
***Insignia – A Monitoring and Enhancement Model for Portuguese
Historical Military Heritage***

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ABSTRACT

The INSIGNIA project aims to develop an enhancement model for Portuguese historical military heritage, applied to the Military Tourism Route (RTM) – a tourism product developed by the Portuguese Military Tourism Association (ATMPT), in partnership with Portuguese municipalities and several public and private entities. The RTM is composed of a set of thematic routes associated to events in Portugal's military history and aggregates a set of resources, services, and a digital repository platform of existing historical and military heritage in Portugal, equipped with dynamic programming in constant updating.

The purpose of INSIGNIA is to safeguard, promote, and enhance national historical and military heritage, contributing to the affirmation of military tourism in Portugal and promoting the qualification of its agents, facilities, and the territories themselves. Therefore,

an action-research methodology will be used, based on document analysis, inquiry, and observation as techniques for collecting information. The methodological plan includes the implementation of five actions aimed at monitoring and optimising the product in the territory. So far, the preliminary results of the literature review tell us about the existing projects and the launch of the RTM digital platform tells us the number of entries and preferences among the routes presented. INSIGNIA began in 2021 and will continue until 2023.

Keywords: monitoring, safeguard, promotion, historical military heritage.

1 INTRODUCTION

INSIGNIA, which has started in 2021 and will continue until 2023, financed by the Foundation for Science and Technology, results from a partnership between Techn&Art - Centre for Technology, Restoration and Art Enhancement and the Portuguese Military Tourism Association (ATMPT – *Associação de Turismo Militar Português*), aiming to develop a model for the monitoring and enhancement of the Portuguese historical and military heritage, applied to the Military Tourism Route (RTM – *Roteiro de Turismo Militar*), a tourism product authored by the ATMPT.

The RTM consists of a set of thematic routes associated with events and periods in the history of Portugal, which aim to promote and disseminate tourism and cultural resources, facilities, and services, which can integrate the offer of military tourism in Portugal, directly or complementarily. The RTM started in the last quarter of 2020 and, in April 2021, the digital platform was presented, with the launch, in a first phase of two thematic routes: The Peninsular War Route and the Mondego Castle and Walls Route.

This Portuguese project of national scope, is growing and under construction, and is endowed with a dynamic program of personalized contents, materialized and updated in partnership with the Portuguese municipalities counting with the support of several public and private entities in the sectors of Culture and Tourism, namely the Directorate General for Cultural Heritage (DGPC – *Direção Geral do Património Cultural*), the Regional Tourism Entities of the Centre, Region of Lisbon, Alentejo and Ribatejo, Algarve and Madeira, *património.pt*, Portuguese Association of Congress Companies, Tourism Entertainment and Events (APECATE - *Associação Portuguesa de Empresas de Congressos*), the Association of Poor Knights of the Temple of Jerusalem (*Associação Ordem dos Pobres Cavaleiros do Templo de Jerusalém*) and the Mondego Castle and Town Wall Network (*Rede de Castelos e Muralhas do Mondego*).

The integration in one of the routes, gives the municipalities a set of services, directed specifically to the promotion and dissemination of the historical and military heritage of their region, with direct entry into a national military tourism network. The aim is

to publicize all points of interest and attraction of the territory, whether they are historical, cultural, or natural resources, capable of integrating the existing routes.

The RTM was created to fill an existing gap regarding the structuring of the existing offer in Portuguese territory and, consequently, regarding the development of military tourism products. In Portugal, the relationship between tourism and heritage associated with national military history has taken on an important role in creating an identity and brand for a national tourism destination (Moreno-Lobato *et. al*, 2020). In fact, in a 900-year-old country, national and military history naturally tend to converge (Marques *et. al*, 2021).

Over the past few years, there has been a consolidation of military tourism in Portugal, from its incorporation in the National Strategic Plan of Tourism (PENT – *Plano Estratégico Nacional para o Turismo*) in 2013 to the most recent inclusion in the 2027 Tourism Strategy. This strategy is based on the existence of a vast and diversified military heritage in the national territory and on the recognition of the relevance of tourism for the growth of the country's GDP, especially in the interior with low population density (Mogollón *et. al*, 2019). Another reasoning behind PENT is the assumption that military history has the potential to trigger tourism and cultural experiences, using narratives and storytelling as differentiating attraction factors (Coelho *et. al*, 2014).

Taking advantage of the synergies already created, the generic objectives of INSIGNIA are to preserve, promote and enhance the national historical and military heritage, to contribute to the affirmation of military tourism in Portugal and to promote the qualification of agents, facilities, and the territories themselves and their communities.

From the point of view of specific aims, the present project seeks to optimize the resources and services available in the RTM and in the existing platform, through the monitoring and evaluation of the heritage enhancement process, always in a perspective of sustainable development, allowing a continuous product analysis from the perspective of the implementation of such a model; to provide the tools for the improvement of the product based on the obtained results; establish specific goals, expectations and objectives, through the definition of a set of reference indicators. These indicators allow to generate information, evaluate the process, and optimize this knowledge, dialoguing and correcting tools already created, such as the inventory matrix of heritage resources on which the platform designed for the RTM is based; and establish evaluation parameters, selected according to the established objectives.

We begin by presenting the theoretical framework of the project, identifying several projects in terms of safeguarding Portuguese heritage, and consolidating military tourism in Portugal. Next, we describe the methodological plan of the research and enumerate the preliminary results of the same. We finish with the final remarks.

2 BACKGROUND

An analysis of the theoretical framework reveals the inexistence of a model specifically dedicated to the enhancement of the historical and military heritage that involves monitoring and evaluating a tourism and cultural product. The specificity of this heritage culminates in a gap that has long been identified at various levels (Eade & Katić, 2017). If, on the one hand, we are witnessing, step by step, to the structuring of the existing offer in terms of the quantity and diversity of existing resources of historical and military nature, on the other hand, we observe the absence of monitoring and evaluation indicators regarding their tourism activation in the territory. This situation is reflected in Portugal and in the world (Coelho *et. al*, 2014).

Despite this, in recent years, there have been some works in Portugal dedicated to the study of monitoring, inventorying, preventive conservation and rehabilitation of cultural heritage.

In 2016, HeritageCare was launched, a cross-border project between Portugal, Spain, and France, which aims to develop a joint strategy for the preventive conservation of the natural and cultural heritage, applied to the Southwest European Space, involving the stakeholders of the heritage. This project aims to implement a new heritage management model in partner countries, promoting sustainability and the involvement of civil society in the protection of heritage (Ramos *et. al*, 2017).

In the context of the inventory there are several information systems dedicated to cultural, immovable, movable and intangible heritage, under the supervision of the DGPC. These systems are not prepared to monitor and evaluate the different processes associated to heritage and its tourist activation, dedicating themselves exclusively to the function of digital collection, as is the case of the Information System for Architectural Heritage (SIPA - *Sistema de Informação para o Património Arquitectónico*) or the National Inventory of Intangible Cultural Heritage (*MatrizPCI - Inventário Nacional do Património Cultural Imaterial*). However, they are an important support for entities that work with cultural heritage in Portugal and the starting point for new models.

As for the entities that oversee most of the resources of historical and military heritage, namely the Municipalities and the Ministry of National Defense, there has been a growing concern regarding their preservation and promotion. In turn, ATMPT has developed, over the six years of its existence, several projects in the field of tourism activation and preservation, and promotion of the Portuguese military and historical heritage, which culminate in the launch in 2020, by the RTM, at the level of structuring of the existing offer in the national territory.

From the specific perspective of tourism, some studies have emerged aimed at analysing and monitoring the tourism performance of the destination in the areas of economic, social, and environmental sustainability (Ward-Perkins *et. al*, 2020). In 2011, appeared a study for the construction of an Observatory for Sustainable Tourism (OST – *Observatório para a Sustentabilidade Turística*) with the objective of monitoring and

predicting tourism development in a given territory (Brito, 2012). This model intends to transmit the necessary information to the various stakeholders so that they can react in advance to the sustainability of the tourism development process. It implies the use of an information system based on a set of economic, social, cultural, and environmental indicators and benchmarks, integrating a base of good practices to improve tourism development (Brito, 2012). Since then, Portugal already has three observatories in the international network of sustainability observatories of the World Tourism Organization (WTO), in the regions of Alentejo, Algarve and Azores.

These examples of monitoring projects can serve as starting points for the development of a monitoring model applied to the concrete reality and the operational logic of enhancement of the Portuguese military and historical heritage.

3 METHODOLOGY

The model for monitoring and enhancing the national historical and military heritage, applied to the RTM, integrates different aspects related to the implementation and monitoring of the product in the territory.

We are dealing with a research-action study, which will privilege document analysis, inquiry, and observation as data collection techniques, and which will use field notes, structured grids, interviews and questionnaires as data collection instruments. The instruments will be created by the researchers and validated by specialists in the field.

To guarantee the viability and success of this model, it is essential to proceed with the collection, treatment, and analysis of information from different areas, namely on the product that is being executed and on possible similar models applied to cultural heritage. From the point of view of the RTM, it is necessary to analyse the available services and the existing platform. From the point of view of product monitoring and evaluation, observe which evaluation parameters and reference indicators are normally used.

From the analysis and interpretation of the data obtained, it will be possible to optimize the product efficiently, contributing to the management and enhancement of the national historical and military heritage and, consequently, to the development of military tourism in Portugal. For this, five actions were defined that we will now describe.

The first action is to survey the existing literature in documentary sources, both national and international, concerning systems for monitoring and evaluating tourism products, in a perspective of sustainable development and enhancement of cultural heritage.

The second action focuses on the collection of information on the product being executed, regarding the implementation phase it is in, the data on the participating municipalities, the available services, and the information platform.

The third action consists of creating a product monitoring and evaluation system. The starting point for this action is the identification of goals, objectives and expectations for the

monitoring and evaluation of the product, to select a set of reference indicators at the level of the different research areas, which allow to monitor and evaluate the RTM, from the user's perspective, the participating entities, and the organization. These indicators may cover areas such as tourism and tourism management, economy, safeguarding of cultural heritage, social sciences, and information technologies. Thus, through a product evaluation (product test), composed by the referred indicators, it will be developed a study on the impact of RTM in one of the municipalities participating in the project. This study will consist of surveys made to RTM users/visitors of a given monument and interviews with entities responsible for the local tourism and cultural management and monitoring of the RTM. Following this process, it is possible to optimize the inventory matrix and, consequently, the existing platform, by indicating the improvements necessary to obtain the desired quality, and making the correspondent corrections, as well as to comply with the sustainable, intelligent, and inclusive principles that mark the present project proposal.

The fourth action comprises the dissemination of results in national and international terms, within the scope of the different scientific areas and domains of the research team.

The fifth and final action involves the organization of activities and events in the scope of product dissemination, for the presentation and evaluation of the obtained results. The promotion and dissemination of the works developed within the scope of the RTM also intends to contribute to the demystification of the concept of military tourism, to the awareness of the importance of this segment in tourism in Portugal and to the appearance of new business opportunities.

Since military tourism is a segment capable of promoting tourism flows to the inland regions, contrary to the trend of mass tourism and seasonality, to aggregate differentiating experiences and to attract new audiences, and to cross, in a complementary way, with other segments, it must be seen as an expanding area with great growth potential at the service of citizens and their communities.

4 DISCUSSION

The challenges we face today, in terms of uncertainty in the tourism sector and the unpredictability of markets, because of the Covid-19 pandemic, force us to rethink strategies and "adjust" expectations. If there are restrictions on accessibility and mobility, the tourism activity is constrained and, therefore, the expected results of this project are dependent on the current limitations. However, the digital platform of the RTM opens a virtual window of access to the heritage and inspires the participatory dynamics of the tourist in the planning of the visit adjusted to their interests, needs and conditions (Ioannides *et. al*, 2018).

Thus, after the launch of this platform, on April 30th, 2021, there were 721 visits, 521 distinct visitors (who returned to the platform) and 2797 impressions (number of views referring to all pages) during the first 15 days. With the presentation, in a first phase of two

thematic routes: The Peninsular War Route and the Mondego Castle and Walls Route, there were 384 and 134 visits in each of the routes, respectively.

The present project is in the first action of the methodological plan, that is, in the documentary analysis to make the parallelism with monitoring and evaluation systems of tourism products applied in a determined country or region, even if directed to another typology of patrimony. At the same time, the second action regarding the collection of data from the RTM began - which will be followed for 19 months – in the follow-up of the launch of the digital platform and the first issue of the magazine *Viagem na História - Turismo Militar*, a communication brand of the RTM with disclosure in early June.

Regarding the rest of the planning, the third action, starting in September 2021, which aims to create the product monitoring and evaluation system, provides, in a generic way, the accomplishment of five activities: identification, selection, testing, treatment/analysis and optimization. The fourth and fifth actions, scheduled every six months starting in November 2021, presuppose the dissemination of the knowledge produced, through the presentation of the results to the scientific community, in national and international communications and publications, as well as, through the organization of events and concrete training and awareness actions aimed at the community in general, local agents and the school public.

The expected results of this project, in addition to the optimization and dissemination of the product, point to the tourism activation of the historical-military heritage and its direct impact on the national territory. The creation of a heritage enhancement model, of a historical and military nature, based on the monitoring, evaluation and, consequently, optimization of the existing product, fits directly into the areas of enhancing cultural heritage and sustainable development, becoming a pedagogical tool to support the training and dissemination of knowledge at the service of researchers.

The expected societal results converge with the challenges defined by the European Union regarding inclusive, innovative, and reflective societies. The involvement of citizens in matters of culture and access to heritage promotes the sense of belonging of communities towards their history and identity (Lima *et. al*, 2018), while investing in research and innovation, contributes not only to the dissemination of knowledge but also to the intellectual empowerment of a constantly changing society.

5 CONCLUSIONS

The work developed by several public and private institutions, being them academic, associative, governmental, military or business, has been reflected in the development of military tourism in Portugal, especially through the ATMPT. The promotion of projects such as RTM in Portuguese territory contributes positively to the consolidation of this brand and to the projection of Portugal as a differentiated destination.

A research-action study such as INSIGNIA has cemented this type of project on the national scene, with the creation of a model for the enhancement of the military and historical heritage.

The project started in May 2021 and is in the initial phase of surveying the existing literature in the documentary sources and collecting data on the tourism product that is being executed. The preliminary results obtained relate to the launch of the RTM digital platform. According to the methodology adopted, the project foresees a total of five actions that will go hand in hand with the creation of a system for monitoring and evaluating the tourism product aiming to optimize and improve the product. The results obtained will be presented in stages during the 24 months of the project.

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