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Stakeholder Engagement, Partnership and Collaboration in Public Policies

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Stakeholder Engagement, Partnership and Collaboration in Public Policies

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The scope of this issue is to present a wide array of perspectives and examples on the role of partnerships and stakeholder involvement in the processes of implementation of diverse public policies. In recent decades the concept of collaborative governance has become a point of reference in policy-making and analysis, both from the perspective of academia and practitioners. Public-private partnerships, networks, participation, and bottom-up approach occupy a firm place in the discourse on methods of policy implementation.

One of the areas of study that has emerged over the past two decades is *place branding.* This concept of applying the principles and instruments of image and reputation enhancement used successfully in commercial organisations to territorial entities is considered a vital component of place management. As such, place branding has undergone substantial evolution. From being understood as a top-down promotional activity, a kind of monologue of central and local authorities aimed at foreign audiences, it developed into a more collaborative and inclusive public policy, where multiple stakeholders negotiate to (re)define place's vision and aspirations. The place-brand strategy serves more and more often as an umbrella concept for the development of selected public policies – hence it is represented and discussed in several of the papers included in this issue of *International Studies.*

The idea of this volume emerged from the experience provided by the exchange of academic ideas and the collaboration among the contributors, city-lab research and teaching activities undertaken by the University of Macerata, research on the Finnish variant of public-private partnership, and methodological studies on the archivisation and reuse of primary data from multi-stakeholder research projects in local governance.

Stakeholder engagement in public policies that results from informing, consulting, involving in decision-making processes, collaborating at the policy implementation stage, and empowering, increases the scope of the networks for public policies. At the same time, it poses important challenges for politicians, policy managers, non-governmental organisations, and citizens. These challenges comprise identifying conflicts, and potential problems, addressing contradictions among actors with diverse histories and backgrounds throughout the processes of policy design and policy-making. Last but not least, the relevance of power to change directs us towards the resource-based perspective on the potential of stakeholders to engage in and to influence the policies in a meaningful way. Only those who possess adequate financial and human know-how and network-related resources can bring about changes in policy processes. The stakeholder influence measured in two-dimensional space of power and interest is a key concept for the understanding of the nature of collaborative governance.

In this volume, we discuss a broad range of subjects and themes relevant to both the theory and the practice of development and implementation of collaborative

public policies. These include new modes of stakeholder participation, current approaches to service and infrastructure delivery, innovative methods of citizen engagement via social media, collaborative approaches to learning in the area of local development, identification of primary beneficiaries of the place at both local, and national level, and the role of research data management in public policy research.

The first three papers offer theoretical insight into the three important aspects of public policies that are: conceptualising and defining target groups/users/beneficiaries of the place; modelling the approaches to participatory budgeting that encourage civic participation, and, as a result, expand the sense of ownership of the place, be it a country, a region, or a city; and discussing threats, and opportunities of social media communication with citizens. The second part of the volume comprises four case studies in the area of public infrastructure delivery (Finland/ Tampere), urban regeneration and nation branding (Columbia), practice-based innovations in higher education in the area of tourism development (Italy/Le Marche), and multi-stakeholder approach in tourism policy of atypical wine regions (Belgium/Limburg and Argentina/Mendoza). The structure of archivisation and approaches to the re-use of qualitative data from public administration research are discussed in the last paper, while the review section offers a comprehensive outline of the monograph that concentrates on concepts, models, and theories of city branding.

In the opening paper, *Beneficiaries Of A Place: Whose Life Is Better?*, Kirill Rozhkov and Konstantin Khomutskii provide the basis for segmentation of residents as place users. They present the relationships between characteristics of residents and places where they live. By applying a combination of three criteria of place attractiveness (retention and attraction, conditions for natural growth, and settling), they classify places as well as profiles of their beneficiaries on the theoretical level. This, in turn, has practical implications for place marketers as it allows to identify the shifts in the structure of beneficiaries of specific places and to predict the direction of its evolution.

The paper *Beyond Figures and Numbers. Participatory Budgeting as a Leverage for Citizen Identity and Attachment to Place* by Justyna Anders-Morawska and Marta Hereźniak presents a proposal of a research framework for studying the relationship between Participatory Budgeting and citizen attachment to place. The authors review the models of PB discussed in the literature in view of their potential impact on individual bonds with the place of residence. In the case of the community development model of PB place attachment should lead to the citizens' increased inclination to participate. In the case of participatory democracy model of PB citizen participation can lead to a stronger place attachment.

In his paper *Social Media as a Modern Communication Tool Between a City and its Users – a Theoretical Approach* Michał Sędkowski reviews the existing literature

on the role of social media as a communication platform between the local authorities and the residents of the city. The author poses that cities can strongly benefit from an active presence in the social sphere, as it opens new paths to co-governance and better communication.

Introducing an Alliance Model in Finnish Urban Infrastructure Projects: Perspectives and Experiences of the First Tampere Alliances, a paper by Pekka Valkama, Lasse Oulasvirta, and Ilari Karppi, presents the results of an empirical study on factors in the implementation of public-private partnerships in Finland. The study highlights how the city government formulates preconditions and objectives of two urban public transit projects; how risks and benefits are shared, and what are the boundary conditions for PPP in urban policy.

In the paper *Re-branding Colombia through Urban Transformation and Regional Marketing,* Norberto Muñiz Martínez showcases how cooperative and coherent public policies have changed the urban landscape and image of Colombia. The Author analyses interregional marketing in this country through the place brand – Coffee Growing Axis – which unites various districts or administration departments, where coffee is harvested and demonstrates how this initiative has led to the creation of the themed tourist experience. The second part of the paper is dedicated to the transformation and branding of the city of Medellín, which has led the processes of urban change in Colombia through the constructions of cultural and educational infrastructures, and its inclusive transport.

In the following paper, *Assessing the Learning Outcomes of Food-Related Educational Tourism Events for University Students: the Case of the International Student Competition of Fermo, Italy,* Sabrina Tomasi, Alessio Cavicchi, Gigliola Paviotti, Giovanna Bertella and Cristina Santini, examine the "International Student Competition on Place Branding and Mediterranean Diet" held in Fermo, Italy: a one-week food-related educational programme in the context of the development of rural areas, organised by the multiple local stakeholders. The dialogue with these local stakeholders and the experiential learning activities offer students an overview of the socio-cultural and economic processes regulating the territory. Local networks like the one presented in the study, embody local managerial and political knowledge and play a role in providing quality and coherence to the services and products offered.

Katleen Vos, the author of the paper *The Development of Wine Tourism in Atypical Wine Regions: A Means of Value Creation?* presents recent trends in wine tourism. Based on the literature review and case study analysis, the paper explores the possibilities to create successful destinations and highlights the importance of co-operation, co-creation within networks and creativity in order to create value for the wine tourism destination. For tourism managers, the main role is, therefore, to bring together the different actors in a larger network of cooperation.

In her methodological paper *Archiving and Re-Using of Qualitative Data as a Path to Development of Public Administration Research* Joanna Gajda characterises the process, tools, and techniques that should be used in order to prepare datasets gathered in situ for secondary analysis. The database samples are intended to enable researchers to reuse data, create material for teaching and material for comparison and analysis. They are also a condition sine qua non for longitudinal research, including impacts on methods of inquiry in policy sectors.

Tomasz Domański gives a concise review of the monograph by Ewa Glińska, *"City Branding: Concepts, Conditions, Model" (Wolters Kluwer, Warszawa, 2016)*, characterising the concepts and models of City Branding. As Tomasz Domański states, the key strength of the publication lies in empirical studies that cover self-governments of small and medium-sized cities in Poland divided into three groups depending on the advancement in introducing brand strategies into city management practices.

The editors hope that the broad spectrum of topics covered by this volume, both theoretical and empirical, will offer an exciting reading to those who are interested in the application of the collaborative approach in public governance.

C O P E

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Beneficiaries of A Place: Whose Life Is Better?[1]

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Abstract

The paper shows relationships between the characteristics of residents and the places, where they live. A combination of three criteria of place attractiveness (retention and attraction, conditions for natural growth, and settling) was chosen to classify places, and profiles of their beneficiaries on the theoretical level. The results of the empirical study partially confirm the developed theoretical typologies. Two methods to segment place market are equal only if expectations of population are constant. Study results allow place marketers to identify emerging shifts in the structure of beneficiaries of specific places and predict their further evolution.

Keywords: resident, beneficiary, market segment

Introduction

Cities, towns and even villages have to compete for the inhabitants, investors, and visitors to meet new global challenges. An answer to the question "How can a concrete place attract the target residents?' has become the key 'know-how' of a place to succeed in this competition.

The issue of preferences of the main population groups, regarding place attributes, has been an important area of emphasis in urban planning research over the past two decades. Differences in environmental preferences between different population groups and classes have generated considerable interest in the planning literature (Stamps; Regan and Horn; Niedomysl). Studies on demographic, socioeconomic, and geographic components of the preferences have contributed to contemporary understanding of residential behaviour (Lindberg et al.; Dokmeci and Berkoz; Niedomysl; and Kim et al.).

Any place is a complex combination of place attributes (place characteristics, facilities, etc.). This approach was reflected by Ashworth and Voogd; Ulaga et al.; Walters. It is also difficult or impossible to change such place attributes as geographical location, climate, the layout of streets, history, and, in some ways, the habits and customs of citizens. These facts make researchers evaluate residential attitudes toward both separate place attributes and their combinations or profiles using multi-attribute approaches and methods (Van Poll; Molin).

In addition, residential preferences have considerable influence on the satisfaction of migrants, tourists and the existing inhabitants, which, in turn, is a determining factor in place marketing and place branding. Considering place as a complex product and the above-mentioned groups as place customers (or target groups of place marketing), it becomes particularly significant to distinguish crucial place attributes that meet preferences of the most valuable groups and largely determine their perceptions of place image and attitudes toward place as a whole (Zenker et al.).

Meanwhile, until now one important issue regarding the practical application of this research has not found a definitive interpretation. On the one hand, the marketing strategy of a place has to be segmented as a marketing strategy of a firm to compete successfully (i.e. to attract valuable residents – Kotler). On the other hand, the concept of a plurality of target groups in place marketing (Ashworth and Voogd) and the concept of undifferentiated marketing (Ward) are in obvious contradiction with this idea. Local authorities and other local stakeholders will inevitably experience difficulties with the development of a place marketing strategy that has to be segmented and coordinated simultaneously with the interests of a broad range of place consumers. In other words, it has been uncertain, what value (value of a place or value of a customer) should underlie the place marketing activities.

The assumption that the creative class is the most valuable (and external, as a rule) target group (Zenker) reflects an approach in place marketing research which could be called "customer-value". At the same time, it is necessary to learn more about the typical preferences of the population groups which already inhabit specific places. The approach of Ge and Hokao, who propose the concept of residential lifestyles and identify empirically four types of residential preferences, can be considered a "place-value" one.

Parker et al. developed this approach and concluded that the clustering of people with similar spatial preferences concurrently means the clustering of places with similar geographic and socio-cultural attributes that are of particular significance for geography and urban sociology. Besides, from our point of view, a list of probable applications of this idea is not limited to these sciences. A classification of places by residential preferences could be a valuable tool for place marketing analysis because it can obviously help place marketers to reveal and describe places as complex products like any product range in the general field of marketing. In addition, such a classification could allow place marketers to determine accurately the target groups whose diversity, indeed, is inherent in the large proportion of real places and inhibits marketing activities in the interests of any one group. That is, place marketing strategy could be developed in the frame of standardised methodology, not as a summarised experience of different cities and towns.

Meanwhile, the theory of place market segmentation (theoretical classifications and typologies, as well as answers to this question on a theoretical level) is one of the less investigated issues in place marketing. And empirical findings on the relationships between place product attributes and place consumers mentioned above can be applied only in special cases. In particular, the diversity of existing and probable target groups, which can be observed in real cities and places, have not yet been reflected in place marketing theory and methodology.

Research concept

Based on the discussion above, there are several questions that will serve as a starting point of this research. The answer to the practical question "How can a specific place attract the desired resident groups?" that was asked at the beginning of this paper, requires stating two theoretical questions: "What residents are considered valuable by different places?" "What type of places can attract what kind of residents?" (or "What kind of residents prefer what type of places?") Only having these two questions answered, it will be possible to determine how a specific place should be changed in order to attract residents that are considered as valuable and, thus, give an answer to the first question.

In our previous study (Rozhkov, "Segmentation") profiles (combinations) of expected demographic indicators of five Russian towns (expected demographic profiles) and profiles of their attributes (towns' profiles) were compared using the typological method. This paper is aimed at comparing demographic profiles of towns to the profiles of their main beneficiaries.

It is necessary to emphasise that the use of the term "target group" is based on the assumption of real marketing activities whose goals are to meet the preferences of a special group of the population. However, place marketing may not be a particularly common tool of public policy, especially in Russia. That is, a place can be managed in the interests of a certain de facto group, but this policy may be not announced. Consequently, it seems essential to use the term "beneficiary of a place" and define it as a group of the population whose preferences are most exactly met by existing place attributes. The following statements underlie the investigation.

1. Certain population groups have preferences regarding the range and quality of place attributes.
2. A specific place has attributes of specific range and quality.
3. Therefore, this place only meets the interests of those population groups whose preferences are the closest to its attributes.
4. The range and the quality of place attributes determine residents' behaviour as the place customers (demographic behaviour of local population as a whole), which, in turn, can be considered as the main characteristic of a place as a product to be marketed.
5. Each type of place is oriented to the satisfaction of place beneficiaries' needs, i.e. beneficiaries demonstrate the most significant satisfaction among other population groups.
6. Consequently, every specific place belongs to a certain type of place and very rarely can fulfil the needs of all residents (or make their lives better). That is, this place hardly ever meets all the criteria of place attractiveness.
7. Finally, the type of place and the profile of beneficiaries of this place are related. In other words, beneficiaries' attitudes towards a place differ from both those of the rest of the population of this place and those of other places. And it is possible to distinguish a beneficiary of each type of place from those who find the place less valuable.

The conceptual base of this research is the heuristic monothetic 3-dimensional typology of places (table 1) and the classification of their distinctive characteristics (Rozhkov, "Tselevye"; Rozhkov, "Segmentation").

Table 1. The heuristic monothetic 3-dimensional typology of places

Type of place	A combination of criteria for attractiveness of place to residents		
	retention and attraction	natural growth	settling
1	–	–	–
2	–	–	+
3	–	+	–
4	+	–	–
5	+	+	–
6	+	–	+
7	+	+	+
8	–	+	+

This paper will discuss whether it is possible to describe the beneficiaries of these nominal places on a theoretical level. If so, then the developed typology could be used as a tool for the segmentation of specific places.

It is possible to assume that the following types of places fulfil the needs of the following population groups or, in other words, these population groups show the highest level of satisfaction with the following places (Table 2).

In other words, it may be suggested that only identifying the type of place, which a specific place belongs to, allows place marketers to understand whose life is better in this town. Alternatively, by classifying the demographic characteristics of the most satisfied people, it becomes possible to establish the belonging of a specific place to a certain type and vice versa.

Data and methods

To examine the hypothesis a street survey of residents was conducted (2,000 people aged 17 and older in five Karelian towns were surveyed).

Based on the results of the survey, a focus group was formed. The focus group consisted of authority representatives, members of the public and non-commercial organisations of surveyed towns. The participants were asked to comment on the results of the survey and in particular those ones which did not approve the hypothesis mentioned above. We have also used local statistical data.

There is some evidence to suggest that the benefits of a place are subjective, which can be better evaluated by residents than anybody else. As each place is mostly oriented to fulfil the needs of place beneficiaries, they are those who demonstrate the most significant level of satisfaction among other population groups.

Table 2. Profiles of place beneficiaries (hypothesis)

Type of place	Sex	Age	Duration of stay	Beneficiary profile	
				Education	Social status
1(−−−)	male	17–29 30–39 40–49	migrant	not educated	unemployed
2(−−+)	equally	over 55	native	Primary Secondary	retiree
3(−+−)	female	30–39 40–49 50–55	native	Secondary secondary specialised	retiree working pensioner
4(+−−)	male	17–29 30–39 40–49	migrant	secondary primary	employee
5(++−)	equally	30–39 40–49 50–55	equally	secondary specialised higher	employee working pensioner
6(+−+)	equally	17–29 30–39 40–49	equally	Higher incomplete higher secondary specialised	employee student
7(+++)	equally	equally	equally	Equally	equally
8(−++)	any	any	native, long–term resident	Any	Any

To build empirical profiles of beneficiaries, data on the level of residential satisfaction with each surveyed town, as a whole, and demographic characteristics of the respondents were collected and summarised. The included question was "How would you rate your town (on a 5-point scale)?" In addition, questions about the following demographic characteristics of the respondents were also asked: sex, age, duration of stay, education, social status. Then all satisfied respondents (who gave marks "4" or "5" to their town) were grouped according to these characteristics, and proportions of these groups in the total number of satisfied respondents in each town were calculated.

Each specific town was classified by three demographic indicators below (Table 3).

Table 3. Indicators for attractiveness of place to residents

Criteria for attractiveness of place to residents	Indicator
1. retention	expected departure
2. natural growth	expected birth rate
3. settling	difference of expected general birth rate and expected departure of natives

Data on reproduction and departure expectations of respondents were collected to evaluate these indicators. Two questions included in the questionnaire were: *"Would you move to another place if it were possible?"* and *"Are you planning to have a child (or another child) in the near future?"*

To compute the indicators of expected departure, the frequency of the answers to these questions relative to the number of all respondents in each town was calculated. Following this, an average value of this relative frequency for all surveyed towns was subtracted from the value of each town. With regard to expected birth rate, the same calculations were done; however, only the childbearing-age women's answers were counted, and the results were first related to the total number of these women in each surveyed town.

To compute the indicators of settling difference of expected general birth rates and the expected emigration of natives for each town was calculated. Then an average value of this difference for all surveyed towns was subtracted from the value of each town.

Each indicator of attractiveness is a binary variable "+" (yes) or "-"(no), whether the relative frequency of the answers to the questions mentioned above for each town was more or less its average value. The combinations of the values of these three indicators showed the empirical types of places the surveyed towns belong to.

Further, the number of coincidences between theoretical and empirical beneficiaries' characteristics was calculated, and the closest type of place was revealed for each surveyed town.

Finally, the empirical type of place and the one that was identified as the closest to empirical beneficiaries' profiles were compared to each surveyed town to check the hypothesis.

Results

The combination of values of three expected demographic indicators for each town pointed to its empirical type of place (Table 4). The positive values of the first indicator were interpreted as the absence of the criteria of retention and vice versa.

Table 4. Empirical types of places

Surveyed town	Indicators for attractiveness of place to residents			Empirical type of place
	relative expected departure	relative expected birth rate	difference of relative expected general birth rate and relative expected departure of natives	
Pudozh	22%	0%	−18%	3(−+−)
Segezha	65%	−5%	−19%	1(−−−)
Kondopoga	−17%	7%	18%	7(+++)
Sortavala	−6%	−5%	5%	6(+−+)
Olonets	−8%	4%	15%	7(+++)

Demographic structures of satisfied residents for each surveyed town are presented in Table 5.

The figures show some similarities in the empirical profiles of beneficiaries. For instance, social status is the demographic characteristic of satisfied people that is common for all towns. Employees have the largest proportion among those respondents who gave marks "4" or "5" to their towns in comparison to other social groups. Four out of five towns are attractive for people with secondary specialised education and the same number mostly fulfils the needs of the residents of both sexes. This profile points to the type 5 of the typology which is the conceptual base of the study.

However, more particular conclusions can be made if both similarities and differences between towns are analysed and, especially, demographic characteristics of satisfied groups of not only between investigated towns as within them are compared.

Both the profile of beneficiaries and the combination of values of place attractiveness indicators of Sortavala point to the same type 6. Focus group data meet the trends revealed by the survey analysis. The only clarification that is needed is the one regarding the description of beneficiaries of this type on a theoretical level. Any business or trade places, not only megacities, can match this theoretical type. Sortavala is such a place with well-developed cross-border trade and with cultural and other links to Finland. Young residents can fulfil their aspirations, do not strive to move out, and seem to behave in line with European stereotypes of childbearing, having one or two children in a family.

Pudozh's typical beneficiary is a 55 years-old (38% of satisfied respondents) man or woman who was born here (76%). These figures could be interpreted as signs of the 2nd type, but education points to the 3d type and the social status of the beneficiaries belongs to the 5th one. The place type number of Pudozh, revealed empirically, is the 3d. The expected birth rate in Pudozh coincides with the average value for all surveyed towns and gives reason to assume that the town probably moves from the 2nd to the 3d type. That is, the demographic expectations of the people are somewhat better than their real life in the town, which beneficiaries rated. Additional information obtained from focus group showed that some new settlers have begun to move in. However, we have no sufficient figures that prove that they are those who support the relative expected birthrate.

Segezha and Kondopoga have the same profiles of beneficiaries which include primarily features of the 5th type of place. Focus group and local statistical data also indicate the industrial profile of both towns. However, there are apparent discrepancies between the profile of beneficiaries and empirical type of place of each town.

Residents of Kondopoga demonstrate comparatively low expected departure and young people are optimistic. This optimism (18%) is more obvious than in the case of Pudozh's women, who showed expected childbearing (0%). It means that there are sufficient prerequisites for young people to become beneficiaries, although they have not become them yet.

On the contrary, residents of Segezha are highly pessimistic in the worst values of all three indicators for attractiveness. Therefore, probable future shifts in the structure of beneficiaries will be extremely unfavourable if the residents' expectations transform into behaviour.

Olonets is the most difficult case of all surveyed towns for interpretation in terms of the research concept. The characteristics of the beneficiaries can be matched to different theoretical types of places. However, a more interesting fact is that Olonets beneficiaries seem to belong to those types which are not adjacent in typology so that the town cannot be considered as moving from one type to another.

Table 5. Empirical beneficiaries' profiles

Surveyed town	Sex	%	Age	%	Duration of stay	%	Education	%	Social status	%
					Name and proportion of the demographic groups among the most satisfied respondents					
					(the percentage of group size to the total number of those respondents of the town who gave the answers "4" or "5" to the question "How would you rate your town (on 5-point scale)?"					
Pudozh	m	**54**	1	25	**1**	**76**	1		1	3
	f	**46**	**2**	11	2	**19**	2	14	2	**39**
			3	18	3	5	3	19	3	6
			4	7			4	**57**	4	26
			5	**38**			5	5	5	26
							6	5		
Segezha	m	**58**	1	17	**1**	**51**	1		1	10
	f	**42**	**2**	**30**	2	**25**	2	7	2	**67**
			3	11	3	24	3	26	3	0
			4	14			4	**33**	4	10
			5	28			5	14	5	14
							6	21		
Kondopoga	m	**47**	1	16	**1**	**57**	1		1	5
	f	**52**	**2**	**29**	2	**32**	2	6	2	**69**
			3	22	3	**11**	3	24	3	2
			4	12			4	**34**	4	14
			5	20			5	15	5	10
							6	21		

	Code	Sortavala	Olonets
sex	m	53	66
	f	47	34
age	1	44	10
	2	17	39
	3	11	26
	4	7	14
	5	21	11
duration of stay	1	52	61
	2	34	16
	3	14	23
education	1	8	6
	2	19	6
	3	41	38
	4	1	8
	5	27	42
	6		
social status	1	33	4
	2	45	77
	3	1	6
	4	13	1
	5	7	11

Notes: Codes of the groups: sex: m – male, f – female; age: 1 – 17–29 years old, 2 – 30–39 years old, 3 – 40–49 years old, 4 – 50–54 years old, 5 – older than 55; duration of stay: 1 – natives, 2 – long-term residents (those who live here more than 10 years but has arrived from other place), 3 – newcomers (those who live here less than 10 years); education: 1 – not educated, 2 – primary, 3 – secondary, 4 – secondary specialised, 5 – incomplete higher, 6 – higher; social status: 1 – student, 2 – employee, 3 – unemployed, 4 – retiree, 5 – working pensioner

Table 6 shows the number of coincidences between empirical (see Table 4) and theoretical (see Table 2) profiles of beneficiaries and the closest theoretical types of places for each surveyed town.

Table 6. Correspondence between empirical beneficiaries' profiles and theoretical types of places

Number of coincidences between theoretical and empirical beneficiaries' profiles					The theoretical type of place
Pudozh	Segezha	Kondopoga	Sortavala	Olonets	
0	0	0	1	1	1(–––)
3	1	1	1	1	2(––+)
2	2	2	0	3	3(–+–)
0	2	2	2	2	4(+––)
2	4	4	3	3	5(++–)
1	2	2	4	1	6(+–+)
1	2	2	2	0	7(+++)
1	1	1	1	1	8(–++)

The comparisons between the closest theoretical (Table 6) and empirical (Table 4) types of places for each town allows us to conclude that the hypothesis of empirical study was supported in Sortavala, partially supported in Pudozh and not supported in three remaining cases.

Discussion

If the applications of two developed theoretical typologies – typology of places and beneficiaries – are compared as a whole, it cannot be stated definitely that there is a consistency between them at the empirical level. That is, the theoretical model of place market segmentation should be corrected in order to typify places and their beneficiaries more adequately.

The first point to be made is that demographic expectations of residents are not always the same as their attitude toward a place as a whole. In other words, the expected behaviour can be both better and worse than a real life in a specific place. Consequently, two methods to segment place market – by both attitude of beneficiaries and expected behaviour or population as a whole – are equal only if expectations of the population are constant. Otherwise, a discrepancy arises and this makes the theoretical model of segmentation unsuitable because population expectations and profiles of beneficiaries can be unrelated (as the cases of Segezha and Kondopoga show).

It is more reasonable to conclude that the profiles of beneficiaries should include not only objective demographic characteristics but also variables of expectations and behaviour to segment residents as accurately as places of their residence.

In addition, it would be useful to clarify the definitions of the 1st and the 7th types of places in the typology. They have a special place in it, reflecting extreme negative (Segezha) or positive (Kondopoga and Olonets) expectations of the population in general and, at the same time, as the other types, they are mostly connected with expectations of particular groups.

Another convenient way of resident segmentation can be worked out if we compare investigated profiles of beneficiaries to empirical statistical data rather than predicted behaviour.

Nevertheless, the approach represented in this paper is valuable by itself because it allows place marketers to identify emerging shifts in the structure of beneficiaries of specific places and predict their further evolution. Indeed, any difference between a profile of beneficiaries and type of place could be interpreted as a probable change of the most satisfied group in the near future. It can be assumed, for instance, that Pudozh might be more attractive for women of childbearing age, Kondopoga could succeed in the retention of the young cohort, and Segezha will lose attractiveness to any internal population group.

Finally, to resolve the problem of contradictions in empirical profiles of the most satisfied residents (for example, Olonets' residents) it is necessary to change the polythetic typology to a monothetic one. That is, each theoretical profile should be completely different and homogenous to identify exactly empirical data on residents' characteristics.

Conclusion

The present article provides the basis for segmentation of residents as place users. Segmentation is becoming a topical issue while considering the needs to develop marketing and branding strategies aimed at target groups, rather than those strategies, dealing with the improvement of local living standards and welfare in general.

In other words, the task to enhance places for the benefit of people is a multi-criteria one. In practice, there appear some specific places, where the needs of certain target groups have to be satisfied. Moreover, the specific nature of residents as place users implies that the place, somehow, has already been used by them before place branding managers have decided to develop it in one way or another.

Therefore, place development management is connected with determining not only future benefits for target groups but also those which have already been assigned to all residents. In this regard, introducing the concept of "beneficiaries of

a place," as well as revealing its (concept's) demographic and behavioural profile, is an important challenge for place marketing and place branding research.

The current paper represents the first step in this direction, i.e. we have investigated the link between characteristics of residents and place. The authors argue that the typology of places, used in the research, makes it viable to shift the focus from already studied spatial preferences of certain groups towards methodological development of segmentation in place marketing.

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C O P E

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Beyond Figures and Numbers Participatory Budgeting as a Leverage for Citizen Identity and Attachment to Place

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Abstract

The purpose of the paper is to examine the potential of participatory budgeting (PB) for the formation of citizen identity and attachment to the place in terms of individual, territorial and thematic focus. In the theoretical discussion, the authors analyse the concepts of place attachment, social identity and their influence on civic participation. The authors propose a conceptual framework for the analysis of relationships between PB, place attachment, and social identity. In the case of the community development model of PB, place attachment should lead to the citizens' increased inclination to participate. In the case of participatory democracy model of PB citizen participation can lead to a stronger place attachment. The conceptual framework presented in the paper requires empirical confirmation. Further research on the subject should revolve around the influence of place

attachment on the formation of social identity and vice versa by application of the discussed models of PB. The placemakers should take into account literature-based evidence that advisory models of PB do not reinforce place identity. The places that apply one of the transition models should consider the evolution of their PB policies towards either community development model or participatory democracy model. By review of diverse theoretical approaches on place identity and local participation, the paper creates a solid foundation for further analysis of the relationships between the application of PB and the development of civic identity and place attachment.

Keywords: participatory budget, place attachment, social identity, community development, participatory democracy, place management

Introduction

This paper examines the potential of participatory budgeting (PB) for the formation of civic (social) identity and attachment to the place of residence. As an instrument of participation, PB is nearly 30 years old. The success of the first PB process in Porto Alegre (Brazil) has been widely discussed in the literature (Wampler; Fuhr and Campbell; Baiocchi *Participation*; Baiocchi *Militants and Citizens*; Marquetti et al.; De Sousa Santos). Silva reports that after one decade since the launch of the process, ca. 20,000 citizens of the city took part in popular assemblies to decide upon the distribution of the local resources. The exemplary impact of Porto Alegre lies in a realised potential for involvement of those social strata that usually do not participate in political processes. According to the results of the Harvard University study, in 2002, 30% of the regional assembles participants recruited from the lowest 20th percentile of the entitled population (Harvard University Centre).

The nature of relationships between public authorities and citizens has been evolving towards residents' empowerment and community governance in which case the focal question is not *whether* to encourage social involvement and participation but rather *how* to organise it in the most effective manner. Inclusion is embedded in the notion of democracy *per se*; thus, the new instruments of participation are designed to address the issue of democracy deficit in public governance with special attention given to underprivileged social groups. Participatory budgeting is considered one of the most advanced tools of social inclusion. According to Wampler, PB should guarantee incorporation of *citizen voice,* assuring *citizen vote* (impact on decision-making processes on resource allocation), *social justice* via the inclusion of disadvantaged strata of the local

community, and *oversight* of the PB process through accountability and transparency mechanisms.

In the theoretical discussion section, the authors analyse the concepts of place attachment, social identity and their influence on civic participation. It is proposed that participatory democracy model of PB described by Sintomer et al. is an instrument that allows the participation of non-elected citizens in the conception and/or allocation of scarce resources within local public finances, and therefore it enables to the greatest extent the formation of social identity that has both territorial and thematic focus (Stortone). Public participation can be understood as a process of social exchange and social cooperation (Simmons and Birchall). Hence, the application of the notions of social and place identity can be useful for the understanding of the residents' willingness to participate in place-related initiatives. There is evidence (Scannell and Gifford) that people are more attached to places that facilitate social relationships and group identity. In this context, the advanced models of PB can be seen as a means to stimulate grassroots initiatives and foster community integration, and as a result, to create and reinforce place attachment.

Examining the relationship between place attachment, social identity and participation

Places thrive and evolve largely due to the multiplicity of relationships and interactions among its residents. These relationships lead to communal experiences of a place shared by its citizens (Campelo) and eventually to the production of a bond between the two. The nature of this bond has been a subject of research for scholars of diverse academic backgrounds, only to mention sociology, human geography, environmental psychology, anthropology and other (Cross). Central to the discussion on how this bond is created are the notions of *place attachment*, with corresponding concepts of the *sense of place* (Relph) and *place identity* (Hafer and Ran).

Conceptualisations of *place attachment* and *sense of place (*also *spirit of a place, Genius Loci, atmosphere of the place, Topophilia)* have been equivocal, with some authors putting the mark of equation between them and applying them interchangeably (Low) while others theorising *sense of place* as a broader term which harbours place attachment, place identity and place dependence (Jorgensen and Stedman). In yet another understanding, place identity, place dependence and the sense of place are all variations of place attachment (Manzo). According to Campelo, *sense of place* and *place attachment* are closely related "because a sense of place implies sensory, emotional, cognitive and subjective experiences that lead
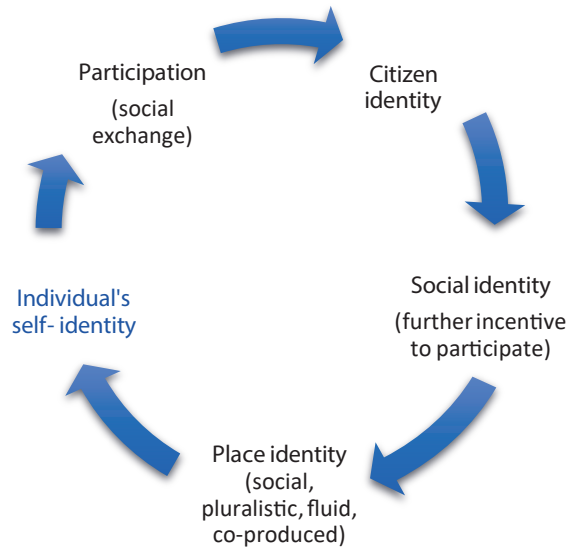
to a positive emotional bond (attachment) with a place, the feeling of pride and wellbeing" (Braun et al.).

Scannell and Gifford propose a tri-component model with *person, process* and *place* dimensions as foundations of place attachment. The *person* dimension suggests that attachment occurs on both: individual (personal connection to a place) and group level (sharing a symbolic meaning of a place among members). Within the *process* dimension, place attachment is a psychological process consisting of three aspects: affect (authentic emotional bond), cognition (memories, beliefs, meaning and knowledge of a place) and behaviour (proximity-maintaining, reconstruction of a place). Ultimately, the *place* dimension of attachment has two aspects: social (social ties, belongigness to the neighbourhood, familiarity with fellow residents) and physical (spatial).

Place attachment performs important functions. It equips residents with the sense of security, assists in goal achievement (people become more attached to places that endorse the accomplishment of their goals), provides continuity (stable sense of self), gives a sense of belongingness, enhances identity and gives rise to self-esteem (Scannell and Gifford).

As it was previously noted, the concept of place attachment defines how people connect to various places. In terms of practical applications, it is thus valuable to examine the effect of such bonds on identity development, place-making and place management (Altman and Law) or how place attachment can be applied to plan and encourage the use of public space. Hence, in the discussion on place attachment, the concept of *place identity* should also be included. Kerr and Oliver argue that place identity is social, pluralistic, fluid and co-produced. Kavaratzis and Hatch posit that it is the product of the meaning-making process between residents and the place, with the former being both producers and consumers of identity.

These findings implicate that place identity is created via citizen participation in the reality of the place. Following the social character of place identity, it is also worth mentioning the approach proposed by Hafer and Ran who argue that citizen participation has yet another function. Namely, it leads to the construction of citizen identity as social identity, which further impacts citizen motivation to participate. In the classic definition, Tajfel describes social identity as "the individual's knowledge that he belongs to certain social groups together with some emotional and value significance to him of his group membership" (292). Furthermore, Proshansky et al. argue that place identity becomes a part of an individual's self-identity and "consists of knowledge and feelings developed through everyday experiences of physical spaces" (Gieseking 73) (see fig. 1).

Participation
(social
exchange)

Citizen
identity

Social identity
(further incentive
to participate)

Individual's
self- identity

Place identity
(social,
pluralistic, fluid,
co-produced)

Figure 1. Participation – identity loop.

As public participation may be defined as a process of social exchange involving social groups (Roberts), the notions of social identity and place identity become valuable also for understanding the residents' inclination and motivation to participate in the co-creation of a place (Lowneds et al.). For instance, some researchers suggest that social identity drives the way people relate to the place and how they behave in it individually (Ashforth et al.) and collectively (Hague), mainly because citizens feel that they are a part of a larger civic identity built around the place (Lowndes et al.). Moreover, Scannell and Gifford observe that people are attached to the places that facilitate social relationships and group identity – which holds multiple implications for the way places are managed. It is also proposed that "participation that citizens view as authentic (e.g., direct, ongoing, and affording the opportunity to make substantive contributions to various stages of the policy process) will most likely be an influential setting for the construction of social identity" (Hafer and Ran 214).

Participatory budgeting: from participation by invitation to community governance

The transformation of relations between citizens and public administration has been widely discussed in the literature (i.e. Fung; Maton; Peters and Pierre). In many countries, the dominant discourse on these relations revolves around the changing

roles of citizens from passive subjects of decision-making processes, through voters, customers, partners towards the key stakeholders (Vigoda). In the citizen-driven model of public policy, empowerment is a key component of participation (Ingram and Smith).

Empowerment in this context means letting citizens play an important role at all stages of policy processes: analysis, formulation, implementation and evaluation. The shift from customer-centred approach (responsiveness) to collaboration is at the core of the changing dynamics of the administration-citizen relationship. There are many methods of citizens' involvement in the processes of local policy-making that might be referred to as *participation by invitation*, such as citizens juries, deliberative panels or planning cells and their local variants, to name just a few. Local authorities are responsible for putting these methods in motion by inviting citizens to have a say about local affairs, which makes participation a top-down process. As it is proposed by Allegretti, "arenas of participation by invitation are the ones created when one or more institutions officially opens social dialogue spaces and admits the presence of citizens in moments of public debate and decision-making" (48).

Participatory budgeting makes an important difference when compared with other instruments of participation by placing a citizen in the centre of the process of microallocation of local finances and by providing an opportunity to experience tangible results of involvement from an individual perspective (Stortone; Avritzer). Santos posits that the PB is a means to "democratize democracy". As a personal re-evaluation of gains and cost of involvement continues, taking part in a social exchange that revolves around the PB (analysing personal and group needs and wants, formulating proposals, deliberation, voting, observing implementation and grasping results) contributes to the formulation of multidimensional individual identity. The multi-layered construct of identity that emerges in the process of deliberation of the PB entails: active citizen identity (of *self* being the one who participates), territorial identity (of *self* being an engaged resident of a specific place, having the sense of hostmanship and ownership) and theme-related identity (of *self* being stakeholder in a specific project, i.e. playground, city lighting in a particular neighbourhood, or bike path, etc.) To stimulate citizen involvement in the PB, the policymakers can appeal to citizens through three types of identity: active citizen identity ("good citizens participate" message), territorial identity ("this is your city" message), theme-related ("you have the power to fix your problem" message).

From the international perspective, local variants allow for the organisation of PB either at the city level or at the level of a single district within a city. The process should be repetitive and should encompass deliberation via specific forums or meetings. Accountability is considered as an indispensable part of PB to guarantee feedback with regards to the results of the process. Sintomer et al. also observe that according to these criteria, there were up to 1470 PBs in 2010 alone. Stortone

stresses that there is no single universal model of PB. The approaches differ depending on the local context. The impetus for the participatory process can sprout from the grassroots groups or from the local authorities. The proportion of the local budget being subject to decision-making can be substantial or minor. The nature of the process can be more deliberative (co-deciding with citizens), or consultative (collecting information on citizens' needs, and cherry-picking those initiatives that are convenient for authorities). PB can be institutionalised and obligatory, or informal and build up according to political will. It can be an autonomous expression of social preferences, when self-ruled by civil society, or leave space for the representation of the government in deliberation. The emergent differences concern also the timeframe (cyclical vs. irregular), the type of participants (only individuals vs. various organisations inc. companies and interest groups), and the social coverage (all residents vs. specific social sectors/themes such as minorities, the elderly, women, etc.) (Stortone). Cabannes proposes the following typology of PB arrangements: minimal, medium and advanced, and differentiates them according to the following dimensions: (i) participatory (*who* is entitled to submit and select the projects in the PB process); (ii) financial, fiscal and budgetary (*how much* is spent on the PB projects in relationship to the size of the city budget); (iii) legal and normative (is PB framed into the local regulations concerning microallocation of resources); (iv) territorial (do PB projects and process cover the entire territory of the place). In contrast, Sintomer et. al discuss six ideal models of PB by analysis of political context; normative orientation; procedures; nature of the collective action; a link between conventional and participatory politics; as well as the strengths, weaknesses and challenges of the process. The *participatory democracy model* (Porto Alegre in Brazil) offers the best framework for the empowerment of all residents and the mobilization of civil society. The other examples of this model are Belo Horizonte (Brazil) and Chengdou (China). This model comprises a wide array of incentives for the citizens to participate: a legal framework for self-organising committees of neighbourhoods, the grassroots democratic process of the selection of neighbourhood representatives, the inclusive deliberation on the project proposals, and empowerment of the process by a local government commitment to implement the projects that were selected by the citizens. The *proximity democracy model* is a consultative type of PB, with a limited deliberation and selective listening of citizens that results in cherry-picking of ideas. Many PBs in Central and Eastern Europe follow this path, which can lead to disillusionment and reduced attachment to the place. In the situation of scarce resources, some cities try to instrumentalise the PB procedures to promote the projects that should have their firm position in the regular local budgets such as infrastructure of primary and secondary education, or road safety (Lodz in Poland). The lack of deliberation reduces the potential of PB in the development of place attachment based on real-time interactions between the engaged residents. The *participative modernisation model* treats the PB

as a tool of New Public Management with little interest in social justice. PB procedure in Cologne lies halfway between this model and the model of proximity democracy. Participation is here instrumentalised as a means to modernise the public administration. The *multi-stakeholder participation model* presents a donor-based perspective, where civil society is only one of many the players in the process (Płock in Poland). The *neo-corporationism model* shifts focus from civic society to an even greater extent in comparison to the previous model, to those "who matter," i.e. organised groups and local institutions. The role of individuals is marginal, and that is a barrier for the processes of the formation of identity. Token participation negatively influences citizens' involvement in contrast to the authentic participation, wherein citizens' input is valued and acted upon (Hafer and Ran). The experiments with PB in Albacete in Spain possessed some features of this approach, but it should be noted that this orientation is mainly present at a national and an international level (Sintomer et al.). Finally, the *community development model* is embedded in the normative frames of pedagogy of the oppressed. In the conditions of a mature community tradition and the high quality of deliberation, the members of upper, working and middle-class play the role of representatives of the socially excluded. Historically, the path-dependent features of the local social organising processes constitute a fundament of a particular PB model (Toronto, London). In comparison to participative democracy model, community development model emerges in the absence of strong local government.

When the representatives of the civil society and the local authorities share the aims of community improvement, an overlap in boundaries between community governance and public sector governance is created (Totikidis et al.). This constitutes an important insight for place managers. Community governance means that the local authorities think of the overall welfare of the place instead of narrow service orientation. They play a subsidiary role in communities, perform the enabler's task instead of controlling the contribution of non-state actors in local policies. Thus, they optimise the use of local resources for the benefit of the place, while paying attention to the needs of the community, and accepting a role of a leader, a reconciler, and – if necessary – a judge (Clarke and Stewart). When performing the three latter roles local authorities should remember about the diversity of perspectives, interests and issues that stem from the heterogeneity of places.

Participatory budgeting – leverage for citizen identity and attachment to place?

Both *participatory democracy model* and *community development* model have potential in building citizen identity and place attachment. The former induces place attachment by providing citizens with opportunities for meaningful impact on how

their neighbourhoods function and for the delivery of tangible benefits. The latter constantly recreates the sense of ownership of place by positive reinforcement of the responsibility for a place and its residents among those who participate. As Allegretti poses, success factors of PB are: (i) political will, (ii) the organisational and the propositional capability of the social fabric, (iii) the financial autonomy of the institution proposing the PB and the resources available for the PB, (iv) the organisation of the process and (v) the rules with which the PB warrants equal access for all potential participants. Advisory models of PB that result in selective listening might have a detrimental effect on place attachment in comparison to co-decision models that place the citizen in a central position. The adverse effect of the advisory models is the dispersion of social capital: a sense of disillusionment "when an individual understands that the good will with which he donated his free time and knowledge for a process of a supposed social transformation was underrated" (Allegretti 51). Avritzer claims that PB requires the commitment of both: a willing political class and robust civil society. Through PB civil society becomes a part of the new state and the so-called diagonal accountability emerges. PB is "a step beyond both the traditional watchdog or society-driven horizontal role of civil society as well as protest or referendum […] Instead of trying to influence policy from the *outside*, the citizens […] are invited *inside* the governmental apparatus itself" (World Bank 14, emphasis original; see fig. 2).
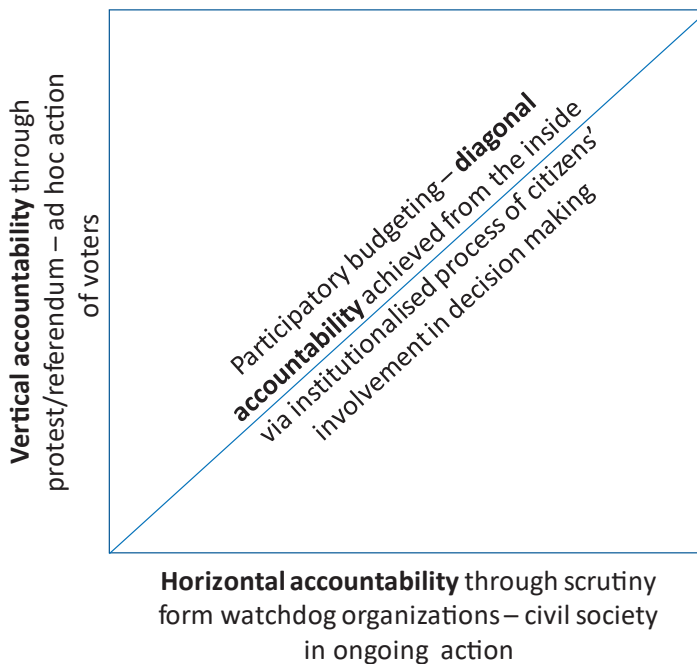
Figure 2. Placing civil society at the core of governance processes in Participatory Budgeting

Following the previous discussion, we propose that further research on the subject should revolve around the mechanisms that lay behind citizens' motivation to participate in place-related initiatives with special attention being given to the influence of place attachment on the formation of social identity and vice versa. Considering the public policy perspective on the subject, an emerging issue is what methods and instruments can the place's authorities use to stimulate place attachment and authentic participation. To this end, various participatory budgeting models should be explored in order to assess its impact on the strengthening of the bond between places and its residents. The value of participatory budget as a concept for understanding of these problems resides in its potential to offer tangible benefits that are transferred from social exchange to the individual level (see fig. 3).
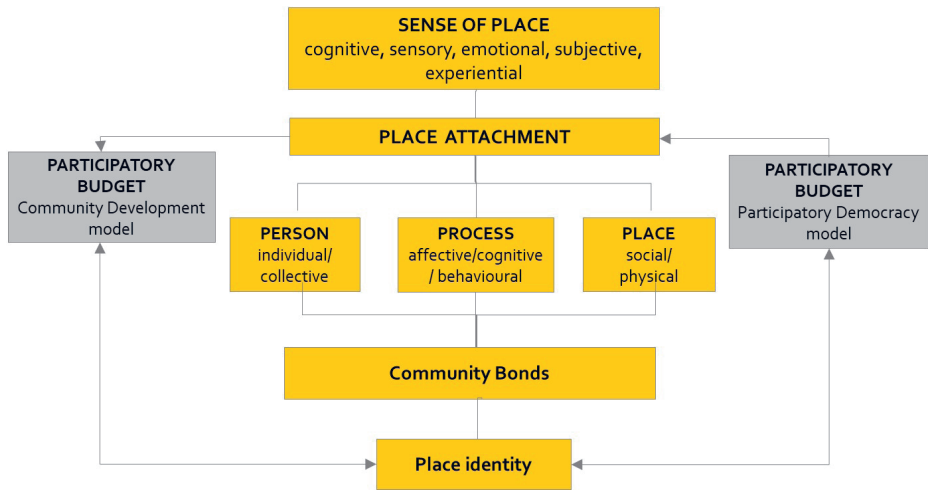
Figure 3. Participatory budget as an instrument for strengthening

Therefore, the authors propose that the following research propositions need to be considered:

P1. Place attachment can lead to the citizens' increased inclination to participate (in the case of the community development model of PB);

P2. Citizen participation can lead to a stronger place attachment (in the case of the participatory democracy model of PB);

P3. Participation may lead to stronger place identity through creation of social identity in three dimensions: citizen, territorial and theme-related.

Given the implications of the above research propositions for the practice of place management, it must be noted that urban planning policies should take into account the participatory budget approach as much as possible, to be able

to reinforce place identity which can be treated dually. Firstly, as a factor stimulating social involvement and participation, and secondly, as a cohesive principle for the creation of territorial communities.

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Social Media as a Contemporary Communication Tool Between a City and its Users – a Theoretical Approach

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Abstract

Social media have become a standard in contemporary communication. That is especially true for business which jumped at the opportunity to connect with current and prospective customers allowing them to integrate with their favourite brands and products even further. This trend, however, seems to be absent in the public domain. Local authorities notice social media but attempt to use it in a one-to-many format, which is incompatible with the interactive nature of the new medium. Cities can strongly benefit from an active presence in the social sphere as it opens new paths to co-governance and better communication.

**Keywords:** social media, urban governance, policy communication

Introduction

Social media are constinually gaining new users wishing to engage in discussions on issues related to both private and business matters. The range of topics discussed can be freely modified depending on the needs. Private individuals, companies or public institutions have become a part of a global network that treats all entities equally. This is a new approach in the relationship between the sender and the recipient of content that brings about many benefits and unprecedented challenges. The added value of communication through social media is the ability to reach a specific recipient with your message, and the potential for receiving immediate feedback. Here, however, the question should be asked whether entities so far communicating through traditional means are prepared to enter the world of interactive communication. Local administration is an example of an entity that has hitherto contacted its users directly or through traditional media such as mail or telephone. New media remained out of its interest due to the need to maintain proper security procedures. The growing popularity of this form of communication among individuals forced some of the local authorities to enter the world of virtual media, where they have faced new challenges and possibilities. This paper aims to explore possible benefits and potential challenges that await cities that wish to incorporate social media into their communication matrix.

Social media as a contemporary communication tool

Before the emergence of social media, the Internet offered broad access to knowledge but did not give its users the opportunity to exchange opinions on a global scale. Communication took place in closed circles focused around a given issue. These communities constituted a kind of support groups for those involved, and the topics often went beyond the formal area of interest of an online forum or discussion group. The main problem was the scope of these undertakings, which on the scale of the Internet as a whole, were marginal. In this sense, social media was the answer to two basic human needs: the possibility of unhampered and free access to other people in the community and access to information that is important from their point of view (Kotler et al.). Social media are tools created to conduct discussions on any topic. Internet forums or discussion groups are usually formed for a specific purpose, e.g. to discuss current political events. Facebook or Twitter does not set such limits, allowing users to publish any content. Monica Patrut and Bogdan Patrut also indicate the need to create a private "infosphere" that

is unique to each user. The infosphere is a stream of information flowing to the user from selected sources. In order for this information to be valuable, sources must be trustworthy from the point of view of the recipient concerned, and the best way to build such trust is from other people (Kotler et al.). The technique known as word-of-mouth is an effective tool for building the recipient's trust in a product, service or information. Research shows that consumers are much more likely to base their purchasing decisions based on the opinions of other consumers than on marketing materials. Social media are in a sense the answer to the needs described above.

Kaplan and Haenlein define social media as a group of Web 2.0 applications that allow users to create and share content online. By registering on a given social networking site, the user gets access to many sources of information which, through subscription, can provide desired information directly to one's profile (Garlicki and Mider). To be recognisable and easily find your friends or people with similar interests, you are encouraged to provide as much information about yourself as possible, including a profile picture. These are not required but recommended as they allow you to take full advantage of the functionality of the medium. This requirement to a certain extent increases the degree of user identification with the profile, which positively affects the substantive level of published materials (Bishop). A false sense of anonymity means that users put much less weight on the published content because they believe that it is impossible to connect the author to a specific statement. Emotions start to play an important role, which often leads to conflicts. The necessity to provide your data forces the user to think about what content they want to be associated with by others. In addition to access to information sources, users gain the ability to connect to groups not limited by geographical coverage, allowing them to discuss any topic with people from around the world. What is most important is the fact that all discussions are public and are usually observed by more than one person. Thus, each user is to a certain extent a moderator of a given discussion and can verify the veracity of the presented arguments. Each user can start a discussion on any topic as long as it can arouse sufficient interest among other users. In this sense, both the individual and the company or brand have similar tools to start and moderate discussions. Thus, everyone who wants to take part in a conversation on a given subject must perform a similar set of activities. In this way, the barrier associated with the need to exit the comfort zone of the recipient disappears, which is typical for communication with broadcasters associated with traditional media (Sloan, Quan-Haase).
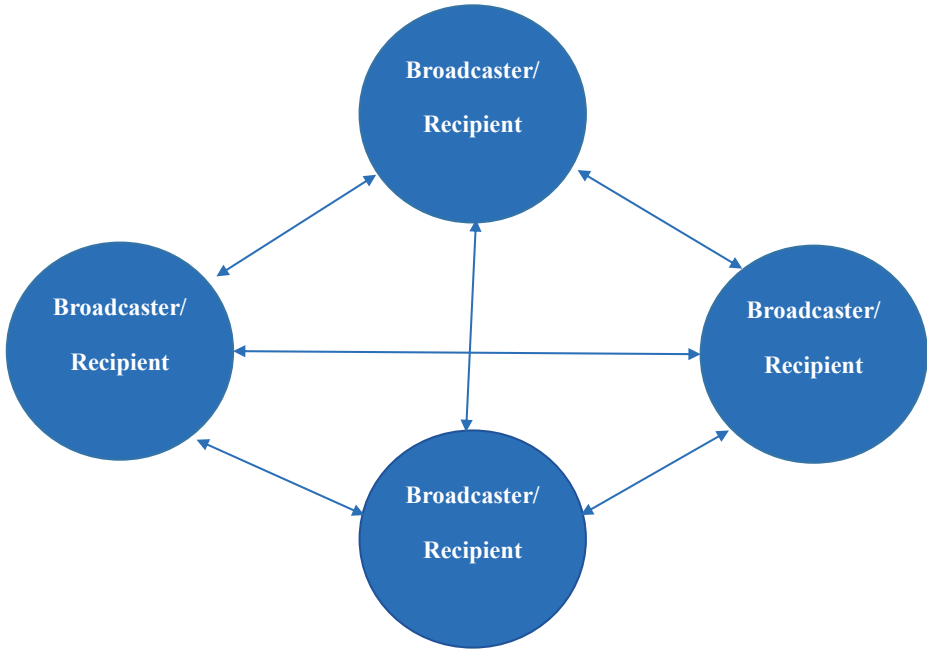
Figure 1. Social media communication model

Social media blur the distinction between broadcasters (creators) and content recipients. Users within a given social platform gain access to a range of tools that allow them to easily create new content, post comments and rate existing threads. Theoretically speaking, each post can become a contribution to a fervent discussion, where supporters and opponents will clash with arguments (Dobek-Ostrowska and Garlicki). The discussion then begins a life of its own, which can be considered an advantage as well as a disadvantage depending on the perspective. Czaplicka emphasises that this readiness to discuss every topic can cause a severe crisis that may have far-reaching consequences for a given entity or brand. In the definition of Kaplan and Haenlein mentioned earlier, the aspect of sharing content is emphasized. Each new piece of content is automatically visible to other users of the social network, which is an incentive to forward the message further. If the message is positive, it might be reinforced by others, while negative posts tend to gather much more attention and are automatically amplified. This process is a significant differentiator in comparison to traditional media. Social media enable instant communication of everyone with equal rights, which allows a single user to easily interact with even the largest companies or public entities like cities or local governments. What is more, the question posed by a single user is visible to a substantial group of users, hence ignoring it might cause tangible consequences. The strength of social media comes from built-in mechanisms, making it easier for users to connect

to groups and support each other in disputes with large entities that have previously had most of the assets on their side. Users have discovered that there is a strength in the numbers that is difficult to ignore (Bakshy et al.).

Local governments and social media – chances and threats

Local self-governments have noticed the growing interest in this new communication method and attempted to meet the expectations of potential recipients. It is important to understand that unlike traditional media, Internet communication channels are interactive in nature; each communication tool has its own specific character and should be used accordingly.

Table 1. Potential use cases of Internet communication tools from the local government perspective

Internet tool	Potential use case
Website	– basic information about the unit – information about current activities
E-mail	– fast and convenient way of reaching a particular audience – can be used to create other tools like discussion groups or newsletters
Discussion group	– exchange of information and ideas between users
Social media	– current information streams – other
Blog	– analysis and comments on current events

Source: Author's own work based on: Rafał Guzowski, *Administracja publiczna w mediach społecznościowych.*

The summary presented in Table 1 indicates the basic problem faced by public entities wishing to start their presence in social media. Websites or information sent directly to specific recipients via email are strictly regulated by European law; the remaining tools function somewhat beyond its framework. It should be stated clearly that it is not forbidden or contraindicated, but that their place on the communication map of a public office is undefined. Rafał Guzowski rightly points out that officials are invited by Internet users to a completely different world: the world of social media. The emphasis on the presence of these entities comes from the stakeholders themselves who, having received a new tool, began to exchange opinions also on topics closely related to what is happening in their local environment. Social media is a universal and easily accessible medium, where everyone is a creator and a recipient of content at the same time. In the case of websites, tools

related to e-mail, blogs or even discussion groups, it is the public entity as the owner (administrator) of a given channel that has full control over the published content and indirectly over the feedback from the recipients. In the case of social networks, such control is not feasible. Of course, in the technical sense, each social network gives the profile administrator the ability to manage access to specific content, or to block users from expressing their views or even accessing the entire profile as a whole. The problem arises owing to the very nature of social networks which put emphasis on public and collective communication. Each new content published on the official profile of the institution, including comments and comments of users, is automatically sent to all subscribers and available in the search results. At the time of uploading new content, it is automatically sent to all these people and, to put it precisely, it is inserted into their profiles. If for some reason the administrator decides to delete this content, it would be noted by users almost immediately. The situation is similar in terms of deleting comments or blocking users. This means that the public entity has much less control over the flow of information and ongoing discussions. As emphasised by Monarcha-Matlak (2008), one of the responsibilities of a public entity is to ensure that the information published is up-to-date and accurate. In the case of communication channels, where the entity is the only sender of a message such as a website, newsletter or e-mail, the published content is subject to full control. Social media put the institution and the user on a level playing field; therefore no party has complete control. It is possible to implement a mechanism forcing the message to be approved by the administrators before it is visible to the public, but it is a solution that requires a lot of additional management on the public office's part. Moreover, the users might consider the said control system as a form of censorship, which could negatively affect the image of a public entity.

As already mentioned, social media is based on content created by the users themselves who share their thoughts and opinions. Cities are trying to enter this trend by publishing information about current events. These posts are usually provided with colourful graphics or photographs illustrating a particular event or object to which the post refers. As a result, each profile subscriber receives daily the latest information about what is happening in the city and several pictures illustrating the city landscape. However, this approach does not fully exploit the possibilities of social media, which are interactive in nature. In this case, there is a passive transfer of content that does not translate into user involvement. The causes of this phenomenon may be multiple:

— Guzowski argues that public administration officials now face a new communication landscape – social media is an important communication channel for many people and presence within this medium is a necessity
— users are not interested in the presence of public authorities in social media. Due to the slow process of entering into the sphere of new media by public

entities, the users simply do not expect interesting content from official city profiles, hence low involvement on their part

— there is a lack of resources on the side of local authorities, necessary for effective use of the new medium. Czaplicka emphasises that social media require that constant overwatch of what is happening on the profile. In other words, a person or group of people is required to constantly monitor city profiles and intervene when needed. Another challenge is creating enough interesting content to gain and retain the attention of users

— local authorities have concerns about the danger of a crisis, understood as an uncontrolled influx of negative opinions on the profile concerning their plans or performance

— negative user experience from contacts with local authorities in the past. Previous contacts may have created barriers between users and local authorities that have permeated the virtual space.

To summarise, it should be said that local authorities and the entire public administration face the challenge of how to respond to the growing popularity of social media. On the one hand, there is an increasing number of users that would like to contact the public office through the Internet. On the other hand, there are legal and technical difficulties that prevent the provision of official services entirely through the Internet. These limitations give rise to frustrations on the part of the recipients who do not have full confidence in services provided electronically.

The specificity of social media is a separate issue. It is a very dynamic medium, which focuses on fast, open and often unstructured communication, which to some extent runs counter to the specificity of a public office. The office, as already mentioned, should ensure that the information published is up to date and true. Tomasz Piróg argues that efficient communication is important, but its accuracy is key. Speed and the dynamics of social media significantly hinder the ability to fully check every information prior to publishing. It is necessary to seek a compromise between speed and quality of the published materials. Social media are not just a temporary trend and should be slowly implemented into a communication strategy. At the moment their activity is informative: it is mainly current information and attractive photos from a given city that are published. However, there is a lack of interaction between the city (local authorities) and users. This may be due to the lack of competence on both sides and the resources necessary to conduct an effective dialogue. Never before has this type of communication been carried out, where both parties have the option of sending a message visible to all other users. Thus, it is necessary to develop principles of such communication through social media on the basis of negotiations between the parties involved. When one of the parties tries to impose its vision, the entire process will end in failure (Adamczuk, 2014).

Another issue is lack of legal support for social media, which makes it difficult to implement them into an official communication matrix. This raises the question of whether legal regulations should be expected or whether the local administration should take the initiative. The concept of the New-Weberian State (Sześciło) by Christopher Pollitt and Geert Bouckaert assumes the restoration of the dominant role of the state, with particular emphasis on administrative law as an element protecting the relationship between the power and the citizen. Following this line of thinking, it should be stated that in the public domain there is no place for spontaneous publication of content, which is typical for new media. The state should regulate the status of social media and the scope of information provided by this channel. Here, however, the question should be asked whether the introduction of such regulation will not cause a drop in the interest of its users. The informal nature of communication through social media is their added value. On the other hand, the concept of New Public Management assumes that local authorities should take the initiative and become the manager striving to maximize achieved results by adapting to the new reality (Krynicka). The superior goal should be to increase communication efficiency. Legal regulations to use new tools are not necessary for this perspective. It is positive that cities try to meet the expectations of recipients in spite of these difficulties and try to appear in the social sphere of the global network.

Facebook and Twitter as a communication platform for cities

Facebook and Twitter dominate the social media market, offering unique characteristics for its users. Both platforms, however, are directed at other target groups, which to some extent, determines popularity among users. The first platform is multimedia-focused, while the other is information-driven. Cities are currently trying to promote themselves as a good place to live, work or study by communicating their offer to various interest groups. Social media are not a temporary trend, but a permanent element of the communication reality for many people who spend a lot of their time online every day. Thus, cities wanting to effectively communicate their offer and help residents in their everyday lives, must adapt to their communication expectations. Applying an analogy, a social media user can already expect information about the current promotion in his favourite sales network, current prices at his favourite petrol station and information about the launch of a new service by his favourite mobile network operator. Following this line of thinking, the user of social media is expecting from the city information about current cultural events, tourist attractions or changes in traffic organisation. There are already examples confirming that cities have attempted to use this method of communication and tried to provide their recipients with the latest information about what is happening

within their boundaries. The city offers users a set of products and services aimed at satisfying their needs. Tadeusz Markowski defines a city product as a material or non-material element of the broadly understood functional and spatial structure of the city, which is subject to market exchange. It can be a specific place, location, civil service or a set of them, as well as an idea concerning, for example, urban development. The adoption of this perspective allows one to state that these products and services can be the subject of promotional activities by the city authorities. These activities can be carried out in both the real world and virtual reality. The goal is to build a positive image among users and to encourage them to use a given product or service (Sevin).

The issue can also be viewed from a political science perspective, where the product becomes an idea and the opportunity to participate in its creation and subsequent implementation. From the user's point of view, the opportunity to engage in urban policy development can be an added value. Many authors indicate that the possibility of co-deciding on the direction of local space development is an important element building positive relations between the city and its inhabitants (Markowski; Kowalczyk; Dzieniszewska-Naroska; Wilk). Cities can compete with each other by offering wide access to co-governing processes and real influence on the surrounding landscape. Social media allows the promotion of urban products to users living in a given city, as well as those outside it. In both cases, the goal is to encourage users to participate and try the city offer. On Facebook, users expect that they will be able to contact their favourite brand, product or service. Presented photos or videos of new products act as inspirations that aim to help users utilize their full potential. Facebook has become to some extent a portfolio for business, where you can present your products and services.

Cities carry out communication activities, presenting their offer using multimedia materials. It is also an element of positive image building strategy. Many authors emphasise (Czaplicka; Mistewicz; Guzowski) that the goal of a commercial entity should not be sales, but building an active and supportive community focused around this entity. This community is an ambassador who is interested in everything that happens around a given brand, recommends it to friends, or answers questions from other users. Stephen Dahl argues that social media is a very good tool for building a credible and positive image among clients (both current and potential). It is proven that users who have interacted with the brand using social media present a more favourable opinion about it and are more likely to forget about any problems. From the point of view of the brand, it is a tool that allows to monitor the mood among consumers, observe changing trends or even get inspiration for new products. From the point of view of the cities, the situation is similar, hence they can actively build their image using social media. Tomasz Domański indicates that cities should build their own brand based on their resources. This approach is now very strong in Polish science and many authors pick up the topic of

effectively building a city brand based on territorial marketing tools (Florek et al.; Rogaska). Every city offers a set of products and services that impacts its image. This set of services is constantly changing through modernisation processes, broadly understood development and resource deterioration (negative process). Residents of cities utilise these resources, but they also co-create them through various types of co-decision and participation processes. If a commercial brand can build an active community around itself in social media, by allowing the users to take part in the process, it is also possible for cities. This is especially true for cities that are complex in nature and offer many overlapping products and services at the same time. From the residents' perspective, the possibility of direct contact with the city authorities and therefore the ability to influence the direction of future development can be a key selling point (Sobaci).

Potential benefits for both sides of the active community in social media, presented in Table 2:

Table 2. Potential benefits of an active community operating in social media

Possible social media functions	Potential benefits for the city	Potential benefits for the user
Information about events organised by the city	Acquiring feedback from the users	Knowledge about current events and possibility to provide feedback
Information about cultural and sports events organised by stakeholders	Presentation of the city offer and positive image building	Knowledge about the city offer regarding cultural and sports events
Information about current problems or accidents	Positive city image building and improving its functionality	Knowledge about current problems and awareness that the authorities are monitoring the situation
Acquiring feedback from the users	Legitimisation of undertaken activities	Possibility of providing feedback; feeling of empowerment
Discussion about the current situation in the city/ plans for the future	Building of social capital	Community and co-responsibility building
Help for the users regarding administrative issues like how to get something done in the city office	Increased effectiveness of the office	Decrease of time required to complete an issue at the office

Source: Author's work based on Guzowski (2015). *Administracja publiczna...* and Mistewicz (2014), *Twitter....*

It should be emphasised that the above list is only a small fraction of potential benefits for both parties. The condition for its implementation is the creation of an active community, that is one willing to discuss current issues related to the city itself. Clicking the Facebook Like button or posting on Twitter is important, but it does not give grounds to claim that the community is active in a conscious way.

In order to build a community around a profile in social media, it is necessary to create a profile and manage it in an attractive way, while maintaining appropriate standards (Kulczycki, Wendland). A very frequent mistake iss merging an account on Facebook with Twitter (or vice versa) which results in automatic copying of content from one to the other. Due to different requirements and limitations in the length of messages, the result are incomplete, often half-cut posts that simply lose their meaning. More importantly, it shows users of the merged service that they are less important to the broadcaster. This does not mean that information about the same event cannot be published on both portals. It is important to do it in a skilful manner, showing the described event from a slightly different perspective. The user must feel that the information is directed to them directly, which increases the likelihood of an interaction (Krząała-Jaworska).

Table 3. Facebook and Twitter Compared

Profile element	Facebook	Twitter	Remarks
Social network	Official profile; graphics and colours should clearly be connected with the city. Official contact should be clearly provided	Official profile; name should clearly indicate which institution or person the profile represents. Contact information must be provided.	If a city has an official profile as well as that of its president or spokesman, it is worth pointing out what kind of information will be published on any given profile
Type of content published	Information about upcoming events, photos and videos from past events; photos and videos illustrating changes in the city	Current information related to the city; briefings on past events	-
How the content is presented	Mutimedia-rich content, minimal text	Brief information with a link to the full story	-

Table 3. (continue)

Profile element	Facebook	Twitter	Remarks
Discussion encouragement	Multimedia-based content that promotes discussion	Question directed at city influencers	Influencers should be identified by the city
Types of posts	Information, contests, content published by users, content published by the city stakeholders	Information from the city directly and vital city stakeholders	Important events should be identified
Frequency of publication	3–4 posts a day	3–4 messages a day + current events	-

There are also some guidelines that can be considered universal:

— jargon and administration-typical vocabulary should be avoided. Messages should have a natural and spontaneuous character
— in the case of a polemic or dispute, do not use *ad personam* arguments, but try to explain the problem calmly
— do not delete any comments as long as they do not contradict the law or violate the basic principles of civilised communication. The falseness of the information contained in the comment is not a sufficient reason to delete it. The exception is when a person intentionally repeats false information to mislead others
— users should not be flooded with information but the information should be published based on a schedule. The exception is when something important happens in the city and users must be notified about it immediately
— the city should identify opinion leaders, social activists and city activists who can help distribute information and start discussions on a given topic. Often people who do not support city activities in a given area can be useful in building an active community (Gawroński).

The above guidelines do not guarantee that the city profile will be a place of active discussion, but it provides a solid foundation for building a community. It is important for the city to react quickly to what is happening on its profiles and leave no questions unanswered. Social media are based on the interaction between people and in a sense the city profile must have human characteristics, reflect the character of the city and the people managing it. For this reason, language misspellings or similar errors can be a positive thing as they might bring additional character to the profile. Every mistake should be corrected and the person who has spotted it thanked personally. In addition to publishing news related to your own posts, it

is also a good idea to include profile subscribers in the content creation process. This will increase community involvement within the profile and its credibility in the eyes of recipients (Kim).

Summary and further research opportunities

The article characterised social media as an interactive medium that allows users to be involved in the processes of creating an interactive discussion platform. Agnieszka Smalec and Leszek Gracz argue that the local administration is currently facing the challenge of including new communication channels in its strategy of cooperation with users. It will allow broadening the scope of people involved in the co-management of the city and will enable the further implementation of the governance concept in public management (Podgórniak-Krzykacz). The effect will be a network of connections that allow one to communicate quickly and effectively with users; each of the social networks will play a different role in the process. Facebook is a potential starting point, where every user can start the process of getting to know others and engage in discussions about city issues. It is important that both parties communicate in a clear manner, in particular regarding mutual expectations and potential benefits of cooperation. Social media can definitely facilitate the start of a dialogue involving many people but engaging individual users who are important from the point of view of the city. It is a slow and lengthy process because it requires the construction of appropriate cooperation mechanisms, and the role of the initiator and curator of the process lies with the local authorities (Stanowicka; Szymkowiak and Scheibe; Gojny). It seems that the interest in electronic media to communicate with local administration is permanent; hence actions must be taken immediately to meet the expectations of recipients (Sommer and Michno). This is still a new, unexplored area of studies. Arguments presented in this paper are theoretical in nature and based on previous experiences of commercial entities. Further research is required to determine whether principles governing social media-based communication in the business sphere can be applied to the local administration. It is obvious that some changes will be necessary owing to law and transparency requirements governing any communication between a public office and a citizen. However, it does not mean that everything needs to be changed as experiences from the private sector have already shaped the communication habits of the masses. The true challenge that stands before every public office is how to fit into those habits and empower the users to be willing to participate in the co-governing process. This question will be one of the most important that researchers must try to answer in the near future.

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To Ally or Not?
The Critical Factors of a New Alliance Model in Urban Infrastructure Projects

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Abstract

The research explains the background of an alliance model which is a new collaborative project concept in urban infrastructure investments and reviews stakeholder views of applied alliances based on a case study analysing project experiences in the city of Tampere, Finland. The alliance model is considered a potential solution for some of the chronic productivity and other problems of the building industry and the classic difficulties in public-sector investment projects, but the model fits a purpose primarily only in publicly funded, technically challenging and sufficiently large projects.

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The alliance model has initiation, development and implementation phases, and of these phases, the interviewed experts named the development phases as particularly critical, as team spirit, shared ethos, and joint goals must all be built in that phase before the actual collaboration between contract parties can be initiated.

Keywords: alliance model, public-private partnership, building contract, urban infrastructure investment

Introduction

City governments and other public-sector bodies are looking for new contractual solutions and management methods to improve the construction and refurbishment of urban infrastructure and public service facilities. Traditional public investments have been straightforward public procurements, where a public body orders project work and a construction company delivers only what is agreed in a building contract. Because of the aims of the European Single Market (ESM) and the regulation of public procurement, public authorities typically grant these contracts via standardised methods of competitive tendering to a company able to bid with the lowest price.

Public-private partnerships (PPPs) and especially private finance initiatives (PFIs) have challenged traditional models of public investment projects since the 1990s, when they were seen as radically new types of building contract. In PPPs and PFIs, private-sector organisations accept wider duties and sign longer commitments than in classical projects, as the companies do not only construct a physical object but also take care of its maintenance for a fixed period of time, as agreed in a contract. However, the basic contractual settings defining a public body as a purchaser and a private company as a producer are the same in PPPs and PFIs as they are in traditional investment projects.

Recently, an entirely new project concept called an alliance model has emerged, developed in Australia and emphasising close collaboration between contract parties. As the model is still a new scheme of operations and not well-known in European urban contexts, there is a knowledge gap regarding the features and challenges of this new concept.

We studied the alliance model as a new project concept by reviewing stakeholder views of urban public investment projects in order to deepen understanding about the critical success factors associated with the introduction and application of this collaboration-based building contract and project scheme. We evaluated

the emergence of the alliance model in Finland in order to explain how it differs from other project models and why it is gaining popularity. Our analyses revealed some national aspects of the development of the building industry and difficulties with public-sector building projects.

We also performed an empirical case study of two urban alliance projects based on original research data. The aim of the case study was to demonstrate the premises and noteworthy interpretations of projects in the City of Tampere, Finland and highlight the features of the phases of the alliances. The studied alliance projects included a highway tunnel project in the urban context and a light rail service project representing an entirely new form of urban public transit in the country.

Analytical framework of the study

Alternative methods of public investment projects: traditional construction projects and partnership contracts

A public-sector construction and investment project can be organised in many ways and it is not possible to review them all here. It is not always effectively possible for public-sector organisations to run "make or buy" pre-considerations in order to evaluate the politically and economically expedient execution of a project, since they tend to operate without the necessary in-house construction capacity and financial capabilities. Consequently, public bodies usually purchase construction projects from external providers using standardised and established contracts.

Figure 1 illustrates the main contract types of public investment projects. All-in, or design-build, projects, include typically only a single contract between a public authority and a company that will take care of all design and construction works. The benefit of this type of contract is that as public authorities have to establish only one contractual relationship with a company capable of designing and building a construction object, it can minimise coordination problems between design and construction works. In design-bid-build projects, planning duties are procured from a design office and construction works are outsourced to a construction company. These projects enable public authorities to organise two separate calls for bids and procure architectural design and construction works from specialised enterprises. The third main type of traditional public investment projects is a project management contract. This is a relatively novel application where public authorities let a project management company manage the investment project via outsourced piecework contracts enabling the authorities to make many contractual choices during the project as to which companies specific pieces of the project are given (Kiiras).
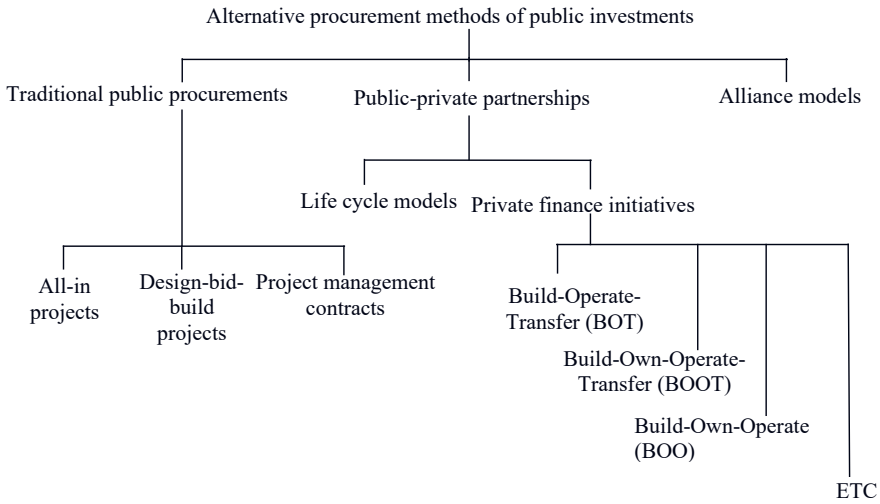
Figure 1. Main procurement methods of public sector investment projects.

A public-private partnership (PPP) is an alternative method of carrying out a public investment project even though the partnership concept is a contested and ambiguous term (see e.g. Powell and Glendinning; Carnwell and Carson). For example, Savas has studied the use of the PPP concept and claimed that for wider political acceptance, some interest groups that want to promote stronger private-sector involvement in the delivery of public projects use the term instead of privatisation. Given that the PPP concept is extensively used but vaguely defined, in this study a PPP is understood as one of the main types of public investment projects, referring to a long-term collaboration between public authorities and private-sector organisations that allocates more responsibilities to the private organisations than is the case in traditional public investments.

PPP contracts are classified into two main categories: private finance initiatives (PFIs) and life-cycle models. A PFI refers to an investment contract between public authorities and private companies that aims to deliver the funding, construction, renovation, management or maintenance of public infrastructure. A PFI contract is a specific form of a PPP, including remarkable upfront and long-term private funding of an investment project that the public sector needs (D'Alessandro, Bailey and Giorgino). A life-cycle model is quite similar to PFI with the key difference that the procurement authorities take care of the funding of a project. Table 1 demonstrates the differences between these main types of investment contracts.

Table 1. Differences between traditional public investment projects, life-cycle projects and PFI projects (Alshawi).

	Traditional public investment projects	Life-cycle models	Private finance Initiatives
Duration of private involvement in the project	Until construction of the facility is completed and the defect liability period, typically 2 years in Finland	Typically from 15 to 20 years in Finland	Typically from 15 to 20 years in Finland
Financing	Public-sector finance	Public-sector finance	Private-sector finance
Private-sector risks	Construction works and materials	Much wider than in traditional investment projects but excluding financial risks	Widest: including planning, construction, operation and finance
Typical remuneration	Lump sum (scheduled payments as works progress)	Lump sum for construction works and annual payments for the use of facilities	Annual payments for everything

PFI models have not been very popular in Finland. Finland's public finances have been relatively stable over a long period, and the central government has been able to borrow money from the global financial market with relatively low costs, more recently with a negative interest rate. A few years ago, public finances faced stronger difficulties and, in 2014 and 2015, Finland's credit rating was downgraded to the second-best level (i.e. AA+). So far, local authorities have also had relatively good possibilities to fund their investment projects via local budgets. Local authorities have wide taxation powers, including a local income tax and a property tax, and the legal and actual capacity to borrow money from the national and international financial markets. They have thus been able to arrange municipal funding for their projects. To secure these capacities and pool the financial needs of individual local authorities, the local government sector (i.e. the municipalities jointly) has established a special financial institution (*Municipal Finance PLC*). This has enjoyed the same credit rating as the Finnish state government, which means that it has been capable of providing cheaply priced loans to local authorities. It has thus been an effective competitor to the banking sector in financing municipalities' projects (Valkama et al.). In the near future, it seems that interest rates, expectedly remaining very low, favour further public debt financing even though they include risk of over-indebtedness.

An alliance model as a new project type

In private-sector business studies, strategic alliances are considered as contractual or ownership-based arrangements between companies involving exchange, sharing, or co-development of products or services (Gulati; Boone and Ivanov; D'Alessandro et al.). D'Alessandro, Bailey and Giorgino have stated that strategic alliances are long-term inter-company arrangements, where alliance parties have shared control mechanisms. They work in proactive ways to integrate the contribution of resources and skills by both partners and have common risk-sharing and -bearing methods in place. Based on these arguments, they have also claimed that a standard PPP/PFI is not a strategic alliance since there are no aligned strategic interests and joint entities.

In public investment projects, an alliance is typically defined as a legal contract of cooperation between a public authority as a customer and one or more private companies as service provider(s) with the purpose to carry out one or more public work projects via collaboration (Jefferies et al.). According to Lahdenperä, a project alliance is a contractual delivery method where project parties commit themselves to shared responsibilities in order to design and construct public facilities or infrastructures, where the parties create a joint organisation or joint venture and where the parties share both negative and positive risks while cooperating closely and sharing information. He claims that key structural features of project alliances are joint agreements, joint organisation and risk-sharing arrangements.

Allying is a form of managing construction cooperation between two or more organisations which agree on a shared goal and commit to working together to perform a specific building project. This is generally considered enough to distinguish allying from standard public procurement projects. It aims at achieving more unity of purpose between contractual parties. In standard procurement and outsourcing commitments, the contract parties maintain organisational independence, but in alliances they have to give up some of their autonomy. To compensate for the reduced autonomy, the parties of an alliance expect to get some particular return on association or value added.

In traditional investment and PPP projects, the parties agree on a fixed or maximum contract price, but in alliance projects, the procedure is different. First, the parties define a target cost including a protocol on profit margins. After the project is fully completed, the parties share the profits or losses. Second, the alliance parties identify possible risks before they come up and commit to managing them jointly. Third, alliances are formed through a careful and long selection process requiring participants to commit themselves to a win-win mind-set (Jefferies, Brewer & Gajendran). Alliance parties have to equalise their negotiation powers and agree on a method of consensus-based decision-making since the possibility of litigation is excluded unless there are clear cases of competence deficit or criminal activity.

Trust, transparency, joint working and open communication are the often-quoted key success factors in alliance projects (Walker and Jacobsson). Table 2 illustrates these and other success factors of alliance projects.

Table 2. Critical success factors in alliance projects (n.b. the cells of the two columns are in random order, with no intended correspondence among their contents on a cell-to-cell scale).

Critical factors identified by a literature review (Jefferies, Brewer and Gajendra)	Critical factors identified by an Australian case study (Jefferies, Brewer and Gajendra)
Strong commitment by client and senior management	Attitude
Trust between parties	Formation of a single entity
Equity	Pre-project and planning workshops
Mutual goals and objectives	Continuous facilitation
Joint process evaluation	Careful team selection and project-specific team alignment
Dispute resolution process	Right project personnel
Cooperative spirit	Integrated alliance office
Flexibility and adaptability	Staging of project and stretch targets
Tight alliance outline	Project-specific key performance indicators
Alliance structure	Dedicated client and commitment by all stakeholders
Best people for project	Benchmarking and continuous performance monitoring
Facilitation	Early commercial development
Commercial incentives	Ongoing workshops including site personnel
Open communication	Web-based management programme
Shared knowledge	Participants with part working relationships
Stretch targets	Awareness of project aim, objectives and charter
	Open (transparent) book nature

The potential benefits of an alliance project are casual or nebulous: close and unprejudiced joint working between the contract parties, a best-for-project spirit, more open knowledge-sharing practices, opportunities for learning, increased communication, more open active media relations, and decreased blaming and

disputing (Walker and Jacobsson). One obvious challenge with the alliance model is that it is not easy to find fit-for-purpose alliance members and build shared understanding and commitments. Because of these issues, an alliance project requires quite time-consuming and possibly difficult preparation measures before an alliance contract is ready to be signed (Walker and Jacobsson).

Theoretical perspectives on collaboration in construction projects

The New Public Management (NPM) discourse promoted the use of business-like management practices in public services via marketisation and quasi-market solutions. However, these kinds of aspirations are not highly relevant in public construction projects since the project models and the market structures of the industry have traditionally been very competitive. The classic regeneration of the capabilities of the construction industry has happened via competitive tendering based on open and transparent public procurements, but those construction companies which cannot bid the lowest prices are not able to get new contracts and, economic theory states, in the end they are excluded from the market via bankruptcy. From the Schumpeterian perspective, this is a crucial element of the economic process of "creative destruction" (Schumpeter qtd. in Aghion & Howitt).

A construction project is typically a labour-intensive process where a construction company combines building materials, building automation technologies and soil to create new infrastructures and facilities. These assemblages turn out real estates that, in turn, constitute vital linkages between architecture as a form of art and urban development as a policy goal (Martin et al.). Besides competition implications, the dynamic advancement of projects depends on how public authorities are able to draft building contracts, collaborate with construction companies, and encourage the companies to make their best efforts during the contract duration. The contract parties of a building project can agree and sign their commitments through a classical or relational contract as described in Table 3. If the building contract is used purely as a classical legal document, it guides the parties' fulfilment of only the precise contractual requirements, eliminating the scope for extensive collaboration, but the public sector has long and extensive experience with traditional contracts, making their use easy and safe. Public-sector bodies are heavily regulated organisations based on the requirements of the rule of law, budget discipline, and the Weberian tradition of public bureaucracy; therefore, it is not easy for them to adopt a new role by introducing the methods of relational contracting.

Table 3. Alternative types of contract: opposite interpretations (Palmer Mills; Morelli; Bevir; Romzek and Johnston).

ASPECTS	CLASSICAL CONTRACTS	RELATIONAL CONTRACTS
Style of contacting	Highly formalistic	Less formal
Parties	Anonymous	Well-known
Interests	Divergent	Common
Favourable conditions of scope	Transactions which are limited in scope and measurable	Repeated transactions in situations which need asset-specific investments
Key features	Predefined terms of contract, negotiation power, conflicts, opportunism	Terms of contract allowing latitude, mutuality, trust
Accountability measures	Ex-ante: careful drafting of contract, competitive tendering, contractual supervision Ex-post; claims for damages, counterclaims	Ex-ante: well-argued choice of contracting partner Ex-post: information-sharing, close collaboration
Decision on disputes	Litigation	Mutual negotiations

As relational contracting leaves space to adjust the terms of the contract during its duration, it is often understood as a platform for social learning and dialogue. Relational norms facilitate cooperation and knowledge-sharing that enable the parties to generate inventions and improvements throughout the duration of the contract. However, public-sector organisations in their classical form have been poorly incentivised to move to the inevitable risk-taking associated with relational contracts (Vincent-Jones). The "innovation paradox" in public investment projects can be unfolded as follows. While the pressures that call for *efficiency* and *productivity improvements* guide public authorities to be flexible, proactive and creative with their contractual parties, they hesitate to work that way because of the strong imperatives for standardised contractual policies. The classical virtues of public administration always tend to prioritise predefined, neutral and distant administrative behaviour instead (Veenswijk).

However, sometimes collaborative approaches and practices are also overestimated. Contractual settings may not always be free from complications but, instead, be infested with contradictions. The theory of collaborative advantage has conceptualised the nature of collaborative arrangements by reviewing complexities that frame collaborative situations. The fundamental assumption of the collaborative advantage focuses on synergies by pointing out that collaboration may

deliver some benefits that will remain beyond the reach of any of the collaborative (or, in this case, non-collaborative) organisations acting alone. However, according to the theory, collaborative arrangements include inertia and they may even fail due to interfering opposite interests or managerial insufficiencies (Huxham).

In analysing collaborative advantages and inertia, the focus should be on a collaboration's structure, communication processes and leadership actors (Vangen and Huxham). Structural issues relate to the contractual parties (including both organisations and their individual representatives) and their formal ties. Process perspectives focus on the instruments and methods of communication and decision-making applied in a project. Leadership actors are those participants who have influential powers and skills to fine-tune a collaboration's agenda (Vangen et al.).

Data and methods

Our empirical study consists of two significant urban alliance projects in Finland: The Tampere highway tunnel and the Tampere light rail project. Both of these are urban public investments co-funded by the city and the state government. The Tampere highway tunnel project is already finished, with the tunnel opened for traffic on November 15, 2016. The Tunnel Alliance was composed of the City of Tampere, the Finnish Transport Agency, and a team of private companies (Lemminkäinen Infra Ltd, Saanio & Riekkola Ltd, and A-Insinöörit Suunnittelu Ltd).

The first phase of the Tampere light rail project was accepted in Tampere City Council on November 7, 2016: "The Tramway Alliance is composed of the City of Tampere, VR Track Ltd, YIT Construction Services Ltd, Pöyry Finland PLC and, by means of a sub-alliance contract, Ratatek Ltd. During the development phase, the Tramway Alliance prepared a detailed implementation plan of the tracks, street planning, stops and depot. The plan's aim was to find the best feasible solutions to support the construction decision" (City of Tampere, "Tramway" online) According to the City of Tampere, the light rail system project includes intentions to have a continuous dialogue with residents, communities, businesses, and property owners (City of Tampere, "Tramway" online).

We collected primary data through face-to-face interviews, interviewing the key people of the mentioned alliance projects in February 2017. The interviewed people represented the city government and the Finnish Transport Agency. Furthermore, we interviewed one external expert who worked as a special advisor on these projects. The interviewed people and interview dates were:

— CEO, urban development, City of Tampere, Feb 7, 2017
— Manager in the Finnish Transport Agency, Feb 17, 2107

— Development manager, City of Tampere, Feb 6, 2017
— Expert consultant, Vison Ltd, Feb 17, 2017

The semi-structured interviews lasted from 40 to 90 minutes. We recorded the interview sessions and transcribed them for further analysis.

The planning phase of the highway tunnel project had started in the City Hall in 2011. Our interviews regarding this project were focused on the fact that it was, at the time of the interviews, an entirely *executed* project. In contrast, the Tampere light rail project was at the beginning of the implementation phase in the winter and early spring of 2017, even if the light rail development programme and development project that preceded it had been working for some years already. Hence, the interviews regarding this project emphasised the features of an unfinished project and its span of implementation and learning curve still underway.

As secondary data, the research team collected and analysed documentary materials, including state government and municipal project reports. We reviewed the governmental value-for-money reports on the alliance projects in order to discover and summarise officially documented and confirmed project aspirations and experiences.

Research findings

Background of the emergence of urban alliances

Problems of the construction industry

In the early 1990s, the Finnish economy faced exceptional problems. The national economy had experienced a finance-led boom in the late 1980s, with the result that after a few years the entire economy overheated. That inflated a bubble of property prices, among other growth effects. A key institutional "merit" of the boom was the too-fast and unplanned liberalisation of the Finnish banking sector that resulted in severe competition for market share between the banks. Banks also lent money recklessly to construction projects, with many of them ending up in financial misery. The state government had to bail out the banking sector, the price bubble burst, and the Finnish economy plunged into deep recession.

As both public and private-sector organisations stopped and cancelled many of their investment plans in the early 1990s, construction companies saw their markets collapsing. Many of their previously important customers and projects were gone for good. The construction industry fell into abysmal financial difficulties, which instigated dramatic changes in the whole management culture of the industry. Some traditional companies went bankrupt, and some companies were sold to foreign ownership. The surviving construction companies made huge redundancies by firing their regular professional staff members (expert consultant).

One of the key managerial changes in the industry was the introduction of new outsourcing methods that included many sub-contracting procedures. The value chains of the construction projects were chopped into small pieces as the main contracting company outsourced individual working phases to small companies via numerous sub-contracts. As a result, construction projects changed their original nature and started to include long contract chains and many project participants. According to the expert consultant, these developments ended up in many disputes and claims between the contracting parties. As he saw it, these developments created many disappointments and frustrations among project stakeholders.

Industrial scientists and economists have considered service sectors as a sinkhole of the economy, immune to significant productivity improvements (Zysman et al.). According to Baumol's "Cost Disease" hypothesis, the productivity of service sectors is either unchanged or grows only very slowly when compared with the scope for innovation in the manufacturing sector. Many investors and analysts considered the Finnish construction industry in the same way and associated it with serious productivity problems (Ronkainen).

The expert consultant claimed that productivity improvements were difficult to promote in the industry since the companies operated in old-fashioned ways without a user-centred approach. According to the expert consultant, public authorities were often disappointed with the infrastructure and construction projects they procured. The final products of the projects were often contrary to their actual wishes. His claims are supported by a recent study undertaken for the Finnish Cabinet of Ministers about government construction projects, of which a considerable part end up in delays and cost overruns (Virtanen). These findings are similar to many international research findings demonstrating that classical construction projects have often suffered overspends and deferred timetables (Walker and Jacobsson).

In order to summarise the observations made by the expert consultant, who actively followed the construction industry and participated in development projects, it has to be noted that during the last few decades "frustrated" has been a term that well-describes many stakeholder experiences of public investment projects. After these experiences, some developers and industry leaders have demonstrated at least an implicit readiness to search for and apply alternative methods of project management. However, many of them lacked specific ideas on how to make improvements before getting familiar with a management doctrine that emerged during the post-recession years. This doctrine, lean management, was their key to studying international experiences of how to renew contract management policies. The expert consultant claimed that nowadays the modern representatives of the Finnish construction industry increasingly understand their operations as a service industry that needs to listen to its customers more carefully than before – and find ways to co-create values with the procuring authorities in public construction projects.

The first alliance project in Europe

Although the Finnish municipalities have strong local self-government and wide general powers, municipal decision-makers hesitate to launch experiments in investment projects which include high risks. In Finland, the state government has been the forerunner in efforts to renew procurement and contract practices in infrastructure undertakings. The Finnish Transport Agency, a government-controlled national authority, was the first public agency to sign a PFI contract in the country in 1997. The agency volunteered to work as a pathbreaker and a role model for other public bodies, and afterwards, a few city governments followed it by launching some local PFI projects (Valkama et al.).

The Transport Agency was the first Finnish public authority to introduce an alliance model in a public infrastructure project. This was a reconstruction project of a 90 km railway line (Lielahti–Kokemäki) with a budget of around 100 million €. It was completed between 2011 and 2015. According to the agency (Liikennevirasto), it launched the railway project as a pilot project in order to test and collect experiences. The agency claims it was the first alliance project in Europe.

Role of the transport agency in the tampere alliance projects

The role of the Transport Agency has also been remarkably important in the alliance projects launched in the city of Tampere. Soon after the national railway alliance was introduced, the agency wanted to test it in an urban infrastructure project and recommended that the alliance concept was suitable for the Tampere highway tunnel project, co-funded by the state and the City of Tampere. As the City Hall authorised the agency to apply the alliance contract and take the role of the project leader in the highway tunnel project, the agency became its procuring authority. The agency was confident in the alliance concept: the railway project was an encouraging reference since the construction works completed ahead of time and the realised costs were less than the estimated ones (Rantatunneli; Liikennevirasto).

In the Tampere light rail construction project, the Tramway Alliance, the city government is the leading and procuring authority. Before launching the light rail development project, the city government evaluated the best contract concept to manage the project, comparing the all-in, life-cycle and alliance models. The city decided to apply the alliance model, especially because it did not yet have ready-made technical plans for the project. The alliance concept gave time to prepare the project plans and flexibility to finalise technical details after the first phase of the alliance project had started. The development manager emphasised that from the perspective of a city government, the alliance concept is only one project concept among others, but has some clear benefits in situations lacking readiness in site planning schemes.

The state government and the Transport Agency are still important players in the Tampere light rail development process, now firmly in the construction phase. The state government is a co-funding body providing 30% of the estimated cost, and the Transport Agency has nominated a representative (a senior manager in the agency) to work as a member of the Tramway Alliance board of managers, even though they do not have a voting right in the board (Raitiotiellianssi).

Phases of the studied alliance projects

In the alliance projects launched so far in the city of Tampere, three main phases can be discerned: 1) initiation, 2) development and 3) implementation. The initiation phase is a search process for service provider candidates, where the interested service providers are screened with a preliminary negotiation phase. Here, the best potential candidates are identified to enter the actual negotiation phase. The negotiation phase ends up with the choice of the best partner for the planning and construction works. Like with any choices when public funds are allocated to external organisations, the initiation phase has to fit the requirements of the regulation of public procurements. They require transparent and neutral treatment of candidate companies.

The development phase continues with the chosen partners. This phase is very intensive and time-consuming. All in all, the initiation and development phases consume more time than the comparable preparation phase in traditional investment or PPP projects. The alliance model requires a careful search process to find good partners at the personal level. Simultaneously, creating the team spirit requires efforts to enable the creation of preconditions for the successful execution of the due planning and development duties. These phases can last one year or longer, depending on the complexities and size of a project, but they are necessary preparations for a successful implementation phase.

The interviewed CEO of urban development emphasised the importance of the development phase. It is not only finding the "good guys" to become partners but also building trust between those partners. This requires laborious negotiations and working on acceptable agreements for all parties. Another very important feature of the development effort is to keep possible disagreements inside the development group and not bring them out in public during the ongoing development phase. The development phase must also produce a plan that is acceptable to the City decision-making bodies, the Executive Board and, finally, the Council.

A key result of all interviews is easy to summarise. The informants considered a success in the development phase's creation of team spirit as a crucial precondition for the later success of the alliance model. Not only was this highlighted in our interviews, but it can also be discerned from the following citation from the Tunnel plan of the Alliance:

The composition of the Alliance in the development phase will be kept unchanged as far as possible in the implementation phase, to ensure that the Alliance ethos, cooperation and approved practices created in the development phase are transferred to the implementation phase. The Alliance organisation will grow substantially during the implementation phase along with the construction organisation. (Tampere Highway Tunnel Alliance project, Project Plan by the Alliance Executive Team 6)

The interview with the manager from the Finnish Transport Agency brought out how important it was for the Tunnel Alliance to reach unanimous decisions during the planning phase and for all parties to agree on common goals and a target price for the project. In our interview, the City of Tampere development director emphasised that the way of processing the project with the alliance model brought several advantages, such as innovative cost savings and shorter planning and implementation times. An example of an innovative cost-saving action was an intersecting bridge that was originally planned to be built from scratch. It was changed to being consolidated on the foundations of an already existing bridge. The joint planning phase with all partners involved was appraised to result in a time-saving of over one year, possibly up to two years, compared with a traditional contract workflow.

One reason for the smooth implementation and the desire to co-operate was the well-thought and generally agreed-upon incentive system that guaranteed that time and cost savings benefitted all parties. Good incentive systems included an agreement on the division of risks between the parties. Thus, some of the encountered risks were tackled together by the whole Alliance, some by the constructor and some by the City as the end-user.

Evaluating the urban alliance projects

The Transport Agency (Liikennevirasto) published an evaluation report on the railway project, demonstrating very positive experiences. Lahdenperä has published a schematic and conceptual list of potential benefits and weaknesses of alliance projects. His key theses are summarised in Table 4.

Our empirical findings on the alliance models in the City of Tampere give support especially to benefits 3–5, 7 and 9–10. The interviews also revealed that the top managers of the city were very committed and experienced personal satisfaction in the successful alliance way of working (number 8). So far, the experiences of these two City Alliance projects have confronted hardly any of the threats, according to the interviews. Threats or weaknesses 6 and 7 were experienced, but they have not been seen as major obstacles to the success of the City of Tampere alliance projects so far.

Table 4. Potential benefits, opportunities, threats and weaknesses of alliance projects (based on Lahdenperä).

Opportunities and benefits	Threats and weaknesses
1. Early selection of contract partners enables relatively quick project implementation	1. Cooperative working methods and shared risk limit the possibility to claim for compensation for other parties' mistakes
2. Incentives boost realisation of qualitative goals related to stakeholder groups	2. Terms of liability insurances may not cover damages caused by one alliance partner to other partners in an alliance organisation
3. Collaborative commitments promote knowledge transfer and shared learning exercises	3. Joint discharge of warranty obligations after project completion is a challenge
4. Contract management is more flexible as changes can be made during the project	4. Changed roles and close cooperation may facilitate key staff members to change their employers
5. Project risk can be understood more holistically	5. Commitments by top managers are needed but sometimes they may be too busy to be strongly involved
6. Joint working improves possibilities to understand life-cycle features of a project	6. Participants may find it difficult to give up their old working methods
7. Shared knowledge improves innovation possibilities	7. Creation of a sustainable collaborative culture may require much work
8. Staff members may experience higher job satisfaction and stronger commitment which may improve organisational cultures	8. Failure to direct incentives according to the project's aims when the measurable aims deviate from the original ones
9. Public authorities can have a better understanding of project challenges and costs via joint working	9. Public authorities have to decentralise some decision-making powers to those actors who operate as representatives of a procurement body in a joint organisation

10. Incentives and cost-based payments are likely to allow the project to be realised at a competitive price	10. The actual price tag of the project is not certain before the completion of the project, the maximum price being a possible exception
11. Excellent performance will enable service providers to reap big rewards	11. Financial supervisors of public authorities may doubt the alliance model, as severe low-price competition may be eliminated
12. Success is enabled via knowledge-sharing without severe price competition	12. Payments based on realised costs increase the risks of opportunistic behaviour and skewed cost allocation
13. Contractors can get a better understanding of customer's needs, enabling them to improve their performance	13. Public authorities have to play an active part in the alliance
	14. Key staff members of the consortium that won the alliance contract may be replaced during the project implementation
	15. The partners bear the risk for the entire project and the actions of others that they can influence only marginally

Discussion and conclusion

The interviewed stakeholders and analysed documents considered that the alliance model of a building contract is a potential solution for some of the chronic problems of the building industry such as low productivity development and project disputes, and the disappointments of public-sector investment projects such as delays and cost overruns. As the model is new and not well-known, the national transport agency has played a pivotal role in efforts to introduce and establish the alliance model at the national and urban levels. For example, the Transport Agency summarised the international experiences of the model, implemented the first national alliance project, and managed the first urban alliance project on behalf of the city of Tampere.

Our empirical case study focused on the premises and phases of the investigated alliance projects which the City of Tampere launched as the Finnish forerunner. To highlight its importance, the model, the experiences and the contracting partners of the Tampere light rail process are in a key role in the large-scale light rail constructions in their inception phase in Helsinki region in 2019. The implemented alliance models included initiation, development and implementation phases. The interviewed experts named the development phase as particularly critical. The phase is very intensive and time-consuming, because team spirit, shared ethos, and joint goals are created in that phase before the construction works and actual collaboration can be initiated.

The interview data and document analyses give a reason to conclude that there are some noteworthy preconditions which have to be fulfilled before favouring an alliance model instead of traditional or partnership projects becomes worthwhile. First, public authorities need to be able to fund the project through public finance. Second, public authorities must be ready to give a fair degree of autonomy to an alliance project by delegating some decision-making powers to an alliance team. Third, our interviewees emphasised that the alliance projects must be big enough, about EUR 30–35 million in the Finnish context. Governments around the world have developed criteria for when it is appropriate to consider an alliance model as an option in an investment project. For example, the Queensland State Government uses the alliance model as a default concept in projects that have a construction duration of more than 12 months or a value of not less than A\$10 million (i.e. approximately EUR 7.5 million) (Jefferies et al.).

If city governments have ready-made plans for a project, they should also have the best possibility to compare the alternative procurement methods of public-sector investment projects presented in Figure 1. The expert consultant interviewed explained that the PFI concept was not applicable in the Tampere light rail project since the city was not able to finalise their plans early enough. Another informant stated that projects containing several ambiguous factors and confronting a high

probability of surprises are suitable for being managed through an alliance contract that allows more degrees of freedom in situations where flexibility is needed. However, the alliance process itself includes and even requires a more intensive and laborious development phase. With lesser complexity, smaller and technically simpler projects fit very well within and can be effectively managed through an all-in contract.

The main methodological limitation of the case study is that our major findings are country- and city-specific. However, the experiences of the Tampere alliances are valuable, nevertheless, for sketching the Finnish alliance landscape. Their scale is indicative: both the tunnel and light rail projects are very large and multiannual public works. Further studies should elaborate on the research questions, lengthen the number and periods of alliance projects, and look for possibilities to diversify the empirical data. This would obviously give opportunities to draw deeper and more persuasive conclusions on the functioning of the new alliance model in different circumstances.

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C O P E

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Re-branding Colombia through Urban Transformation and Rural Regional Marketing

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Abstract

Colombia is now projecting a new, positive image to the world after overcoming a past characterised by politically inspired guerrilla warfare and violent conflict with narco-trafficking cartels which had ravaged the country for decades. Even before the country's transformation, other intermediate place institutions – cities and regions – had already taken significant steps towards territorial change and marketing. This paper outlines the processes involved in urban and social transformation in the city of Medellín and in the marketing of the coffee region, as illustrative cases of city re-branding and regional branding, respectively.

Keywords: urban transformation, cultural service ecosystem, Medellín, rebranding

Introduction

In the modern social-economic globalisation, institutional territories – cities, regions, countries – are seeking good international or national positioning to become better places to live, to attract citizens and tourists, to create investment and exports, to promote certain social-cultural values, etc. In this context, over the last decades, there has been a growing increase in territorial marketing and place branding (Kavaratzis et al.), searching for better visibility and governance.

Marketing emerged as a branch of business management that was focused on the commercialisation of products and services. Over the past years, its principles have also extended towards non-profit entities, as well as in political, sport and cultural organisations. Additionally, marketing is also applied by cities and countries who wish to improve their governance, management and positioning, offering conceptual frameworks to enunciate their exchanges, among the proposals and demands of diverse stakeholders: mainly their citizens, but also tourists and institutions. Cities are connection knots, where diverse flows of exchanges are carried out, be them economic, social, cultural or informational (Castells), in complex networks, among multiple social-economic actors. Some places become brands (Anholt "Foreword"; Anholt "Nation branding"; Lucarelli); cities, regions and also certain natural areas, in relation to specific identities and values.

Although places shows certain parallelisms with business marketing, there are notable differences derived from the public character of cities, regions and countries which are complex social systems among human and institutional groups, especially higher entities such as nations. Frequently, territorial marketing tends to be confused with mere publicity campaigns of a territory, i.e. a place. Marketing should be conceived as an integral framework that this both strategic and of institutional governance; and that the process is established within the place identity, or within its improvements; marketing of solid, singular, cultural or economic content, not simply as propaganda that lacks meaning. Due to this, modern approaches to place branding tend to emphasize processes that are much more orientated toward territorial cultural identity (Kavaratzis and Hatch), instead of mere short term promotional or advertisement campaigns or the creation of logos and slogans (Govers).

Territorial marketing is evolving towards place branding, and it develops through top-down management approaches and marketing plans created by organisations (town halls, federal governments, country ministries, frequently in coalition between these public governments and private organisations such as businesses): toward governance approaches that are much more holistic, participatory and horizontal – bottom-up; thus, re-thinking place branding for cities and regions (Kavaratzis et al.), where the multiple stakeholders that are involved

in each territory co-create value (Houghton and Stevens; Stubbs and Warnaby; Muñiz-Martínez).

The consolidation of peace in Colombia has paved the way for attracting investments and opening new destinations in the country which were previously unknown even to the Colombians themselves; thus, they can discover the attractions and charms of their own country. The city of Medellín has undergone a more profound process of social and urban regeneration than any other city in Colombia, investing in culture, education, social infrastructure and transport as motors of improving its image. During the 1980s and early 1990s, the violence of the *Medellín Cartel* wreaked havoc on Colombia's second city. However, at the beginning of the present century, a network of public place administrations, private actors, and social stakeholders embarked on a strategy to transform the city that a decade later has borne fruit, repositioning the image of Medellín very positively.

Meanwhile, a remarkable cultural service ecosystem (Lusch and Vargo) has been created in the coffee region of Colombia that leverages the coffee growing culture and landscape. Based on the theme of agricultural coffee production, a centre for experiential tourism has been created that has emerged as a popular tourist destination in Colombia, second only to the colonial city of Cartagena de Indias. Visitors appreciate the leisure and the opportunity to learn about coffee-growing culture offered in traditional countryside houses set in a beautiful landscape, awarded the World Cultural Heritage status by the UNESCO in 2011, in recognition of the region's cultural and landscape value. Co-branding synergies have been generated between coffee firms in the region: the national umbrella brand *Café de Colombia*, and the *Colombian Coffee Cultural Landscape* (Muñiz-Martínez).

Re-imagining Colombia through regional marketing: the Coffee Growing Axis

Gastronomy, be this based on food or drink, represents a key subject in rural, local, or regional economy (Bessière), for a new development that is both sustainable and has multidisciplinary implications (Rinaldi), which promotes the type of tourism that hunts for experiences of authenticity that link food and place (Sims). Gastronomy has become a growing subject in terms of place branding (Berg and Sevón). In this section, we will analyse interregional marketing in Colombia through the place brand, Coffee Growing Axis, which unites various districts or administration departments, where coffee is harvested. Following its inception, themed tourism was developed in which the visitors looked to experiment and learn the coffee-making process. The Colombian Coffee Cultural Landscape represents an important resource, which adds value both to the production of coffee and

to the tourism as a sensory landscape. Thus, an ecosystem of coffee services is put together among multiple social actors, with an important sensory component.

The Coffee Growing Axis in an area in Colombia made up by the states of Quindío, Caldas, Risaralda, where high-quality coffee is produced, and where, following this, a large rural tourist attraction was created in traditional coffee country houses, where tourists wished to experiment with the coffee-making process. These elements, included in the framework of the *Coffee Cultural Landscape of Colombia*[1] as a World Heritage Site by the UNESCO in 2011, constitute the basis of a notable experience of place branding.

The Colombian Coffee Region, locally called the Coffee Axis, or *Eje Cafetero*, has created a branding process (Figure 1); evolving from a mere provider of coffee as generic raw material, or a bulk product or commodity item, into a producer of high-quality good, some of them sold as premium or gourmet brands with a higher added value. This is unlike other tropical or semi-tropical commodities such as cocoa and its final consumer product, chocolate, which often tends to be associated with refined business brands from industrial nations (where there are no cocoa plantations), such as Godiva from Belgium or Lindt or Nestlé from Switzerland rather than the country in which the raw material, the cocoa-bean, is produced, e.g. Venezuela (Deshpandé), Ghana, Ivory Coast. However, the coffee branding process is generating wealth and creating value in this Colombian region, contributing to market Colombia as a positively progressing emerging nation.

Similar approaches to agricultural production branding towards gastronomic excellence were developed in the Funen island, Denmark (Askegaard and Kjeldgaard); and, in general, the European Nordic gastronomy of place branding based on culture, *terroir* (Gyimóthy). Cooperative networks were developed by small local producers and public organisations, so as to create high-quality food service that could serve as an alternative to the mass-produced or manufactured goods by large corporations in the food industry. Similarly, cooperation in the coffee region between small coffee-growers and public organisations has contributed to ensuring that the economic wealth generated from coffee remains in the region, unlike the income drawn by multinationals from other coffee-growing areas of the world that merely provide merely bulk commodity products. Synergies are created among the small coffee brands of that region, the national Brand Coffee of Colombia, represented by the *Juan Valdéz* character as the ambassador of coffee culture. Thus, the production of certain products is linked with the image of the region or of the country and, particularly, of coffee with Colombia (Kotler and Gertner).

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[1] Aside from the three districts that make up the Coffee Growing Axis, the área that makes up the Cultural Coffee Landscape is also the North of the Valle del Cauca.
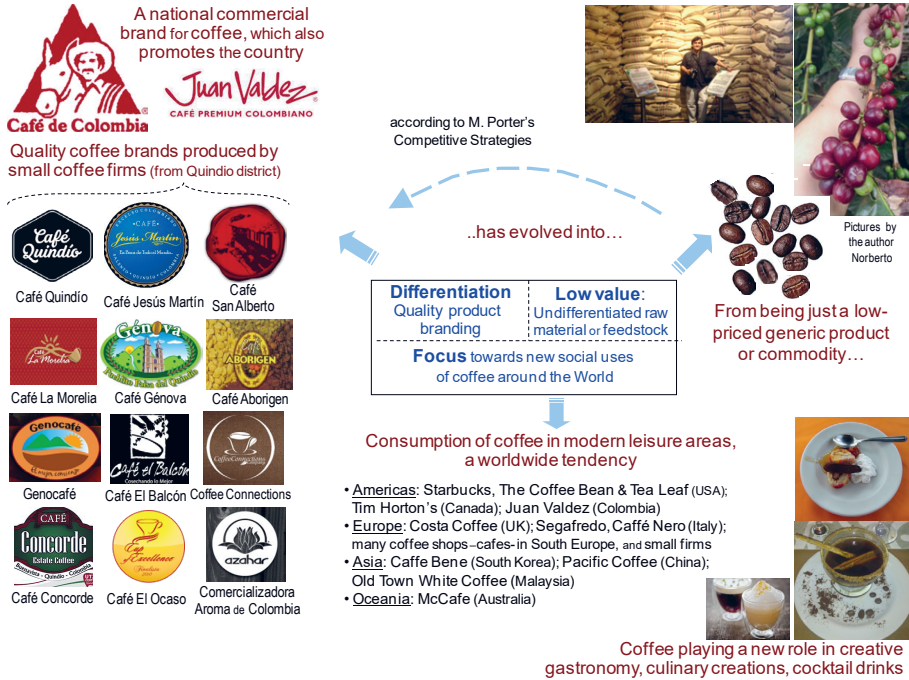
Figure 1. Evolution of coffee positionings from the Colombian Coffee region

During the mid-1990s, in the face of the coffee prices crisis, there was a discussion to abandon coffee agriculture that was subsidised with one million pesos per hectare to destroy all coffee plantations. Luis-Fernando Ramírez-Echeverry, who was the Secretary of Tourism of Quindío at the time, used the rural tourism of France and Spain as a reference, and with the construction of the Coffee Themed Park proposed complementing the coffee business with tourism. To that effect, he travelled to Bogota to propose the initiative to the Ministry of Tourism, but this was rejected; therefore, he started the initiative in his own district. After carrying out market research, he proposed redirecting part of the finance to carry out investments in coffee country houses, which were necessary to accommodate tourists, maintaining the agricultural activity. He invited 20 coffee production companies, with only 12 showing up for the meeting; finally, only two plantations entered his initiative, led by Sonia Montoya in her estate called *El Gran Chaparral*. Despite the initial scepticism for professionalising for tourist activities the characteristic uses of the hospitality and kindness of the people in the region, the initiative was a success. The following year, another 24 estates were incorporated, with 3,285 visitors; 46 estates in the third year, with 7,918 visitors, which continued to grow until the current amount of over 1,000 estates.

The Coffee Growing Axis, and especially the state of Quindío, is currently a mature tourist destination, with hotels and different types of accommodation. There

are innovative businesses that combine coffee production and touristic activities falling within this theme. *Combia Inspiración* offers their visitors the chance to learn the coffee process through an artistic outing through the coffee plantations and coffee tastings; *Jesús Martín* offers an integral experience *from the plantation to the coffee cup* (which is hand-selected grain by grain); *Café San Alberto* (a business that has been internationally awarded several times due to the quality of their quintuple selected coffee) offers their guests tastings on a beautiful terrace with panoramic views of the landscape; *Café Quindío*, develops state-of-the-art branding in a themed space and restaurant-space; *Café Sorrento*, a handmade artistic space with a garden area. There are many estates that receive many tourists, such as Salento; others offer traditional living: Filandia or Quimbaya rely on their handmade crafts, while Pijao has joined the network called *CittaSlow* which promotes a sustainable lifestyle in agriculture, architecture and gastronomy. Thus, a coffee-growing ecosystem has been created among multiple public and private actors at different governmental levels – regional, national and local – and their respective public administrations, as well as coffee growing companies, interacting in a complex coffee service ecosystem with different users – clients and coffee consumers, both individuals or organisations, and tourists looking for sensorial experiences within the coffee growing culture.

Figure 2. Experiential tourism, in search of authenticity in the Colombian Coffee Cultural Landscape.

In this coffee-growing ecosystem, a Special Coffee Shop Network (*red Tiendas de Café Especial*) was created in the Colombian Coffee region in 2017. Based on a market research of the local consumption of coffee carried out in 2016 by the Technological University of Pereira and the consulting firm *7Q,* led by Ms Angélica-María Rodríguez-García, this project aims to capture the coffee-growing culture, which has been recognized by the UNESCO as a World Heritage, in a simple cup of coffee. The Network is made up of over 20 shops of special coffee. It is considered as specialised coffee, i.e. coffee produced out of coffee grains that have obtained over 84 points in the SCA (*Specialty Coffee Association of America)* Evaluation. Aside from offering a selection of the finest coffee, expert baristas explain how to prepare and serve it. Therefore, the Network aims to create memorable sensorial experiences, through interactions such as shows and arte *latte* contests, tastings, filtering method samples, exhibitions of handmade crafts, speeches, songs, poetry, etc.

The Coffee Growing Axis combines the effect of territorial prestige in the business production of coffee, and the development into an internationally famous touristic sub-system in the coffee-growing sector, thus creating an integral place brand. Although agriculture and tourism have already been combined around the world in the agro-food sector (Croce and Perri), tourists are still attracted to discovering the places where a product is grown and understanding its process, as occurs with the production of wine and the wine tourism in the northern hemisphere, e.g. USA, France, Italy, Spain, Portugal, Germany; and in the southern hemisphere, in South Africa, Australia, Argentina or Chile. Notwithstanding, it is not as common to find a similar creation of value in tropical areas of the world, which tend to be the suppliers of prime materials, and the added value is created by multinational brands of industrial countries. The coffee-growing place brand contributes to the value created by coffee remaining in Colombia.

The transformation and international branding of Medellín, at the Colombian urban vanguard

This section will analyse the notable transformation and branding of the city of Medellin, which has led the processes of urban change in Colombia through the constructions of cultural and educational infrastructures, and its inclusive transport. After unfavourable times in the past decades, having suffered from the violence of drug trafficking and the crimes involved in this, as well as the consequences of the dislocations during the armed political conflict that the country had suffered from for half a century, the city undertook integral urban solutions that are now a point of reference in South America and, in general, in all of the Latin-America region. Because of this, Medellin was appointed as the *most innovative*

city in the world in 2013 by *The Wall Street Journal* (USA), thus renovating its image and city brand.

The city holds a metropolitan area of almost 4 million citizens; the second most important number in Colombia after the capital of the country, Bogota. It is the capital of a region with a strong sense of historical identity (Antioch in Colombia). Unquestionably, aside from a tangible physical-urbanistic dimension, the territories become places through social interactions and human affective engagements, grounded in the historical-cultural links that represent emotional ties to a city (Florek), region or nation. The ex-mayor, Mr Sergio Fajardo had a vision of channelling human and institutional emotions within civil society, into moments of social impulses.

Socio-historical context in which Medellín began a city re-branding process

Medellin is the Colombian city that has most probably experimented with the most notable improvements in terms of management and promotion during the last decade. Along with Cali, the capital of the Cauca Valley, it suffered from the violence of drug trafficking which negatively affected its reality and image for a long time. Although the reality of Medellin had already changed during the mid-1990s, the image of the city was influenced by the negative image of violence in its aftermath. Because of this, integral governance and branding were key in helping the exterior perception evolve toward a more positive image.

Medellin had a strong but negative image; the problem was how to analyse it to change that image (Gertner and Kotler). In this context, in 2004, the International Forum *City Marketing Medellin* was organized to analyse and debate how to implement an improvement. The Author of the paper, who was invited to deliver a keynote presentation at this symposium, recommended that the city got involved in organising events that would provide a positive reputation (until then, the only thing created was negative notoriety). That year, the III International Congress of the Spanish Language was held in Rosario (Argentina), and the following one was going to be held in Cartagena de Indias (Colombia). This event has international coverage, with the presence of the international media and Spanish speaking authors, as well as heads of state and governments; but while Cartagena was already famous for its historical beauty and for being a UNESCO World Heritage Site, it was underlined that the congress would be more important for Medellin in terms of creating good news for the city. Therefore, in 2007, Medellin co-organised the conference in which the Spanish Language Grammar was unified; and in Cartagena, the congress in which a tribute to the Colombian author and Nobel Prize for literature, Gabriel Garcia Marquez, was carried out. It was a complete success, with

citizen participation and international coverage. The King and Queen of Spain visited the city, inaugurating the Spanish Library in the suburban area or township of Santo Domingo. Medellin finally began to generate positive news after the negative times related to the Cartel of Medellin and the violence of drug trafficking.

Why Medellín needed it to undertake the re-branding of the city

Because there was a big difference between the city image ant its realty

Image	Reality
Medellín was stigmatized by the violence of the past drug-trafficking and crime	Dynamic and entrepeneur city: • Trade shows and congresses: Colombia Moda, AgroFuturo Expo, decoration –Feria Home-, health –trasplants, dentristy-. Sports and cultural events

Murder rate evolution in Medellin 1980-2012

Source: Gil Ramírez, M.Y (2013), "Medellín 1993-2013: Una ciudad que no logra encontrar el camino para salir definitivamente del laberinto". Woodrow Wilson International Center for Scholars, Washington D.C.

Universities, Poetry Festival, arts (Fernando Botero, a figurative artist and sculptor); music: Carlos Gardel (Tango music eminent singer), Juanes (pop music singer)	
Privileged weather: *"city of eternal springtime"*	
Potential rural tourism, ecotourism, heritage villages (Santa Fe de Antioquia, Guatapé); coastal and beach tourism in the Caribean-Urabá and Pacific-Chocó areas	

Medellín, the most educated; city motto based on culture

Spain Library Park (*Parque Biblioteca España*) represents a key cultural infrastructure to improve the living conditions of slums conflicting urban areas through education and culture.

Figure 3. Differences between the image and reality of Medellin, from the beginning to the end of the 1990s and 2000.

The library was co-financed by the Spanish international cooperation. The United States also cooperated with Medellin, as a part of the American Geographical Society's Bowman Expedition program, focused on the social change in poor neighbourhoods, in particular the slum called "Comuna 13" (Drummond, et al.). This program's goal was to improve the security, development and infrastructure in the area. On the other hand, in 2009, the project "Medellin, the Most Educated" was awarded the 1st edition of the *City to City Barcelona* FAD *Award* (Spain). The award was collected by the ex-mayor Sergio Fajardo, and it acknowledges the value of a plan of infrastructure and programs related to education and culture, which contributes to pacification, social integration and the improvement of lifestyle in Medellin.

In 2010 Medellin organised the Pan-American Games of 2010. Through such events, the city began the process of improving its image on an international scale

that still continues today. Medellin is one of the cities in the world whose image has differed the most with regards to its reality; because of this, a good branding approach was important, to be guided by social inclusive governance and branding that created a positive image. With regards to the infrastructure, Medellin was a pioneer in Colombia, building the first and only subway in the country; it has a great convention centre that organises numerous congresses, and it is the headquarter of businesses and multinationals in Colombia. It is a dynamic and entrepreneurial city, with universities and healthcare that is renowned for its surgery and transplants; it has emerged as the cluster of fashion and design. In international cooperation or city benchmarking, Medellin established an alliance with Barcelona, internationally renowned for its transformation model and urban promotion.

At present, the city is witnessing a wave of new cultural revitalisation, such as culinary and gastronomic creativity (Londoño and Medina), and literature events of international scope with several world languages, such the annual Medellin Poetry Festival which debates and divulges poetic and expressive tendencies, and is carried out in theatres and auditoriums, some of these open-air, in the metropolitan parks around the city. The festival has also won a Spanish literary award for its contribution to peace (Arias). The city also organises a Book and Culture Festival, which, in its 11th edition, attracted over 450,000 visitors with different activities, such as editorial launches, conferences and meetings between authors and readers (Manetto).

Medellín's transformation reaches international reputation

Given its notable urban regeneration, Medellin attracts the international interest of the media. *The New York Times* states that many of the once marginal slums have been transformed through some amazing architectural works, like the *Biblioteca España* (Spain's Library), a modern public library and community space up on the hills of the low-income Santo Domingo neighbourhood (McShane). The city's Metrocables (aerial gondola lift implemented system) and outdoor automatic escalators of nearly 400 metres, developed to integrate the poor hillside neighbourhoods with the city centre, are innovative solutions in public transit. This transport system carries 30,000 people daily and connects into the Medellin's Metro. New educational and cultural spaces and greenery parks provide the city with social infrastructure.

The plan to bury almost 400 m stretch of highway along the Medellín river is ambitious, to build a park and open spaces on the top surface. Similar renovation projects have been developed in such cities as Seoul – Cheonggyecheon River – (South Korea), Madrid-Rio (Spain), the "Big Dig" in Boston (USA), the *Avenida Colombia* tunnel

in the Colombian city of Cali; and also waterfronts renewals: Barcelona for the Olympic Games 1992, the Porto Maravilha project for the Rio de Janeiro 2016 Olympics, Puerto Madero in Buenos Aires. These are all cities that have rethought their highways and waterfronts for the benefit of public space. Certainly, urban change stands out in Latin American's capitals –Bogotá, Mexico City, Lima, Montevideo, Santiago de Chile; and also in medium-size and non-capital cities.

Due to this transformation, in 2016, Medellin received the Lee Kuan Yew Award, an award which is considered to be the Nobel Prize of Urbanism, and which is awarded biannually by the *Urban Redevelopment Authority* Singapore and the *Centre for Liveable Cities* to promote urban innovation and sustainable development. Since 2010, the award bears the name of Lee Kuan Yew (1923–2015) who was the Prime Minister of Singapore and globally positioned this city-state. 38 other cities from around the world competed; among them, those that received an honorary award were Auckland (New Zealand), Sidney (Australia), Toronto (Canada) and Vienna (Austria).

Medellín River surrounded by highway sides, which prevents walking along the riverside. Building to the right is EMP -Medellín Public Corporation Businesses- (Empresas Públicas de Medellín).

before

after (project)

A visualisation of the planned buried highway (to the right of the river). Photograph: Latitud

A visualisation of Medellín's plan to bury its highway and build a park. Photograph: Alcaldía de Medellín

Figure 4. Plan to bury a stretch of highway along the Medellín River, to provide green space for citizens' leisure.

The projects that Medellin presented, and for which it won the award, were three: the Wrap Around Garden, a green metropolitan fringe that connects surrounding

the areas of the Comuna 8 with garden spaces and pedestrian pathways; the River Parks, to recuperate and integrate the Medellin River into the city as a meeting point; and the Articulated Life Unites that are civic-social centres in the suburbs to promote sport and culture. The judges of the award said about Medellin:

> The key for its transformation is a daring and visionary leadership, as well as social and urban innovation. The chosen leaders showed strong political will and commitment to good government, citizen participation and equal opportunities for all citizens. Despite having limited resources, they creative and unconventional approaches were taken to deal with difficult problems. Medellin focused on education and culture to achieve changes on a smaller, but efficient, scale; with high impact urban projects that have transformed their communities and the city in a short space of time" ("Medellin").

With this transformation, Medellin leads the transformation process in its country, and is considered as avant-guard, and maybe even ground-breaking, due to the positive resolution of the violent conflicts it has suffered from. This city is a point of reference in Latin-America, along with other American cities, like the Ecuadorian Guayaquil, with its urban regeneration, the North-American Vancouver (Canada) with its environmental management, or the avant-guard example of San Francisco and the cluster of the ICTs in Silicon Valley; the South American Curitiba (Brazil) with its environmental management and citizen participation or the urban regeneration of the fluvial front of the Parana River in Rosario (Argentina), among others.

Conclusions

Colombia is a country that opens to the world, and presents a new, positive reality after decades of having suffered from political armed conflicts and violence from criminal groups. Its urban and regional experiences are in the vanguard of the social-economic development of the country. Such are the creation of the coffee-growing ecosystem and its consolidation as an experiential tourist destination; as well as the great urban and social transformation, and the branding in the city of Medellin. These processes contribute to promoting the country as a whole.

The synergies between business branding and place branding of the Coffee Growing Axis can be an example to emulate for other emerging regions, located in (semi)-tropical areas, to create value through quality local productions, which can be internationally commercialised, and also could be a sector for tourism. The development of the brand Café de Colombia and *Juan Valdez,* and brands from smaller companies of quality coffee, leads in the direction of the image improvement of Colombia, its cities, and its regions. Also, Colombian coffee can have a role around the planet, as a drink and cocktail in modern leisure spaces, places of social gathering and cosmopolitan

lifestyles; as well as in relation to the new gastronomic creativity. The co-creation of value in the Coffee Growing Axis and the social-economic culture that it represents obtained international support through the award of the Colombian Coffee Culture Landscape as a World Heritage Site from the UNESCO; with the consequent fame that this gives. It is important to preserve the Coffee Culture Landscape, not only of that region but also of cities like Armenia (capital of the state of Quindío), because this is what makes it unique, with the panoramic landscape view from the city, which is currently in danger from uncontrolled urbanisation.

Large urban areas are being formed around the world, whose connectivity is creating new, worldwide geopolitics, alongside those of the states-nations; the processes that are now a global reality (Khanna). Along with the largest urban groups in the world and the global cities, second-tier cities have also emerged, being the centre of sub-national geographic areas, with notable urban processes, of international or sub-regional importance. In this sense, Medellin is a city that represents a positive example in the world for having overcome violent conflict, and or marketing-city repositioning with innovate urban and social solutions.

Integral marketing of cities, regions or countries, should focus on the cultural identity of each territory, and find a creative differentiation of place brand, much more than a mere exterior promotion through a short term advertisement campaign, a motto or slogan and a logo. Place branding should not be only about tourist promotion, which is one of the many urban exchanges. The key is adequate communication with all of the stakeholders involved in the city, notably the citizens themselves, as well as tourists and other visitors and customer organisations. The cities should aim to achieve a lifestyle for their citizens through the improvement of infrastructure and public services, social integration; they should be attractive to visit and should also stress innovative values of creativity, excellence and urban design. Multidisciplinary approaches are needed in urbanism, sociology, economy, environment and culture. Aside from being better places to live, the cities and territories compete in different sector concepts, and some places become brands in accordance to their respective identities.

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Assessing the Learning Outcomes of Food-related Educational Tourism Events for University Students: The Case of the International Student Competition of Fermo, Italy

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Abstract

This paper examines the International Student Competition on Place Branding and Mediterranean Diet held in Fermo, Italy, in the context of the development of rural areas. This one-week food-related educational programme was organised by the University of Macerata's Department of Education, Cultural Heritage and Tourism in collaboration with The Piceno Laboratory on the Mediterranean Diet, a local network of public and private stakeholders committed to the promotion of Fermo area as a touristic destination based on traditional gastronomy. The aim of this study was to understand how and to what extent such food-related educational events may contribute to providing students with the knowledge, expertise and soft skills needed for careers in the food tourism sector. Of interest also was how such events may benefit the development of rural areas.

The ISC was founded in 2016 and continued in 2017, 2018 and 2019. In order to assess students' perceptions about the experience, specifically regarding what they felt they had learned about food tourism, and which soft skills they had acquired or honed, 13 students who participated in the 2017 event were interviewed for a qualitative study. Moreover, the authors drew upon information gleaned from interactions with students and teachers, as well as with several important actors of the local food and tourism sector, including tourism and hospitality entrepreneurs and representatives of government agencies, with whom they collaborated in the context of planning, running and evaluating the events. The findings show that the ISC can provide students with a good general understanding of the territory and practical knowledge about place branding and food tourism. In terms of career preparation, the combination of fieldwork activities with traditional lectures and group activities was particularly fruitful in promoting soft skills such as communication, efficient use of social media, teamwork, problem-solving and decision making.

Keywords: educational tourism, food tourism, experiential learning, knowledge, soft skills, employability.

Introduction

In the *Future of the Job* Report, the World Economic Forum (WEF) argues that in the near future, some behavioural soft skills will replace or be more important than other technical and professional ones. For example, emotional intelligence, creativity and critical thinking are expected to play a fundamental role in enhancing future professional profiles (WEF). In defining the Student Employability Profile (Rees et al. 90–92) related to hospitality, the UK Higher Education Academy listed several skills and kinds of knowledge that a new graduate in this field should develop. Field-related skills include the ability to analyse and implement food, beverage and/or accommodation service systems, supported by ICT, mathematical and organisational skills. Important soft skills include interpersonal acumen as well as skills in communication and presentation, teamwork, critical thinking, and the ability to learn, especially from work experience.

The overall purpose of this study was to explore how and to what extent food-related educational events may contribute to providing students with the knowledge, expertise and soft skills needed for careers in the food tourism sector, thus improving their employability. The subject of this study was the International Student Competition on Place Branding and Mediterranean Diet held in Fermo, Italy, organised by the University of Macerata's Department of Education, Cultural Heritage and Tourism in collaboration with The Piceno Laboratory on the Mediterranean Diet, a local network of public and private stakeholders committed to the promotion of Fermo rural area as a touristic destination based on traditional gastronomy.

In Ritchie's description of an educational tourism experience, the learning component is a primary or secondary part of the journey. It can be related to the competencies that students develop during their studies to face the challenges of the world of work. In the food tourism literature and, in particular, in relation to the development of food tourism, various types of competencies have been identified as critically important (Bertella; Johanson et. al.; Rees et al.; Başaran). For example, Bertella identified scientific and local food knowledge, global and local managerial and political knowledge, and tourism knowledge.

The present article reports the results of a specific case study of a one-week educational program developed in line with the main ideas of the experiential learning approach (Dewey; Kolb), the International Student Competition (ISC) on Mediterranean Diet and Place Branding, organised by the University of Macerata (Italy) in the rural area of Fermo in collaboration with an association of government and private actors, The Piceno Lab on the Mediterranean Diet. During such a week, students attend talks, meet with local producers, visit farms, taste local products, participate in cooking lessons, and learn how to use social media to promote agritourism, a restaurant, a farm, a tour operator, or other such enterprises.

In the competition, teams of students work on case studies to formulate sustainable, original and innovative action plans for one of these operators, in the overall context of promoting the rural development of the Marches Region.

The article is structured as follows: the first part provides a review of the background literature on educational tourism, with a specific focus on short-term study abroad programmes, experiential learning and soft skills for employability in relation with food tourism. Next, the background context of the educational event is described, and the applied methodology is explained. Finally, the collected data are analysed and discussed.

Students perceived that the experience of working on real cases in a multicultural context helped them gain useful knowledge and skills that would improve their employability. They pointed to such knowledge as a general understanding of the territory and practical information about place branding and food tourism. They felt that they improved their skills in communication, problem-solving and decision making, which, they said, could be adapted to other situations and workplaces as well.

Theoretical background

The case study of the International Student Competition of Fermo offers four interesting aspects for contemplation. The event in itself is an *educational tourism experience* that, through a competition, engages students in place and problem-specific *experiential learning* activities, in order to provide them with *employability-related skills* useful for their future; furthermore, it is a *food tourism experience* featuring the Mediterranean Diet, and involved students in promotion of the local food culture and lifestyle, and thus of the value of the area.

The following sections present a quick overview of the literature on Educational Tourism, Experiential learning, Food Tourism and Soft Skills for employability.

Educational tourism

Ritchie defines Educational Tourism as a "tourist activity undertaken by those who are undertaking an overnight vacation and those who are undertaking an excursion for whom education and learning is a primary or secondary part of their trip" (18), and indicates that it has several potential segments. In this study we consider the "education first" or purposeful segments which primarily serve to promote education and learning, for example, school excursions and exchange programmes, stays-abroad at language schools, and tourism related to university students. Stone and Petrick define study-abroad programs, including short-period programs,

as touristic experiences perceived by the students as challenging and potentially enriching opportunities to travel, live and learn about another culture and language. Kalinowski and Weiler write that educational travel is motivated by curiosity to learn about other people, their language and culture, and by interest in stimulating cultural and naturalistic topics. For them, educational tourism goes "beyond a curiosity, interest or fascination for a particular topic. It involves a travel experience in which there is organised learning, whether that be formal or experimental" (Kalinowski and Weiler 17).

Educational tourism abroad offers a number of benefits: it provides students with an opportunity to learn about the political and social issues, the people, geography, history and culture of another country (Chieffo). It also can push them to improve their organisational, communication and problem-solving skills, and thus foster their personal growth (Gmelch).

Experiential learning in tourism and hospitality degree programs

Experiential activities, as described by Dewey, Boydell and Kolb, can play an important role in students' education, above all if set within specific learning programmes (Stone and Petrick). As Bauer and Bennett explain, field research projects are an important part of a degree program in tourism management because students can learn more about tourism in this setting than by attending lectures and seminars or reading textbooks and articles. Bauer and Bennett describe tourism as a multifaceted, multidisciplinary field, and argue that "hands-on" training that combines both theory and practice best prepares students for work in this complex arena. Similarly, Goh affirms that field trips in tourism education pique the interest of students, give them a better understanding of the specific subjects addressed in their program, and provide them with insights into future career pathways.

In this context, a well-rounded education is important: "tourism-related educational organizations should build a curriculum that combines culinary culture and tourism, enhances the cooperation between academia and industry, and deepens the knowledge and learning of culinary culture" (Horng and Tsai 812). In particular, gastronomic studies are multi-disciplinary, as they include history, sociology, literature, languages, nutrition, philosophy, hospitality and cooking, and may give direction in the planning process of communities and businesses (Scarpato). A well-rounded education is also facilitated by the combination of learning modalities. Travel and discovery provide an opportunity for students to reflect on their experiences, and this reflection is a vital part of learning (Mouton). In his research about experiential learning in tourism education in North Cyprus, Başaran (33) follows Kolb's theoretical framework and asserts that during work or training in the hospitality sector, students profit from their direct contact with stakeholders; reflective observation (RO) on the ideas they hear and situations they experience opens

them to new perspectives. The opportunity to hear guest speakers such as business representatives and researchers, and engage in group discussions with them, enriches the learning experience as well. Of course, attending lectures and studying textbooks are important for the abstract conceptualisation (AC) of the subject. In addition, active experimentation (AE) through presentations, simulation games, role play, and practical workshops can be used effectively to support experiential learning.

Other modalities, such as location-based learning (Croy) and especially problem-based learning (Vygotsky; Paris) can be applied to business competitions, to help students enhance their employability by expanding their business knowledge, gaining work experience, and improving their abilities in problem-solving and teamwork; students also may find that these experiences boost their motivation and build up their self-esteem, and encourage them to engage in life-long learning. And, not unimportantly, these experiences can be fun (Shah et al.).

Knowledge in food tourism

Food is often an important aspect of rural tourism, as it allows the destination to express its own identity and allows tourists the opportunity to enjoy meaningful experiences, gaining in-depth knowledge about the local culture and cuisine (Bessière; Hjalager). Knowledge about food tourism is important for both tourists and tourism operators.

Knowledge in food tourism from the tourists' perspective

For tourists, food is a multifaceted cultural artefact to be enjoyed in many locations and through many activities such as food trails, events, festivals and visitor attractions (Everett and Aitchison). Hall and Sharples define food tourism as "visitation to primary and secondary food producers, food festivals, restaurants and specific locations" in order to experience a particular type of food or product of a specific region (10). Hall et al. consider food tourism as part of the local culture, "consumed" by tourists, an element of regional tourism promotion, a component of local agricultural and economic development, a key element to competitive destination marketing, an indicator of globalisation and localisation, and a product and service consumed by tourists with specific preferences and consumption patterns.

As Rinaldi argues, "food culture involves many different branding elements, including products (food and beverages), practices (eating and meals), the art and customs of preparing and eating (gastronomy), sensory elements (taste, smell, touch, visual), origins (organic food, ethical cuisine, locally produced food, etc.), preparation (ways of cooking), serving (fast food, slow food, street food, etc.) and the context in which food is served and consumed (restaurants, bars, markets, food

quarters, streets, etc.)" (7). According to Horng and Tsai, in order to create a culinary tourism destination, it is necessary to identify the core resources and combine internal and external policies to support marketing strategies and to design products suitable to the target market, by creating a brand identity able to communicate the features and values of culinary tourism products. According to Richards, tourists want to increase their cultural capital and consider gastronomy as a creative experience rather than just consumption. In this sense, food tourism belongs to the creative tourism sector, and, therefore, specific knowledge and expertise are needed. Tourists are eager to learn about the ingredients used, the way they are grown, and how to cook them; they appreciate learning how culinary traditions have developed over time.

Knowledge in food tourism from the perspectives of tourism operators and students

Food tourism can influence the success of a destination in a competitive and rapidly changing tourism market. Local government assessors for tourism or rural development, tourism operators, local restaurants and hotels, as well as producers and sellers of local specialities must have the necessary food-related knowledge if they are to develop food tourism in their area. In addition, key elements for successful innovation and competition in this field are talent, knowledge retention and management skills (Hall et al.). Bertella analyses the role of knowledge in food tourism in agricultural and/or fishery areas and investigates several types of knowledge important for the development of food tourism in rural areas. These are:
— local food knowledge;
— scientific food knowledge;
— tourism knowledge;
— local managerial and political knowledge.

Food tourism can be boosted by the creation of networks among actors who detain different types of food knowledge in order to brand the destination.

In this context, education, training and research programmes may play an important role in regional development through food and tourism (Hall et al.). Specifically, hospitality education should include the study of gastronomy, in addition to management courses, to provide students with an understanding of the history, culture and traditions of the products and dishes of their own region or country (Santich). Furthermore, students should develop practical management skills, but also gain a general understanding of various social science disciplines, and become equipped to manage the economic, social and cultural impacts of tourism on the residents of the host region.

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Soft skills for employability in the tourism sector

The most accepted and shared definition of employability was articulated by Yorke and Knight who described it as "a set of achievements and skills, understandings and personal attributes helpful for graduates to gain employment and work successfully with a benefit for themselves, for the workforce, the community and the economy" (3). Soft skills are "desirable qualities for certain forms of employment that do not depend on acquired knowledge: they include common sense, the ability to deal with people, and a positive flexible attitude."[1] For the purposes of this study, soft skills are understood here as personality-specific skills related to one's character, attitudes and behaviour; they are intangible, non-technical and their application is not limited to one's profession. In addition, they are constantly developed in everyday life and the workplace. Soft skills can be transferred from one context to another (UNESCO-IBE), but can be also technical, as is the case, for example, with fluency in languages or expertise with computers.

Even if a universal set of transferrable and soft skills has not been agreed upon (Caballero et al.), some helpful reference frameworks have been developed: the European Union identified 8 key competences for lifelong learning and several relevant soft skills, as have some other international government agencies (Crawford et al.; the U.S. Department of Education[2]; the Australian Department of Education; Bacigalupo et al.). These are summarized in Table 1.

Regarding employability in the hospitality sector, Baum called for curricula that develop skills in learning, communication, mathematics and IT, and teamwork, as well as competences in foods and beverages, and management. Similarly, Johanson et al. indicated as important competences the basic functional areas of management, such as the ability to recruit, train, and motivate; financial skills, communication skills, and customer care, computer-related skills, and knowledge about workplace security and safety. They also included specific knowledge related to food preparation, such as ingredients, sauces and stocks, and basic culinary production processes.

As Ruhanen's case study showed, experiential approaches are useful learning tools for improving the employability of tourism and hospitality students. They can contribute to bridging the gap between academic knowledge and the required practical knowledge and skills those in the workforce should have. They promote learning, interest and enthusiasm for the subject, work experience and industry practice. Lee reports that industry-based experiential learning enhanced the learning outcomes of hospitality students: it increased their understanding of how organisations work, helped them view their career expectations more realistically,

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1 https://www.collinsdictionary.com/dictionary/english/soft-skills (Accessed 30 Sep 2019)

2 https://cte.ed.gov/initiatives/employability-skills-framework (Accessed 30 Sep 2019)

Table 1. Key competences and soft skills: a comparison among international frameworks (our own summary)

European Union 8 Key competences for lifelong learning	1. Communication in the mother tongue 2. Communication in foreign languages 3. Mathematical competence and basic competences in science and technology 4. Digital competence 5. Learning to learn 6. Social and civic competences 7. Sense of initiative and entrepreneurship 8. Cultural awareness and expression **Relevant soft skills:** communication; interpersonal and intercultural skills; problem-solving; organisational skills; active participation; sense of initiative; creativity; emotional skills.	
Crawford et al. 7 Soft Skills Clusters for employability	1. Communication 2. Decision making/Problem-solving 3. Self-management 4. Teamwork 5. Professionalism 6. Experiences 7. Leadership	

Table 1. (continue)

ENTRECOMP (Bacigalupo et al.) 15 competences for entrepreneurship	*Area 1 Ideas and Opportunities* 1. Spotting opportunities 2. Creativity 3. Vision 4. Valuing ideas 5. Ethical and sustainable thinking	*Area 2 Resources* 6. Self-awareness and self-efficacy 7. Motivation and perseverance 8. Mobilising resources 9. Financial and economic literacy 10. Mobilising others	*Area 3 Into action* 11. Taking the initiative 12. Planning and management 13. Coping with uncertainty, ambiguity and risk 14. Working with others 15. Learning through experience
US Employability Skills Framework (US-ESF website)	APPLIED KNOWLEDGE	*Applied Academic Skills* Reading Writing Math strategies/procedures Scientific principles/procedures	*Critical Thinking Skills* Think creatively Think critically Make sound decisions Solve problems Reasons Plan/organise

EFFECTIVE RELATIONSHIPS	*Interpersonal Skills* Understand teamwork and work with others Respond to customer needs Exercise leadership Negotiate to resolve conflict Respect individual differences	*Personal Qualities* Demonstrate responsibility and self-discipline Adapt and show flexibility Work independently Demonstrate a willingness to learn Demonstrate professionalism Take initiative Display a positive attitude and sense of self-worth Take responsibility for professional growth			
WORKPLACE SKILLS	*Resource Management* Manage time Manage money Manage resources Manage personnel	*Information Use* Locate Organise Use Analyse Communicate	*Communication Skills* Communicate verbally Listen actively Comprehend written material Convey information in writing Observe carefully	*Systems Thinking* Understand and use systems Monitor systems Improve systems	*Technology Use* Understand and use technology
Australian Employability Skills Framework (Employability for the future)	1. Communication 2. Teamwork 3. Problem Solving 4. Initiative and Enterprise 5. Planning and Organising 6. Self-Management 7. Technology 8. Learning				

developed their network of professional contacts, spurred their ability to take initiative, increased their ability to adapt to change, honed their leadership skills, and boosted their financial management skills. According to García-Rosell, in order to work in and improve the tourism industry, tourism students should develop knowledge and competencies through problem-based learning (PBL) activities that stimulate critical approaches and reflexibility. Students should live and experience tourism and hospitality work rather than simply acquiring knowledge about it. Problem-based learning in tourism education allows students to develop skills like teamwork, creativity, problem-solving and leadership and helps them in developing the flexibility and adaptability needed to respond to the socio-technological changes affecting the tourism and hospitality industry.

Background context: The International Student Competition on Place Branding and the Mediterranean Diet

The week-long International Student Competition of Fermo (ISC) is a study-abroad programme based on the Mediterranean Diet brand. Established in 2016 by the Department of Education, Cultural Heritage and Tourism of the University of Macerata, in collaboration with The Piceno Laboratory on the Mediterranean Diet, a local network of public and private stakeholders committed to promoting the Fermo area as a touristic destination based on traditional gastronomy, it has attracted students from Italy and abroad every year since 2016 (http://www.laboratoriodietamediterranea.it/it/international-student-competition-2019).

The small rural hill town of Montegiorgio, near Fermo, 30 kilometres from the Adriatic Sea, was chosen to host the ISC because of its particular importance as a representative of the traditional Mediterranean diet and its link to longevity. In fact, since the town was marked by a high number of centenarians, and its traditional cuisine typical of the Mediterranean diet, a cohort of men from Montegiorgio was one of the sixteen enrolled in the long-term Seven Countries Study, conducted from 1958 to 1999, which compared data on heart and vascular disease with information on traditional eating patterns and lifestyles in the seven participating countries (USA, Finland, Italy, the Netherlands, Yugoslavia, Greece, and Japan).[3] Exploiting this claim to fame, local leaders chose to brand the Fermo area as the land of Mediterranean Diet in efforts to promote food tourism here. The Piceno Laboratory of the Mediterranean Diet played an important intermediary role among the local actors, linking the touristic offer to food, health and wellness, and

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[3] http://www.sevencountriesstudy.com/ (Accessed 30 Sep 2019)

engaging the support of the University of Macerata. One of the outcomes of this collaboration was the ISC, with the following objectives:

— for students: discovering connections between gastronomy, events and place branding; understanding the potential of food and gastronomy for sustainable development; developing skills for destination management challenges; understanding the potential of Information and Communications Technology (ICT) for place branding activities; discovering Italian culture, lifestyle and gastronomy,

— for stakeholders and local actors: elaborating innovation and development paths to increase the international reputation of the destination, through an ICT-based real-time marketing of the territory (Cavicchi et al.).

The participants came from universities in Italy, Norway, Belgium, Poland, Ukraine, the Czech Republic, belonged to different nationalities, and had diverse educational backgrounds (Tourism and Hospitality Management, Economics and Business Management, Agricultural Studies). They attended seminars about Food & Wine Tourism led by researchers from Italy and abroad, set in ancient theatres and locations symbolic of the local cultural heritage. In addition, they attended cooking classes, visited local farms and had field trips, met local producers and gained insights into food processes, local gastronomy traditions and culture. Participants were hosted in rural B&Bs and farmhouses, to offer them the opportunity to learn about local hospitality and become familiar with the landscape and its attractions.

The students worked in groups in close collaboration with local stakeholders to give them the opportunity to engage in real case studies. The participants in the first ISC in 2016 were asked to come up with an innovative idea to help the Piceno Laboratory of Mediterranean Diet elaborate a promotional strategy for the Fermo area using the Mediterranean Diet as a brand. The next year, participants were given two different assignments: 1) the application of the Business Model Canvas (Osterwalder and Pigneur) to two local firms, in order to implement promotional strategies based on their distinctive resources; and 2) the integration of the identified strategies within a sustainable tourism development plan for the area. In 2018, again, participants worked to elaborate a promotional strategy for the Fermo area using the Mediterranean Diet as a brand and in 2019, participants were asked to provide local stakeholders with a promotional video representing the characteristics of a gastronomic tourism experience in Fermo area.

Each year, students also helped promote the Fermo area by acting as "ambassadors," in a daily social media competition, sharing pictures and contents using official hashtags, the impact of which was then analysed by staff at the Polytechnic University of the Marche in Ancona. Each day, the participant who had the greatest social media impact won a prize consisting of local products. In doing all these activities, students "translated" theoretical ideas and tools into concrete plans for

the local destination. Local students supported international students in the activities with local stakeholders. "Translation" also took a literal form, with Italian participants helping foreign participants communicate with local stakeholders.

Methodology

In order to investigate the learning outcomes of the ISC and, more specifically, what kind of knowledge and skills students might have developed through this experience, this study relied on the three data sources: first, a general questionnaire about motivation for participating, expectations for the event, and level of satisfaction with the event, administered to all the 2016 participants and some of the 2017 participants; second, follow up interviews with 13 of the 2017 students about knowledge gained and skills improved through the event; and third, information gleaned by the authors in the context of their various roles in planning, organising and running the ISC, during numerous informal conversations with students, teachers, tourism and hospitality entrepreneurs, and representatives of government agencies.

A preliminary assessment of the ISC experience

The goal of the first phase was to assess the motivations, expectations, and level of satisfaction of the students who participated in the ISC. They were asked to fill out a questionnaire organised on a 5-point Likert-type scale, by assigning values to affirmations such as "I wanted to meet other students interested in tourism," "I expected excellent lectures," "I feel that I have gained a good understanding of the job of local entrepreneurs/producers," "My participation in this competition is an important part of my total university experience," and "My satisfaction as a learning experience." Comparison among the means revealed that the Italian students appeared to be more interested in and satisfied with the learning experience related to food tourism, local traditions and culture than their colleagues from universities abroad. In fact, the majority of the respondents were students of the University of Macerata's Master's Program in International Tourism Destination Management, which includes the ISC as part of the second year of studies. They were familiar with the subjects addressed during the event, which were relevant to their education and preparation for future employment. On the basis of the questionnaire results, it was decided that a second phase should be undertaken, specifically with the University of Macerata students who had participated in the 2017 ISC, to gain more information about the outcomes in terms of knowledge and skills development.

Semi-structured interviews on learning outcomes of the ISC

The second phase employed a qualitative approach in which 13 open-ended questions were asked of 7 young women and 6 young men, five from abroad (2 from India, 2 from Ghana, 1 from Russia), and the rest from Italy (3 from the Marche Region, 1 from Latium, 2 from Campania, 1 from Apulia, 1 from Sicily). Most of the 30-minutes interviews were conducted via Skype. Since the interviewer had participated in the ISC and knew the respondents personally, the interviews had an open and friendly tone and were marked by mutual trust. The students who could not Skype submitted their answers by email. The contents of the interview were elaborated following the frameworks of Bertella; and Crawford et al. because they allow synthesising the characteristics of the other frameworks. Table 2 shows the soft skills clusters and related characteristics according to Crawford et al.

As mentioned in the literature review section, Bertella identified important kinds of knowledge in food tourism in agricultural and/or fishery areas: local and scientific food knowledge, tourism knowledge, and local and global managerial and political knowledge. Many scholars (Horng and Tsai; Baum; Johanson et al.; Lee; Scarpato; Richards; Hjalager; Hall et al.; Santich) confirmed the importance of these competences, seen as essential in the perspective of regional branding and development of sustainable food tourism strategies.

The interview was divided into different sections, as in the following Table 3.

The interviews were recorded and transcribed, and content analysis based on theoretically derived codes was conducted.

Action research

Following an action research approach (Gilmore and Carson) the authors involved in different roles in the planning, organisation and training at the ISC, through their direct experience and conversations with the students and local stakeholders had the opportunity to collect data. A participant observation approach (Jorgensen) was applied, to note and interpret the physical and social context and the interactions among the participants.

Findings

The data collected showed that most of the students had little previous knowledge about the Fermo area and its local gastronomy and food tourism. Only those who had an educational background related to tourism management were more aware of these topics, mainly students from the Marche Region, who also had a broader knowledge of the area and the local gastronomy.

Table 2. Soft skills clusters and descriptive characteristics (elaboration from Crawford et al.)

Cluster	Descriptive characteristics	Relationship with other literature/frameworks
Communication skills	– Listen effectively – Communicate accurately and concisely – Effective oral communication – Communicate pleasantly and professionally – Effective written communication – Ask good questions – Communicate appropriately and professionally using social media	– Baum, 2002 – Johanson et al., 2010 – Ruhanen, 2006
Decision making	– Identify and analyse problems – Take effective and appropriate action – Realise the effect of decisions – Creative and innovative solutions – Transfer knowledge from one situation to another – Engage in lifelong learning – Think abstractly about problems	– García-Rosell, 2014 – European Union, 2006 – U.S. Department of Education
Self-management skills	– Efficient and effective work habits – Self-starting – Well-developed ethic, integrity and sense of loyalty – Sense of urgency to address and complete tasks – Work well under pressure – Adapt and apply appropriate technology – Dedication to continued professional development	– Australian Department of Education, 2002 – Bacigalupo et al., 2016

Teamwork skills	– Productive as a team-member – Positive and encouraging attitude – Punctual and meets deadlines – Maintains accountability to the team – Work with multiple approaches – Aware and sensitive to diversity – Share ideas to multiple audiences
Professionalism skills	– Effective relationships with customers, business and the public – Accept and apply critique and direction in the work place – Trustworthy with sensitive information – Understand the role and realistic career expectations – Deal effectively with ambiguity – Maintain appropriate décor and demeanour – Select appropriate mentor and acceptance of advice
Experiences	– Related work or internship experiences – Teamwork experiences – Leadership experiences – Project management experiences – Cross-disciplinary experiences – Community engagement experiences – International experiences
Leadership skills	– See the "big picture" and think strategically – Recognise when to lead and when to follow – Respect and acknowledge contribution from others – Recognise and deal constructively with conflict – Build professional relationships – Motivate and lead others – Recognise change is needed and lead the change effort

Table 3. Contents of the interview, developed on the basis of models in the literature (Bertella, 2010; Crawford et al. 2011)

SECTION ABOUT LOCAL FOOD & WINE CULTURE
1) Which was your preliminary knowledge about food & wine tourism and about the territory visited, before the ISC?
2) Do you think you learned something new during this experience? What?
3) How do you think this kind of experiences related to local food culture (meeting producers and entrepreneurs, attending cooking classes and tasting sessions, seminars about food production processes, history and traditions related to food, etc.), you had the opportunity to attend to during the ISC, helped you in developing some knowledge about the territory and local food traditions?
4) Do you think that this experience is useful for your future job in this context? Explain your answer?
SECTION ABOUT LOCAL MANAGERIAL AND POLITICAL KNOWLEDGE
5) During the ISC you met a lot of local public and private stakeholders and you had the opportunity to study specific case studies. Do you think it helped you in developing knowledge about socio-cultural aspects related to the territory and specifically about collaborative realities and networks?
6) Do you think that after this experience you would be able to work with these realities for local development related to food & wine tourism? Explain your answer.
SECTION ABOUT FOOD & WINE TOURISM KNOWLEDGE
7) Do you think that the seminars about food & wine tourism you had the opportunity to attend to helped you in developing knowledge and perspectives in conceiving tourism as an experience that aims to give value and promote a destination and its local resources? If yes, in your opinion which are the most useful aspects that can be useful for getting a job in this context?
SECTION ABOUT COMMUNICATION SKILLS
8) Do you think that the ISC experience contributed to the development of communication skills (listen effectively, communicate accurately, concisely and professionally, effective oral communication, communicate appropriately and professionally using social media) that can be useful for your future job, specifically in food & wine tourism context? If yes, how do you think it happened and which skills do you think you have gained?

SECTION ABOUT PROBLEM SOLVING/DECISION MAKING SKILLS

9) During the ISC, divided into groups, you had to work to solve a specific case study. In which way, this working method based on a specific problem related to a local reality helped you in developing skills like: identifying and analysing problems, elaborating decision processes, identifying creative and innovative solutions, applying decisions to reality? What did you learn?

Do you think that the knowledge you gained in this context could be adapted to another situation or to a similar case? Explain your answer.

SECTION ABOUT TEAMWORK/LEADERSHIP

10) Which role did you play inside your team during the ISC? While answering take into consideration these aspects: leadership, level of involvement and productivity as a team member, positive and encouraging behaviour, openness to sharing ideas, multiple working methods.

11) In which way did you interact with other group members belonging to different cultures?

SECTION ABOUT SELF-MANAGEMENT

12) The team had to provide a final presentation with an original proposal that you had to prepare in a short time. How did you face the fact of working under pressure?

SECTION ABOUT EXPERIENCE

13) How can an experience like the ISC (a group experience that is transdisciplinary and involves local communities) contribute to developing knowledge and skills useful to a future job in the food & wine tourism context?

Knowledge and soft skills acquired during the ISC experience

Respondents deemed that the ISC experience had helped them gain knowledge and develop soft skills through direct contact with the local context and dialogue with local stakeholders, as well as through the seminars and the experiential learning activities held. Some themes emerged from the interviews.

Understanding of the area

More generally, students affirmed that during the ISC they learned about local food & wine, local management and politics, and food tourism.

The most evident aspect was the acquisition of a general understanding of the area in terms of:
— in-depth knowledge about local food production and local, small food-related firms,
— awareness about the relationship between the land and food authenticity,
— the importance of considering food as a resource for local development (above all, after the 2016 earthquakes which hit the area),
— potential future work opportunities for students in the food tourism field in that area.

Two indicative statements were:

"I had the opportunity to meet large and small local businesses, to learn first-hand about their potential, their weaknesses and their unique features".

"The ISC allowed me to explore the untouched beauty of the Fermo territory and to taste the local food, and experience the richness of the Mediterranean Diet."

By achieving a more complete understanding of the area, participants could understand the specific context, analyse problems and needs, gain awareness about the objectives of the Piceno Laboratory on Mediterranean Diet, get closer to local businesses and understand how to plan promotional initiatives to brand them. The respondents could observe the commitment of local producers to guarantee quality products, see their passion for their jobs, and recognise the importance of local food for tourism.

The seminars on food tourism held by professors from different countries and the experiential learning activities (meetings with producers and entrepreneurs, cooking classes and tasting sessions, seminars about food production processes, history and traditions related to food, etc.), supported students in improving their

knowledge of the local context. However, they need to pursue further knowledge about the fundamentals of food tourism, to be better equipped to promote local development through food tourism.

The dialogue with local stakeholders as a means for knowledge acquisition

Most respondents said they developed their knowledge about the territory and local food traditions through direct connection with local stakeholders. Through meetings and farm visits, they gained awareness of the context in which people work, the issues they face, the way they try to market themselves, and the processes implemented to create quality products, whether they were small family-owned firms or SMEs that also worked as "ambassadors" of area. One of the respondents said that he understood why local people were passionate about and proud of their traditions and felt they should express these sentiments in their promotional activities.

Students also highlighted how this experience supported them in acquiring knowledge about the local socio-cultural structure and networking:

> It was a great experience to meet the stakeholders; it helped us understand how the tourism industry works, especially throughout the territory. It gave me a clear picture of the practical network of the significant stakeholders.

Experiential learning as a means for knowledge acquisition

The acquisition of knowledge about the territory and local food traditions was also related to the learning methods proposed during the ISC, such as experiential learning and problem-based learning, including field visits, cooking lessons, workshops, and teamwork activities.

Seminars were helpful, but experiential learning activities appeared to be more effective in the students' learning, as they provided first-hand experiences involving all the participants' senses, as indicated in these observations:

> [...] talking to producers, taking part in cooking classes and tasting the delicious local cuisine got me to live Le Marche region as I could have never done otherwise...;

> Apparently, the best way to learn something is to experience it, see, touch and taste it. It's a much more effective way of learning than reading theory, so ISC gave me a very profound and practical insight about local food and wine culture and cooking and sharing food traditions.

Seminars as a means for learning about food tourism and developing soft skills

Respondents indicated that the seminars held by international professors helped them gain technical knowledge about place branding and food tourism. Just like a puzzle, some said, this kind of activity provided all the pieces to have a complete overview of the food tourism topic related to the territory investigated. In their opinion, the main competition was a useful way to build upon the theoretical foundation through a hands-on approach; they also valued the aspect of working in teams to develop a real case study for the local area. Marketing, the use of social media as a promotional tool, and gastronomy as a brand and a tourism driver were considered the most interesting topics.

> Yes, the Place Branding, Cultural Heritage Management courses and the International Seminars gave me a quite comprehensive overview of what a tourist product should be. It was certainly useful because it helped me gain a new perspective and made me learn about innovative and unusual approaches, mainly presented during the seminars that week.

Students felt that they improved their ability to listen as well as their skills in public speaking during the seminars. Some of them appreciated the technical knowledge gained and the food tourism-related terminology learned throughout the event, which they could later use in their final presentations. The seminar about the use of social media for promotional aims was particularly appreciated. It helped hone the participants' communication skills in terms of effective and professional communication.

Networking as a means for soft skills acquisition

During the week, the students had the opportunity for networking with local stakeholders, their team members, the other participants, and their professors. They perceived to have gained several soft skills, especially through the dialogue with local stakeholders and through teamwork. An overview of these skills is provided in Table 4.

Table 4. The role of networking for soft-skills development

NETWORKING WITH LOCAL STAKEHOLDERS		NETWORKING THROUGH TEAMWORKING	
Perceived skill acquisition		Perceived skill acquisition	
	Related quotes		Related quotes
Communication skills		**Problem analysis/ Decision-making process**	
interpersonal communication	"Sure, it gave us a practical insight into the real life and problems faced by entrepreneurs; how the situation could be improved. It helped us understand the roots of those problems and gain an overall impression of the SMEs' activity in the region, their advantages and what they lack."	brain-storming	"It's an adventure: you have to match the need to find something meaningful for your final work and meet the deadline at the same time. Brain-storming happens very fast."
effective listening		sharing of ideas	
technical language development		problem-solving	
communication in English	"We learned the inner workings of the private and public stakeholders that helped us analyse them in the most practical way. It can absolutely be adapted to a similar territory; ideas and situations were learned, and the positive points can definitely be shared and developed."	collaborative and supportive approach	"It allows you to have direct contact with reality. It opens your mind because it gives you the opportunity to work in a multicultural context with people who have different backgrounds and compare your approach to the same experience with that of others. It is an opportunity to work on real case studies with a multidisciplinary knowledge you need to apply to the context. It's useful, from a future career point of view, thanks to the contact with several stakeholders and to the international and multicultural context in which participants are involved."
public speaking		work in a multicultural context	
Problem-solving/ Decision-making skills		**Working under pressure and to meet a deadline**	
analysis of real issues affecting the territory		Need for more time to work on the assignment	
proposal of suitable solutions			

Discussion

The findings of this study suggest that educational tourism experiences based on experiential learning and problem-based learning approaches (Dewey; Boydell; Kolb; Vygotsky; Paris) enable students to gain employability skills, business knowledge and work experience (Shah et al.). During the ISC, students learned about critical approaches and the reflexibility useful in the tourism industry, through the application of problem-based learning (García-Rosell). In line with Stone and Petrick, the ISC can be therefore defined as a short study-abroad programme as well as an educational touristic experience. Students had opportunities for personal and professional growth through travel, experience, learning about the gastronomic culture of the Fermo area and its efforts to promote food tourism, and also enhanced their fluency in English, the official language of the event.

With regard to employability, students perceived to have gained:

1. Understanding of the territory: the dialogue with local stakeholders and the experiential learning activities offered students an overview of the socio-cultural and economic processes regulating the territory. Local networks embody local managerial and political knowledge and play a role in providing quality and coherence to the services and products offered (Bertella). These experiences may help students to start working at a local level for local development and place branding by identifying challenges and needs and by finding innovative and feasible solutions. However, they also acknowledged they might need to improve their knowledge about place branding and food tourism management.

2. Practical knowledge about local food, place branding and food tourism: according to Bertella, food-related knowledge is one of the most important assets to promote and give value to a destination, and food tourism is a key element for destination development, local promotion and the valorisation of local resources. Technical knowledge about place branding and food tourism is essential to regional development in the food and tourism area, according to Hall et al. One of the main characteristics of the ISC is to link theoretical knowledge about place branding and food tourism to the practical experience gained through the experiential learning activities proposed. Participants gained practical insight into the field by attending seminars, visiting farms, sharing information with local stakeholders, and taking part in cooking classes and tasting sessions. This was also highlighted by the students during the conversations with the authors. During the presentations of the final projects on the last day of the competition, the authors observed that the teams of students applied the knowledge acquired to a suitable proposal for the firms involved through the use of the tools provided (business model canvas).

3. Soft skills for employability. Students gave particular importance to the following soft skills:

a) communication skills; the students noted that during the ISC experience, they improved their skills in listening and speaking effectively, formulating good questions and communicating appropriately and professionally using social media. In particular, all week the students communicated and interacted with people to whom they may not usually relate, such as students and professors from other countries, local farmers and business people, and government functionaries, for example. Similarly, the teams presented their final project to a heterogeneous audience.

b) problem-solving and decision-making skills: the dialogue with local stakeholders and the brainstorming with the other members of the team helped the students develop some of the abilities involved in decision-making (Crawford), namely, identifying and analysing problems; transferring knowledge from one situation to another; proposing creative and innovative solutions; taking effective and appropriate action; and assessing the effect of a solution. The multicultural context of the mixed teams contributed to the development of several points of view useful for interpreting different situations and increasing the shared knowledge. Furthermore, all respondents said that it was possible to adapt the solutions they found to other contexts by applying several tools presented during the ISC. The problem-based learning approach showed them specific issues affecting the Fermo area. Rural areas often share similar problems and need similar solutions, which nonetheless need to be adjusted to each case.

c) self-management and teamwork skills: students noted that working well under pressure (self-management) was a challenge but also a limitation and felt they would have benefitted from more time to do the final project (Crawford et al.). Self-management also has to do with efficient and effective work habits and a sense of urgency to complete tasks. These aspects had to be extended to the whole team, as the competition was based on teamwork. Regarding the characteristics of teamwork skills (Crawford et al.), students particularly highlighted their positive and encouraging attitudes and their productive approaches as well as the sensitivity to diversity, as the teams were multicultural.

Even if the respondents did not explicitly name them, some other skills related to the experience (Crawford et al.) emerged from the interviews: project management experiences; cross-disciplinary experiences; community engagement experiences; international experiences. Similarly, students highlighted some of the leadership and professionalism skills outlined by the author. During the teamwork activity they practised skills related to respect for others and acknowledgement of their contributions, as well as dealing constructively with conflicts, a key aspect of leadership. The authors present at the event observed that student networking with local stakeholders and professors led to effective relationships with "customers, business and the public." Similarly, students practised behaviour appropriate

to the settings, accepted advice, gained greater understanding of their own role and refined their career expectations to be more realistic, all of which are professionalism skills.

While the ISC seems to have contributed to the students' knowledge and soft skills development, the findings showed the need for follow-up activities that can bring together local stakeholders and students in order to expand the knowledge and experience gained during the ISC.

Conclusions

This study explored how and to what extent food-related educational events may contribute to providing students with the knowledge, expertise and soft skills needed for employability in the food tourism careers. It focused on student experiences at the week-long ISC event, arranged by the University of Macerata (Italy), an educational programme that facilitated the co-creation of food tourism knowledge by bringing together local stakeholders and students. Students worked at a local level to accomplish their competition assignment and learn about the reality of the Fermo area, gaining an understanding of the context in which they would have to intervene. They perceived to have developed useful skills and knowledge for employability through their work on real cases in a multicultural context. Locals benefitted from the students' competition projects, which offered creative contributions for promotional activities and place branding that could be implemented to promote tourism in the area.

Having participated in all the planned activities, the students felt they had gained a general understanding of the territory and practical knowledge about place branding and food tourism; in addition, they thought they had improved their soft skills in communication, problem-solving and decision-making, all of which are useful for enhancing their employability. They valued the opportunity to exchange knowledge, share ideas and work in a multicultural environment. All these learning outcomes can be adapted to other situations and can be useful in the workplace.

On the basis of student questionnaires and interviews, as well as conversations with local stakeholders, it emerged that the ISC event offers students a good opportunity to gain sector-related knowledge and skills. More in general, this kind of event linking academics and local stakeholders, education and tourism, and experiential and formal learning has potential for both students and people working for local development.

Even so, a need was noted for further follow-up events, to provide more experience and theoretical knowledge. More opportunities could be created to work at the local level, strengthening the connection between students and local

stakeholders, perhaps through internships and students-led initiatives at the local level.

Some limitations also emerged from the study. First, the interviews were conducted only with 13 University of Macerata students of the 2017 ISC. Further research including the students from the other universities abroad could provide a broader perspective. Moreover, while the authors gleaned interesting input from the stakeholders during informal conversations, future, more structured work to encompass their perspective could prove useful. Finally, further research could be conducted to assess what or how much the local stakeholders learned, and whether the ISC provides a beneficial setting for knowledge exchange that can foster successful place branding and enhance the development of local food tourism.

Conflict of interest statement

Even though three of the authors work for one of the institutions that manages the event presented in this case study (one University of Macerata professors and two UNIMC doctoral students), they declare that there is no conflict of interest.

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The Development of Wine Tourism in Atypical Wine Regions: the Challenge of Multistakeholder Cooperation?

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Abstract

In the last decades, worldwide wine tourism has been steadily progressing and has grown substantially as a research object. Several academic papers treat strategies for development and management of wine tourism. This paper aims to describe recent trends in wine tourism, and more specifically, the development of wine tourism in atypical wine regions. Therefore, it synthesises the key findings from the second UNWTO wine tourism conference.
Furthermore, it argues that the successful development of wine tourism is not an exact science. Emerging wine destinations often have many difficulties to overcome. Using literature review and case studies, it explores the possibilities to create successful destinations and highlights the importance of co-operation, co-creation within networks and creativity to create value for wine tourism destinations.

Keywords: wine tourism, atypical wine regions, UNWTO wine tourism conference

Wine tourism as a multi-stakeholder industry

Wine tourism can be considered as a form of niche tourism that attracts a specific type of tourist that expects particular types of activities, focused on unique experiences, elaborated by a number of stakeholders that are interlinked with each other. According to Hall et al., wine tourism can be defined as "visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine are the prime motivating factors for visitors" (197). Very often wine tourism is a symbiotic relationship between two different industries; on the one hand, the wine industry based on agriculture and manufacturing, and on the other tourism, a service industry. Several studies have explored the cooperation between both industries.

According to Hall et al., there is an integration taking place both horizontally (within each industry) and vertically (between the industries). An example of this type of integration is the case of the Niagara wine tourism cluster, whereby Telfer notices interactions between both industries, but also with other organisations (e.g. accommodation), other clusters (agriculture and food cluster), governmental institutions and research bodies. Getz suggests that wine tourism can be perceived from three different perspectives: that of producers, that of destinations or "the territory" and that of tourists. The producers are concerned about educating their clients and selling their wine, the destinations see wine tourism industry as a strategy for the creation of visitor attractions, while the visitors are interested in visiting wine destinations.

The supplier side

Envisaging wine tourism from the supplier side, one can notice that wine producers in atypical wine tourism regions are often SME's and family businesses with a rather little capacity of job creation compared to producers in larger, well-established wine regions. Therefore, cooperation at the supplier side of wine tourism is of utmost importance for emerging atypical wine tourism destinations. As stated by Getz, strong, favourable, and unique destination associations are crucial for the development of wine tourism, particularly in rural areas.

There is a multitude of motivations to develop wine tourism. According to Dubrule, the two most important motivations are, on one hand, to increase the direct sales volume of the wine and on the other to increase the number of visitors in the wine regions. Dubrule also mentions that the wine tourism business is perceived to be a steady growing economic sector in Europe: there is a demand in society for quality products, for "terroirs," for the "typical" landscapes that are connected with a certain way of quality living, where one can practice leisure activities and participate in cultural events that are linked to these places.

In some parts of the world, wine tourism is a strongly established economy, e.g. in well-known wine regions of France such as Bordeaux, Burgundy and the Champagne region. In other regions wine tourism is still in an embryonic stage as is the case in Belgium, for example. This illustrates that the level of development in wine tourism varies. So, there is a distinction to be made between highly developed and less developed wine regions or countries (Hall).

The territory

The concept of "terroir," derived from the word *terre* (land) is used in the wine industry to depict the unique characteristics of a place that influence and determine the wine that is made from the grapes grown in that place (McCarthy). Especially in France, the concept is used by winemakers to identify the particularities of wines from different vineyards. Nowadays, tourists search for "authentic experiences" linked to the terroir. Some scholars (Marlowe and Baumann) even refer to "terroir tourism."

Getz and Brown state that wine tourism can be regarded as a marketing opportunity for wine producers to educate and to sell their products directly to the consumers; for destinations it can be seen as a way to elaborate and market wine-related attractions and imagery, while for tourists it can be seen as a form of consumer behaviour. In many regions, wine tourism is considered as a tool for sustainable development, in particular, the rural areas, in which it is situated and which have previously relied on agriculture, extraction and manufacturing sectors. It has a significant role as a job creator. Moreover, the addition of value for the wine sector and the tourism sector plays a major role for destinations that are highly valued both by tourists and by quality wineries (Peris-Ortiz et al.).

According to Valduga and Valduga, tourism can significantly change a wine region as is the case in Vale dos Vinhedos in Brazil, where since the increase in tourism arrivals from the mid-1990s on, the wine tourism offer has expanded, the rural activities diversified, and the landscape dramatically changed. The region was able to consolidate as a tourist destination, and the wines became more important in the national market.

The wine tourist

On the demand side, the wine tourist is the most important stakeholder in the wine tourism system. UNWTO perceives tourism as a demand-driven sector. Therefore, the motivational factors that lead to a wine trip should be taken into account and be incorporated into the tourism product.

During the wine 2nd UNWTO Global Conference on Wine Tourism,[1] three wine tourist profiles were explored: the wine expert, the wine lover and the occasional wine tourist. The first has a broad knowledge of wines and visits the winery to buy, to taste and to learn about wine. The second type likes wine, has some experience in tastings and is eager to know more about the wine, whereas the third has a moderate interest in wine and wants to explore the region for non-wine reasons. The wine lovers and the occasional wine tourists represent the largest part of the wine tourism segment.

Experts participating in the conference agreed that for consumers each wine has unique features that differentiate it from other wines from other regions. This point of view offers new opportunities for the creation of new wine tourism destinations, as it suggests that wines that are perceived to be of high quality can be produced everywhere.

The creation of wine tourism experiences

The wine tourists are not different from other tourists in that they search for unique, authentic experiences. According to the experience economy model by Pine and Gilmore, the key factors to create these experiences are the 4 E's (education, aesthetics, entertainment and escapism). These key factors are applied by Quadri-Felittito to explain wine tourism as an experience. Following wine tourism activities are listed as examples by Quadri-Felitti:

Key factors of experience	Activities
Education	– Wine tastings and seminars – Culinary-wine pairing events – Home wine-making seminars – Cooking and craft-making classes
Esthetics	– Consuming the 'wine-scape' – Enjoy unique lodgings and wines – Driving along scenic routes (along vineyards) – Art and craft fairs at the vineyards
Entertainment	– Cellar concerts, music in the vineyard – Wine blending demonstration – Farm and food demonstration
Escapist	– Vineyards hikes, cycling tours – Hot air ballooning over vineyards – Vineyard tours by horse and carriage

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[1] The 2nd UNWTO Global Conference on Wine Tourism was held on 29–30 September, 2017 in Mendoza, Argentina.

Pine and Gilmore also suggest that an experience should be successfully themed before it can be staged. The theming involves scripting a story that relies upon the participation of the guests. In order to be successful, the creation of a theme should enhance a sense of place for the visitors.

Cooperation is a critical factor for success in the wine tourism sector when it comes to organising such experiences. The cooperation can be arranged at the intra-sectoral or inter-sectoral level. In the former case, there is cooperation within the wine sector or within the tourism sector e.g. wineries promoting their wines together or accommodation suppliers that sell their units through a common booking platform. In the latter case, there is cooperation between different sectors: the wine sector and the tourism sector, e.g. wine products are sold at tourism information centres, wine routes are elaborated along local bars and restaurants offering regional wines.

If a region or a terroir desires to expand its wine tourism activities, as stated by Croce and Perri, it is of utmost importance that it first identifies all its wine-related attractions. Furthermore, it should link these attractions according to a certain theme. Even if this is a rather complex exercise, once such a theme is defined, the terroir can foster its own identity and hence distinguish itself from other destinations, and thus acquire a stronger sense of place. Croce and Perri also argue that it is crucial for public and private stakeholders to cooperate in this process in order to be successful. Only then the region can bring together and organise all elements that define the region.

Guedes and Joukes describe the wine tourism in the Douro region as a catalyst for the region's economy as they research the relationship between the hotel boats and the wineries along the Douro river (Peris-Ortiz et al.). There, wine tourism is combined with river cruise tourism. The authors notice that the online promotion for the river cruises by the cruise companies is attracting an increasing number of international tourists to the wineries and the villages along the river.

The creation of wine routes is by many authors regarded as a favourable means by which many stakeholders on a regional level can be connected to co-create together regional wine experiences. They provide an excellent means to successfully connect a winery with the local community as well as with other wineries. A wine route can be defined as a tourist route that connects several wine estates and wineries in a given area, characterised by natural attractions, man-made attractions (wineries, wine estates, vineyards, and roads) and markers (signposts) to direct the tourist to the wine enterprises along the route (Vlachvei and Ourania). The combination of natural, cultural and social features that express the distinctive character of each wine route is usually noticeable. When moving between the wine routes, the tourist recognizes and values the difference in landscape and winescape (Hall). Sometimes tourists are also actively involved in the wine-making process; they might, for example, be invited by the wine producer to help them with the picking of the grapes

and this can be seen as a form of co-creation. Both forms, cooperation and co-creation are key factors that are also applied in the UNWTO Prototype Methodology for the development of wine tourism destinations worldwide that was presented during the 2nd UNWTO Global Conference on Wine Tourism (UNWTO).

The UNWTO Prototype Methodology for the development of wine tourism

The UNWTO Affiliate Members Programme[2] has developed a Prototype Methodology as a "framework for wine tourism development through public and private sector cooperation. It can act as a plan as to how to create innovative tourism projects in such a way that they are beneficial to destinations, businesses and institutions. It requires compliance with the UNWTO Global Code of Ethics for Tourism and is aimed to maximise the socio-economic contribution of tourism while at the same time minimising its potential negative impacts" (UNWTO).

The UNWTO Prototype Methodology was first applied in 2015 in Spain as an initiative of the Leading Brands of Spain Forum. They proposed the development of a wine tourism prototype with five leading Spanish wineries. At the same time, the UNWTO Gastronomy network identified winery tourism as a great potential asset for destinations endowed with a wine-centred culture and heritage. In the first place, the wineries were seen as the lead stakeholders to produce experiences based on wine but also to offer a larger range of related experiences to suit any demand.

First, an assessment of the tourism potential of the wineries and their region was analysed. Then, a parallel analysis was conducted in other countries and also in potential generating markets for wine tourism in Spain. Furthermore, opinion leaders and scholars in wine tourism were involved in the process. Both branding and product development were investigated.

According to the scholars and the opinion leaders, the central theme of the place should be interpreted by the winery and reflected in the product. "The Joyful Journey" brand that was designed suggests a large range of experiences for the traveller that fit in the following themes: more time (experiences related to nature, history and culture), happier (gastronomy, local lifestyle, popular culture) and younger (activities that generate vitality: sports, well-being, care).

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2 The World Tourism Organization (UNWTO), a specialized agency of the United Nations, advocates forms of tourism that contribute to economic growth, inclusive development and social, economic and environmental sustainability. UNWTO brings public and private initiatives together through its Affiliate Members Programme, which develops policies and instruments to encourage competitive and sustainable development through public-private partnerships.

As a conclusion, it was stated that, if well-planned, wine tourism can become a powerful tool to enhance and preserve the cultural heritage of a region. To achieve this, it must connect the product to its surroundings by offering a complete experience to its visitors, beyond the visits to wineries and wine tasting: e.g. by visits to nearby museums, outdoor activities for non wine-drinking visitors, wine-related events. Furthermore, each winery is exploited as the tourism interpretation centre of its surroundings and can be imagined as a 'node' in a network of wineries, so travellers can tour from one winery to another. Applying Quadri-Felliti's model of the creation of experiences for terroir tourism to the UNWTO prototype methodology, it could be suggested that the UNWTO prototype follows similar reasoning for the development of valuable wine tourism experiences.

Nowadays, storytelling is a popular tool for the production of tourism experiences and is particularly relevant to wine tourism, as travellers want to feel immersed in the culture of winemaking to discover the people and the community behind the wine product. Wine destinations that answer this need by providing authentic, unique and emotional experiences will be the most successful according to experts of UNWTO (UNWTO). The stories told should be clearly articulated and consistent with the traveller's perceived image of the region and the country. Therefore, wine destinations should put people forward in their narrative. This offers an opportunity for emerging wineries and destinations to compete with those well-established ones (UNWTO). This way, the UNWTO prototype methodology offers a useful tool to identify the symbiotic relationship of the wineries and their settings, such as their impacts on local and regional history and culture as well as on the socio-economic situation (UNWTO). This tool can be adapted to and replicated in different regions, allowing for destinations to be promoted through their wine context by accentuating other aspects such as culture, history and tradition.

Challenges

Developers of wine tourism sometimes have to face specific challenges: they might encounter difficulties concerning the political requirements that are associated with opening a business in the region, whereby they sometimes lack financial support. This revealed that the benefits of developing wine tourism should be clearly communicated to governments at different levels. Not only financial support can be missing; in some cases, a poorly developed transportation network might discourage travellers from visiting the destination.

Dubrule also notices in his research that there might be some barriers that wine tourism areas are confronted with:

— the wine business and the tourism business are rather unknown to each other
— in most of the cases, the quality of the hospitality as well as the tourism knowledge of the winemaker could be optimised
— the lack of commercial accommodation in the vineyards
— a problem of accessibility due to a lack of signalisation towards the vineyards, and
— a variable quality control system according to the sites.

Other types of challenges are linked to technical knowledge, natural resources and required investments for the production of wine. Furthermore, it is often quite a task to achieve coordinated public-private collaboration.

Case studies

In order to illustrate the methodologies and challenges mentioned above, two case studies are explored more thoroughly: the case of Belgian Limburg and the case Mendoza. Both cases are emerging wine tourism destinations in atypical wine regions. However, they are situated in different geographical contexts and are in different stages of wine tourism development.

The case of Belgian Limburg is presented first as an emerging atypical wine region. Secondly, the focus will be on Mendoza, Argentina that has already successfully applied the UNWTO Prototype Methodology for the development of wine tourism.

Case study: the development of wine tourism in Belgian Limburg

The province of Belgian Limburg is situated in the northeastern part of Belgium, close to the border with the Netherlands. This province has known a period of economic crises as it suffered from the closing of the coal mines in the late 1990s and of some major international companies who moved their activities to other countries during the last decade. Furthermore, the region also saw a significant part of its fruit export to Russia being blocked by a trade embargo.

In this economic context, tourism was considered as a way of tackling the crises and getting the economy back on track. Tourism was defined as one of the main axes of the SALK project (a Strategic Action Plan for the Belgian province of Limburg). Nowadays, tourism is one of the main economic activities in this region with 34.781 persons employed in the leisure economy (Provincie Limburg). The same SALK project also provided a financial input for the development of wine tourism in the area as it is one of the most important wine regions in Belgium in quantity

and in quality (Groot Zevert et al.). However, in size it is still quite moderate: in total Belgian vineyards count approximately 200 hectares which is the size of an average French domain (Groot Zevert et al.).

According to the statistics of the average tourism expenditure in the province of Limburg in 2017, the average tourism expenditure per person in Limburg in 2017 was €95 per night (Provincie Limburg). The subregions where the average impact per person per night is high are first the Limburgse Kempen (€1768 per person per night), a region with thriving holiday resorts offering also attracting business tourism, secondly Hasselt, the capital of the province (€145 per person per night) and, in the third position, the subregion of Haspengouw (€1351 per person per night), the second-largest fruit production region in Western Europe (Provincie Limburg). Most of the vineyards of Limburg are situated in this subregion (Groot Zevert et al.). Here, most accommodation is provided by bed-and-breakfasts that are often located in former farmhouses or castle farms, but also more innovative accommodation facilities, e.g. treetents, are offered.

A strong tourism product in the province of Belgian Limburg is the bike road node network, a bike road system, based on former wayfinding techniques in the coalmines. This numbered system of bike road nodes is one of the main tourist attractions in the province, as it attracts yearly about 2 million tourists. It has existed for nearly 25 years and has created a vast network of stakeholders that are connected to deliver a wide range of services linked to biking tourism: from accommodation with places to store bikes and local cafes that sell repair sets, to an application that outlines the routes according to the tourist's wishes.

Some parts of these routes are designed in a creative way to deliver memorable experiences for biking tourists. They are aimed to appeal to all senses, e.g. biking through water, biking in the trees, biking underground, which reflects also the aesthetical and the escapist aspects of the 4 E-model by Pine and Gilmore.

Compared to this form of tourism, wine tourism is still in an embryonic stage in the Belgian Province of Limburg, although wine has been cultivated in this area since the 11th century. Due to climatic and other reasons, wine-producing had been abolished from the 16th century on but has known a revival from the 1990s on, when the first steps towards wine tourism were taken. Some wineries have already been active since the 1990s and have elaborated a range of tourism activities around their vineyard, but mostly their offer is limited to the traditional wine tastings and visits to the vineyards and caves.

To enhance the attractiveness of Belgian Limburg as a wine tourism region, it is thought that it is necessary to foster an own local wine identity and to connect the tourist attractions that are designed around the wine (Groot Zevert et al.). Nowadays, biking and Vespa tours are organised along the vineyards, connecting several tourism spots and artistic landmarks in the area. Breakfasts and lunches can take place in some vineyards.

Another inspiring example of how this is done can be found in Mendoza, Argentina, where wine tourism is developed through the Prototype Methodology for Development of wine tourism constructed by UNWTO[3] (UNWTO).

Case Mendoza

The Mendoza region is situated at the backdrop of the Argentinian Andes and known as the centre of Argentine winemaking, even though its natural conditions were not very favourable initially. Thanks to an ingenious system of water supply imported by early Spanish immigrants and methods of wine-producing introduced by Italian migrants in the 19th century into this desert region, vines can thrive there. Nowadays, wine production accounts for 70% of the national wine production and about 85% of the bottled wine sales. Its identity is firmly connected to wine and it offers visitors the opportunity to visit a variety of wine tourism projects, linking both the public and private stakeholders of the tourism and wine sectors.

Wine tourism development in Mendoza has taken place using the methodology of the Prototype for Wine Tourism Development of the UNWTO (UNWTO). This methodology is focused on three main questions. First, the differentiation from similar products is explored, then an innovative approach is aimed at by connecting persons that are not used to working together and thirdly, it is oriented towards value creation. For the latter, as Kotler states, supply and meaning is the future of value proposition in marketing (Kotler).

As stated above, the concept was first launched and tested in Spain and later also implemented to other destinations. It is aimed at the creation of an unforgettable, memorable and happy journey: the tourism product is so innovative that tourists discover the wine region in an entirely new way and Mendoza can improve the competitiveness of the region.

One of the features of the methodology was also the design of a logo/brand with the promising name "Joyful Journey," which relates to the experiences offered to the tourists: "live longer, be happier and stay younger" (UNWTO). The "vineyarding in Mendoza-in the Clouds of Malbec" connects all components of the wine value chain, aiming at "building the ideal tourism" product. Wine experiences are based on the agricultural variety of products, of landscapes and the rich handicraft heritage of the area. All created products contribute to sustainable development

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3 The Prototype Methodology provides a roadmap for such processes based on initial research and analysis. It can incorporate a governance model, a catalogue of tourism products to be developed, strategies for market positioning and messaging and a brand identity. The Prototype Methodology entails compliance with the UNWTO Global Code of Ethics for Tourism so as to maximise the socio-economic contribution of tourism while at the same time minimizing its potential negative impacts (UNWTO).

in the region. The products that are designed are often a combination of several different types of experiences, e.g. tango and wine, movie and wine, sports (cycling, golf, marathon) in or through the vineyards or even spa tourism and wine (whereby products, derived from grapes are offered). Local governments build routes, linking wineries with hotels and restaurants, taking care of accessibility, signalisation and education of the personnel and facilitate information exchanges between the wine producers.

Although both destinations differ in terms of wine tourism development, some similarities can be encountered:

Similarities	Differences
Both regions enjoy a favourable climate for wine tourism.	The geographical context and the landscape are rather different: at one hand a desert area close to the Andes mountains in Mendoza and at the other hand: a plateau region of low, rolling hills and rather fertile soil in Haspengouw in Belgian Limburg.
Both regions developed wine tourism in an atypical wine region.	Stage of wine tourism development: both destinations seem to be in the development phase according to the Tourism Area Life Cycle of Butler (Butler). However, Belgian Limburg is still at the beginning of this development phase (close to the involvement phase), whereas Mendoza is already evolving towards the consolidation phase. Thanks to the implementation of the UNWTO Wine tourism prototype, Mendoza has already built a quite strong reputation as a wine tourism destination on an international scale, whereas Belgian Limburg is known as a wine tourism destination on a national level and in the surrounding countries. Furthermore, Mendoza offers already a wide range of wine tourism products. Belgian Limburg has only taken some small steps in this direction.
Both cases show that wine tourism is a multi-stakeholder business.	Whereas the wine tourism stakeholder network in Mendoza seems to be already well established (estates, bodegas, restaurants, markets and tour operators work together to offer an extended range of wine tourism products, e.g. wine and wellness, wine and movies at the vineyards), Belgian Limburg still needs to expand its wine tourism network to carry on the wine tourism development.

Conclusion/Lessons learned

The wine tourism sector represents a promising niche tourism market that offers a large set of opportunities to diversify the tourism offer. The main lessons learned for wine tourism developers are situated at multiple levels and are different for each stakeholder in the process of wine tourism. Designing a wine tourism product can represent quite a challenge. However, a strong connection to its environment through the integration of natural and cultural elements such as gastronomy or art, can be the key to success.

The combination of the above-mentioned elements with efficient management and a well-organized communication strategy will generate authentic and innovative experiences that will fascinate and inspire any traveller. For tourism managers, the main role is to bring together the different actors in a larger network of cooperation based on partnership and cooperation. This is intended to involve the local communities and to support the SME's in the region.

The cases shown above indicate that well-elaborated wine tourism can become a powerful tool to familiarize the traveller with the richness of the terroir, and then subsequently becoming a powerful catalyst for socio-economic development and the upgrading of the cultural heritage of a tourism destination.

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Images

1. The landscape of Mendoza

Source: Vos, K.

2. Wine and movie (Mendoza)

Source: Vos, K.

3. The wine-castle of Genoels-Elderen (Belgian Limburg) – AOC Haspengouw

Source: https://creativecommons.org/licenses/by-sa/3.0/

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1. Tree tents in Borgloon

Source: Budenaerts, G. (https://www.panoramio.com/photo/79476420)

2. 'Reading between the lines' – artwork

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Archiving and Re-using of Qualitative Data as a Path to Development of Public Administration Research

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Abstract

In response to the assumptions of new public management models and public or good governance, practical aspects of research in the area of public administration and the development possibilities of qualitative research methods are presented in the article. Due to the fact that qualitative research has become increasingly popular in the above disciplines, data archiving and transparency is discussed (Moravcsik), (Yom et al.) and guidelines and principles are established (American Political Science Association). However, there is a lot of controversy among scholars (Monroe), and some examples are missing. This paper presents the challenge of 'openness' in the empirical activities (or empirical practice) of researchers. Its purpose is to present the archiving data potential from in-depth interviews on the example of a small set of qualitative data from research in the field of public administration. Firstly, the basic assumptions of new models of functioning of public administration and related consequences for researchers are described. In the second part, the challenges related to openness in contemporary public administration models are briefly mentioned. Next, the method of creating an archive from existing data, individual stages, documents, and data is outlined; it is based on the author's best practice on Qualidata (American Political Science Association; Van den Eynden et al.) and DA-RT principles.[1] The summary includes examples of probable opportunities and challenges related to usage of data archiving for the research in public administration and political science development.

Keywords: Public Administration (PA), qualitative research, qualitative data, (IDI) In-depth interviewing, new public management (NPM), qualitative data archive

Joanna Gajda

New models of public administration and the collection of qualitative data[1]

Changes in public administration, from the model of *Classical Public Administration* (Weber classical theory of bureaucracy) through *New Public Management* to *Public Cooperation* (Good Public Governance) bring not only challenges to the administration staff but also researchers operating within this area. One of the principles of the new public management according to Kulesza and Sześciło is "institutional development management" (Kulesza and Sześciło). It imposes an obligation on the entire first sector of the economy and the people working to continually learn, improve and monitor effects of activities with a focus on economic efficiency, whose rules (management through results, performance-based budgets, citizen as a client) are related. However, the activities of the administration can not only be effective but are to serve public tasks; the employees are to be oriented towards the fulfilment of citizens' needs. Therefore, tension occurs between economic efficiency and social responsibility. For administration employees the model of co-management is even more challenging, in which autonomous, competent, learning, committed individuals, i.e. people working in the administration have the opportunity or even the need to enter into partner relations with citizens (Mazur and Olejniczak). In addition, a clerk as an individual is to be focused on the quality of customer service. What is more, training documents for administrative employees published by the Chancellery of the Prime Minister[2] contain an extensive list of required competences. Therefore, the expectations towards officials are high. In addition, administration staff is no longer to be regarded as a machine working to meet people's needs. The quality of customer service is examined by developing standards, indicators, procedures and methods.

For researchers active in this area processes, results, decisions, policies, activities, etc., are interesting specifically the various aspects of performing tasks and mechanical actions. However, if new models of administration are to be examined, the process cannot be limited to the inquiry of the officials about the stages of investment implementation. It is worth mentioning that how respondents are perceived influences what is studied and how it is inferred. There is a risk that when officials are involved in the research, the subjectivity is not reflected as models of new public management (NPM) and co-management would have it. Respondents are treated rather as an element of the bureaucratic machine. Co-management is

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[1] Qualidata is one of the examples of system for collecting data in qualitative research (*Main Web*). More about archives: Gajda; Filipkowski; Parry and Mauthner; Harrison; DA-RT – Data Access and Research Transparency.

[2] Among others The Chancellery of the Polish Prime Minister. Final report. Guidelines for implementing customer satisfaction management standards in government administration offices, Warsaw 2012, https://dsc.kprm.gov.pl/sites/default/files/pliki/zal._3.pdf [10.08.2018].

the ability of the state to serve its citizens and to be open to them: it is the quality of services and communication that is taken into account. Therefore, attention can be focused on the study of service providers – their thoughts and opinions (of officials and managers) and the challenges they face while fulfilling their duties. Consequently, not only the quantitative aspect of administration activities can be studied by asking: how many?, how much?, etc. but also the qualitative aspect can be researched by answering the questions: why? how?, etc.

While reviewing the literature on the subject, it can be pointed out that in administration as an area both quantitative and qualitative research and mixed methods can be implemented. On the one hand, in the period 2001–2010, the qualitative approach prevailed: "Results show that the qualitative methods are still predominant compared to quantitative methods (56% versus 44%), the field is becoming increasingly quantitative" (Groeneveld et al.)605 articles published between 2001–2010 in four leading journals: Journal of Public Administration Research and Theory (JPART). However, another author indicates that in the period 2010–2014 the quantitative approach was dominant: "Qualitative work represents a small percentage of the journal articles published in the field" (Ospina et al.). As both sources indicate, the approach that is the least frequently mentioned, involves combining quantitative and qualitative analyses.

Another consequence of the new models of administration is the future of data collected by public institutions and researchers. Co-management requires being opened, defined "as citizens' access to knowledge about administration activities, participation, accountability, effectiveness, coherence understood as co-ordination and integrity of implemented programs, strategies and policies" (Anders-Morawska and Rudolf). The above assumption has consequences for researchers in the need for archiving and sharing data. Public access to quantitative data generated by the administration becomes a reality. The trend for open data in connection with the cooperation of administration with researchers is being developed in some states of the USA (Graham et al.), through joint projects and analysis. Openness applies both to administration and research activities.[3] The administration obtains important information for its activities and outsources research to scientific institutions. As part of this partnership, the respondents agree, on the terms of cooperation, to fulfil longitudinal studies – repeated in the long term – and analyze cohorts in particular groups. A specific attitude towards sharing quantitative data can also be noticed in Poland. Access to data is possible not only on the GUS platform,[4] but is also offered by the Open data site https://dane.gov.pl/, which allows citizens access

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[3] Data Access & Research Transparency, *Home Page*, https://www.dartstatement.org/, [12.07.2017]. The guidelines have provoked a discussion in social science and will be the subject of another publication.

[4] Główny Urząd Statystyczny – General Statistical Office, Databases, http://stat.gov.pl/banki-i-bazy-danych/ [5.05.2018].

the required data.[5] Thus, there is an awareness of the value of the quantitative data and the need to share them. As the above-mentioned American example suggests, this practice is most effective when both parties use and clearly establish rules for sharing and processing data. In data access, there is always a strong tension between openness and privacy (Graham et al.).

Archiving and sharing data is the basis for cooperation between disciplines. The qualitative data archiving, which will be discussed more in the further part of the article, could be particularly interesting (Moravcsik; Nosal). For political scientists who might be interested in political decisions, leaders, decision processes, the exercise of power, authority and conflict, administration employees may seem more accessible and more interesting than politicians. The employees of self-government and administration are closer to the citizen, so they are really connected with decision-making processes, experience all stages of decision implementation, have the opportunity to observe changes, are involved in conflicts, see how authorities change, are not separated from public opinion, and their work involves meeting clients-citizens. Officials seem, on the one hand, to be people with individual opinions, but on the other hand, they are public employees representing the self-government, and therefore are more like institutional entities. Their own views, opinions, motivations are important but should not determine their actions. Therefore, the question to be asked is what assumptions are – are the processes investigated, or people's thoughts about the process's trajectory, or maybe in the course of research the views and motivations of people working in there are recognized. As mentioned above, each question in interview scenario and then answers coding are assumptions that point out what the researcher actually analyses, not as it is declared. If the questions are about the number of projects, their course – dates and means, the number of participants, advantages and disadvantages then we get to know the perspective of perfect bureaucracy. The research does not present the perspectives of participants creating services and partnerships in the New Public Management and Co-management Model.

As it is assumed by the model of co-ordination, in principle, the society has the right to know and has the right to information. Consequently, it can be assumed that officials should take part in research – researchers have the right to obtain full information from them. However, IDI (in-depth interviews) are to reach not only official records, as the opinions of the respondents are also of interest. A good IDI requires the involvement of respondents and their openness; people being forced to participate in the interview are not a good source of information. This is also affected by the fact that the researcher who collects data in the administration is in some way biased because as a scientist he/she approaches the organization with

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5 At the time of this article submission, on 22.11.2018, the following material was published by the Ministry of Digitization: *Opening Data. Handbook of Good Practices.* https://dane.gov.pl/media/ckeditor/2018/11/22/otwieranie-danych-podrecznik-dobrych-praktyk.pdf [22.11.2018].

the preconceived idea about its operations. Thus, it might be difficult to establish the necessary partnership. Therefore it is a very important aspect of the research implementation in every organization and especially in administration. This is a problem described by Monika Kostera who notes that the respondent is a researcher's partner and his/her actions should not be evaluated by the researcher. Thus, in the interpretative trend in the organization's research: "first of all, we do not give piece of advice to practitioners. (…) Practitioners are essential for us to learn from them, how to practically organise and manage. We [the researchers] are necessary for them that they are able to get away from their everyday reality in search of something new or maybe something unimaginable. They can manage themselves" (Kostera).

Accordingly, what a qualitative researcher can offer to respondents is a different perspective on the given issues, but only through asking questions, hence using more of the coaching approach. Researcher – if non-involving research is conducted (opposite to action research which predicts a direct impact on the respondents) – has no right to suggest solutions or influence the examined person. The fact is that the interview between the researcher-researched person affects the reality of both actors. Such a meeting may give the examinee a different point of view and inspiration, disturb him or her, make them worry or interested. In qualitative interviews, interesting questions can be asked by respondents who find out that research is carried out in other cities and ask how others are doing/having/thinking. The organisations under study are interested in how the researcher assesses their actions or thoughts. The comments such as: "I have never thought about it," "I have to think about it," "interesting question," "I have never had time to consider it," "It's good that you ask about it" appear. In a well-prepared interview, respondents may feel appreciated as specialists, people in the position, etc. Thus, the ordinary human aspect of the researcher-researched entity relation can be still visible. A qualitative interview as a method of choice is also supported by the fact that: "In-depth interviews with government officials are a critical research method of government" (Jiwani and Krawchenko) and particularly the informal internal dynamics that influence policy, require a depth of understanding that is often best investigated through such interview methods. At the federal level in Canada we see many trends that point to the increasing centralization and control of government information. There has been political interference in Access to Information Requests; the outcomes of scientific research have been suppressed; and media access to politicians has become highly constrained. This led us to ask whether tightening controls on information have also affected access to research interviews with government officials. This paper explores this issue by interviewing both academics and public servants in the Canadian federal government. We ask is there evidence of a tightening grip on access to governmental research interviews and, if so, is this affecting how and

what we research? (Jiwani and Krawchenko). Such an approach can be treated as adequate for a co-ordinated model implementation, and well-implemented qualitative research can bring valuable effects to both sides – escalating relations as partners. Despite the benefits of qualitative research, the public administration as a study area is a big challenge, primarily due to the fact that these studies absorb a lot of time, energy and money. For researchers, they are an extraordinary intellectual-financial-organizational-logistic challenge. As mentioned earlier, they require much larger involvement of the administration staff, who have to spend a lot of time on them rather than on clicking on the questionnaire. The question appears whether participation in the study should not be treated as a job assignment that directly benefits the community. It might be assumed that the time devoted to research is for the development of science, but not exclusively, as the community will benefit from the results of research, so it is worth for the researcher to foresee some benefit for society.

The next problem is limited access to the administration employees. The technical challenge is to get approval for research, to arrange, and carry out studies; there is no homogenous procedure to obtain research permissions in Poland. Usually, a request to conduct a study is directed to the person managing the office/unit. Recruitment is carried out among managers, probably assuming that they have the widest knowledge in the studied area. It happens that a managing person assigns an employee to research, then the employee receives an official order to participate in the meeting. As a contrast, the researchers describe the situation in Canada before 2014, where officials were unwilling to give interviews. The authors describe that the official procedure of the invitation for research was not effective and the officials did not want to talk in the office (Jiwani and Krawchenko). The strict procedure that makes participation in the research obligatory can be harmful for the study in question. From the perspective of the qualitative research implementation, the law and civil servants guidelines are less significant. What matters more is the attitude and sense of mutual benefit from cooperation between researchers and the institution. As Canadian example points out, although access to data will be facilitated by the introduced law – without "openness" it is increasingly difficult to carry out qualitative research in administration (Jiwani and Krawchenko). For example, in Canada, "federal government is undermining access to public servants" (Jiwani and Krawchenko). In the Polish environment it happens that the person managing the office does not agree to participate in the study, and people working in the office do not have the opportunity to participate in research if their superior does not agree. In comparison, in Canada it was observed that in general officials did not respond to a formal invitation to participate in the research, they only agreed to research if it was possible to talk off the record.

The next common problem revolves around the inadequate knowledge of researchers about the real attitude of all the officials towards the studied problem.

In qualitative research it is rather the one who speaks that has the power and authority or the sense of it. The superiors speak more willingly and often more confidently than regular employees. Lower-level employees have a lot of doubts about what to say and whether what they are saying would be consistent with their supervisor's opinion. The problems with access to administration employees described by researchers (Jiwani and Krawchenko) is also noticeable in Polish conditions. As part of their research in public administration in Canada, they point out that only access to superiors (senior public servants) is possible. Due to their work specificity and considerable responsibility, they are hard-to-reach people and have no information about everyday routine activities. Lower-level employees, those who are involved in the implementation of decisions, contact with the citizens, conflicts and negotiations of specific elements of the activity, want to be loyal to their superiors and if they are appointed to participate, the conversation depends a lot on their relations with the supervisors. Sometimes, they are less willing to express their own opinions, indicate their lack of right to speak, refer to the knowledge of other people. Managers are resistant to talk about the programs' implementation and more about politics and strategy ("senior public servants will differ from those with less elderly ones," Jiwani and Krawchenko) and it happens that they are more afraid of assessments from the researcher, seeking the confirmation from their assemblies. They are also dependent on the people who have appointed them for the position and want to meet their expectations. According to the researchers, the respondent who participates in the study influences the subject of the research and conclusions that can be formulated (Jiwani and Krawchenko). The best informants seem to be those who despite the efforts undertaken at the stage of the study design the researcher might not get access to. One solution to these dilemmas might be talk to officials who retire because they are not burdened with dependencies, are more anonymous and may look from distanced (lukewarm) point of view at the matters falling within the scope of our interest.

As indicated by researchers dealing with qualitative research in the PA area, the most significant issue, though, is that only a small number of published qualitative studies in PA journals can be considered a breakthrough (Ospina et al.). In the area of public administration, as in other areas, a discussion is going on about the quality of qualitative research, allegedly not bringing anything new to science and reproducing old truths. A suggestion for researchers is development of cooperation in the environment, in other words: "A deeper understanding across the epistemological divide will build methodological pluralism and enhance readers' ability to evaluate the work of colleagues. A possible strategy is to foster conversational spaces-in conferences" (Ospina et al.). The second proposal requires compliance with the standards or else "Scholars should care about methodological reporting standards, as this can enhance research credibility for policy makers"

(Ospina et al.). That would be possible only if a list of such standards was created or the results of work were shared and were raised for substantive discussion.

The above-mentioned opportunities and challenges brought by the application of interviews with administration employees resulted in the idea of archiving data from public sector research to enable good quality and in-depth analysis. The proposal of archiving and sharing qualitative data presented below supplements the proposed solution of the ongoing cooperation between researchers. The presented example of an archive building offers an opportunity for the researchers in the field of PA to improve the quality of their analyses while saving time of the potential candidates for interviewed officials. It also proposes a formalised manner of collaboration within the groups of researchers. Archiving interviews could give an opportunity for: an increase of quality analysis by allowing access to data for young researchers and PhD students, facilitating comparative study design by offering access to data, the establishment of good practices of research and expansion of knowledge within particular areas of study rather than duplication of research topics and approaches. The database presented below is the result of several years of work on identifying subjects of secondary analysis and archiving data and sharing the acquired knowledge at conferences and seminars. The author postulates the creation of quality databases and the application of retrieved data in political analysis related to changes in the public sector. The following example is based on the author's several years of interest in archiving qualitative data, and analysis of state of art on this field that resulted in a doctoral dissertation based on Qualidata and DA-RT procedures. Since 2012 in Poland, there has been a strong inclination towards the creation of qualitative data archives (Nosal), which is also present in the international debate in the field of political science. There is only a lack of substantive discussion regarding archiving practice. The record of procedures in this area comprises universities (e.g. King's College London), companies (e.g. EDF–Verbatim), research funding institutions (e.g. The Economic and Social Research Council), organisations (e.g. Institute for History and Biography) and associations (e.g. APSA). In Poland, internal archive procedures are unfortunately not available on websites and existing archives, due to the costs of preparation of the collections. However, high-quality research requires the development of strategies for preparing materials in response to the challenges of accessibility and transparency. The example below indicates the challenges that arise when archiving is carried out after the project has been completed. The procedure of creation of the archive is described in the section below.

Database of preliminary information

The database contains data collected in 2012 as a part of the project titled *Marketing as Operational Development of Governance Concept in Public Management*. The project was completed within the Faculty of International and Political Studies at the University of Lodz. The official name of the archive is *The Concept of Governance in City Management. Authors of the studies: Justyna Anders-Morawska, Wawrzyniec Rudolf 2012*. The author of the archive is the author of this paper. Interviews were carried out in eight Polish cities with metropolitan potential or serving as strong regional centres. Primary researchers chose 18 interviews to create the database. Due to financial limitations, 15 interviews were transcribed.

The qualitative empirical process in the original project had two stages (Anders-Morawska and Rudolf). The structure of the interview scenario with respondents representing the city was mirrored in the scenario adressing the representatives of institutional stakeholders. This stage of research involved representatives of legal entities that were important for the local structures of the city governance. The research outcome is presented below:

Stage I (city) – the following respondents took part:
— City president or city vice president (depending on availability).
— Directors or deputy directors of specific departments in the city council – by list.
— City councilors (chairman or vice-chairman of selected committees of the city council – by list).

Stage II (institutional stakeholders) – the following respondents took part:
— Directors or deputy directors at the Marshal Office (by list) – interviews marked by letter M and first letter of the name of the city.
— Directors or deputy directors of institutional stakeholders of the city (Regional Tourist Organization, University College, Regional Development Agency) – interviews marked by letter I and first letter of the name of the city.

The project required initial contact with the managers of public institutions; appointing coordinators and local interviewees; and arranging meetings and re-invitations to the studies. Then the local coordinators and interviewees received the scenarios. The research was carried out in the following way: interviews were handled by the project coordinator, the deputy coordinator and the persons recruited for the interviews. The interview proceeded in accordance with the semi-structured scenario adjusted to the specificity of the office positions of the respondents (performed functions, tasks carried out). At the same time, the tool was a template for creating a grid by an interviewer. The tools contained open and closed questions. A detailed methodology of the project, and respective research tools are described in a monograph, that was a result of the project: *Orientacja rynkowa we współrządzeniu miastem* (Anders-Morawska and Rudolf).

Basic assumptions of data archiving and re-analysis

The collected data concerned not only the subject of research, so the project co-ordinators were asked to preserve the research material for educational and scientific purposes. Archiving of qualitative data is related to the assumption that the collected/generated data is a photographic-like reflection of reality at a given moment in time – it has never happened before or will not ever since. With respect to respondents and examiners, it can be verified whether data can be the basis for answering new research questions and supporting scientific projects (Gajda). Data backup and longitudinal tests are also possible thanks to data archiving.

The first stage of the analysis reassesses how much data can be valuable for further analysis; it also requires a re-evaluation of the materials gathered within the project, i.e. those that the original researcher wants to share, and answering several questions that will verify the data potential. At this stage, the key (from the ethical perspective) was to get the permission of: a) the primary researchers to study the data set and make them available. In the end, the original researcher decides about the possibility of using the data, who, how and in what topic can use it, b) the researched units about the usage of data for scientific purposes. In the ideal pre-interview research procedure, the written consent of the respondents to the archiving and re-use of data (British experience) is obtained. In a situation when the methodology is new in Polish science and there is no practice of implementing such agreements,[6] it is necessary to make a decision based on the assumptions of primary researchers. The qualitative data archives created in Poland are a place where researchers can deposit their collected materials[7] but there is still no practice of thinking about archiving while planning research.[8]

Due to the fact, that interviews were made with employees of the institution that agreed to perform the research and data analysis without indicating that the data should be destroyed after the analysis, they remain at the disposal of the researcher acting in good faith (the basis for decision-making might be a comment and a reference to the personal data protection law). The use of materials for scientific and didactic purposes allows processing of personal data for a different purpose than they have been collected for. It should be noted that the emerging threats in the area of the GDPR did not change anything in the area of scientific data processing by primary researchers.

The relation between the researcher and researched entity should be verified with care, based on documents (tools and notes) and interviews, information the researcher obtained, and the terms of study that the parties agreed to. Data

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6   More: https://www.ukdataservice.ac.uk/use-data/guides/methods-software/qualitative-reuse [19.10.2018].

7   E.g. in: Quality Data Archive, Daily Life Research Archive, etc.

8   E.g. in: The Social Science Research Council.

anonymisation is required after preparing the data transcription. However, it is not necessary if we do not collect sensitive data. Finally, anonymisation of the data in the presented set was not necessary, because the data is still at the disposal of the original researchers. During the re-use of data, attention should be paid to the respondents' requests for data anonymisation indicated in the notes, which in practice will mean that in using the data the researcher will undertake the necessary means to protect the identities of the respondents. The collected database is a full record of interviews. The course and the effect of base creation are described in detail in the next section.

Preparation for database creation

In order to be able to archive the data, certain arrangements had to be made with primary researchers. That is why a conversation was held with the coordinators, and its summary was included in the database. While deciding to archive data of other researchers, it is worth to write down the arrangements that have been made and place them in the database as a document. The summary should contain answers, among others, for the following questions:

1. Q: What is the rationale of creating a base?
   A: We create a qualitative database for didactic use and for own scientific work (each page informs about the use of data).
2. Q: How many copies of the database should be created?
   A: 2 copies are created, each of the files is described in the document (which can be found in the file). In addition, the database contains a spreadsheet, in which there is a summary of interviews (keywords, main themes, interview situation, etc.).
3. Q: What kind of data are placed in the database?
   A: The data concern the local governments activities, the cooperation of local governments with institutional stakeholders in several areas.
4. Q: What are the sensitive data in interviews and how to protect them?
   A: There are several potential ethical issues: the people who spoke were very honest (personal judgments). The confidentiality of data should be preserved, information about researchers and subjects are classified as protected.
5. Q: What keywords describe the base?
   A: The database can be described using words such as: inter-organisational relations, interactions, cooperation, local government, city management, co-management and governance processes.
6. Q: What information about the project should be provided when using the database?

A: In the publication, the following bibliographic note should be inserted: *Governance Concepts in City Management. Authors of the Study: Justyna Anders-Morawska, Ph.D. Wawrzyniec Rudolf, Ph.D., 2012.*

This set of information was stored in the folder CC. Archive arrangements.

In the case if at the next stage the original researchers decided to share the data with other researchers, it would be necessary to write down the following questions: Who and on what principles should the data be made available to? What data can be left in the transcripts, what should be anonymised? Based on the above-mentioned agreement from July 2016, the tools for the re-analysis of the data were the obtained recordings and notes. Up to 15 interviews were available for transcription. Recordings for transcription were chosen by primary researchers, due to the limited amount of resources, three interviews were not transcribed. When preparing a database, attention should always be paid to the file format, e.g. the Maxqda program does not read audio files in .amr format. Therefore, before building a database, it is worth considering the tools used in the analysis and checking what kind of systemic constraints may appear.

Data sorting

Finally, instructions, information for researchers, auxiliary data, procedures, and data were structured and stored in 4 folders:

1. Data – data set arranged in accordance with the arrangements with the primary researchers.
2. Arrangements – a folder with a file with arrangements for the archive, which is a contract between research coordinators and the researcher who is the author of the archive. This folder should also contain information for researchers who want to work with the archive at the time of its availability.
3. Using the database – a folder containing documents regarding the use of data. Basic information about re-analysis, information about the project from primary researchers, description of the archive, data sharing card.
4. Maxqda data set – a folder with files ordered in the program for qualitative data analysis ordered by coordinators.
5. Instructions for using the database – a file containing a short outline how to deal with the database.
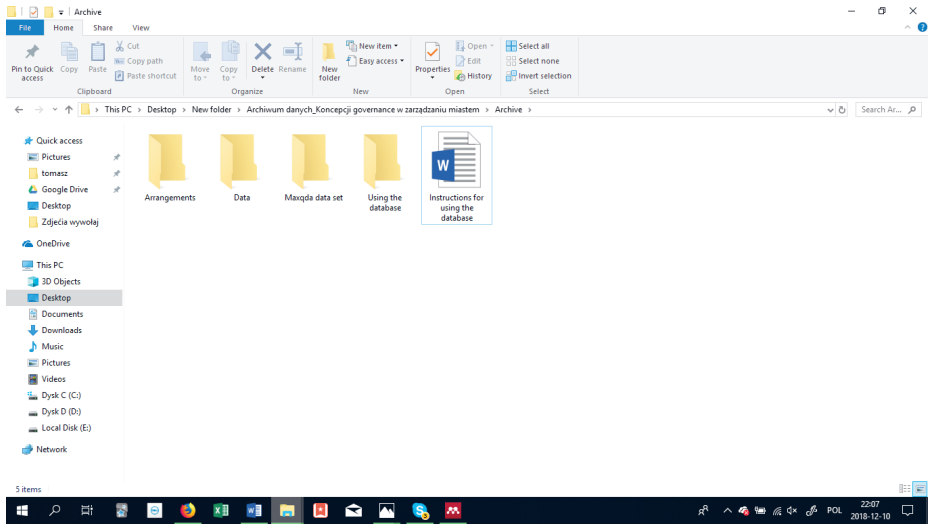   The picture below shows the organisation of the archive:

Figure 1. Archive folders

By placing the obtained files in one set and systematic review of the data, it became possible to identify deficiencies, organise the interviews and divide them into groups of documents assigned to cities. Some file names have been changed for data sorting purposes. Changing names is quite a challenge, as there are no guidelines. Based on the author's earlier projects and experience short labels for individual file types were selected. The following abbreviations have been used:

Not – an interview notes – grid prepared in 2012 by an interviewer conducting an interview, or by a primary researchers. Based on the grid, the primary analysis was made and the publication was created. **Trans** – transcript of the interview prepared in 2016, funded by the research for young scientists of the Pedagogical University as part of project: *The valuable data – exploration of the potential of qualitative data*, project supervisor: Joanna Gajda. **Nagr** – interview recording prepared by the interviewer; if the recording is divided into parts, they are numbered from the first (1) to the last (2, 3, 4). The titles of the recordings and transcripts of interviews were to help in their ordering; the following shortcuts were used in consultation with primary researchers: **P and the letter of the city** – self-government authorities, employees of the City self-government. **M and the letter of the city** – institutional stakeholders – Directors or deputy directors at the Marshal Office.

I and the letter of the city – institutional stakeholders, Directors or deputy directors of the institutional stakeholders of the city (Regional Tourist Organization, University, Regional Development Agency.) As a result, the following set of files was obtained:
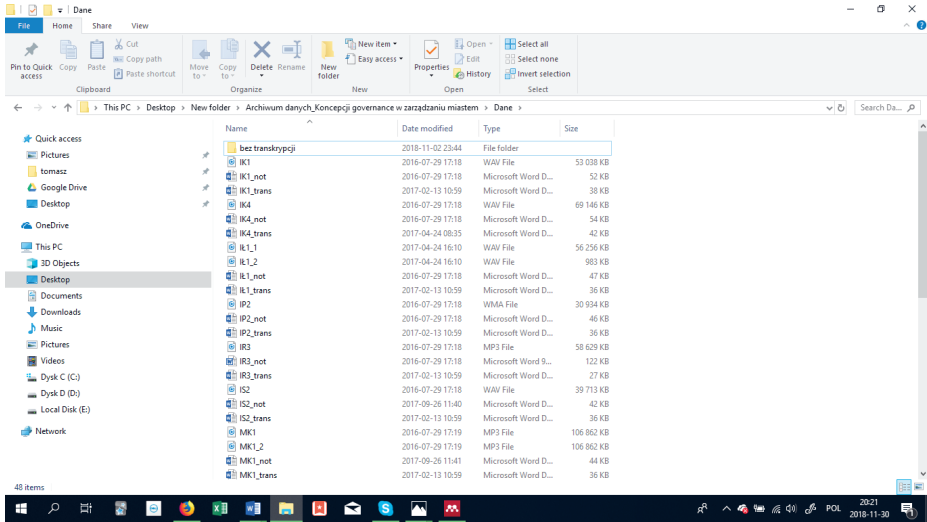
Figure 2. Data List

The main beneficiaries of the archive are the research coordinators, so it must be clear and helpful to them; it cannot impose solutions that they do not accept. For the preparation of the archive documentation, the instruction was used that had originally been the basis for the creation of the British database QUALIDATA:

"Good data documentation includes information on:

— the context of data collection: project history, aim, objectives and hypotheses,
— data collection methods: sampling, data collection process, instruments used, hardware and software used, scale and resolution, temporal and geographic coverage and secondary data sources used,
— dataset structure of data files, study cases, relationships between files,
— data validation, checking, proofing, cleaning and quality assurance procedures carried out,
— changes made to data over time since their original creation and identification of different versions of data files,
— information on access and use conditions or data confidentiality"(Van den Eynden et al. 9).

The set also provides data in the Maxqda program prepared for analysis. The database was forwarded to primary researchers on Oct 5–6, 2017. However, the most important is the file that is the data usage instruction.

The summary

To sum up, the archiving procedure proceeded as follows:
— primary researchers decided to select the interviews for archiving;
— the researchers provided interview recordings for transcription and interview notes;
— in the initial stage, the submitted recordings were sorted out, the names of the interviews were verified, the notes for the interviews were adjusted, duplicates of the documents were identified in the database;
— the data were ordered on the basis of practices derived from Qualidata assumptions and DA-RT procedures;
— 15 interviews were selected for transcription, assuming the diversity of the methods of conducting the interview and its processes;
— 15 out of 18 interviews were transcribed;
— An outline has been developed to make the data available in accordance with the system operating at the Quality Data Archive (ADJ), and the KARTA Center Foundation.

The above procedure assumes access to data on-site (Łódź, Kraków) by the courtesy of the original authors who may become acquainted with the purpose of the research and make a decision to share the data or not. To enable the use of data, it was proposed to use the DATA USAGE OUTLINE CARD WER 1.1. If primary researchers want to transfer data for re-analysis to other researchers, they will be able to use the above document. The work and consultations of the data sharing card are still in progress for other projects.

The existing database is an example of the ability to share data, potential experiences exchange of knowledge and learning from past research. It does not contain only perfect interviews. Nevertheless, it allows analysing the work of interviewers and the statements of the officials. It was created based on the assumption that qualitative data are valuable material that should be respected. To make better usage of the time of researchers and officials involved in the studies on PA, it is possible to encourage primary researchers to cooperate by creating small databases of interviews enabling the implementation of analyses for the community. Their creation may be a fundamental issue for the postulated development of qualitative research in PA. At the same time, it allows the prospective researchers to construct the vocabulary of an interview in the language of the respondents, to search for good practices in the implementation of interviews, and to identify errors that can be avoided in subsequent surveys.

This database sample is intended to enable researchers to reuse data, create material for teaching and material for comparison and analysis. It is worth pointing out that: "Qualitative research is about being closer to the subjects: the 'direct encounter'" (Blackman). Therefore, such databases are potentially valuable for all those who are interested in the subject of public administration and local government.

"This makes it even more important to conduct longitudinal research, including impacts on methods of inquiry and policy sectors. This was a study of the public policy academics" (Jiwani and Krawchenko). In the end, without data archiving, longitudinal studies are not possible. Therefore, the author postulates that during the planning of qualitative research in the area of public administration, archiving data obtained through interviews is considered. Such activities may allow the most effective use of resources (time, money, the potential of administration and research workers) and create an area for exchange of experience. Having even a small set of data archived, we become partners for a discussion with other researchers. We can improve our skills and our understanding of the subject, use data more effectively, intensify analysis, run longitudinal studies, compare results, and ask new questions. This allows the improvement of the quality of qualitative research and finding new areas, e.g. considering public officials as partners whose opinions and motivations are interesting in an epistemic sense. This article could be an example of the practical answer to the issue of the expectation of transparency and replication in social science. It presents a procedure that can be implemented by every researcher in Poland and that is also in accordance with international standards. The author shares this experience of creating a database in hope to open a discussion in this area.

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Book Review

Review of a Monograph by Ewa Glińska
City Branding: Concepts, Conditions, Models
(Warszawa, Wolters Kluwer 2016)

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Ewa Glińska, *Budowanie marki miasta: koncepcje, warunki, modele*
Wolters Kluwer 2016, 352 pp.

What is specific to Ewa Glińska research work is the combination of research with her role of an advisor to local authorities. Observations from working with the local self-government first inspired her to write an interdisciplinary PhD thesis that brings together elements of urban sociology and territorial marketing and now have led to an interesting habilitation monograph. Ewa Glińska developed her interest in place marketing based on studies of Polish cities but also by analysing its trends at a global level. She became particularly interested in a research trend focusing on building brands for particular places, which is critical for the specificity of small and medium-sized cities. A passage from city marketing to city branding clearly favours the integration of diverse management efforts within a given territory.

Ewa Glińska noticed a cognitive gap in management sciences, i.e. the absence of a city branding model for small and medium-sized urban centres. Their specificity necessitates separate theoretical foundations for city branding policy as well

as a deepened reflection on the distinctive identity determinants for brands of such towns and cities. A number of research questions arise here creating a framework for a broader reflection.

In her monograph titled *Budowanie marki miasta. Koncepcje, warunki, modele*, [City Branding. Concepts, Conditions, Models] published in 2016 by the Wolters Kluwer publishing house, Ewa Glińska investigates the possibilities of adapting the concept of city branding to fit with management processes in territorial self-government units. The author focuses on the idea of brand identity for small and medium-sized cities; the subject which has never been considered at a theoretical or empirical level in Poland. Earlier studies on place branding centred usually around big cities, regions or countries. The author rightfully draws our attention to the relevance of city branding policy for small and medium-sized cities in the context of building their more extensive development strategies. Her considerations are based on the analysis of a broad spectrum of foreign and Polish literature, her own empirical studies and experiences from acting in the capacity of an advisor to different territorial self-government units.

No doubt, Ewa Glińska identified a gap in theories offered by management sciences, i.e., the absence of a city branding model that would take into account the specificities of small and medium-sized cities and fit their identity development. To close this gap, more comprehensive quantitative studies of small and medium-sized cities were necessary. Besides, there are no research tools that would be validated and properly adapted to assess the outcomes of territorial self-government activities in the field of brand management policy. Ewa Glińska's findings have helped in formulating recommendations for territorial self-government units concerning city branding models. Surely, the approach proposed by the author allows us to avoid pitfalls resulting from an uncritical choice of solutions that have been developed for commercial operators, in small and medium-sized cities.

The main goal of Ewa Glińska is to draft theoretical foundations for city branding policy highlighting its identity elements with regard to the segment of small and medium-sized cities. Their specificity requires taking account of the complexity of the urban product and the viewpoint of an extended network of local stakeholders. Ewa Glińska examined particular city branding strategies against the size of cities, coherence of brand strategy in relation to brand identity distinguishing factors, selectivity in the approach to highlighting city brand distinctive elements in relation with the environment, and the similarity of characteristics of city brand personalities in the context of commercial brand personality models.

The author conducted her studies based on an in-depth analysis of literature on brand management and quantitative and qualitative empirical studies. That allowed her to assess the evolution of the concept of using a brand in management sciences and present the specificity of branding in relation to territorial self-government units, paying particular attention to city branding. Glińska examined

the dynamics of brand value creation based on interactions between diverse stakeholder groups.

The author demonstrated that a place brand is much more complex than a commercial brand mainly due to the complexity of city as a product. In her monograph she also highlighted economic, social, and political context of place branding. Product complexity translates into the complexity of city branding. The identity of a city brand emerges in a dialogue with an extended group of stakeholders ("multi-dialogue").

In her monograph, Ewa Glińska carries out a critical analysis of "place branding" models, which mostly target "tourist destinations". The analysis of the existing models helped her in developing her assumptions that are useful in the analysis of small and medium-sized cities. The review of place *branding* models and their critical analysis from the point of view of their usefulness in the creation of brands for small and medium cities are important components of the monograph. Such ab analysis was missing in the Polish literature on the subject.

The author highlighted the role of different stakeholder groups and their interactions in place branding. Focusing on the interactive dimension of the development of regional brands is an important conclusion in the context of discussions on co-decision and co-creation of such brands by different stakeholder groups. The need to bring together functional and representation attributes in city branding calls for synergies of different local policies in accomplishing common goals connected with a city brand.

The key strength of the publication lies in the empirical studies that covered self-governments of small and medium-sized cities in Poland divided into three groups depending on the advancement in introducing brand strategies into city management practices. Glińska distinguished cities which have integrated aspects of branding into city management practice to a low, medium or high degree. In her approach, she used Kavaratzis's city branding model and its organisational and promotional components. To divide cities into three groups the LCA – Latent Class Analysis was used. In the next stage of the study, she profiled these groups. Glińska analysed organisational and promotional distinguishing factors for each class, paying attention to leaders of marketing activities (48 cities). These leading cities have established specialised departments within their administrative structures that deal with promotion; they also engage various stakeholder groups in their promotion and use various tools of marketing communication. Self-governments in this group spend relatively more on promotion activities and employ specialists to handle them. The study included also measuring the perception of selected attributes of cities by target groups, such as residents, tourists, and entrepreneurs. Ewa Glińska conducted qualitative studies in the form of focus group interviews with the involvement of local stakeholders to identify areas, which could provide foundations for building city identity within city branding. She constructed a wide

set of 37 variables that may be decisive for arriving at a desired image of the city and have become components of brand identity. The author distinguished seven key dimensions that altogether make up the image of a city and she asked respondents to evaluate them on a seven-point scale. In her studies, she demonstrated that self-governments in small and medium-sized cities much more frequently highlight functional aspects of their image. She also showed that self-governments who declared having a clear brand idea described in a strategic document much more frequently made references to non-functional identity attributes, such as the overall atmosphere of the city, its history and culture. Moreover, in a survey conducted among promotion managers in city offices she tested their ideas about the identity of the city they managed (personification of specific characteristics of city identity).

Ewa Glińska's monograph makes a significant contribution to the development of management sciences with respect to place marketing and managing small and medium-sized cities. At a theoretical level, the author carried out a comprehensive analysis of branding small and medium-sized urban centres paying attention to the development of place identities. Compared to other publications on place marketing, the author has strongly emphasised participatory approach to city branding. This approach highlights the role of an active social dialogue with local stakeholders in place branding and in identity building.

At a theoretical level, the author divided small and medium-sized cities into segments according to their advancement in the implementation of brand strategy. She also distinguished key city identity and brand personality distinguishing factors. This area may become an exciting subject for her further studies. Research methods used in this case may provide the basis for further comparative empirical studies conducted on bigger groups of small and medium-sized cities.

In practical terms, the monograph can be used for management purposes by self-governments in small and medium-sized cities as well as in consulting services outsourced by these cities in connection with city branding. The tool needs to be improved to boost its operational capacity and to adjust it to the specificity of small and medium-sized cities. Ewa Glińska is right when she stresses that the future of research on city brands becomes increasingly linked with the need to search for new attributes decisive for the unique comparative advantage more frequently founded on non-functional attributes of individual urban centres. When it comes to functional attributes, cities are usually becoming more alike.

Summing up, when assessing this monograph, we need to highlight its comprehensiveness that stems from the wide use of international literature on place marketing and brand management. Its unquestionable advantage also consists in focusing on the specificity of branding small and medium-sized cities, which have not been separately examined in Poland or covered by empirical studies. Glińska's

innovative input in the development of management sciences can also be confirmed by the results of empirical studies profiled for small and medium-sized cities.

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