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Enhancing equity and local inclusion through tourism: The case of Langhe-Roero and Monferrato, Italy

Case Study Analysis and Policy Recommendations

Abstract

Langhe-Roero and Monferrato is an area in northern Italy mostly known for its vineyard landscape that reflects the richness of the local culture as well as the importance of the agricultural techniques and knowledge that have significantly gained worldwide recognition for its cultural heritage by organizations like UNESCO, resulting in the significantly development of tourism in the area. Growth in touristic activities as well as the accessibility to the territory and the establishment of big corporations have caused some towns and municipalities to grow more than others, leaving aside the value of the territory and its culture as a region and developing as dispersed, segregated settlements. In this scenario, equity and local social inclusion come to play an important role not only to promote a sustainable tourism, but also to respect and enhance the cultural, environmental, and social characterization of the territory thinking on benefiting all actors involved by promoting a healthy environment based on communication and cooperation that will help them draw a common pathway for development. This report will present a territorial analysis based on specific steps that will help support the final result being a proposal of a set of policy recommendations that seek to work towards a more equal, sustainable, inclusive territory.

Keywords: Langhe-Roero and Monferrato, Italy, Tourism, Spatial Planning, Policy Recommendations, Sustainability, Local Social Inclusion, Equity

Theoretical and methodological framework

Aim of the report

The following report is the result of a one-week case study workshop in the Italian region of Langhe, Roero and Monferrato under the SPOT Spatial Planning for Tourism Destinations project's framework. The purpose of this report is to first present the territorial analysis of the Langhe, Roero and Monferrato region in Italy based on the characterization of the case study followed by a stakeholder analysis and SWOT validation exercise. The final result is expected to be a set of policy recommendations for the area focusing on the role of tourism and its contribution to equity and local social inclusion through the homogenization of tourist activities and knowledge sharing in all municipalities as a whole region and not dispersed settlements, while at the same time motivating communication and cooperation among them.

Research question: How can tourism contribute to the achievement of equity and local social inclusion in the Langhe-Roero and Monferrato region?

Literature review

Spatial planning can be used as an instrument for coordinating socio-economic development through preventing environmental problems and simultaneously protecting the natural and cultural environment (Risteskia et al., 2012). Spatial planning and the development should be focused on redefining the existing models and standards for establishing and executing tourism activities in certain areas (Risteskia et al., 2012). In another word, in order to achieve the goals of sustainable development, tourism areas must be reconciled and policies must be adapted based on the models and goals of the area (Singh Boori & Voženílek, 2015).

Studies have shown that a destination management organization that manages the network of interests and organizations in a destination, are supporting the sustainability of the tourism destination (Volgger & Pechlaner, 2014). One cannot assume that actors in a destination are willing to work together, which could make it necessary to identify the common interests in the area, and coordinate these (Volgger & Pechlaner, 2014). Enhancing stakeholder collaboration is normally assigned to a Destination Management organization (DMO). A DMO that works with the collaboration between the actors in a destination are key to the destination's competitiveness (Volgger & Pechlaner, 2014).

The concept of equity is used in the same way as the concept of fairness. The concept of equity also includes the process that is moving forward. In order to create equity, the entire process needs to be functioning correctly and accurately. In the Destinations, equity consists of the participation of the local people and is closely related to the concept of sustainability. Local people are the main focus in the development of tourism businesses and the benefit of the community (Cohen, 2002).

In order to ensure the local economy, the development of the local community and the proper experience of this process, the ecological balance is needed to remain intact and the strong or empowered society. It is possible to meet the needs of the local people so that the process can work successfully, with economic revenues evenly distributed across all segments of support. Tourism contributes greatly to the economy of

the community. However, in order to improve tourism in destinations, participation of the public is as important as the municipality and the state (Tugun & Karaman, 2014).

On equity, sustainability in tourism destinations, Jamal and Camargo (2014) studied the concept of 'sustainable community-based tourism'. As a result of the study, it has revealed three dimensions of sustainable development for destinations that have not developed tourism over other regions. The first dimension is economy, the second is socio-cultural and its final dimension is environment. However, another dimension has evolved, which is the dimension of equality related to governance, institutional regulations and political environments.

Tourism has a very important place today. It is also very important that the Destinations be saved for tourism. Dangi and Petrick (2021) have shown that destinations need to be able to provide tourism, increase their charm and equity between destinations to contribute to society. The result of the study was not only a destination, but also other destinations in the region, but economic, environmental and tourism.

In order for knowledge sharing to take place, there must be people and the information must be transferred to other people. When information is not transmitted, the activities that people can do are restricted. In knowledge sharing, the information, that is, the message to be given, must come from a certain source and reach the target. In knowledge sharing, both the person who will give the information and the person who will receive the information must be volunteers (Yenicer & Demirel, 2007). Knowledge sharing among individuals is known as a process in which one exchanges information for the other party to use (Ipe, 2003).

When a literature review is made, knowledge sharing; It has been proven that the use of information in the electronic environment consists of interpersonal advice, obtaining information by pursuing information, obtaining information readily, acquiring information, producing and sharing information, and sharing information by renewing it (Huysman & Wit, 2004; Haas & Hansen, 2005; Cabrera, Collins & Salgado, 2006).

Knowledge sharing and collaboration are closely related. Knowledge sharing is collaborative. Cooperation consists of acting in a coordinated manner among cooperating individuals (Pais & Santos, 2014). Thanks to cooperation, people develop team spirit, increase motivation, increase trust in each other, strengthen communication skills, set a common goal, create new ideas, increase commitment, and transfer knowledge (Taşçı, 2021).

Methods

The methodology carried out for the vineyard landscape of Piedmont: Langhe-Roero and Monferrato was mainly based on the method of case study analysis. Case study analysis helps in-depth, multi-faceted explorations of complex issues in their real-life settings. For this we were able to visit the site and had a 'local talking' session with the stakeholders. We were able to find some core problems which need to be addressed for the site. The case study was supported and followed by the SWOT analysis and Stakeholder analysis of the region. This helped us in understanding the area, the potential and threats and the roles of stakeholders in depth. These exercises helped us in finding the problem and formulating some policy recommendations on the topic of equity and social inclusion of the regions. These policies were formulated with the help of the conclusions from the methods used for the study of the region.

Case study analysis

Case study area



Figure 1: Global location context of UNESCO site and zones.

Source: own elaboration.

Vineyard Landscape of Piedmont: Langhe-Roero and Monferrato covers five distinct wine-growing areas with outstanding landscapes and the Castle of Cavour, an emblematic name both in the development of vineyards and in Italian history. It is in the southern part of the region of Piedmont, Italy between the Po River and the Ligurian Apennines, and encompasses the whole range of technical and economic processes relating to the winegrowing and winemaking that has characterized the region for centuries.

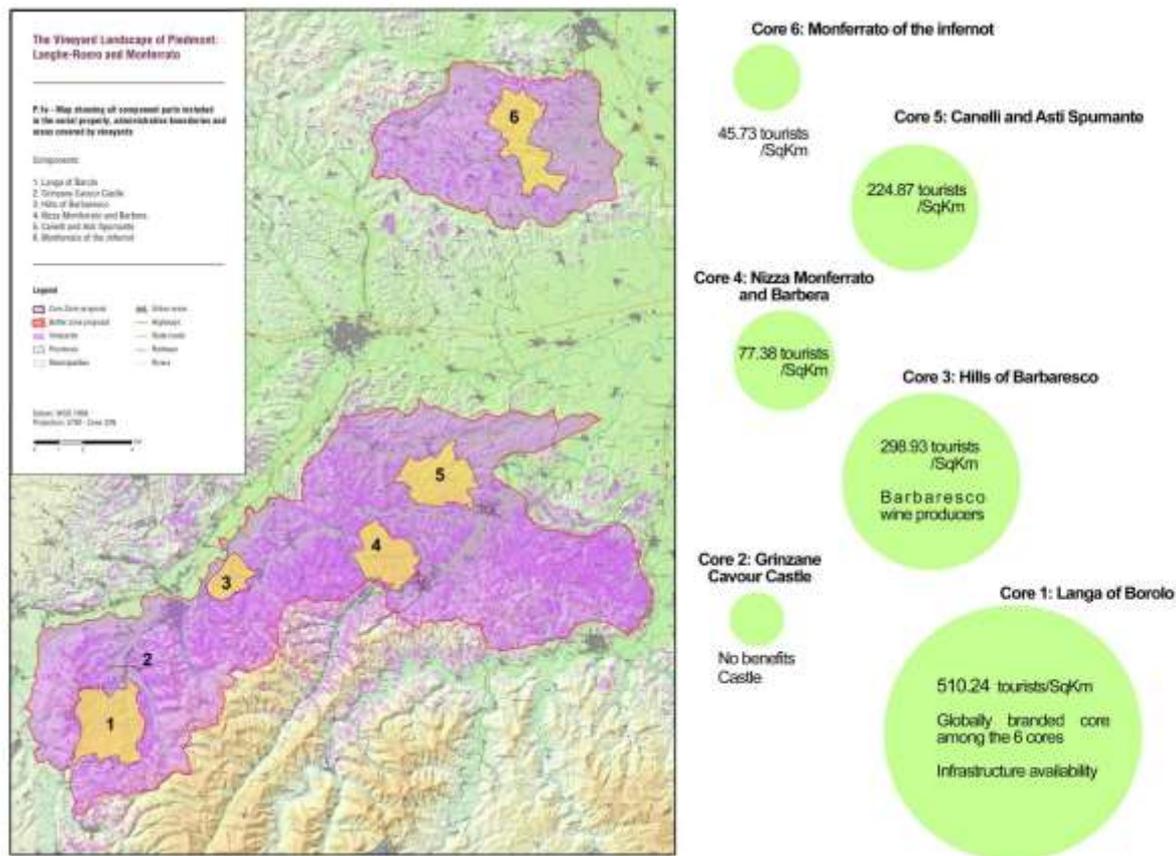


Figure 2: UNESCO site and zones.

Source: own elaboration based on <https://www.unesco.org/en>.

The case study analysis of the Langhe Roero and Monferrato was carried out on the 20th September 2022. The session took place in Serralunga d’Alba, and it was moderated by Prof. Giancarlo Cotella. We had the opportunity to discuss the challenges and opportunities for a more sustainable development of tourism activities in the area Langhe-Roero and Monferrato with some local stakeholders, Aldo Buzio (Ideazione Srl), Claudio Boasso (President of Pro Loco Association of Serralunga d’Alba), Dr. Sergio Moscone (Major of the Serralunga d’Alba Municipality), Enrico Rivella (ISMEA RRN), Enrico Rivetto (Wine producer), and Silvia Soldano (LINKS Foundation).

The event was fruitful in identifying some challenges related to the region connected to the tourism sector of the region. Tourism and Eno gastronomy are the basis for the economy of the area. It was noted that not just buying wine is no longer the only objective of the visit but also longer stays in the region. But it was also noted that one of the cores had more advantages in case of infrastructures availability, global branding, and incoming tourist numbers over the others. This was confirmed quantitatively by the available numbers from Table 1 and Table 2.

Table 1: Economic dataset of the case study.

UNESCO perimeter	Agriculture				Tourism				Real estate		Forests		
	n° agriculture firms	n° agriculture workers	n° BID agriculture firms (2013)	n° PDO/ PGI firms *	Utilized Agriculture Surface (ha)	n° tourism arrives	n° tourism presences	n° total beds	n° beds in farmhouses	Real estate value of properties (€m2)	Average agriculture value (€/ha)	n° Forestry firms*	Forestry surface (ha)
Core 1	1280	2001	14	1071	7591.29	68056	149.785	2624	2704.000	156000	1000.092	0	2208
Core 2	54	17	0	41	236.98	0	0	26	0	1500	249.146	0	2
Core 3	335	593	2	289	1698.16	8667	17944	389	143	2900	1415.851	0	265
Core 4	1075	783	3	862	5343.09	7999	23190	836	243	7530	802.798	3	1669
Core 5	906	1635	3	819	2817.68	14104	29803	601	448	3450	1617.446	0	951
Core 6	414	509	1	296	5671.41	4629	7029	390	180	7540	481.363	0	1425

Source: Assumma et al. (2022).

Table 2: Demographic dataset of the case study.

Cores	Population (2014)	Population (2020)	Area (Km2)	Tourist per SqKM
Core zone 1	13687.00	13307.00	133.38	510.24
Core zone 2	2010.00	1989.00	3.81	0.00
Core zone 3	4101.00	3931.00	29.06	298.93
Core zone 4	17632.00	18190.00	102.99	77.38
Core zone 5	15906.00	15433.00	62.72	224.87
Core zone 6	6754.00	6353.00	101.23	45.73

Source: Assumma et al. (2022).

It was inequitable for one of the cores to have advantage over the other even though the other cores and regions have the potential and the cultural and geographical opportunity to develop. The fact that the tourism is located at a specific core rather than spread over the region can cause mass tourism or over tourism of the region. It was understood that the local inhabitants do not aim to mass tourism, they are rather interested in a more diffuse and sustainable tourism that spreads around the area in a softer way.



Figure 3: 'Locals talking' session.

Source: <https://spot-erasmus.eu/2022/09/langhe-roero-and-monferrato-for-sustainable-tourism-locals-talking/>.

There is also an opportunity to have other activities in the region rather than just focusing on the Eno gastronomy of the region. The case study helped to understand the availability of resources for activities such as biking, hiking trails, mushroom hunting, even though truffles hunting exists for a particular season, and scenic walks could be marketed together with the Eno gastronomy tourism of the region. This would also spread the tourists. There is also a potential for gastronomy in the other cores of the region too.

Another thing we noted was the lack of cooperation or knowledge sharing among the local producers and among the zones of the region. The case study helped us in identifying and concreting the problem we are going to focus on for this study. And, to formulate policies which would give a vision to the region focusing on the topic of Equity and Local social inclusion.

Stakeholder analysis

A stakeholder analysis is a process used to identify who are the actors that are going to be taking part in a project before it starts, in order to take into account the role they will hold in the decision-making process regarding the interest and how they will impact (positively or negatively) the final result. It also helps to categorize a stakeholder by what type of actions should be taken when working with them.

Its relevance relies on clarifying what measures should be taken with each stakeholder group in order to open an organized discussion where all points of view are taken into account and are expressed in the final result as the outcome of fair negotiation. The division into categories regarding the scale of action is useful for determining the key actors for each scale and role categorization.

Table 3: The power and interest of the stakeholders.

No.	Name of Stakeholder	Power (1-10)	Interest (1-10)
1	Locals	7	10
2	Tourists	2	2
3	DMOs	7	10
4	Municipalities	9	8
5	Big enterprise producers	6	2
6	Small / family business producers	4	7
7	Labours / workers	2	4
8	Tourism operators	5	1
9	UNESCO	9	7

Source: own elaboration.

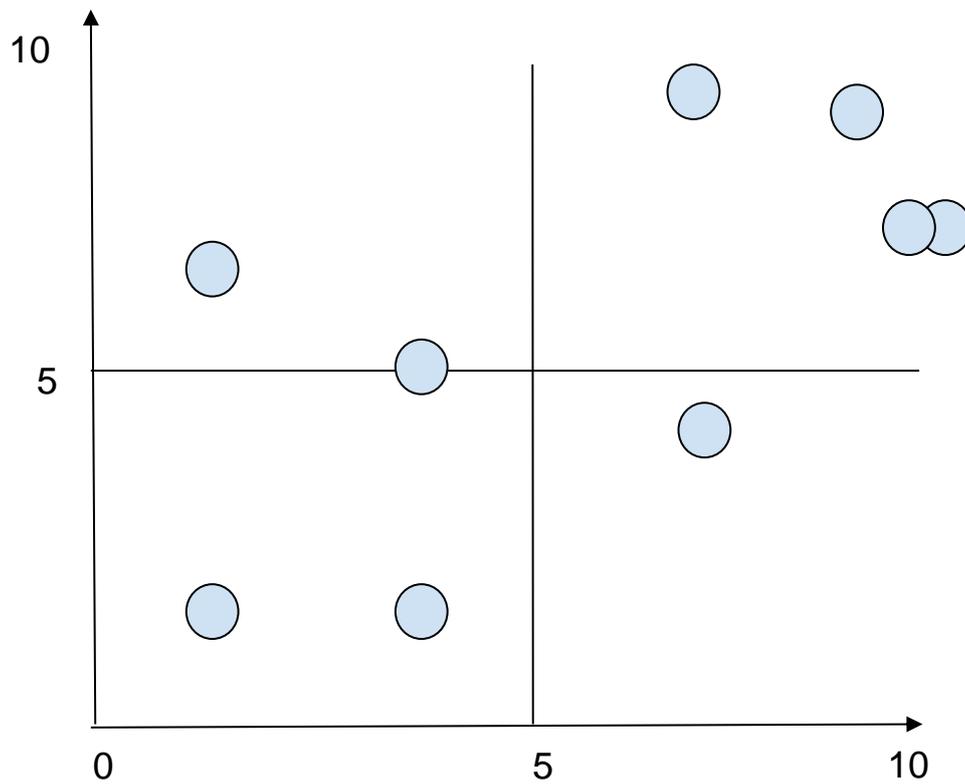


Figure 4: The map of the stakeholders influence and interest.

Source: own elaboration.



Figure 5: Key actors.

Source: own elaboration.

The previous exercise, along with the stakeholder meeting during the study area visit, helped us determine key actors that will play a vital role in the assessment of our selected issue:

- **Locals:** As land and business owners, locals are the ones with the knowledge and technical capabilities to support and enhance agricultural practices as well as local culture. They have the power to work towards the development of the region as a whole and should be of their high interest to create a general vision of the territory in which all actors are benefited.
- **Destination Management Organizations:** Local association in charge of managing and planning the territory from the point of view of tourism. Should serve as a channel for all actors to discuss and arrive to an agreement on the general vision of the region as well as to ensure the homogeneous development of all municipalities, towns and villages in a sustainable, equal, inclusive way.
- **Municipalities:** Policy making and project support and execution of all initiatives agreed by the stakeholders that work towards sustainable development of the region.

SWOT analysis

A SWOT analysis is a helpful tool to organize the collected information in the diagnostic stage in order to analyse, discuss, prioritize and agree on the main issues that the project faces. It is an analytical methodology used to identify and categorize the main internal (Strength and Weaknesses) and external (Opportunities and Threats) factors recognized in a particular scenario like an organization or territory.

The following SWOT analysis was made for the case study of Langhe, Roero and Monferrato in Italy, with the objective to have a clear scope of the current dynamics of the territory and identify the possible pathways for development focusing on equity and social inclusion and how tourism can contribute to the achievement of them

Topic: Tourism contribution to equity and local social inclusion through the homogenization of tourism in all municipalities as a whole region and not dispersed settlements, while at the same time motivate communication and cooperation among them.

The strengths of the region of Le Langhe, Roero and Monferrato is that most of the wine businesses are local. There is also a lot of local knowledge about wine making and agriculture. The wine and food culture in the area is a big strength and attracts tourism. The area also has a strong brand, and the wine is known all over the world. The area has a Destination management organization, which makes it possible for future local inclusion and equity.

The strength of the brand of Barolo is a weakness for the equity between the different zones in the area. There seems to be a lack of cooperation in the community. The wine farms are not cooperating and sharing their knowledge with each other. Also, the policy makers seem to not be communicating or cooperating with the rest of the community, like wine farmers. The differences between the farms that are producing in the traditional way and the farms that are using more innovative solutions, could also contribute to inequity in the destination. The last weakness assessed is the geographical segregation among territories.



Figure 6: SWOT analysis.

Source: own elaboration.

An opportunity for the area is more tourists coming to see the culture of the place. The site is on the UNESCO list, which is also an opportunity since taking care of the culture, and therefore the locals is a priority of UNESCO. Tourism moving away from traditional, non-sustainable tourism concepts, to wanting to appreciate and learn about the culture could be an opportunity for the area.

There are a lot of potential threats for the area, and the equity and inclusion of the locals. External tourism operators or big companies making wine, wanting to settle in the region could be a threat to the small, local businesses. Climate change destroying some parts of the area could increase inequity, since some places would be affected more than others. The change of agriculture patterns in the area, for example exchanging the wine with hazelnuts, could threaten the culture of the place. The tourists themselves could also propose as a threat, if not managed well they could be overstepping the carrying capacity of the destination.

Policy recommendations

Problem Definition: The case study analysis as well as the stakeholder analysis followed by the SWOT exercise helped us determine issues in the area regarding the inequity in economy and knowledge among the six core areas as well as the buffer zones in the Langhe-Roero and Monferrato area.

Currently Core 1 has the most benefit economically from tourism due to internationally recognised brands (Barolo wine) as well as better infrastructure and marketing. All 6 cores have the responsibility to preserve UNESCO protected culture and landscapes yet interests and actions towards are vary due to lack of social inclusions and knowledge differences. Continuation of this trend causes wider economical differences and uncollaborative behaviours to make the danger of unique culture and harmony. **The inequity among the six territorial cores of the UNESCO site and the lack of social cooperation between local producers as well as among municipalities.**

Goal: Enhance equity and local social inclusion in the area by improving management and branding of tourism through the creation of a local association that not only manages the territory and its activities as a destination, but also creates a safe environment for communication and cooperation.

Target 1: Improving the brand value of the area, specifically those with less touristic presence and activities.

Actions:

1. Educating local businesses about branding and tourism – Educating the local actors should be an initiative from the Destination management organization. To have a positive effect they have to get local businesses to participate and spend their time on learning. The main resources for this action is money and time. The money should come from the budget of the DMO, but the time invested needs to be from both the educators and the people learning. The education could happen either in a gathering among the locals, or it could be giving information to the local stakeholders that they can spend time on at home. The education of the local businesses should happen over a longer time period, and continue for as long as it seems necessary.
2. Traditional Advertisement (Posters, Brochures) – The traditional advertisement of the destination should also be done by the DMO, but it could cooperate with tourism companies. The main resource needed is money for the advertisement, and it could come from the municipality. The local farms and companies should also be a part of making the decisions about the advertisement. The advertisement could both be targeted at new potential customers and the already visiting tourists in zone 1. The time frame for this action should be over a longer period, but the advertisement should be sent out in intervals.
3. Create connectivity through all municipalities by public transport – In order to ensure accessibility and connectivity between municipalities and settlements, public transportation needs to be created in the region to guarantee mobility not only for locals to be able to move between cities, but for tourist to be able to enjoy the touristic offer of the region as a whole.

Target 2: Improving the local inclusion and equity by restructuring the Destination management organization (DMO).

Actions:

1. Assign each municipality a representative for the DMO.
2. The DMO meeting with the stakeholder twice a year to discuss and share knowledge – The stakeholders from all over the area should meet twice a year to discuss, learn and share their knowledge and experiences. The knowledge could be from tourism management, but also

agriculture, social or other topics relevant for the stakeholders. The geographical place for meetings should vary from time to time, in the different municipalities. The DMO or the municipalities should be in charge of and initiating the meeting conference.

3. Communication campaign to inform actors about the ideas proposed in meetings.

To implement these actions the resources needed is both time and money, coming from funding for tourism. The timeframe for these actions should be approximately one year, where the first 6 months should be used on setting the frames and planning how the DMO should function.

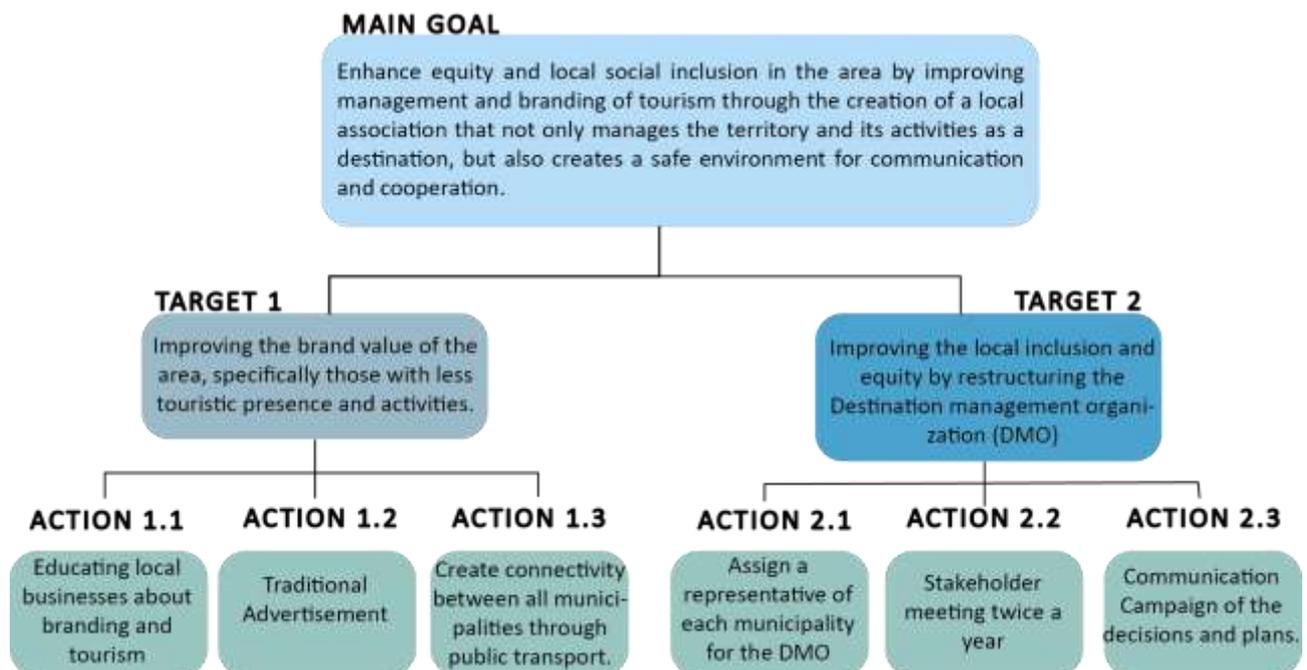


Figure 7: Policy recommendations.

Source: own elaboration.

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