar facilities.

Movable cultural heritage is defined by the same law as:

- collection of objects in museums, galleries, libraries and other institutions, as well as in other legal entities and state and administrative bodies, including natural persons,
- church inventory and items,
- archives, records, documents, letters and manuscripts,
- movies,
- archaeological finds,
- anthological works of fine and applied arts and design,
- ethnographic objects,
- old and rare books, money, securities, postage stamps and other printed matter,
- documentation on cultural goods,
- theatrical props, sketches, costumes, etc.,
- utility items (furniture, clothing, weapons, etc.), means and devices of traffic and transport, items that are significant evidence of the development of science and technology.

Intangible cultural heritage can be various forms and phenomena of spiritual creativity that are transmitted by tradition or otherwise, and in particular:

- language, dialects, speeches and toponymy, and oral literature of all kinds,
- folklore creation in the field of music, dance, tradition, games, rituals, customs, as well as other traditional folk values,
- traditional arts and crafts.

Preservation of intangible cultural goods is carried out by making and keeping records of them, as well as encouraging their transmission and nurturing in the original and other environments.

3. DEFINING GROUPS OF RELEVANT STAKEHOLDERS, TARGET GROUPS OF STAKEHOLDERS AND LOCAL COMMUNITIES OF PRACTICE (LCP)

According to the concept of stakeholders, the central place in a tourism destination is occupied by a network of relations of interest and influential groups to ensure their long-term existence, where the stakeholder is any person or group that can influence or influences destination goals (Krce Miočić, Razović & Klarin, 2016). Due to such a broad stakeholder concept, there is no single list of relevant stakeholders that would be valid for all destinations. However, the most common groups are: the private sector, the public sector, the civil sector and the local population and tourists. By defining relevant stakeholder groups, users in the value chain of tourist products are also identified. This is an important starting point because by involving relevant stakeholders in the analysis of the situation and development of tourist products, the implementation of tourism products itself gets full meaning. Therefore, at the very beginning, it is necessary to identify groups of stakeholders who have interests and influence on the development and implementation of tourist products.

For the purposes of this analysis, the relevant stakeholder groups are:

- Local and regional government (public sector)
- Tourism industry (private sector)
- Civil sector (non-governmental organizations)
- Scientific community (academia which explores the geographical area and heritage on which the tourism product is based)

These stakeholder groups also represent the population of stakeholders from which the group of local stakeholders or Local Communities of Practice (LCP) group is selected. Each of the stakeholder groups must be represented by at least one member within the Local Communities of Practice (LCP). It is important to emphasize that LCP is selected primarily from the narrow area where the tourism product is developed but does not exclude stakeholders from the wider area (region or country), if their actions affect the observed area (through the adoption of strategic guidelines, management mechanisms, etc.). The list (base) of relevant stakeholders, target group stakeholders and local stakeholders should be made in a separate document (in Excel format) and submitted to the project partner that is the holder of this activity (PP RERA). The scientific community includes institutes, universities, polytechnics and individuals who do not have to be listed in the database but are invited to the LCP based on previous scientific work.

The LCP defined in this way is the starting point for the quality realization of a project that in its essence aims to combine innovation, smart specialization and local heritage with the goal of improving the current tourist offer through redefined or new innovative tourist products.

When the LCP is formed, it is necessary at the first meeting (whether it took place live or online) to invite members to assess the state of cultural and natural heritage in the area where the new tourist product will be developed. Assessment of the state of cultural and natural heritage with local stakeholders is carried out on the basis of a designed guide (questionnaire), which can be found in the attachment (Appendix 1). This serves as a basis for communication (physical or online) with local stakeholders who evaluate individual elements, and their ratings (results) are

entered in a separate table in excel format to be combined at a later stage of the project. An Excel spreadsheet with the answers of local stakeholders should be submitted to the project partner that is the holder of this activity (PP RERA).

In the case of an online (electronic) meeting with local stakeholders (LCPs), the questionnaire needs to be converted into electronic (digital) form and forwarded to stakeholders so that they can respond to it, i.e., so that they can assess the state of the cultural and natural heritage in question.

4. DEFINITION AND DEVELOPMENT OF BASIC CATEGORIES FOR ASSESSMENT OF CULTURAL AND NATURAL HERITAGE STATE

The categories used to assess the state of cultural and natural heritage in each selected area (territorially covered by the Take It Slow project), within which a new tourist product will be developed, consist of a GENERAL and a SPECIAL part. The first GENERAL part identifies and clarifies the basic categories of management with the corresponding elements that need to be included in the analysis of the state and assessment of cultural and natural heritage. The basic categories are as follows:

- Legislation of cultural and natural heritage
- Cultural and natural heritage management
- Human resources and cultural and natural heritage
- State, visibility and involvement of cultural and natural heritage in tourism

Considering the specifics of cultural and natural heritage, in the further part, individual categories and individual elements for cultural and natural heritage are elaborated, whereby intangible cultural heritage is additionally elaborated as a SPECIAL part.

SPECIAL part refers to the elements by which each partner specifically examines the state of heritage closely related to its tourist product. If only the GENERAL part is sufficient for one of the partners to assess the state, it is not necessary to expand it with a SPECIAL part.

It is necessary to repeat once again that based on secondary data sources (scientific and professional papers, strategic documents, heritage management plans, heritage inventory, etc.), according to the given categories and elements, it is necessary to analyse and assess the state of cultural and natural heritage in the field of product development, and especially visibility (spatial, virtual, market etc.). The same categories and elements are defined by a designed guide or questionnaire (Appendix 1) which is used to assess the state of cultural and natural heritage by local stakeholders.

4.1. Categories for assessing the state of cultural heritage

The corresponding elements of certain categories indicate that the assessment of cultural heritage refers to cultural heritage in general (which includes tangible and intangible cultural heritage, as mentioned earlier), but some elements are more characteristic of tangible cultural heritage. Precisely because of that, but also the specifics of intangible cultural heritage, in a special part the elements for the assessment of intangible cultural heritage are developed and can be used by those partners who recognize their product within this segment of heritage.

4.1.1. Legislation of cultural heritage

Since the management of cultural heritage is determined by strict regulations, legal and sub-legal regulation are key elements and a starting point for state analysis and assessment of cultural heritage. In this context, this category determines the basic (pre)conditions and implies certain

possibilities and limitations of its tourist valorisation. Therefore, this category primarily provides insight into the legal framework and corresponding regulations at the national, regional and local levels as determinants of its use. Accordingly, it is possible to determine the extent to which these regulations facilitate or complicate the preservation and protection of cultural heritage, as the fundamental objectives of its management. However, legislation is an important prerequisite for its economic use and tourist valorisation, so from that aspect it is necessary to determine the existence of measures and mechanisms related to its sustainable use, i.e., long-term management and conservation. It should be pointed out here that the assessment of the elements of this category is based on the available secondary data and the factual state, wherein the field data provided by the relevant local stakeholders (LCPs) should also be considered.

Table 2. Elements of the category of cultural heritage legislation

Elements	Description
Availability of legislation and appropriate conservation basis for the preservation and protection of cultural heritage	Low Moderate Exceptional
Regulation of property-legal and ownership relations related to the utilization of cultural heritage	Low Moderate Exceptional
Establishment of mechanisms for the use of funds collected through the utilization of cultural heritage in its preservation and protection (monument annuity)	Low Moderate Exceptional
Existence of a system for sustainable management of cultural heritage	Low Moderate Exceptional
Ease of procedures for putting into service (valorisation) of cultural heritage	Low Moderate Exceptional
Promotion of the importance and value of cultural heritage and the possibility of its inclusion in economic flows	Low Moderate Exceptional
Availability of tax policy incentives and financial support for the preservation and valorisation of cultural heritage	Low Moderate Exceptional

4.1.2. Cultural heritage management

Within this category, the complexity of cultural heritage management in a modern environment is determined. The first part identifies the institutions responsible for the management of cultural heritage, in whose domain is the register of cultural heritage and all other relevant information related to its inventory. In the case of a cultural heritage register, it is necessary to provide a website (link), as well as a website (link) to the umbrella organization that manages cultural heritage. Accordingly, further elements determine the value and recognition of cultural heritage at the global, national and regional levels, resulting in a diversity of approaches to action. Consequently, other elements of this category point to strategic and operational action according to the principles of sustainable management and clearly defined criteria for the use of cultural heritage and indicators for measuring and monitoring the state and changes in it. The assessment

of the elements of this category is also based on the available secondary data and the factual state, wherein the field data provided by the relevant local stakeholders (LCPs) should also be considered.

Table 3. Elements of the category of cultural heritage management

Elements	Description
Existence of a governing body that manages cultural heritage	Yes No
Existence of an inventory (database) of cultural heritage	Physical Digital No
The existence of cultural heritage extremely valuable on a global scale	Yes No
The existence of cultural heritage extremely valuable on a national scale	Yes No
The existence of cultural heritage extremely valuable on a county scale	Yes No
Existence of a cultural heritage management plan	Yes No
Monitoring of data on the state and changes in cultural heritage	Yes No
Implementing sustainable cultural heritage management	Yes No
Existence of clear criteria for procedures for valorisation of cultural heritage	Yes No
Existence of risk management, disaster and emergency protocols and other measures	Yes No

4.1.3. Human resources and cultural heritage

Cultural heritage management is based on quality and professional human resources, therefore the appropriate elements of this category determine the adequacy and qualification of human resources required for quality cultural heritage management. This refers to the human resources of various institutions that are in various ways related to the management of cultural heritage in the selected area, as well as to the local population whose role is crucial in the presentation and interpretation of cultural heritage. Therefore, further elements determine the awareness of the local population and its competence about the possibilities of using cultural heritage, without which the economic use and valorisation of cultural heritage is not possible. The assessment of the elements of this category is based on available secondary data (a list defining the total population and working age population in the area, a list of non-governmental organizations, etc.) and the factual situation, including field data provided by relevant local stakeholders (LCPs).

Table 4. Elements of the category of human resources and cultural heritage

Elements	Description
Adequacy of human resources for quality management of cultural heritage	Low Moderate Exceptional
Knowledge and expertise of human resources for the preservation and protection of cultural heritage	Low Moderate Exceptional
Local population's awareness on the possibilities of using cultural heritage in economic flows	Low Moderate Exceptional
Level of knowledge and creativity on the use of cultural heritage in tourism	Low Moderate Exceptional
Development of non-governmental organizations involved in the preservation and valorisation of cultural heritage	Low Moderate Exceptional
Development of local community awareness on the economic utilization of cultural heritage based on concessions	Low Moderate Exceptional

4.1.4. State, visibility and involvement of cultural heritage in tourism

This category of cultural heritage assessment includes elements that create a presumption and certain preconditions for the economic use of cultural heritage. It should be noted that certain elements relate more to the tangible and less to the intangible cultural heritage. First of all, these elements determine the physical accessibility and orderliness of cultural heritage and the development of connected infrastructure that affect its visibility and attractiveness in the space itself. Its presence in the space is only a precondition for use, but without the affiliation of the local community with the cultural heritage and its engagement in presentation and interpretation, the cultural heritage decays and disappears. Therefore, the elements of local community involvement in cultural heritage are extremely important in order to preserve cultural heritage for future generations and to present and valorise it in terms of tourism. The assessment of the elements of this category is based on the available secondary data and the factual situation, and the field data provided by the relevant local stakeholders (LCPs) should also be considered.

Table 5. Elements of the category of state, visibility and involvement of cultural heritage in tourism

Elements	Description
Tidiness of cultural heritage	Low Moderate Exceptional
Traffic accessibility of cultural heritage	Low Moderate Exceptional
Development of municipal and other infrastructure that enables the inclusion of cultural heritage	Low Moderate Exceptional
Physical visibility of cultural heritage in space	Low Moderate Exceptional
Revitalization and restoration of unused cultural heritage	Low Moderate Exceptional
Landscaping in the immediate vicinity of cultural heritage	Low Moderate Exceptional
Cultural heritage signage	Low Moderate Exceptional
The affiliation of the local community with the cultural heritage	Low Moderate Exceptional
Presentation and interpretation of cultural heritage through tourism	Low Moderate Exceptional
Involvement of the local community in the revival of forgotten and lost cultural heritage	Low Moderate Exceptional
Involvement of the local community in the preservation and presentation of cultural heritage	Low Moderate Exceptional
Development of tourist products and services based on cultural heritage	Low Moderate Exceptional
Realization of possible revenues from valorisation of cultural heritage	Low Moderate Exceptional

4.2. Categories for assessing the state of natural heritage

In accordance with the previous elaboration, the categories and associated elements of natural heritage are presented in this section. Categories and individual elements are identically listed in order to conduct an analysis and determine the situation according to unique and uniform

criteria. For ease of understanding, the same or similar explanations of the categories and associated elements are given. The specifics of natural heritage and existing differences in relation to cultural heritage are considered. It should also be noted that natural heritage primarily refers to protected parts of nature, however, according to the given categories, it is possible to include other elements of the natural environment that are integral parts of human life and work in the area under analysis.

4.2.1. Legislation of natural heritage

Since the management of natural heritage is determined by strict regulations, laws and bylaws are a key element and starting point for the analysis of the condition and assessment of natural heritage. In this context, this category determines the basic (pre) conditions and implies certain possibilities and limitations of its tourist valorisation. Therefore, this category primarily provides insight into the legal framework and belongs to regulations at the national, regional and local levels as a determinant of its use. Accordingly, it is possible to determine and measure the extent to which these regulations facilitate or complicate the preservation and protection of natural heritage, as fundamental objectives of its management. Legislation is an important precondition for its economic use and tourist valorisation, so from this aspect it is necessary to determine the existence of instruments and mechanisms related to its sustainable use, i.e. long-term management and conservation. It should be noted here that the assessment of elements of this category is based on available secondary data and facts (it is necessary to provide websites and links to documents related to each element), and field data provided by relevant local stakeholders (LCPs).

Table 6. Elements of the category of natural heritage legislation

Elements	Description
Availability of law regulations and appropriate institutional background for the preservation and protection of cultural heritage	Low Moderate Exceptional
Regulation of property-legal and ownership relations related to the utilization of natural heritage	Low Moderate Exceptional
Establishment of mechanisms for the use of funds collected through the utilization of natural heritage in its preservation and protection	Low Moderate Exceptional
Existence of a system for sustainable management of natural heritage	Low Moderate Exceptional
Ease of procedures for putting into service (valorisation) of natural heritage	Low Moderate Exceptional
Promotion of the importance and value of natural heritage and the possibility of its inclusion in economic flows	Low Moderate Exceptional
Availability of tax policy incentives and financial support for the preservation and valorisation of natural heritage	Low Moderate Exceptional

4.2.2. Natural heritage management

Within this category, the complexity of natural heritage management in a modern environment is determined. The first part identifies the institutions responsible for the management of natural heritage, in whose domain is the register of natural heritage and all other relevant information related to its inventory. Accordingly, further elements determine the value and recognition of natural heritage at the global, national and regional levels, resulting in a diversity of approaches to action. Consequently, other elements of this category point to strategic and operational action according to the principles of sustainable management and clearly defined criteria for the use of cultural heritage and indicators for measuring and monitoring the state and changes in it. The assessment of the elements of this category is also based on the available secondary data and the factual state, wherein the field data provided by the relevant local stakeholders (LCPs) should also be considered. In the case of a natural heritage register, it is necessary to provide a name, as well as a website (link) to the institution (governing body) that manages natural heritage.

Table 7. Elements of the category of natural heritage management

Elements	Description
Existence of a governing body that manages natural heritage	Yes No
Existence of an inventory (database) of natural heritage	Physical Digital No
The existence of natural heritage extremely valuable on a global scale	Yes No
The existence of natural heritage extremely valuable on a national scale	Yes No
The existence of natural heritage extremely valuable on a county scale	Yes No
Existence of a natural heritage management plan	Yes No
Monitoring of data on the state and changes in natural heritage	Yes No
Implementing sustainable natural heritage management	Yes No
Existence of clear criteria for procedures for valorisation of natural heritage	Yes No
Existence of risk management, disaster and emergency protocols and other measures	

4.2.3. Human resources and natural heritage

Natural heritage management is based on quality and professional human resources, therefore the appropriate elements of this category determine the adequacy and qualification of human resources required for quality natural heritage management. This refers to the human resources of various institutions that are in various ways related to the management of natural heritage, as well as to the local population whose role is crucial in the presentation and interpretation of natural heritage. Therefore, further elements determine the awareness of the local population and its competence about the possibilities of using natural heritage, without which the economic

use and valorisation of natural heritage is not possible. The assessment of the elements of this category is based on available secondary data and the factual situation, including field data provided by relevant local stakeholders (LCPs).

Table 8. Elements of the category of human resources and natural heritage

Elements	Description
Adequacy of human resources for quality management of natural heritage	Low Moderate Exceptional
Knowledge and expertise of human resources for the preservation and protection of natural heritage	Low Moderate Exceptional
Local population's awareness on the possibilities of using natural heritage in economic flows	Low Moderate Exceptional
Level of knowledge and creativity on the use of natural heritage in tourism	Low Moderate Exceptional
Development of non-governmental organizations involved in the preservation and valorisation of natural heritage	Low Moderate Exceptional
Development of local community awareness on the economic utilization of natural heritage based on concessions	Low Moderate Exceptional

4.2.4. State, visibility and involvement of natural heritage in tourism

This category of natural heritage assessment includes elements that create a presumption and certain preconditions for the economic use of natural heritage. These elements primarily determine the physical accessibility and orderliness of natural heritage and the development of related infrastructure that affects its visibility and attractiveness in the area. Its presence in the space is only a precondition for use, while the affiliation of the local community to the natural heritage emphasizes its importance in the life and work of the people in the area in which it is located. Therefore, the elements of local community involvement in natural heritage are extremely important in order to preserve natural heritage for future generations and to present and valorise it in terms of tourism. The assessment of the elements of this category is based on the available secondary data and the factual situation, and the field data provided by the relevant local stakeholders (LCPs) should also be taken into account.

Table 9. Elements of the category of state, visibility and involvement of natural heritage in tourism

Elements	Description
General tidiness of natural heritage	Low Moderate Exceptional
Traffic accessibility of natural heritage	Low Moderate Exceptional
Development of municipal and other infrastructure that enables the inclusion of natural heritage	Low Moderate Exceptional
Revitalization and restoration of unused natural heritage	Low Moderate Exceptional
Natural heritage signage	Low Moderate Exceptional
The affiliation of the local community with the natural heritage	Low Moderate Exceptional
Presentation and interpretation of natural heritage through tourism	Low Moderate Exceptional
Involvement of the local community in the preservation and presentation of natural heritage	Low Moderate Exceptional
Development of tourist products and services based on natural heritage	Low Moderate Exceptional
Realization of possible revenues from valorisation of natural heritage	Low Moderate Exceptional

4.3. Categories for assessing the state of special heritage elements that were not previously included, but are used in the development of a new tourist product

In case it was not included in the previous analysis, the project partner in this SPECIAL section should assess the state of heritage related to the tourist product. In this section, it is also necessary to assess the elements of this category based on the available secondary data and the factual situation, and the field data provided by the relevant local stakeholders (LCPs) should also be considered. As an example of how a special part of the analysis is created, categories are given to assess the condition of the intangible cultural heritage on which many tourism products and services are based.

4.3.1. Categories for assessing the state of intangible cultural heritage

In case the project partner bases tourist product on the intangible cultural heritage, it needs to be elaborated separately, taking into account its characteristics and specifics. Intangible cultural

heritage testifies to the intangible elements of human creativity in time and space. Elements of intangible cultural heritage outline the lifestyle and culture of living and working, which are often associated with the cultural identity of a particular community. Unlike the tangible, intangible cultural heritage is subject to time and socio-economic events and is dependent on man, so it is much more difficult to preserve. Due to its sensitivity, but also its growing appeal in global multicultural interaction and communication, it requires special attention when managing. Its specifics and assessment of the state have so far not been included in the assessment of certain categories of cultural and natural heritage, and therefore an update of the assessment of the state and potential is needed.

4.3.1.1. Assessment of the state and potential of intangible cultural heritage

Within this category, elements of intangible cultural heritage are defined and their appearance and preservation in the modern environment is determined. Accordingly, further elements determine the value and recognition of the intangible cultural heritage at the global, national and regional levels, from which arises the diversity of approaches to action in socio-economic terms. Depending on the specifics of the intangible cultural heritage of a particular area, it is possible to include other relevant elements in the analysis. The assessment of the elements of this category is based on the available secondary data (scientific and professional papers and official publications) and the factual situation, and the field data provided by the relevant local stakeholders (LCPs) should also be considered.

Table 10. Elements of the category of state and potential of intangible cultural heritage

Category	Description
Preservation of language, dialect, speech and toponymy	Low Moderate Exceptional
Preservation of oral literature (legends, chants, etc.)	Low Moderate Exceptional
Preservation of folklore (music, dance, games, rituals, customs, etc.)	Low Moderate Exceptional
Preservation of gastronomy	Low Moderate Exceptional
Preservation of traditional arts and crafts	Low Moderate Exceptional
Preservation of fairs	Low Moderate Exceptional
The existence of intangible cultural heritage extremely valuable on a global scale	Yes No
The existence of intangible cultural heritage extremely valuable on a national scale	Yes No
The existence of intangible cultural heritage extremely valuable on a county scale	Yes

	No
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4.3.1.2. Intangible cultural heritage legislation

Cultural heritage management is generally determined by law and regulations, which implicitly refers to the management of intangible cultural heritage. Elements of legislation form the starting point for the analysis of the state and assessment of intangible cultural heritage. Legislation also determines the possibilities and limitations of tourist valorisation. In addition to the existing elements related to cultural heritage in general, this category further emphasizes the legal framework and related regulations and measures at the national, regional and local levels that allows its preservation and protection, but also economic use and tourist valorisation. It should be noted here that the assessment of elements of this category is based on available secondary data (laws, regulations, etc.) and facts, and field data provided by relevant local stakeholders (LCPs) should also be considered.

Table 11. Elements of the category of intangible cultural heritage legislation

Category	Description
Availability of legislation and appropriate ethnological basis for the preservation and protection of intangible cultural heritage	Low Moderate Exceptional
Ease of procedures for putting into service (valorisation) intangible cultural heritage	Low Moderate Exceptional
Promotion of the importance and value of intangible cultural heritage and the possibility of its inclusion in economic flows	Low Moderate Exceptional
Availability of tax policy incentives and financial support for the preservation and valorisation of intangible cultural heritage	Low Moderate Exceptional

4.3.1.3. Intangible cultural heritage management

Within this category, the complexity of intangible cultural heritage management in a modern environment is further determined. The existence of the register and inventory of intangible cultural heritage as a starting point for its management was emphasized once again. Other elements of this category point to strategic and operational action according to the principles of sustainable management and clearly defined criteria for the use of intangible cultural heritage. The assessment of the elements of this category is also based on the available secondary data and the facts, and the field data provided by the relevant local stakeholders (LCPs) should also be considered.

Table 12. Elements of the category of intangible cultural heritage management

Category	Description
Existence of an inventory (database) of intangible cultural heritage	Physical Digital No
Existence of an intangible heritage management system that ensures its effective preservation and use	Yes No
Monitoring data on the state of art and changes in the intangible cultural heritage	Yes No
Existence of clear criteria for procedures of valorisation of intangible cultural heritage	Yes No

4.3.1.4. Human resources and intangible cultural heritage

Cultural heritage management is based on quality and professional human resources, therefore the corresponding elements of this category emphasize the qualification of human resources required for quality intangible cultural heritage management. This refers to the human resources of various institutions that are in various ways related to the management of intangible cultural heritage, as well as to the local population whose role is crucial in the presentation and interpretation of intangible cultural heritage. Therefore, these elements determine the awareness of the local population and their competence about the possibilities of using intangible cultural heritage without which economic use and valorisation is not possible. The assessment of the elements of this category is based on the available secondary data (if any) and the factual situation, and field data provided by relevant local stakeholders (LCPs) should also be considered.

Table 13. Elements of the category of human resources and intangible cultural heritage

Category	Description
Adequacy of human resources for quality management of intangible cultural heritage	Low Moderate Exceptional
Knowledge and expertise of human resources for the preservation and protection of intangible cultural heritage	Low Moderate Exceptional
Awareness of the local population on the possibilities of utilizing intangible cultural heritage in economic flows	Low Moderate Exceptional
Readiness of the local population for valorisation and sharing of knowledge about intangible cultural heritage	Low Moderate Exceptional
Level of knowledge and creativity for the use of intangible cultural heritage in tourism	Low Moderate Exceptional
Development of non-governmental organizations involved in the preservation and valorisation of intangible cultural heritage	Low Moderate Exceptional

4.3.1.5. State, visibility and involvement of intangible cultural heritage in tourism

This category includes elements that create a presumption and certain preconditions for the economic use of intangible cultural heritage. In this part, the connection of the local community with the intangible cultural heritage is emphasized, and its preservation and transmission to future generations depends on the activities of the local community. The involvement of the local community in the presentation and interpretation of intangible cultural heritage affects the preservation and strengthening of the cultural identity of the local community and the development of unique and attractive tourist products. The assessment of the elements of this category is based on the available secondary data and the factual situation, and the field data provided by the relevant local stakeholders (LCPs) should also be taken into account.

Table 14. Elements of the category of state, visibility and involvement of intangible cultural heritage in tourism

Category	Description
Endangerment of the preservation of intangible cultural heritage	Low Moderate Exceptional
The affiliation of the local community with the intangible cultural heritage	Low Moderate Exceptional
Presentation and interpretation of intangible cultural heritage through tourism	Low Moderate Exceptional
Involvement of the local community in the revival of forgotten and lost intangible cultural heritage	Low Moderate Exceptional
Involvement of the local community in the preservation and presentation of intangible cultural heritage	Low Moderate Exceptional
Development of tourist products and services based on intangible cultural heritage	Low Moderate Exceptional
Realization of possible revenues from valorisation of intangible cultural heritage	Low Moderate Exceptional

5. PROCESS OF SELECTION OF HERITAGE ELEMENTS ON WHICH A VALUE CHAIN WILL BE BUILT

The selected value chain, based on which the tourism offer (product) is developed must, derive from the selected heritage of the area - clearly specified and described. Therefore, based on the analysis of secondary data and the conducted questionnaire on local stakeholders (meetings with LCP), it is necessary to define and describe the most important heritage and representative products (value chain) in the selected area and make a final assessment of the state of cultural and natural heritage in the field of product development.

One of the problems that project partners may encounter when choosing the heritage on which the development of the value chain will be based are the selection criteria. If an area possesses a lot of heritage that can be valorised, it is recommended to choose the one that has the greatest potential to create a value chain and has not yet been sufficiently valorised. After analysing the secondary data sources and determining the position of LCP stakeholders on the importance of each heritage in the area of interest, it is necessary to select at least five heritage elements (attractions) on which the value chain can be built. Each of the elements needs to be described (max. 150 words), with special reference to the uniqueness of the selected heritage and emphasizing its quality, excellence and innovation.

The selection should be based on the relevance of the heritage attraction element:

A) Level of protection:

1. heritage is included in the UNESCO list of tangible or intangible heritage,
2. the heritage is nationally protected and included in the national list of valuable heritage,
3. heritage is a regionally significant heritage and is included in the regional list of valuable heritage,
4. the heritage has not been protected so far.

It is then necessary to determine whether the five selected heritage elements have been valorised through value chains so far:

B) Previous valorisation of heritage:

1. a series of value chains based on a specific heritage has been developed,
2. only one value chain based on a certain heritage has been developed,
3. a heritage-based value chain has not been developed.

Here it is important to identify all value chains developed on the heritage that is planned to be included or has already been selected to be valorised through the tourism product. Thus, for example, if oenology is already selected (e.g. wine and wine tasting rooms), then it is necessary to include and list all relevant elements in the value chain for that: e.g. grape varieties that are indigenous and protected, micro-locations where vines are grown, vineyards if they are located in some protected areas or are specifically planted, dry stone walls if the vineyards are fenced with it, methods of wine production and customs if they are specific, packaging, storage of wine or some special features when placing wine on the market or tasting rooms in areas where wine

is produced, existing wine roads, etc. This is only a rough example and can be expanded or narrowed according to the needs of the selected value chain and space.

If the heritage has already been valorised (at least in one part), it is necessary to describe the value chains and define the specifics for those that have been best valorised as a product so far.

In order to create the preconditions for technology transfer and smart specialization in the future, it is necessary to identify already at this level which stakeholders are involved or may be involved in the future in creating and improving the value chain. These stakeholders can be from different groups of relevant tourism stakeholders for the development of smart, green and sustainable tourism products based on smart specialization:

- Local and regional government (public sector);
- Tourism industry (private sector);
- Civil sector (non-governmental organizations);
- Scientific community (which explores the geographical area and heritage on which the tourism product is based).

For each identified stakeholder, it is necessary to describe how to involve it. E.g., for the above example of oenology selection, the local and regional government needs to protect micro-locations suitable for growing a particular grape variety, to design a system of incentives and support, for the civil sector to participate in preserving the tradition of vineyard work or wine-making customs, the tourism industry must be ready to create and market new wine-based tourism products, such as creating excursions at the time of grape picking and setting up presentation centres on wine production, while the scientific community should conduct research with the aim of improving grapevine cultivation, more effective protection against diseases, better wine storage processes, etc. These are just some examples that can guide the design of the value chain.

Table 15. List of five (5) heritage elements suitable for value chain development

Heritage	Location	Level of protection	Product from the value chain
Describe the heritage (max. 150 words) to explain why it was chosen and why it is suitable for the development of the value chain	Specify all important locations for the selected heritage (in all its emerging stages)	UNESCO National Regional Local Some other	Describe existing value chains and define their importance. If no value chains have been developed so far, then describe the potential ones

6. ASSESSMENT OF TOURISM DEVELOPMENT OF THE AREA IN WHICH THE SUBJECT CULTURAL AND NATURAL HERITAGE IS LOCATED

Since the goal of the project is the development of tourism products based on cultural and natural heritage, it is important to determine the level of tourism development of the area where the cultural and natural heritage is located, because it significantly affects the possibility of implementing the products themselves. Accordingly, the elements of this category determine the basic elements of tourist infrastructure without which the conduct of tourist activities is not possible, but also additional elements that make up the potential forces in the development of tourist products. That means that each individual partner can introduce and highlight those elements that differentiate it and create a comparative advantage in the development of new tourism products that are the subject of this project. In this way, it is possible to identify strengths and weaknesses and opportunities and threats to the tourism development of the area in the context of the development and implementation of new tourism products. The assessment of the elements of tourism development is based on available secondary data (various statistical lists, strategic and action documents, data of local tourist boards, etc.) and data collected from the field through guided conversations and a completed questionnaire by local stakeholders (LCPs).

Table 16. Elements of tourism development of the area

Category	Description
Development of the overall tourist offer	Low Moderate Exceptional
Availability of accommodation capacities	Low Moderate High
Availability of catering facilities	Low Moderate High
Availability of travel agencies	Low Moderate High
Development of tourist signalization	Low Moderate High
Quality of accommodation capacities	Low Moderate High
Quality of the gastronomic offer	Low Moderate High
Production of food for tourist activities	Low Moderate High
Development of ecologically certified accommodation facilities	Low Moderate High

Development of ecologically certified producers (e.g .food, wine, etc.)	Low Moderate High
Existence of an action plan for tourism development management	Yes No

7. ASSESSMENT OF STRATEGIC DOCUMENTS RELATING TO THE AREAS IN WHICH THE SUBJECT CULTURAL AND NATURAL HERITAGE IS LOCATED

The aim of this project is that tourism products are developed based on selected natural and cultural heritage and turned into a value chain. For these products to fit into the overall offer of the destination in the future, it is necessary to make an analysis of strategic documents at all levels. The analysis is performed at the following levels:

A) AREAS OF STRATEGIC DOCUMENTS

1. general development strategy;
2. protection of cultural heritage;
3. protection of natural heritage;
4. cultural and creative industries;
5. tourism development;
6. smart specializations;
7. sustainable development;
8. smart tourism, sustainable tourism (if it exists).

B) GEOGRAPHICAL COVERAGE

1. analysis of EU documents;
2. analysis of national strategic documents;
3. analysis of regional strategic documents;
4. analysis of local strategic documents.

C) TYPE OF STRATEGIC DOCUMENT

1. strategic;
2. operational.

D) CONTENT ANALYSIS (Mirošević, 2012)

1. Is a specific holder / implementer involved in the measures from the development document?
2. Does the development document include an implementation plan?
3. Does the development document contain a cost estimate / financial plan?
4. Are the sources of funding explicitly stated in the development document?

The selected areas of strategic documents (A) for the implementation of the analysis related to the subject of the project are mandatory areas, but each project partner can expand them according to selected value chains (e.g., if cycling tourism is the selected value chain, strategic documents related to it, such as traffic strategy, construction of bicycle paths, etc., are also observed. If at any level there is no strategic document for an area, it should be written in the table.

Each of the documents being processed needs to be named and put a network link to it (if it exists, then also a link in English), and describe and analyse it with max. 300 words. Thereby, the

goals, priorities, policies, measures and tools (if adopted by the document) should be highlighted. It is important to read from the description: who adopted the document, to whom it is applied, what are its goals, who oversees their realization, is monitoring prescribed and is it monitored, what are the monitoring indicators and are the funds for realization anticipated. The table also lists the elements of content analysis, which represents the necessary technical conditions for the implementation of the planned strategic document (Mirošević, 2012). Table 17 gives some examples of citing the documents. When listing the documents in the table, it is necessary to respect the order of geographical coverage, so the broadest EU documents are listed first, and the last local ones related to the area of interest (e.g., city, municipality, etc.).

Table 17. List of strategic documents

Document name and link	Geographical coverage	Type of strategic document	Content			
			Who is responsible for measures designated?	Does the document contain an implementation plan?	Does the document contain a financial plan?	Are sources of funding listed?
1) GENERAL DEVELOPMENT STRATEGY						
	EU National Regional Local	Strategic Operational	Yes No Partially	Yes No Partially	Yes No Partially	Yes No Partially
E.g., Sustainable Europe 2030 (Sustainable Europe 2030) https://ec.europa.eu/info/publications/reflection-paper-towards-sustainable-europe-2030_en	EU	Strategic	Yes	No	No	No
E.g., Croatia 2030 (Hrvatska 2030) https://hrvatska2030.hr/	National	Strategic	Yes	Yes	Yes	Partially
2) TOURISM DEVELOPMENT						
E.g., Zadar County Tourism Development Master Plan 2013 - 2023 (Glavni plan razvoja turizma Zadarske županije 2013. - 2023.) https://www.zadra.hr/imagines/dokumenti/izradeni_stateski_dokumenti/10.pdf	Regional	Strategic	Yes	Partially	No	No

Note: each of the documents listed in the table must have its own brief description. The list of relevant strategic and operational documents together with the accompanying descriptions is submitted to the project partner (PP RERA) who together with the contracting partner (expert) prepares an overall analysis of the strategic framework from the subject area of the project (smart specialization strategy, sustainable tourism, cultural and creative industry, heritage, etc.).

Table 18, which lists all the most important elements of the strategic plan, can be used as auxiliary table for the preparation of these documents. It is especially important that each of the partners proposes a policy instrument that they consider would be important for the development of a smart sustainable tourism product.

Table 18. Auxiliary tables for describing strategic documents

The name of the document	
Document duration (time period within which the document is valid)	
Short description of the document (goal and purpose)	
Priority related to the topic of analysis (which could identify sustainable tourism and smart tourism based on cultural and natural heritage)	
A goal within which sustainable tourism and smart tourism based on cultural and natural heritage could be identified	
A measure that could identify sustainable tourism and smart tourism based on cultural and natural heritage	
Indicators for monitoring the implementation of these objectives / measures	
Proposed policy instruments (if any)	
Project ideas and some planned funds (if any)	

Upon collection of all the relevant data from the partners, it is necessary to define the levels that can contribute to the application of the concept of smart specialization in tourism within the cross-border project area. The conclusion of the analysis should include distinguished priorities, objectives, policies and measures that can contribute to the strengthening of research, development and innovation in the value chain in heritage-based tourism within the cross-border project area. From these distinguished segments of strategic planning, it is necessary to define 5 policy instruments based on the conducted analyses defined by smart value chains. These policy instruments will be specifically linked to the goals of a Smarter Europe, a More Connected Europe and a Greener Europe and the priorities set in the forthcoming programming period. Priorities of the 2021-2027 Competitiveness and Cohesion operational programme on which the special emphasis should be set are: (1) Strengthening of the economic investment in research and innovation, by supporting the business competitiveness and digitalization and development skills for smart specialization, (2) Strengthening the digital connectivity, (3) Promoting the energy efficiency and renewable energy sources, adaptation on climate changes, risk prevention, environmental protection and sustainability, and (5) Development of sustainable, smart and safe mobility.

Policy instruments must be defined so as to be consistent with all value chains defined through this project, which include sustainable smart tourism products based on heritage. These policy instruments must contribute to strengthening the value chain in tourism by encouraging research, development and innovation in the process of diversifying cross-border tourism supply based on natural and cultural heritage.

In order to be able to define five policy instruments, which represent one of the outcomes of this project, it is necessary to find ways of funding the defined measures. Therefore, it is necessary to find possibilities for funding these policy instruments through European, national and regional funds. Therefore, it is necessary to analyze operational programs in order to identify possible funding indicators:

Table 19. Layout of the form for defining policy instruments

Name of the policy instrument	Documents on which policy instruments are based	Coverage of the policy instrument	Holder	Possibility of funding	Test indicators / measures	Time and holder of indicator measurement
1. POLICY INSTRUMENT	List all strategic documents: EU, national, regional, local	Italy and Croatia, through transnational, national, regional and local coverage	Define the holder, for example DNC	List all potential sources of funding	List all indicators that are a measure of policy instruments	Define the dynamics of measurement and the organization / person responsible for measurement

Policy instruments derive from strategic documents and cover the area of Italy and Croatia and relate to sustainable smart development of tourism and heritage. The aim of policy instruments must be to use innovation (smart specialization) to increase the availability of heritage and heritage-based products / services grounded in heritage and transformed into value chains. Policy instruments need to be selected by assessing the advantages and disadvantages of each of the options, taking care to cover the largest number of designed value chains that include all segments of smart specialization and are based on smart sustainable development. At the same time, it is important to estimate the costs of each of the options, and to ensure the optimal ratio of the value of the investment for future realization.

For each of the policy instruments, the holder who should implement it, the source of funding and appropriate measurable indicators that will be able to verify the implementation of policy instruments must be defined. In total, at least seven measurable indicators need to be devised to measure the achievement of policy instruments. For the indicators, the unit of measurement, the dynamics of verification and the entity responsible for conducting measurements and monitoring execution must be defined. Measurable indicators of the achievement of policy instruments need to be designed so that they can be checked relatively easily and cheaply (possibilities based on existing secondary data). It is recommended to select indicators whose time span of monitoring encompasses one year. For one policy instrument, several measurable indicators can be designed to measure their achievement. All measurable indicators must be described and arranged in a catalogue of measurable indicators. It is desirable to harmonize this catalogue with already existing catalogues of indicators (although this is not an obligation, but in this way, it contributes to comparability).

Table 20. Indicator measurement monitoring form

NAME OF THE INDICATOR INSTRUMENT							
Measurable indicator 1 (name and description)	Unit of the measurement	Baseline value on the date	Estimated value on the measurement date	Measured value on the date	The entity which performed the measurement	Reason for the deviation	Proposed measures to eliminate the reasons for the deviation

Once the policy instruments and their measurable indicators have been defined, it is necessary to make proposals for action plans for each of the specific areas, in accordance with the objectives set and on the basis of which they will be achieved. Action plans must be developed according to a certain logic and are based on defined policy instruments and according to them selected measurable indicators.

8. DEVELOPMENT OF ACTION PLANS

An action plan is a document that identifies the activities needed to achieve the objectives and measures of a policy instrument. The action plans adopted within this project are linked to the five policy instruments defined through the previous steps, which include all value chains that create smart sustainable tourism products based on the recognized natural and cultural heritage through the concept of smart specialization.

It is extremely important that the action plan is designed including the broadest stakeholder base in the community for which it is intended (see pages 12-14). Multidisciplinary thinking is necessary for the plan to cover the widest possible range of activities, but also to receive community support in the adoption and implementation of strategic policies, measures and related activities.

Table 21. Stakeholders and their functions

REGIONAL STAKEHOLDERS	SCIENTIFIC SECTOR	PUBLIC SECTOR	PRIVATE SECTOR
FUNCTION	heritage research	heritage management	creating heritage-based products
ACTIVITIES/PROJECTS	* scientific researches * measures of testing, measurement, evaluation	* increasing the heritage availability * marketing and promotion	* certification of products / services * clusters

The beneficiaries involved in the analytical background and whose views must be evaluated in order to properly direct strategic action are the local population and tourists. They are not direct decision makers, nor do they actively participate in achieving the goals and implementing the activities from the action plan, but they directly and indirectly feel the effects of strategic development. Therefore, it is important to examine their views and incorporate the lessons learned into the design, implementation and control of the action plan.

The action plan is designed on the basis of the aforementioned analyses, but the plan proposal must be analysed together with all stakeholders to whom it will relate and will be affected. There are three phases in the development of the plan.

Table 22. Phases in the development of the action plan

Phases	Activities
Phase 1	Return to the analysis of policy documents to establish identified problems, needs, objectives and measures, related to sustainable and innovative tourism based on cultural and natural heritage.
Phase 2	Development of 12 Action Plans based on the analysis of policy instruments, proposals for examples of good practice and presentation of the new EU funding framework for the period 2021-2027
Phase 3	Interview with the stakeholder group and harmonization of the Action Plan with stakeholder recommendations.

In order to ensure that all stakeholders participate equally in the discussion of the proposed plan, it is necessary to draft it in the local language, in addition to English.

8.1. The Action Plan principles

Each action plan must, from the moment it is designed until the end of the implementation of the plan, comply with:

- the principle of accuracy and completeness
- the principle of efficiency and effectiveness
- the principle of responsibility and focus on results
- the principle of sustainability
- the partnership principle
- the principle of transparency.

Each of these principles is equally important and must be applied simultaneously at all stages of the design and implementation of action plans.

8.2. The Action Plan content

The Action Plan is usually prepared for a period of 3 years, and the scope of the Action Plan should be about 20 pages. It is recommended that the action plan consists of a textual and a tabular part. It is recommended to include in the text part:

1) Introduction

In the Introduction, based on the project results, it is necessary to describe the goal and purpose of the action plan, what it intends to achieve and why it is important for future projects related to heritage, smart specialization and sustainable development of tourism products.

2) Description of the challenge

This part of the text should briefly describe the problems and needs identified during the project and through stakeholder interviews related to the content of policy instruments and their implementation so far, in the part related to the sustainability of cultural and natural heritage-based tourism. In addition, the mentioned measures and planned projects should be listed, but the current situation, implementation and future needs should also be considered. Within this chapter, policy instruments should be clearly and concisely described, with the obligatory indication of financial sources and deadlines for their realization. Where appropriate, this chapter may include a summary of previous analyses related to natural and cultural heritage, the implementation of smart specialization principles and sustainability in the development of the value chains on which the tourism product is based. If necessary, stakeholders can include in this chapter specific SWOT analyses based on data obtained from stakeholders, although it is suggested that in this section they rely on the state of the art analyses developed under the programs that can be found at the link.

The tabular part also begins with a short introductory textual part in which the general objectives are briefly described, and then the objectives, measures and measurable indicators are elaborated in the tables.

3) General goals and measures for the future

In order to clarify the tabular elaboration of policies in more detail, this section provides an overview of the key objectives recommended for the sustainable and smart development of cultural and natural heritage projects for the next programming period. In this textual part, it is important to recognize the limitations that can slow down or prevent the implementation of action plans.

4) Action plan tables

Following the description of the basic guidelines, the tables elaborate the measures, projects and activities that serve to achieve these objectives, the competent institutions, the estimated period in which these projects take place, the amount of funding that should be proposed for the proposed activities together with their sources. Special attention needs to be paid to measurable indicators and it is extremely important to think over a longer period of time in order to properly assess the measurable indicators to be achieved in the year for which the action plan is developed, but also to define their development in the next two years.

Table 23. Goals, measures and activities table

GOAL 1: WRITE A GOAL									
Measure 1.1. NAME OF THE MEASURE									
Activity/ project	Indicators	Unit of measure	Baseline value 2021	Target value 2022	Target value 2023	Holder(s) of implementation	Amount of the implementation cost	Source	Execution deadline
1.1.1.	<ul style="list-style-type: none"> there can be multiple indicators 	for example. yes/no m2 % ...					EUR		for example September 2022

5) The action plan conclusion

It provides a final reflection on all activities and goals that the plan is expected to achieve.

6) The list of projects

As a mandatory part of the plan, it is necessary to include a list of projects within which it is necessary to list and briefly describe all projects currently being implemented in the pilot area for which the action plan was developed, related to smart specialization in tourism, sustainable development of cultural and natural heritage and its valorisation in tourism. It is recommended to provide this information in the form of a table.

Table 24. The list of projects

THEMATIC UNIT	NAME OF THE PROJECT	DESCRIPTION OF THE PROJECT	PROJECT LEADER AND PARTNERS	PROJECT BUDGET AND SOURCES OF FUNDING	DURATION OF THE PROJECT
Smart specialization	Zadar Urban Mobility 4.0	Up to 100 words, with the special reflection on what is contributed to by the project			

Detailed elaboration of parts of the action plan and instructions for its development will be developed within the user-friendly manual for the development of the action plan.

9. CONCLUSION

This methodology provides a framework for analysis and assessment of the state of cultural and natural heritage. Accordingly, the methodology allows the introduction of additional elements relevant to the development of tourism products which is the goal of this project. This stems from the diversity of legislation of the countries from which the project partners come, the characteristics and specifics of the cultural heritage of individual regions and the diversity of tourism products that are to be developed and implemented based on the cultural and natural heritage. Each of the partners must make a thorough inventory and assessment of their cultural and natural heritage in the selected narrower area, related to the selected value chain (tourism product) to be developed. By forming individual LCPs in the field of interest, which aim to encourage cooperation among stakeholders, actively participate in the design of the value chain and implementation of strategic guidelines and policies resulting from this project, each partner develops its bottom-up approach to developing smart, sustainable and slow tourism according to a selected value chain based on heritage and space. At the same time, this methodology provides a framework from which policy instruments, indicators and ways to monitor the implementation of the goals of sustainable and innovative development based on smart specialization will be derived. Cooperation between the scientific community, local government and self-government units, the economy and non-governmental organizations will enable the implementation of the region's tourism product (CB), competitive in the global market. Finally, this document also provides a brief overview of the methodology for developing an action plan, which will be elaborated in detail in a handbook and presented at a workshop for the target public.

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ANNEX 1. GUIDE OR QUESTIONNAIRE FOR ASSESSMENT OF NATURAL AND CULTURAL HERITAGE STATE OF ART BY LOCAL COMMUNITIES OF PRACTICE (LCP)

This guide is a basic document that will help you gather data from stakeholders. The proposal is to use it to conduct a conversation (in the form of a focus group) with stakeholders involved in the LCP, but obligatory also as a survey questionnaire in digital or physical form.

These categories and elements are used to assess the cultural and natural heritage state of art in each selected area (territorially covered by the Take It Slow project), within which a new tourist product will be developed. In doing so, the specifics of the territorial structure and legislation of the partner countries are taken into account, as well as the new tourist product in a particular selected area for which certain elements of the assessment are not necessarily significant.

ASSESSMENT OF NATURAL AND CULTURAL HERITAGE STATE OF ART

PLEASE ASSESS THE WEALTH OF THE AREA WITH ONE OF THESE APPEARANCES

Category	Extremely low	Low	Medium	High	Extremely high
NATURAL HERITAGE	1	2	3	4	5
CULTURAL HERITAGE	1	2	3	4	5

Category	Extremely low	Low	Medium	High	Extremely high
IMMOVABLE CULTURAL GOODS	1	2	3	4	5
MOVABLE CULTURAL GOODS	1	2	3	4	5
INTANGIBLE CULTURAL GOODS	1	2	3	4	5

GENERAL PART

ASSESSMENT OF CULTURAL HERITAGE STATE OF ART IN THE AREA CONCERNED

1. Law regulations of cultural heritage

Elements	Description
Availability of law regulations and appropriate conservation basis for the preservation and protection of cultural heritage	Low Moderate Exceptional
Regulation of property-legal and ownership relations related to the utilization of cultural heritage	Low Moderate Exceptional
Establishment of mechanisms for the use of funds collected through the utilization of cultural heritage in its preservation and protection (monument annuity)	Low Moderate Exceptional
Existence of a system for sustainable management of cultural heritage	Low Moderate Exceptional
Ease of procedures for putting into service (valorisation) of cultural heritage	Low Moderate Exceptional
Promotion of the importance and value of cultural heritage and the possibility of its inclusion in economic flows	Low Moderate Exceptional
Availability of tax policy incentives and financial support for the preservation and valorisation of cultural heritage	Low Moderate Exceptional

2. Management of cultural heritage

Elements	Description
Existence of a governing body that manages cultural heritage	Yes No
Existence of an inventory (database) of cultural heritage	Physical Digital No
The existence of cultural heritage extremely valuable on a global scale	Yes No
The existence of cultural heritage extremely valuable on a national scale	Yes No
The existence of cultural heritage extremely valuable on a county scale	Yes No
Existence of a cultural heritage management plan	Yes No

Monitoring of data on the state and changes in cultural heritage	Yes No
Implementing sustainable cultural heritage management	Yes No
Existence of clear criteria for procedures for valorisation of cultural heritage	Yes No
Existence of risk management, disaster and emergency protocols and other measures	Yes No

3. Human resources and cultural heritage

Elements	Description
Adequacy of human resources for quality management of cultural heritage	Low Moderate Exceptional
Knowledge and expertise of human resources for the preservation and protection of cultural heritage	Low Moderate Exceptional
Local population's awareness on the possibilities of using cultural heritage in economic flows	Low Moderate Exceptional
Level of knowledge and creativity on the use of cultural heritage in tourism	Low Moderate Exceptional
Development of non-governmental organizations involved in the preservation and valorisation of cultural heritage	Low Moderate Exceptional
Development of local community awareness on the economic utilization of cultural heritage based on concessions	Low Moderate Exceptional

4. State of art, visibility and inclusion of cultural heritage in tourism

Elements	Description
Tidiness of cultural heritage	Low Moderate Exceptional
Traffic accessibility of cultural heritage	Low Moderate Exceptional
Development of municipal and other infrastructure that enables the inclusion of cultural heritage	Low Moderate Exceptional
Physical visibility of cultural heritage in space	Low Moderate

	Exceptional
Revitalization and restoration of unused cultural heritage	Low Moderate Exceptional
Landscaping in the immediate vicinity of cultural heritage	Low Moderate Exceptional
Cultural heritage signage	Low Moderate Exceptional
The affiliation of the local community with the cultural heritage	Low Moderate Exceptional
Presentation and interpretation of cultural heritage through tourism	Low Moderate Exceptional
Involvement of the local community in the revival of forgotten and lost cultural heritage	Low Moderate Exceptional
Involvement of the local community in the preservation and presentation of cultural heritage	Low Moderate Exceptional
Development of tourist products and services based on cultural heritage	Low Moderate Exceptional
Realization of possible revenues from valorisation of cultural heritage	Low Moderate Exceptional

ASSESSMENT OF NATURAL HERITAGE STATE OF ART IN THE AREA CONCERNED

1. Law regulations of natural heritage

Elements	Description
Availability of law regulations and appropriate institutional background for the preservation and protection of cultural heritage	Low Moderate Exceptional
Regulation of property-legal and ownership relations related to the utilization of natural heritage	Low Moderate Exceptional
Establishment of mechanisms for the use of funds collected through the utilization of natural heritage in its preservation and protection	Low Moderate Exceptional

Existence of a system for sustainable management of natural heritage	Low Moderate Exceptional
Ease of procedures for putting into service (valorisation) of natural heritage	Low Moderate Exceptional
Promotion of the importance and value of natural heritage and the possibility of its inclusion in economic flows	Low Moderate Exceptional
Availability of tax policy incentives and financial support for the preservation and valorisation of natural heritage	Low Moderate Exceptional

2. Management of natural heritage

Elements	Description
Existence of a governing body that manages natural heritage	Yes No
Existence of an inventory (database) of natural heritage	Physical Digital No
The existence of natural heritage extremely valuable on a global scale	Yes No
The existence of natural heritage extremely valuable on a national scale	Yes No
The existence of natural heritage extremely valuable on a county scale	Yes No
Existence of a natural heritage management plan	Yes No
Monitoring of data on the state and changes in natural heritage	Yes No
Implementing sustainable natural heritage management	Yes No
Existence of clear criteria for procedures for valorisation of natural heritage	Yes No
Existence of risk management, disaster and emergency protocols and other measures	Yes No

3. Human resources and natural heritage

Elements	Description
Adequacy of human resources for quality management of natural heritage	Low Moderate Exceptional

Knowledge and expertise of human resources for the preservation and protection of natural heritage	Low Moderate Exceptional
Local population's awareness on the possibilities of using natural heritage in economic flows	Low Moderate Exceptional
Level of knowledge and creativity on the use of natural heritage in tourism	Low Moderate Exceptional
Development of non-governmental organizations involved in the preservation and valorisation of natural heritage	Low Moderate Exceptional
Development of local community awareness on the economic utilization of natural heritage based on concessions	Low Moderate Exceptional

4. State of art, visibility and inclusion of natural heritage in tourism

Elements	Description
General tidiness of natural heritage	Low Moderate Exceptional
Traffic accessibility of natural heritage	Low Moderate Exceptional
Development of municipal and other infrastructure that enables the inclusion of natural heritage	Low Moderate Exceptional
Revitalization and restoration of unused natural heritage	Low Moderate Exceptional
Natural heritage signage	Low Moderate Exceptional
The affiliation of the local community with the natural heritage	Low Moderate Exceptional
Presentation and interpretation of natural heritage through tourism	Low Moderate Exceptional
Involvement of the local community in the preservation and presentation of natural heritage	Low Moderate Exceptional
Development of tourist products and services based on natural heritage	Low Moderate

	Exceptional
Realization of possible revenues from valorisation of natural heritage	Low Moderate Exceptional

SPECIAL PART

ASSESSMENT OF INTANGIBLE CULTURAL HERITAGE STATE OF ART AND POSSIBILITY OF UTILIZATION IN THE AREA CONCERNED

1. Assessment of intangible cultural heritage state of art and potential

Category	Description
Preservation of language, dialect, speech and toponymy	Low Moderate Exceptional
Preservation of oral literature (legends, chants, etc.)	Low Moderate Exceptional
Preservation of folklore (music, dance, games, rituals, customs, etc.)	Low Moderate Exceptional
Preservation of gastronomy	Low Moderate Exceptional
Preservation of traditional arts and crafts	Low Moderate Exceptional
Preservation of fairs	Low Moderate Exceptional
The existence of intangible cultural heritage extremely valuable on a global scale	Yes No
The existence of intangible cultural heritage extremely valuable on a national scale	Yes No
The existence of intangible cultural heritage extremely valuable on a county scale	Yes No

2. Law regulations of intangible cultural heritage

Category	Description
Availability of legislation and appropriate ethnological basis for the preservation and protection of intangible cultural heritage	Low Moderate Exceptional
Ease of procedures for putting into service (valorisation) intangible cultural heritage	Low Moderate Exceptional
Promotion of the importance and value of intangible cultural heritage and the possibility of its inclusion in economic flows	Low Moderate Exceptional

Availability of tax policy incentives and financial support for the preservation and valorisation of intangible cultural heritage	Low Moderate Exceptional
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3. Management of intangible cultural heritage

Category	Description
Existence of an inventory (database) of intangible cultural heritage	Physical Digital No
Existence of an intangible heritage management system that ensures its effective preservation and use	Yes No
Monitoring data on the state of art and changes in the intangible cultural heritage	Yes No
Existence of clear criteria for procedures of valorisation of intangible cultural heritage	Yes No

4. Human resources and intangible cultural heritage

Category	Description
Adequacy of human resources for quality management of intangible cultural heritage	Low Moderate Exceptional
Knowledge and expertise of human resources for the preservation and protection of intangible cultural heritage	Low Moderate Exceptional
Awareness of the local population on the possibilities of utilizing intangible cultural heritage in economic flows	Low Moderate Exceptional
Readiness of the local population for valorisation and sharing of knowledge about intangible cultural heritage	Low Moderate Exceptional
Level of knowledge and creativity for the use of intangible cultural heritage in tourism	Low Moderate Exceptional
Development of non-governmental organizations involved in the preservation and valorisation of intangible cultural heritage	Low Moderate Exceptional

5. State of art, visibility and inclusion of intangible cultural heritage in tourism

Category	Description
Endangerment of the preservation of intangible cultural heritage	Low Moderate Exceptional
The affiliation of the local community with the intangible cultural heritage	Low

	Moderate Exceptional
Presentation and interpretation of intangible cultural heritage through tourism	Low Moderate Exceptional
Involvement of the local community in the revival of forgotten and lost intangible cultural heritage	Low Moderate Exceptional
Involvement of the local community in the preservation and presentation of intangible cultural heritage	Low Moderate Exceptional
Development of tourist products and services based on intangible cultural heritage	Low Moderate Exceptional
Realization of possible revenues from valorisation of intangible cultural heritage	Low Moderate Exceptional

ASSESSMENT OF TOURISM DEVELOPMENT OF THE AREA CONCERNED

1. Tourism development of area

Category	Description
Development of the overall tourist offer	Low Moderate Exceptional
Availability of accommodation facilities	Low Moderate Exceptional
Availability of catering facilities	Low Moderate Exceptional
Availability of travel agencies	Low Moderate Exceptional
Quality of accommodation capacities	Low Moderate Exceptional
Quality of the gastronomic offer	Low Moderate Exceptional
Production of food for tourist activities	Low Moderate

	Exceptional
Development of ecologically certified accommodation facilities	Low Moderate Exceptional
Development of ecologically certified producers (e.g. food, wine, etc.)	Low Moderate Exceptional
Existence of an action plan for tourism development management	Yes No

ANNEX 2. TIME LIMIT FOR COMPLETION OF PROJECT ACTIVITIES ACCORDING TO THE METHODOLOGY

Nr	ACTIVITY	DEADLINE
1.	Creating a list (database) of relevant stakeholders	31.12.2020.
2.	Selection of stakeholders participating in the LCP based on the developed database	31.12.2020.
3.	Conducting questionnaires with LCP	15.3.2021.
4.	Submitted data in a table in excel format (PI RERA)	20.3.2021.
5.	Assessment of heritage state of art in the area of interest based on secondary data sources	1.4.2021.
6.	Guided conversation based on default categories with LCP	10.4.2021.
7	Submitted report on the assessment of strategic documents related to the areas in which the cultural and natural heritage is located	15.4.2021.
8.	Submittance of the final assessment of the cultural and natural heritage state of art for each PP according to RERA	1.5.2021.
9.	Defined value chains and submitted a report on selected elements of the value chain and products based on them	1.5.2021.
8.	Data submitted to the selected Research Expert	1.5.2021.
9.	Drafting Policy Instruments	1.5.2022.
10.	PP comments adopted and Strategic Framework and Policy documents drafted	1.7.2022.

ANNEX 3. SELECTED VALUE CHAIN

PRODUCT	PRODUCT DESCRIPTION	DESCRIPTION OF HERITAGE ON WHICH THE PRODUCT IS BASED	COMPARATIVE AND/OR INNOVATIVE ELEMENT OF THE PRODUCT
<p>Enter the product name / add the number of rows of how many products are included in the value chain</p>	<p>Describe the product with all its characteristics and possibilities of inclusion in the tourist offer</p>	<p>Describe the heritage on which the product is based, state whether the heritage is globally, nationally or regionally relevant and whether stakeholders consider it most important in their area</p>	<p>Indicate the innovation / comparability or competitiveness of the product in the local, regional, national or global market. Indicate which manufacturers and brands of the selected product from the value chain are examples of good practice and the reasons why they are so far.</p>