



CENTER FOR ADVANCED STUDIES IN TOURISM

UNWTO

Western Silk Road National SWOT Study



ITALY



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Table of contents

Executive Summary.....4

Introduction.....6

Strengths.....7

Weaknesses.....13

Opportunities.....16

Threats.....21

Conclusion.....23

Credits and references.....24



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Executive Summary

During the centuries, the ancient Silk Road has played a very important role in terms of trade and infrastructure development, spread of different cultures and knowledge among the people along the routes.

There were different main routes, from the ground to the sea, reaching many western countries from the Caspian Sea to the Mediterranean Sea. We will focus on the present Italian territory, trying to investigate which are the principal sites involved along the ancient Silk Road, the roles they played in trading and producing the noble fabric and the ancient evidences we can find nowadays.

Following the guidelines received by UNWTO Silk Road programme, the research group has firstly collected documents, articles and news in order to set up a background database of contents, allowing to avoid a dispersed and too general overview on the topic. In consideration of the short time frame available for providing the SWOT analysis, the research group decided to avoid forums organisation and defined therefore a set of questions for structured interview. The research group has then listed the name of possible key actors and stakeholders to be interviewed. The interviews have been conducted between the half of November and the beginning of December 2016. The research group intends to further develop a second step of the analysis on an independent way, sending the results of the SWOT to the respondents for their further and additional comments.

CAST research group has processed the first results of the interview and decided to concentrate the focus of the analysis on two main urban destinations, Genoa and Venice, both because of the historical past of these two towns and because of the need to identify the most suitable historical timeframe for a possible cultural tourism product design. Therefore, the silk road heritage of the Roman era has not been taken into consideration.

The research team feels the following being just as a first and very indicative overview about the potential extension of the Silk Road towards the West. The interviewed stakeholders generally agree upon the need for a further and more deep identification on the whole national territory, of the Silk Road tangible and intangible heritage assets, which requires additional time and human resources.

Despite the long list of weaknesses identified by the research group, the hypothetical development of the Western Silk Road in Italy encountered the interest of all the solicited actors. The research team opinion is that the wide range of opportunities constitutes a potential chance for building new promotion strategies both in already heavily visited urban areas, as well as in less frequented and marginal tourism destinations. In particular, the strong links between the manufacturing sector and the cultural and creative industries within the Silk Road context is consistent with the strong international image of "Made in Italy".



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The principal results of the survey are summarised in the following table.

<p>STRENGTHS</p> <p><i>Italian cultural heritage related to the Silk Road</i></p> <p><i>Local artisans and experiential tourism</i></p> <p><i>Opening of Italian industrial and manufacturing firms to tourism</i></p> <p><i>Concentration of Places, Museums and Exhibition</i></p> <p><i>Diffusion of Silk Cycleway and active tourism</i></p> <p><i>Marco Polo committee within Italian Cultural Routes Board</i></p>	<p>WEAKNESSES</p> <p><i>Absence of an integrated and coordinated knowledge about the Silk Road heritage all over Italy</i></p> <p><i>Low awareness of Italy as a Silk Road destination</i></p> <p><i>Scarce formation of local tourism industry with reference to eastern markets</i></p> <p><i>Implementation of Italian Silk Road sites network difficult to carry on</i></p> <p><i>Scarce experience in developing extended cultural routes and using them as a promotional tool</i></p>
<p>OPPORTUNITIES</p> <p><i>Sustainable management of tourism flows and tourism requalification in overcrowded area thanks to the Western Silk Road Brand</i></p> <p><i>Develop new upward trending markets through the Brand Silk Road</i></p> <p><i>Revitalization of silk industry</i></p> <p><i>Cooperation with already existing initiatives promoted by associations and institutions</i></p> <p><i>Coherece with Italian Strategic Tourism plan and Regional tourism strategies</i></p> <p><i>Eastern languages and cultures degree programmes at Ca' Foscari University in Venice</i></p> <p><i>Food tourism</i></p> <p><i>Synergies with OBOR programme by Chinese government</i></p> <p><i>Creation of a tourism online platform related to Western Silk Road in Italy</i></p> <p><i>Use the appeal of most famous cities as gateways to marginal areas and favour dispersal</i></p>	<p>THREATS</p> <p><i>The risk that the classic Italian destinations will stand out without valorising the less-known Italian heritage</i></p> <p><i>Great level of coordination is required due to the absence of a material route</i></p> <p><i>Italian political instability</i></p> <p><i>Uncoordinated efforts in promoting Western Silk Road Brand</i></p>



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Introduction

During the centuries, the ancient Silk Road has played a very important role in terms of trade and infrastructure development, spread of different cultures and knowledge among the people along the routes. It dates back to the III century BC in China, where the Han dynasty officially opened a route for the trade of the precious silk to the West. Together with the valuable material and many other goods traded, the Silk Road contributed to the technological development, fostered political and economic relationships between different regions and created a long-lasting commercial bridge to the West. There were different main routes, from the ground to the sea, reaching many western countries from the Caspian Sea to the Mediterranean Sea. We will focus on the present Italian territory, trying to investigate which are the principal sites involved along the ancient Silk Road, the roles they played in trading and producing the noble fabric and the ancient evidences we can find nowadays.

In this perspective, we can set the main centers or the main Italian areas in the broad Western Silk Road Programme Initiative, recommend the principal strengths and opportunities and outline the limits and the threats.

The silk revealed itself as a good of enormous value since the Roman Empire, opening an enduring commercial route toward the West, passing through the harbours of southern Italy or on the other route through the mainland. The regions and the cities along the Adriatic Sea coasts as well played an important role in the trade of the silk direct to the Balkans and then to the East. Since then the secret of the silk production was kept by Chinese, but with the Byzantine empire a silk production started also in European regions. Lucca, Genova and Venezia became in the following centuries the unquestionable most important European cities in terms of silk production and trade. With the opening of new oceanic routes by Spanish and Portuguese started a period of decline for these cities, but they maintained very high standards in manufacturing this luxury commodity. We can find examples of silk production also in Bologna, Como, Napoli and Piedmont region.

Several Italian cities show a strong cultural and material heritage connected with the trade and production of silk, bringing this textile to sublime level of refinement. Museums, churches, historical buildings, spread all over the already rich cultural and artistic heritage of Italian territory, preserve a significant number of evidences related to the past Silk Road: textiles, paintings, manufactures, books.

For these reason, the following SWOT analysis tries to better understand the potential and the opportunities Italy could gain from the inclusion in the wide initiative of the Western Silk Road; at the same time an attentive analysis has been carried out to underline the weaknesses and the threats related to the territory and this project.



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STRENGTHS

Italian cultural heritage related to the Silk Road

From the 13th century to the 15th century, many Italian cities were in front line in the dialogue between the East and the West, building a wide array of relationships and trades with the Asian continent.

Italian catholic missionaries sent by Pope Innocent IV were the first Europeans to travel along the Silk Road, in order to pursue the peace with Mongolian Empire, which was posing a serious threat to Eastern Europe and the whole Christianity. These missions led to the improvement of relationships with the East, later supported also by the ever more widespread presence of Italian merchants, who fostered the trades along the Silk Road.

In Italy, just like in the rest of Europe, there was an impressive demographic boost in the 11th century, which contributed to the rebirth and expansion of urban centres. Therefore, some seaward cities were protagonists of this commercial revolution.

Italian merchants were able to enlarge their operations thanks to the progresses in navigation, especially to very detailed nautical charts named “portolani”, whose production centres were Venice and Genoa. These two cities, and to a lesser extent Pisa, created the first commercial outposts in the East. During these centuries, Italian cities were directly involved in the fruitful exchange of ideas, goods and techniques along the Silk Road.

This brief historical overview underlines how Italy is deeply rooted within the Silk Road and therefore the cultural heritage left by those ages in the country is inevitably very wide.

It is possible to find evidences of the strong links between many Italian cities and the silk trade towards the West, but two of them were particularly important: Genoa and Venice.

The leading role assumed by Venice in the commercial routes with the East deserves a focus on this city and it is the main reason for the flourishing of the Republic and the proliferation of amazing monuments that made the city and its lagoon a site of UNESCO World Heritage. Therefore, the cultural heritage of Venice is strictly correlated to the Silk Road Brand and everything in the city can tell some story about the Venetian Merchants and the Golden Age.

Saint Mark’s Basilica has been continuously enriched during the centuries with columns, friezes, marble, sculptures and gold brought to Venice on merchant ships coming from the East, often deriving from ancient buildings that had been demolished. Saint Mark’s bell tower was built in 1173 as a beacon for merchants.

The Venetian Arsenal was the heart of the shipbuilding industry and the origin of its power along the commercial routes. Moreover, it was one of the earliest large-scale industrial enterprises in history.

The commercial vocation of the city is also represented by “Fondachi”, wonderful buildings rising



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along Canal Grande, once used as storehouses and shelter for foreign merchants (Fondaco dei Tedeschi, Fondaco dei Turchi, Fondaco del Megio).

Venice also shows everywhere traces of the Eastern legacy left during centuries of continuous commercial and culture exchange. Cultural tours leading tourists to discover this heritage are already offered by some tour operators, especially in the Sestriere of Cannaregio, which is also located outside the central and most crowded area of Venice.

As explained in the previous part, during the XIII century Genoa experienced a significant population grow that, combined with the pax mongolica, opened the doors to the prosperous Eastern trade. Along the ancient commercial routes and with the creation of several outposts in strategic sites in the East area, Genoa became, with Venice, one of the most powerful European city controlling the Eastern trade. At the end of the XIII and until the middle of XIV century, the maritime empire created by Genoa led the city to its Golden age: merchants and many men involved in the trade of silk and other precious commodities became also very important political and diplomatic channels between East and West. Genoa fostered very strong relationships with Lucca and its businessmen, whilst was in open hostility with Venice for the control of the sea and the trade.

This fortunate period left to Genoa a significant heritage. We can find influences deriving from this “global” trade in many buildings, churches, even a street called “Salita della Seta”, paintings, books, dresses, exhibitions, food.

The city of Ravenna, even though it knew its splendour in an earlier age with respect to the medieval trades along the Silk Road, deserves its own chapter. In fact, with its 8 Unesco World Heritage monuments and the role played as bridge between the West and East (from the 4th to the 8th century), should be taken into consideration within the Western Silk Road Brand.

The Port in Classe (which has recently being converted in archaeological site) was the most important in Easter Mediterranean and made of Ravenna the capital of the Western Roman Empire and lately a neuralgic centre of the Byzantine Empire.

Therefore, the astonishing uniqueness of this city was born from the merger of Western and Eastern cultures, from the synthesis of Roman art and Byzantine art, whose greatest legacy are the mosaics that decorate the different religious buildings of the city. The art of mosaics was not born in Ravenna, but in Ravenna has developed in an original way.

Ravenna has also hosted during its history settlements of Far Eastern populations, which have left traces to the present day, from the silk tie to the Mah Jong game, still played in many pubs.

Local artisans and experiential tourism

During the golden age of commercial trades along the Silk Road, Italian cities reached the apex of quality in manufacturing and established a market of absolute world value. They promoted and enhanced their intrinsic capacity of producing, while importing raw materials thanks to maritime



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trades and knowledge In the Eastern markets.

Artisans specialized in spinning, boiling, dyeing and weaving, in processing silk with gold thread and silver, making of Italian cities a symbol of craft excellence and high level finished products.

According to UNESCO, whilst the silk trade was one of the earliest catalysts for the trade routes across Central Asia, it was only one of a wide range of products and techniques traded between east and west, and which included textiles, spices, glass beads, precious stones and much more.

Again, Italian artisans were able to develop high-level skills in the processing of these materials, like Murano master glaziers, who inherited from the East the use of soda-lime glass, and refined more and more their techniques, carrying out unique, inimitable and prestigious products that are still appreciated world-wide.

Discovering the ancient crafts that in Italy and especially in Venice are still alive, watching its artisans at work and experiencing it through labs and workshops, are activities more and more available for tourists as a single daily experience to be bought on online platforms of tourism operators or as part of itineraries along the city.

It appears as deeply coherent with the history of these cities and the role they played in the Silk Road, to consider the immersion in the alleys of their excellence craft as one of the images conveyed by the Brand Western Silk Road in Italy.

A positive example about how to convert this heritage in a tourist experience is given by VivoVenetia, a local tourism portal offering this kind of experiential opportunities to tourists: visiting an atelier of historical costumes or a forge while having an aperitif with the blacksmith, many labs with local artisans that allow the tourists to create their own traditional carnival mask, to design and produce a unique jewel or to understand and experience glass processing.

This trend is part of a specific strategy followed by Confartigianato Veneto, the trade association that represents and protects thousands of small and medium enterprises in the region. Not only Venice is involved, since the companies participating to the project “Color your stay in Veneto and craft your experience”, realized by Confartigianato and VivoVenetia, are scattered in 5 provinces in Veneto (Venezia, Belluno, Treviso, Vicenza and Padova).

Local artisans are eager to extend their revenues exploiting the great potential of tourism. However they have some difficulties in the promotion and commercialization of these experiences, in terms of online presence, web marketing and multilingual offer. The project is aimed at building a network of this single operators and undertake common actions to address these issues. Besides an online platform, also other channels of distribution will be developed, such as a re-selling system through hotels and B&B and also European Tour Operators have been involved.

Proposing this kind of experience through the Brand Western Silk Road could be a win-win approach. The Brand Western Silk Road in Italy would be enriched by a coherent and modern tourism product, while being part of an international and established Brand would consent a greater visibility, extending the impact of those benefits that communities would enjoy, such as a



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better management of tourism flows, greater income for residents, the conservation of cultural and traditional heritage and knowledge.

Opening of Italian industrial and manufacturing firms to tourism

Italian quality industry and manufacturing firms are showing an increasing interest to open their gates to visitors, in order to answer to a perceived interest for a type of tourism which is both industrial and cultural.

This trend has led to Open Factory, the first opening of industrial and manufacturing culture in Italy. In its second edition in November 2016, about one hundred firms from Veneto have welcomed thousands of visitors to tell their stories, reveal their secrets and show their high-quality products, through the creation of many thematic and experiential routes.

This project of enhancement of manufacturing sites and districts is intended to be continued after the day of the event, in order to structure itself in constant promotion activities in manufacturing tourism and also through a catalogue. Moreover, the aim is to extend the project beyond the borders of Veneto towards the rest of Italy.

Companies collaborating to the project are not generic custodians of a past world, proposing tradition and culture as items to be stored in a museum display case. On the contrary, they are organizations which have proved their capacity to stand on the frontier of globalization, combining tradition, innovation and digital culture.

The Western Silk Road Brand could benefit from the inclusion of this world and this type of high quality and modern tourism opportunity, while at the same time through the Western Silk Road Brand this companies could widen their market, both in terms of visitors interested in a cultural tour of the company (with an associated shopping opportunity for those who sell directly to the consumer) and in terms of B2B opportunities.

Concentration of Places, Museums and Exhibition

Talking about the Silk Road in Italy does not mean just Genoa and Venice. Due to the millenary interaction with the East, several Italian cities show connections with the ancient commercial route or with some of the luxury goods traded. Just in Liguria region, a recent research carried out by the major experts on textile have catalogued about 10.000 pieces: silk, damask, tapestry, dresses preserved in museums and churches. Particularly important in this context are the sixteen civic Museums of Genoa, with Musei di Strada Nuova e DVJ above all. We can also find a museum focused on production and machinery in Lorsica, the area that together with Zoagli produced high level silk manufactures.

In Veneto Region, and more precisely in Vittorio Veneto, is located the Museum "Baco da Seta", which is very important not only for the deep knowledge about the historical silk tradition within



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the region, but also because of the educational activities and the strong connections with the local actors that are still involved in the silk sector.

Fortuny Museum in Venice exhibits clothing, textiles, matrices, towels, decorative drapes, constituting a rich sample that identifies well the early twentieth century extraordinary textile and fashion production.

Como and its surroundings were a very important center of silk production, and Museo Didattico della Seta di Como gathered several original machineries, archives and textiles; Museo della Seta in Soncino, Abbazia Lariana and Civic Museum Abegg complete the most-known museums in Lombardia region. Continuing the research in Northern Italy, they should be listed also two Silk Museums based respectively in Racconigi and in Monesiglio, showing how the Piemonte region as well was an important center of silk production. We can't forget the great importance of Bologna, with an impressive amount of production and the famous watermills for the silk fabrication. Lucca and Florence brought the silk textile to a level of refinement never seen before, with strong relationships both with Genoa and Venice. An interesting exhibition was held in Lucca at Museo Città di Lucca, where over than 130 pieces of silk manufactures showed the millenary relationships between East and West.

A very interesting temporary exhibition about the Silk Road is held at Palazzo delle Esposizioni in Rome and another one called "From the ancient to the new Silk Road" is held at Palazzo del Quirinale. These exhibitions clearly show the mutual interests for the long-lasting meeting between the East and the West.

The Southern part of Italy also played a crucial role in the ancient Silk Road, especially considering the maritime route. Napoli in the XVI century experienced a great population growth and became a flourishing center of silk production. We should also list Caserta, where it is possible to visit San Leucio Silk Museum, Brindisi and Taranto as places of trade and sites such as Catanzaro and Sicily Region, very important for the production of silk and its export.

Silk Museums in Mendicino and Catanzaro are great evidences of the important artistic and economic role of the silk for local populations.

Diffusion of Silk Cycleway and active tourism

The presence of a mapped cycle route built around the historical heritage of silk in Italy is definitely an asset, in order to develop a product coherent with the Silk Road Brand and focused on the increasing market of cycle tourism. The Silk Cycleway starts from Venice and arrives in Livorno, crossing Ferrara, Bologna, Lucca and Pisa, for a total amount of 418 kms. The project has been coordinated by Montesole Bike Group from Bologna, which has produced a guide with the road map, indications about local accommodation facilities and catering and the cultural description of the places along the route, built on the central theme of silk trades.

While the gpx track can be available, the route official signage should be improved, nor the route



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is well-known or promoted and commercialized.

Travelling along paths and minor roads, the Cycleway passes through beautiful landscapes, old villages and highlights the Italian history of silk production in Venice and the mulberry plantations in Veneto hinterland, the hydraulic spinning wheels at the origin of the leadership of Bologna and the qualified industriousness of Lucca.

The most receptive markets interested in this type of tourism product are European markets, especially Germany, Switzerland, The Netherlands, Austria and Denmark.

Beyond the Silk Cycleway, more and more public and private authorities in Italy are investing in cycle routes for tourism, trying to take advantage of the up warding trends of this tourism segment.

Cycletourism is also interdependent with enogastronomic tours, in terms of assimilability of the product and in terms of the interests of target tourists.

Therefore the Brand Western Silk Road in Italy can also present a section dedicated to active tourism, proposing the Silk Cycleway and many other itineraries available for cycle tourists in the areas which have been individuated as coherent with the Brand.

Marco Polo committee within Italian Cultural Routes Board

Italian Cultural Routes is a permanent forum for the definition of shared visions and strategies to ensure that itineraries and routes can be an important asset for sustainable development and the creation of homogenous tourism destinations.

Within the Board has recently been constituted Marco Polo Committee, which is gathering many institutional authorities in order to develop the Silk Road project: among them, there are Italian regions of Adriatic dorsal, the Adriatic Ionian macro-region and Mirabilia (European Network of UNESCO sites realized by the Chambers of Commerce of 12 Italian cities).

The purpose is to foster interregional coordination, to define common strategies in order to support the Western Silk Road and to develop proposals able to receive financing from Interregional Programmes such as ADRION.



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WEAKNESSES

Absence of an integrated and coordinated knowledge about the Silk Road heritage all over Italy

During the interviews with institutions, associations, local experts, researchers and members of private sectors, many resources and assets have emerged that are strongly related to the Italian heritage and legacy of the Silk Road.

Silk museums spreading the knowledge about the local historical and manufacturing culture, cultural heritage in many Italian cities, conferences and exhibits have been held, researches have been published and historical documents are available (especially in Archivio di Stato of Genoa and Venice).

However the absence of an integrated database collecting and structuring the existing sources related to the Silk Road in Italy is a weakness, since it would provide for a digital mapping of the areas and sites pertaining to Brand and for a fundamental endowment of knowledge useful to better shape also tourism experiences.

Low awareness of Italy as a Silk Road destination

Differently from the Eastern part of the Silk Road, in Italy and more generally in the Western side of the Silk Road, at the present time the Silk Road has not yet been used as a Brand to appeal tourists. It is very easy to prove it through online researches: the unequivocally outcome is that almost every tour sold by Tour Operators with the label "Silk Road" is located in China, Central Asia and Caucasus, and the same geographical areas are the ones most represented in blogs and multimedia promotional materials related to the Silk Road.

The immediate consequence is that the awareness of Italy as a Silk Road destination is very low among tourists. It has also been clearly stated by the research "Trip Advisor Travel Trends for the Silk Road 2016". While Italy, among the destinations of the Silk Road, is the most researched one (35% of researches among the top ten countries), it is not present in the top ten countries that travellers identify as being Silk Road destinations.

This mean that even though Italy holds great potential in terms of heritage for being a Silk Road destination, it will take a deeper effort to associate itself to the Silk Road Brand. Efficient unique selling propositions must be found and the investment in promotion needs to be higher than for other countries.

Absence of a Silk Road tourism product in Italy

Despite Italy can offer a wide array of tourism product satisfying any type of tourism demand, a



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real tourism product related to the Silk Road is still to be implemented from the ground. Maybe it is also for these very reasons that a product related to the Silk Road is difficult to imagine and doesn't show strong appeal both for tourists and for local travel agencies or tour operators. The evocative call of commercial routes, the far East and the luxury goods traded at this time respond only for the outgoing Italian market, especially towards China. Public and private stakeholders have to share their knowledge in order to expand their market share for ingoing tourism, creating a new brand and promoting it with the primary purpose of draw a big share of the emerging Eastern touristic market.

Scarce formation of local tourism industry with reference to eastern markets

Simplified visa application processes, increasing percentage of middle-income individuals with disposal income for outbound travels, a higher increase in individual trips compared to package tours, the desire to enjoy real Italian experience (food, culture and fashion) and a growing trend of repeat Chinese visitors to Italy exploring new non-traditional places are important opportunities to shape tourism experiences (also for individuals) that move away from the usual organized tours in the most famous cities sold in the international markets.

According to International Travel monitor Chinese report in 2014, about two thirds of Chinese consumers now tend to travel independently. However, language barrier is still a problem faced by Chinese visitors in terms of tourism sector personnel, restaurant menus, hotel reservation, brochures and guided tours, especially in those locations that are not among the mainstream destinations but that could take benefits from the described trends.

Quality service and adequate training (hotels, restaurants, cultural attractions and retails industry) is fundamental to cater the needs of Chinese tourists.

Moreover, online custom-made content addressed to Chinese tourists (avoiding direct translation) is still lagging.

Implementation of Italian Silk Road sites network difficult to carry on

Since we have tried to map the areas of interest for the Western Silk Road at national level, we noticed how the evidences are displayed all over the Italian territory. The itineraries coming from the ancient Silk Road are different, complex and not always interconnected. First aspect to underline is to divide cities or areas directly involved in the ancient itinerary, located on the path, and the cities or areas important in the Silk Road context but not located on the itinerary: these are very important centers of silk production and distribution such as Sicily, Como, Bologna and Lucca.

For all these reasons, it is not easy to project and think of a homogeneous itinerary inclusive of all these areas and cities. The creation of micro or macro geographical network is complicated as



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well, meaning a great joint effort by public and private stakeholders to build a strong image for the Brand. Transportation and infrastructure, combined with the fact the Silk Road is not a traditional route, could be another hindrance in the creation and promotion of a quality tourism product.

Scarce experience in developing extended cultural routes and using them as a promotional tool

With 51 World Heritage Sites, Italy is the leading country in this special ranking. From big cities to smaller towns the Italian cultural heritage is immeasurable and variegated, while the same can be stated for the fascinating natural attractions and landscapes throughout the whole country, without forgetting local gastronomy.

Every single destination in Italy can count on numerous appealing drivers and it is definitely positive and a badge of honour. However, the possibility for each local area or Region to display its own attractions has made Italy lagging with respect to other countries in the practices of structuring and integrating several destinations through cultural routes and thematic Brands and the promotion and commercialization through wider channels.

Some of the experts we interviewed highlighted how it is getting more and more common to find in international travel fairs the promotion of tourism products integrated along cultural routes (one example is Great War brand in France), while Italian promotion of itineraries or routes mostly relies on local and regional initiatives, despite the wide number of Cultural Routes of the Council of Europe crossing the Country.

The reasons reported at the beginning of this section are among the factors that produced a fragmented tourism market, less used than other countries to foster networking practices, as well as a lower degree of cooperation and joint promotion among local authorities in terms of tourism. The guidelines that have been drafted into the Italian Strategic Tourism Plan may turn this tide and provide for a framework of greater joint efforts, but still, local and especially regional political will is needed. In fact, Italian Regions own a residual, and therefore full, legislative authority over tourism, even though the political and jurisprudential practice has led to a “liquid” application with the central level keeping an addressing role in establishing the fundamental principles of tourism and in some cases exerting competences due to Constitutional Court pronouncements on presented instances.



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OPPORTUNITIES

Sustainable management of tourism flows and tourism requalification in overcrowded area thanks to the Western Silk Road Brand

The building of a thematic route is an opportunity for those destinations that need tourism requalification due to the fact that most famous attractions are very close to exceed or have already exceeded their carrying capacity.

The most fitting example is the city of Venice, which is suffering from overcrowding of tourists, and the congestion is especially remarked in its central area to the point that authorities are considering to place a cap on tourist numbers. In 2014 UNESCO had threatened to add the city to the list of endangered World Heritage sites. So far, no decision has been taken, however the issue will be revisited in 2017. Therefore, the municipality of Venice has recently constituted a technical work-team to analyse proposals about the management of tourists flows.

The development of new cultural and Silk Road branded tours in the lesser-known parts of the cities, such as Cannaregio and its Jewish Ghetto, the proposal of local artisanal experiences and the increase of the appeal that can be achieved thanks to the promotion through the Western Silk Road Brand can bring important benefits to Venice and its sustainability in terms of tourism.

Develop new upward trending markets through the Brand Silk Road

Chinese tourism market represents the fourth entry in the list of international arrivals in Italy in 2015, and Chinese daily per capita expenditure is ranked at the second place. These data clearly show how important is the Eastern market for Italian tourism and how urgent is to respond effectively to its needs and preferences. Especially if Italy is deeply rooted with the Chinese culture.

The image of Marco Polo raises a special awareness in China and especially in the cities of Hangzhou, Suzhou and Yangzhou in the Yangtze River Delta Region. The Brand Western Silk Road is an important tool to capitalize upon the fame and recognition of Marco Polo.

The Brand Western Silk Road can be the leitmotiv around which to structure an integrated promotional campaign addressed to Chinese travellers. Since the present tourism marketing and promotion from Italy are fragmented without a concerted thrust, a partnership approach involving multiple regions and tourism companies built on the Western Silk Road Brand is highly recommended.

Moreover, the participation of China in the wider Silk Road Brand is an opportunity to strengthen partnerships in tourism and take advantage from a privileged access to Chinese tourism market.



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Revitalization of silk industry

After the decline of Italian silk industry in the mid-20th century, in 2014 the project “Fair Silk Way” has been launched in order to restore the production of silk cocoons and rebuild the complete silk cycle of production through a network of firms in the provinces of Vicenza and Treviso. The last western Europe functioning silk spinning mill has been brought back to splendour and mulberries have been planted. The project has gained recognition by the Region of Veneto and has been one out the four projects selected by the European Commission among hundreds of proposals to be presented in Bruxelles at the international meeting “Grow your Region”, in April 2015. The revitalization of the silk chain is leading to the production of 100% Italian silk, utilized also to create jewellerys made of gold and silk (it was precisely with this purpose that D’Orica, a goldsmith company, laid the grounds for the project).

The infrastructures and knowledge that have made possible this project are a legacy of the Silk Road age and a rejuvenated and modern silk industry in Italy could be an asset for the Western Silk Road Brand and could be included within a tourism product in different ways.

Cultural and educational tours can combine visits to the disused silk industry heritage such as old silk spinning mills to food & wine tours.

Moreover, a revitalized silk industry able to produce high quality silk and silk-related products (such as jewellerys), can offer shopping options to luxury tourists.

Cooperation with already existing initiatives promoted by associations and institutions

Besides the already cited exhibitions and events related to the Silk Road, in Italy the awareness of the valued heritage and opportunities related to the Silk Road is emerging also thanks to initiatives carried on by local associations.

Aikal is an association for the promotion and the development of cultural and supportive projects located in Venice. In collaboration with Overland (Italian Tour Operator and famous for World Truck Expeditions), Aikal will realize a Roadshow in Italy during Spring 2017 to exhibit Chinese culture and start an intercultural dialogue to collect subscriptions from Italian companies willing to take part to the camper caravan that will travel along the Silk Road, taking entrepreneurs and tourists from Venice to Beijing. In parallel, the return trip will involve Chinese companies and tourists with the purpose to build a strong network of economic, cultural and tourist interests and a global strategy of exchange sociality.

Besides, the trip Venice-Beijing back and forward will be preparatory to the setting-up of a permanent exhibition of the alimentation culture in the crossed countries, to be realized in Venice, Beijing and Dubai (hosting Expo 2020).

Another project sharing many synergies with the Western Silk Road initiative is VeroTour, coordinated by Veneto Region, co-founded by the European Commission and involving many



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national and international associations and partners. It aimed at implementing a transnational thematic cultural route along the historical maritime itinerary of the Silk Road. Building upon the immense cultural heritage and sites available, a diversified and sustainable tourism product is the key of the initiative. The sailing routes proposed by VeroTour allows people to experience and come to know at least eight different countries (Italy, Slovenia, Croatia, Montenegro, Albania, Greece, Cyprus and Turkey).

It appears as evident that the fulfilment of the Western Silk Road should take into account this already existing initiatives, drawing from the knowledge and the expertise of the associations and institutions involved in them and proceed in structuring, promoting and commercializing a coherent and appealing tourism product.

Coherence with Italian Strategic Tourism plan and Regional tourism strategies

The Strategic Tourism Plan 2017-2023 drafted by Mibact (Italian Ministry of Cultural Heritage and Tourism) presents many strategies and proposals that are compatible with the Brand Western Silk Road and could be actualized and made effective through it.

One of them is the transformation of the most famous centres of attraction (Venice, Florence, Rome, etc.) in gateways towards surrounding territories and new forms of tourism.

The adaptation of the infrastructure network has also emerged as an important issue to consider also from a tourist point of view and it is strictly correlated to the previous point.

The promotion of tourism experiences starting from the core cities but intended to reach the less known but equally fascinating areas and destinations, can't disregard an efficient and comfortable mobility, especially for independent travellers.

The goals of valorising Italian tourist offer through an integrated action and the recognition of relevant projects (national and interregional), the elaboration of thematic tourist products, the promotion of productive industries directly or indirectly related to tourism economics and the creation and strengthening of business networks are other favourable premises for the development of the Western Silk Road Brand.

Moreover, many Italian Regions that have been contacted by the Marco Polo Committee have already declared their interest in taking part in the Western Silk Road project and the synergies of it with their tourism planning strategies, accepting the invitation to a dedicated meeting that is going to be scheduled for the first half of 2017.

Eastern languages and cultures degree programmes at Ca' Foscari University in Venice

Ca' Foscari University in Venice offers bachelor and master degree programmes in eastern languages and cultures. The well-known quality of those programmes and the strategic location in Venice can be an asset for the developing of programmes involving scholars, professors and



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students in the setting-up of the Western Silk Road Brand.

Consultancy in realizing a tourist product meeting the expectations, needs and culture of Eastern markets, a qualified formation of local tourism businesses and the direct involvement of students in linguistic mediation are some examples that might be advantageous and also lead to employment opportunities.

Food tourism

Silk Road does not mean only the trade of the precious textile, but also a meeting of different cultures, traditions and habits. Among these food and spices, yet discovered by Marco Polo in the XII century and documented in his famous “Milione”: the great Venetian explorer took note of different food and drinks used in China and several merchants brought back from there different unknown spices. Most of them are still used in Italy and in Europe in many traditional dishes. But this is not the only link that that Silk Road has with the Italian territory. The creation of the Western Silk Road Brand could easily combine the excellence of the worldwide praised Italian cuisine with its invaluable cultural and artistic heritage. The discovering of Italian regions or cities linked somehow with the Silk Road, combined with its traditional dishes deeply rooted with the territory, could be an appealing solution for the Eastern market.

Synergies with OBOR programme by Chinese government

The Republic of China has launched in 2013 the initiative “One Belt One Road”. The purpose is to undertake an ambitious investment (from US\$ 4 trillion to 8 trillion) for developing regional infrastructures in order to improve trade and relations with Asian, Central Asian and European countries. It consists of two main components: the Silk Road Economic Belt (land-based) and the Maritime Silk Road.

Just like in the traditional Silk Road, both of them will end in Venice, therefore Italy is the convergence point of the two roads. The strengthening of Sino-Italian cooperation is an opportunity for many sectors, tourism included, and synergistic with the construction of a Western Silk Road Brand. Italian institutions, which have already signed a memorandum for tourism cooperation between Italian Regions and Chinese Provinces during Expo 2015, should not miss the opportunity for a joint planning of investments and easing of visa policies in order to tap on OBOR’ s potential benefits on tourism.

Creation of a tourism online platform related to Western Silk Road in Italy

The need for developing powerful and appealing contents through the by now essential



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technology, is one the key to promote Italy and its extended cultural and artistic heritage. In particular, the implementation of an online multilingual platform including the most important sites, areas and Regions related to the Western Silk Road Brand, could be very useful for the future tourists. Through different sections dedicated to geographical, artistic and cultural evidences of the ancient silk road, the tourist can widen and deepen its knowledge of the places in order to better plan its trip and things-to-do. Even more important is to perform a segmentation of the target in order to have different sections related to the different experiences available, answering before to the question “What can I do?” and only after to the question “Where should I go?”, consistently with the modern concept of tourism as an experiential activity.

A direct and integrated booking system with local accommodation facilities, tour operators and experience providers is fundamental.

While it would require an initial big effort from the local communities in order to map, communicate and promote their respective heritage, potential benefits are many.

A coherent image of Western Silk Road in Italy would be more easily conveyed to potential visitors and participants can share the costs of promotions realizing a unique efficient online website and even the less-known areas could easily be marketed reaching greater numbers of future visitors.

Use the appeal of most famous cities as gateways to marginal areas and favour dispersal

One of the biggest challenges Italy has to face regards the promotion of the huge artistic and cultural heritage of less frequented areas. Indeed, if some of the Silk Road evidences are related to the most known Italian cities, a large part of manufactures, center of production and masterpieces are located in less-known regions. Putting local communities first, promoting their villages, their treasures and their landscapes could be beneficial both at touristic and economic level. Link “new” itineraries different from the standard ones, creating a high-level touristic product, is a great opportunity Italy has to catch in order to gain share in the emerging thematic tourism.

An opportunity to achieve this, is to consider the appeal of Italian most known Silk Road destinations as gateways towards marginal areas that hold tourism potential.

The dispersal of tourists and thus the dispersal of tourism’s economic benefits to these marginal areas coupled with a more integrated product development and marketing approach is a positive consequence of route development. The integration of activities and attractions into one unified route system can serve the stimulation of cooperation and partnership between communities and can act as a vehicle for economic development in marginal areas.

Eventually it will lead to reduce pressure on core areas, provide new opportunities for employment and increase total length of stay and total spending.



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THREATS

The risk that the classic Italian destinations will stand out without valorising the less-known Italian heritage

Italy is among the most visited countries in the world. Iconic cities rich of historical and artistic heritage, a complete array of experiences for every type of tourism and hundreds of less-known city or areas that proudly conserve their beautiful culture and traditions. If Rome, Florence, Venice, Genoa and Naples are worldwide known and accommodate every year the majority of Italian touristic flows, there are several other regions offering high level touristic products based on their landscapes and beauty.

For these reasons, the creation of a Western Silk Road Brand should recognize every single aspect related to the Silk Road and the biggest touristic cities, but the risk that these attract almost all the attention exists. Public and private stakeholders should collaborate together to foster the less-known heritage and let the tourist discover these hidden gems. It's then important to imagine a tourism product including areas or cities different from the ones traditionally included by foreign Tour Operators, usually focused on promoting standard and renowned cities.

Great level of coordination is required due to the absence of a material route

The need for coordinated efforts in order to develop an appealing tourist offer related to the Western Silk Road has already been reported in the previous section.

In addition to that, it is here another reason which makes this coordination even more essential and, at the same time, more difficult to be implemented.

Differently from other countries involved in the project, crossed by the historical Silk Road land routes and where the heritage is collocated along a more or less traceable itinerary (and this is one of the reasons why tours are already available and offered by many Tour Operators), the Silk Road traditionally reached Italy and its cities by sea, also triggering a series of internal trades along the already existing routes.

The outcome which should concern those who will be involved in the accomplishment of the Western Silk Road in Italy, is that its legacy is spread among many poles, making it difficult to realize an itinerary from one point to another, connecting all the intermediate locations (as it can be done for example for "Via Francigena").

As a consequence of that, since the most likely configuration for the Western Silk Road in Italy is a network of cities and areas, it will be required an even deeper degree of coordination in order to build a solid structure and an integrated offer.



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Italian political instability

Present instability of Italian institutions, from the government to the constitutional reform, necessarily switch the attention from several primary issues. Italy is the fifth country in the world in terms of international tourism arrivals and tourism is one of the most important sector to Italian economy, contributing for almost ten per cent of the total GDP. Italy has almost 70 per cent of the total historical and artistic worldwide heritage and, for the above-mentioned reasons, a strategic and effective touristic planning by the public authorities is inevitably. But the re-organization of institutional structure and the possibility that political elections will take place in 2017 could divert the attention from this crucial matters, producing a minor interest by local or national administration to implement long-term structural strategic policies for tourism.

Uncoordinated efforts in promoting Western Silk Road Brand

The great opportunity given to all the countries located on the Western side of the Silk Road to enhance their tourism offer developing new fruitful touristic product, needs to be imagined in a common perspective. The even more increasing market competition regards not only every single country, but Western as a whole.

An existing risk is that, instead of understanding that the opportunity to raise awareness about the Western Silk Road relies on coordinated efforts and transnational projects, single countries will take on a competitive approach to catch the benefits stemming from the project.

This would eventually lead to an uncoordinated development of the Brand Western Silk Road, but on the contrary, in order to be effective, it needs an integrated positioning and targeting, common promotional campaigns, transnational experiences and a usable international network of sites and regions to widen the overall market share and spread all the potential benefits.



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CONCLUSIONS

The research team feels the following being just as a first and very indicative overview about the potential extension of the Silk Road towards the West. The interviewed stakeholders generally agree upon the need for a further and more deep identification on the whole national territory, of the Silk Road tangible and intangible heritage assets, which requires additional time and human resources.

Despite the long list of weaknesses identified by the research group, the hypothetical development of the Western Silk Road in Italy encountered the interest of all the solicited actors. The research team opinion is that the wide range of opportunities constitutes a potential chance for building new promotion strategies both in already heavily visited urban areas, as well as in less frequented and marginal tourism destinations. In particular, the strong links between the manufacturing sector and the cultural and creative industries within the Silk Road context is consistent with the strong international image of “Made in Italy”.

In a medium-term perspective, the launch of the EU_China relationship Year, launched by the DG Growth of the EU for 2018, will be a further opportunity to foster the cooperation exchanges on one of the fastest growing markets interested in cultural tourism.

The research team’s opinion is that if there is an international interest on developing the Silk Road towards the West, a great effort of trans scalar coordination should be foreseen: at the countries, regions and destinations level.



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