

**Global-local Relationships in World Heritage:  
Mount Taishan, China**

by

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A thesis  
presented to the University of Waterloo  
in fulfillment of the  
thesis requirement for the degree of  
Doctor of Philosophy  
in

Geography  
Waterloo, Ontario, Canada, 2009

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## **Author's Declaration**

I hereby declare that I am the sole author of this thesis. This is a true copy of the thesis, including any required final revisions, as accepted by my examiners.

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## **Abstract**

The concept of heritage is full of conflicts and contestations. The UNESCO's intervention in the form of the "World Heritage Convention" enriches the meaning of heritage but may exacerbate the intrinsic tensions in heritage while expanding its economic significance through tourism. Heritage tourism is an effective means to realize the economic potential of heritage. This is a major reason why developing countries like China apply for UNESCO world heritage designation. However, some stakeholders take more benefits while others bear more costs in the interplay of heritage conservation and tourism. Achievement of a balance among resource conservation, tourism development, and local community well-being is a pressing challenge for planning and management of World Heritage Sites.

This research examines the implications of World Heritage designation for conservation of the world heritage and, particularly, for the lives of local people living in and around the site. It is argued that such people often bear the most costs while often being ignored or disadvantaged in terms of benefits. Sustainability of local life is interdependent with sustainability of heritage conservation and tourism. A key goal of heritage planning should be to mitigate heritage contestation and dissonance, and to sustain local people's livelihoods and enhance their life quality. This would be conducive to the overall sustainability of the heritage resource.

Using Mount Taishan, a UNESCO world heritage site in China, as a case study, employing a plan and implementation evaluation approach, and taking a community perspective, this thesis evaluates the plans for the world heritage site and their implementation from three perspectives: resource conservation, visitor experience and local well-being (particularly local involvement in, and benefit from tourism). A mixture of quantitative and qualitative research methods is used and the transferability and applicability of western heritage planning and evaluation methods to China is examined implicitly.

It is shown that much attention has been placed on resource conservation on this

world heritage site, although the desire for economic returns underpins the conservation. The resource integrity of the heritage mountain has been marred by the construction of several cable cars for tourism. The number of visitors keeps growing. However, visitor experiences are generally positive except for crowding during the high seasons and length of stay has decreased.

Local involvement in decision making relating to heritage operations is low. Local involvement in the provision of tourism services is high but uneven, and usually under the organization of the village committees. Faced with land loss, displacement, and livelihood change, villagers are very positive toward and very much dependent on tourism as the major or sole means of making a living.

The power-relations that are reflected in the heritage nexus are a key issue. As the most powerful stakeholder, the local government's intervention produces high efficiency and also inequity. Short-term goals are sought, reflecting the short tenure of officials. Within this context, western heritage planning ideas, including the advocacy of community involvement and public participation, have met many challenges in China, although this could change with socio-political developments in China.

## Acknowledgements

So many people come to mind when I am about to write the acknowledgements.

First, I would like to thank my committee members, Dr. Susan Wismer, Dr. Robert Shipley, and Dr. Luna Khirfan. I would thank Luna for the comments and references she suggested on my defense which helped revising my thesis, and I would particularly thank Susan and Robert for their great insight and valuable feedbacks during the process of my writing the thesis, and for the enduring patience, support, and confidence they have given me.

My deep gratitude goes to my advisor, Dr. Geoff Wall. I would thank him for his great advising work --- for his insightful suggestions on every step I made in my study and research toward the completion of my dissertation, for his conscientious input in reading and editing my writings, and most of all, for his unchanging encouragement and support throughout the years of my PhD study. This dissertation would not have been possible without his help.

Sincere thanks go to Dr. Mark Seasons for his knowledge and advice concerning the plan evaluation literature. Special thanks also go to Dr. Stephanie Scott, Dr. Graham Whitelaw, Dr. Jean Kay-Guelke, Dr. Mike Stone, Dr. Jonathan Price, Dr. Robert Gibson and Dr. Bruce Mitchell for the time they would spend on discussing my research. Their research views and experiences and the discussions with them helped a lot inspiring and shaping some of my research ideas and approaches.

I would particularly thank the graduate program administrator, Mrs. Lynn Finch, an amazing lady with high professionalism and an angel's heart. Her kindness and her sincere help and support in my time of difficulties have meant so much to me.

I feel so indebted to my friends, Dr. Jack Rollwagen and Dr. Louise Stein, of New York State University. Their friendship, their faith in my potential and their consistent encouragement and support are so invaluable to me. Special thanks also go to Dr. Ling Mu of Yale University whose encouragement and confidence helps greatly in moving me forward.

My appreciation extends to Tai-an Municipal Tourism Bureau and Taishan Administrative Committee whose reception facilitated greatly my field research. I thank all the key informants and interviewees who would share their time and opinions with me. Sincere thank you also goes to my friends and colleagues in Tai-an city: Prof. Wang Leiting, Prof. Ma Haiyang, Prof. Cheng Fangying, Mr. Li Zhonghua, and Mr. Wang Xiujiang. I especially feel grateful toward Mr. Xu Jian, who helped me with the local connections and the access of some planning document, and Mr. Yu Wei, who helped me with the tedious work of sorting out the survey data.

My heart-felt thanks go to my wonderful friends and colleagues while my stay in Waterloo, Wei Wei, Nora, Jason, Zhaoping, Honggen and Jianping. They either provided good suggestions and sources for my research or gave me warm help and care in life. I cherish their friendship. Thank you also goes to those friends and colleagues at Shandong University back in China for their unfailing understanding and support.

Finally, deepest gratitude goes to my family. I would like to dedicate this dissertation to my mother and my daughter, Yezi, the two most important women in my life. Their unconditional love is the source of my strength to fulfill this long but rewarding journey.

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## **List of Abbreviations**

**CCTV:** China Central Television

**CPC:** Communist Party of China

**ICOMOS:** International Council on Monuments and Sites

**IOU:** I Owe You

**IRRIDEX:** Doxey's Index of Irritation

**IUCN:** International Union for Conservation of Nature

**PLA:** Participatory Local Appraisal

**PRA:** Participatory Rural Appraisal

**RRA:** Rapid Rural Appraisal

**SBE:** Stakeholder-based evaluation

**SCE:** Stakeholder-collaboration evaluation

**SIE:** Stakeholder-informed evaluation

**SRE:** Stakeholder-referred evaluation

**TAC:** Taishan Administrative Committee

**TDTB:** Taishan District Tourism Bureau

**TMTB:** Tai-an Municipal Tourism Bureau

**TPPCC:** Tai-an People's Political Consultative Conference

**UNESCO:** United Nations Education, Science and Culture Organization

**WHC:** World Heritage Convention

**WTO:** World Tourism Organization

## **Chapter One: Introduction**

### **1.1. An overview**

Heritage conservation has become a major concern in recent years in both developed countries (Hall, 1993; Timothy and Boyd, 2003, Stubbs, 2004) and developing countries (Nuryanti, 1996; du Cros, 2001; McKercher et al, 2005). This is partly because heritage tourism has grown at an accelerating pace over the last decade, producing both benefits and costs. Some heritage stakeholders take more benefits while others bear more costs. It is believed that local people living in and around the heritage are often those who take the most costs while being often ignored and disadvantaged in terms of benefits. This is particularly so in the developing world (Wall, 1996, 1999, 2004; Wall and Black, 2005; Robinson, 1999; Daher, 2000). Heritage is characterized by complexity and conflicts (Mitchell, 2002) and, thus, shares many attributes with the conservation of resources in general. Cultural heritage, in particular, is inherently contested, inviting conflicts and contestations in conservation practice. UNESCO's intervention in the form of the "World Heritage Convention" (see **Appendix 2** for further information), while enhancing economic significance through international tourism, has exacerbated the intrinsic tension and dissonance in cultural heritage, especially concerning the interests of the local community. Deriving a balance among resource conservation, tourism development and community well-being is a big challenge faced by heritage planners. Although collaboration and stakeholder involvement in conservation and development are increasingly advocated and embraced to address these tensions in developing countries (Reed 1997, 1999; Timothy, 1999), few successful cases can be found (Aas et al., 2005). Even though exceptions can be found, such as Aas et al.'s (2005) recent case study of Luang Prabang, Laos, very limited research has been done that evaluates heritage plans and their implementation so as to find the reason for their successes or failures whereby improvements can be made.

Against the above background, this thesis uses China's Mount Taishan, a UNESCO listed World Heritage site, as a case study. It evaluates the plans and their implementation, taking a community perspective. In this way it addresses a research gap. The impacts of World Heritage

designation are examined with particular emphasis on the consequences of site conservation and tourism for the lives of the local people living in and around the site. It is argued that the sustainability of local lives and sustainable heritage conservation and development are interconnected and interdependent, and that key goals of heritage planning should be to mitigate heritage contestation and dissonance. Thus, local people's livelihoods and their quality of life may be enhanced and this would be conducive to the overall sustainability of the heritage resource.

Western researchers generally agreed through both theoretical study and practice that local involvement and equitable stakeholder participation and collaboration are a promising route to attain the aforementioned goals. Nevertheless, contextual constraints should not be overlooked. Some western concepts and theories, while they are believed good and are practiced well in western cultures and societies, may not be easily accepted and applied successfully in other settings. For example, although China has seen social progress and the evolution of governance and public participation and devolution of power in recent decades, it is very different from western countries in its political and economic system, social structure, history and cultural conventions. The aim here is not to judge which system is better. Rather, the purpose is to explore if western achievements in heritage conservation can be replicated in China and if and how western processes can be best applied and adapted in practice in China. Many failed cases in political, economic, and social reform in China show that the mechanical application of western ideas to the Chinese context will not likely work, although learning from the west has been a national policy and a key influence in China's reforms.

## **1.2. Research goal, objectives, and questions**

This study will examine the extent to which the tourism plan and the conservation plan (a prerequisite for UNESCO designation) of a World Heritage Site and their implementation address local needs. It will explore the extent to which local people benefit from the World Heritage Site around which they live. In doing so, it will examine implicitly the applicability and transferability of western heritage planning and evaluation approaches to the Chinese context. The operation of the World Heritage Site will be evaluated in terms of heritage conservation, visitor experiences, and local well-being, by examining the plans and their implementation. The ultimate goal is to provide

knowledge and recommendations for sound heritage planning and management, including tourism on site, in a developing country so as to better address the needs and aspirations of local people and improve the quality of their lives while conserving the world heritage site for humanity. A case study approach will be taken with a focus upon the evaluation of plans.

Based on the above goals and objectives, a series of questions has been formulated:

1. What goals and objectives are the tourism and conservation plans for the World Heritage Site meant to achieve? What do they articulate concerning the local community and their lives?

2. Since tourism is one of the most important activities going on in most World Heritage Sites, what do the plans say about tourism and local involvement in tourism? Do the local communities benefit from tourism? Why or Why not?

3. How well have the plans been implemented at the research site? Has the practice on the ground matched and met the objectives? If so, how; if not, why? Have local communities benefitted from the designation of the World Heritage Site? How so, or why not?

4. Is local involvement and public participation in heritage and tourism planning, as widely advocated in the western world, applicable in the Chinese context? Why or why not?

### **1.3. Structure of the thesis**

This thesis is composed of eleven chapters. Chapter one gives an overall introduction in which the research goal and objectives, research questions and the structure of the thesis are presented. Chapter two provides a conceptual basis for the research by critically reviewing the relevant heritage and tourism planning literature. Concepts such as heritage, multi-function of heritage, heritage tourism, heritage dissonance, sustainability of heritage resources and plan evaluation are discussed. An evaluation model is adopted and relevant indicators are developed and presented. Chapter three reviews the planning and management of heritage, including World Heritage in China. Chapter four introduces the research site selected for this study. Chapter five discusses research methodology and data collection methods employed in the field research. Chapter six presents the results of the analysis of quantitative and qualitative data collected for this research. Chapter seven provides a synthesis and comparison of the quantitative and the qualitative data analyses. Relevant plans are evaluated

intensively in Chapter Eight in terms of both the plan documents and their implementation. Chapter Nine discusses research findings and provides recommendations based on the discussion. Chapter Ten is the concluding chapter. It restates the key contributions of this research, identifies the major research contributions of this thesis, and suggests future research directions.



## **Chapter Two: Conceptual Framework**

### **2.1. Heritage and heritage tourism**

#### **2.1. 1. Heritage and world heritage**

Researchers of different disciplines continue in their efforts to define the term “heritage”. As defined by linguists, heritage constitutes things “that have been passed on from earlier generations” and “a nation’s buildings, monuments, countryside, etc. especially when regarded as worthy of preservation” (Barber, 1998: 659). According to Hewison (1989: 16), heritage is “that which a past generation has preserved and handed on to the present and which a significant group of population wishes to hand on to the future.” Heritage can be classified using types of attraction, e.g. natural heritage, living cultural heritage, built heritage, industrial heritage, personal heritage, dark heritage, and so on (Timothy and Boyd, 2003).

Although there is a wide range and diversity in definitions, the term heritage basically can be summarized into two major categories: 1) natural heritage, drawing its qualities from nature, and 2) heritage with cultural and built elements in association with people and events (Herbert, 1995). Since this study, though associated with both cultural and natural heritage, is more focused on the cultural elements of heritage, and since culture is defined as “the system of shared beliefs, values, customs, behaviors, and artifacts that the members of a society use to cope with their world and with one another, and that are transmitted from generation to generation through learning”(Bates and Plog 1976:7), the researcher will use a more specific definition given by Herbert (1995:9): “Heritage places include historic buildings or monuments which bear the distinctive imprint of human history. Their interest may derive from architecture or design, from historical significance, or from a combination of these attributes.” Heritage, in this sense, is inevitably associated with society and usually also has economic values. Most importantly, it is associated with people.

Museums undoubtedly play a large role in cultural heritage and there are a myriad of research papers in museum studies (Graham et al., 2000) but, due to limitations of space, they will not be further discussed here as this paper will focus on open-air and associated built cultural heritage sites.

Although the merits, defects and implication of the World Heritage Convention are still under

discussion (Leask and Fyall, 2000; van de Aa et al., 2005; Williams, 2005), the UNESCO (1972) concept of world heritage provides understanding of heritage from an international point of view. **World heritage** refers to a rare, fragile, non-renewable resource with special historic, scientific, or esthetic qualities. It is of universal value to the whole world. **World cultural heritage**, as designated and listed by the World Heritage Convention (WHC, see **Appendix 2** for further information), includes monuments, groups of buildings and sites which represent “a master piece of human creative genius” and a “unique artistic achievement”, have “exerted great influence”, bear a “unique or exceptional testimony to a civilization which has disappeared”, are an “outstanding example of a type of building ensemble which illustrates a significant stage in history” or are “tangibly associated with events, ideas, or beliefs of universal significance” (ICOMOS: 1993:73, see **Appendix 2** for further information). **World natural heritage** includes “natural sites”, “natural features consisting of physical and biological formations or groups of such formations”, and “geological and physiographical formations and precisely delineated areas which constitute the habitat of threatened species of animals and plants” that bear “outstanding universal value” from the point of view of science, conservation, and aesthetics. The general objectives of WHC are to enhance worldwide understanding and appreciation of heritage conservation. Many cases have shown that the designation can, in fact, attract more tourists and thus increase the economic prosperity and status of the place where the heritage is located. Therefore, many **state parties** (see **Appendix 2** for further information), especially those in the developing world, consider the designation of a world cultural heritage site to be beneficial in both a political and a general sense (du Cros and McKercher, 2000; Harrison, 2005).

### **2.1.2 Tourism and heritage tourism**

Being widely recognized as a visible and important economic use of heritage, **tourism** needs to be defined. There is no one definition of tourism that has gained *universal* acceptance. With different criteria applied, tourism can be defined with differing emphases. Classically, tourism is defined as the travel of people to destinations away from their usual dwelling or working place and the provision of facilities to cater to the needs arising from this travel (Mathieson and Wall, 1982). This type of definition was further developed in an effort to gain more precision by the European Commission

(2002) as the set of activities performed by people who travel and stay in places outside their usual environment for no more than one consecutive year for leisure, business and other purposes. These two definitions focus more on the demand side compared with the one given by Jafari (1977), who describes tourism as the study of man away from his usual habitat, of the industry which responds to his needs, and of the impacts that both he and the industry have on the host's socio-cultural, economic, and physical environment. Jafari's definition will be adopted here because the emphasis on the local impacts fits in with the theme of this research.

It is widely held by researchers that heritage provides a crucial product in the world's largest service industry, tourism (Johnson and Thomas, 1995, Tunbridge and Ashworth, 1996, Wall, 1997, Graham et al, 2000, Timothy and Boyd, 2003). The World Tourism Organization (**WTO**) has recognized that heritage and culture have become a component in almost 40% of all international trips undertaken (WTO, 2003). A basic definition of **heritage tourism** developed by the U.K. National Trust for Historic Preservation is traveling to historic and cultural attractions to learn about the past in an interesting and enjoyable way (cited in Richards, 1997). While this definition is apparently focused on the cultural attributes of heritage, Yale (1991) noted that heritage tourism is nothing more than tourism centered on what we have inherited, which can mean anything from historic buildings to art works, to beautiful scenery, which includes cultural as well as natural sites with historical significance. The WTO (1992) defined heritage tourism as an immersion in the natural history, human heritage, arts, philosophy and institutions of another region or country. This attempt at clarifying the definition of heritage tourism nevertheless remained insufficient. Poria et al. (2001: 1049) conceptualized heritage tourism as "a subgroup of tourism, in which the main motivation for visiting a site is based on the place's heritage characteristics according to the tourists' perception of their own heritage." The definition of Poria et al. (2001), on the one hand, is considered to be helpful in guiding the interpretation of heritage for tourism purposes; on the other, it has received criticism from some researchers, for example Garrod and Fyall (2001), who claimed it is too demand-sided and fails to consider the perspective of those who actually supply the heritage tourism experience which is the essential element of this kind of tourism. They also argued that it focused and relied excessively

on the perception of tourists and ignored the issue of dissonance which is intrinsic to heritage and which needs to be carefully dealt with for the healthy development of tourism based on heritage resources.

In searching for a holistic understanding of heritage tourism, Silberberg (1995:361) directed attention to the destination community by defining cultural tourism, of which cultural heritage tourism is a part, as “visits by persons from outside the host community motivated wholly or in part by interest in historical, artistic, scientific or lifestyle/heritage offerings of a community, region, group or institution.” Laws and Pan (2004) also argued, drawing on Chang (1999), that heritage is supposed to play a dual role in attracting visitors to a destination while fulfilling the social, cultural and recreational aspirations of locals. It is contended that, ideally, heritage tourism should bring economic benefits to host communities and provide a significant means and motivation for them to manage their heritage and continuing traditions.

Therefore, to sum up the above discussion, **the key elements in defining heritage tourism in a holistic way** are:

1. It is based on cultural or natural heritage resources;
2. It provides a special visitor experience based on the unique cultural, natural or historical attractiveness of a certain site.
3. It supports conservation of heritage resources, and undertakes an educative role in cultivating awareness of heritage conservation among the visitors, the heritage managers, and owners, including local residents.
4. It generates economic benefits for local communities and helps them to sustain their traditions and cultural identities which are an integral part of the heritage environment.

Heritage tourism has grown at an accelerating pace over the last decades. Forecasts indicate an ever-faster rate of growth with the second most important tourism destination of the world by 2020 becoming Asia and the Pacific (WTO, 2001). Heritage tourism in this region is characterized by issues typical of a developing context, as most of the tourist destinations here are developing countries, among which China is one of the biggest.

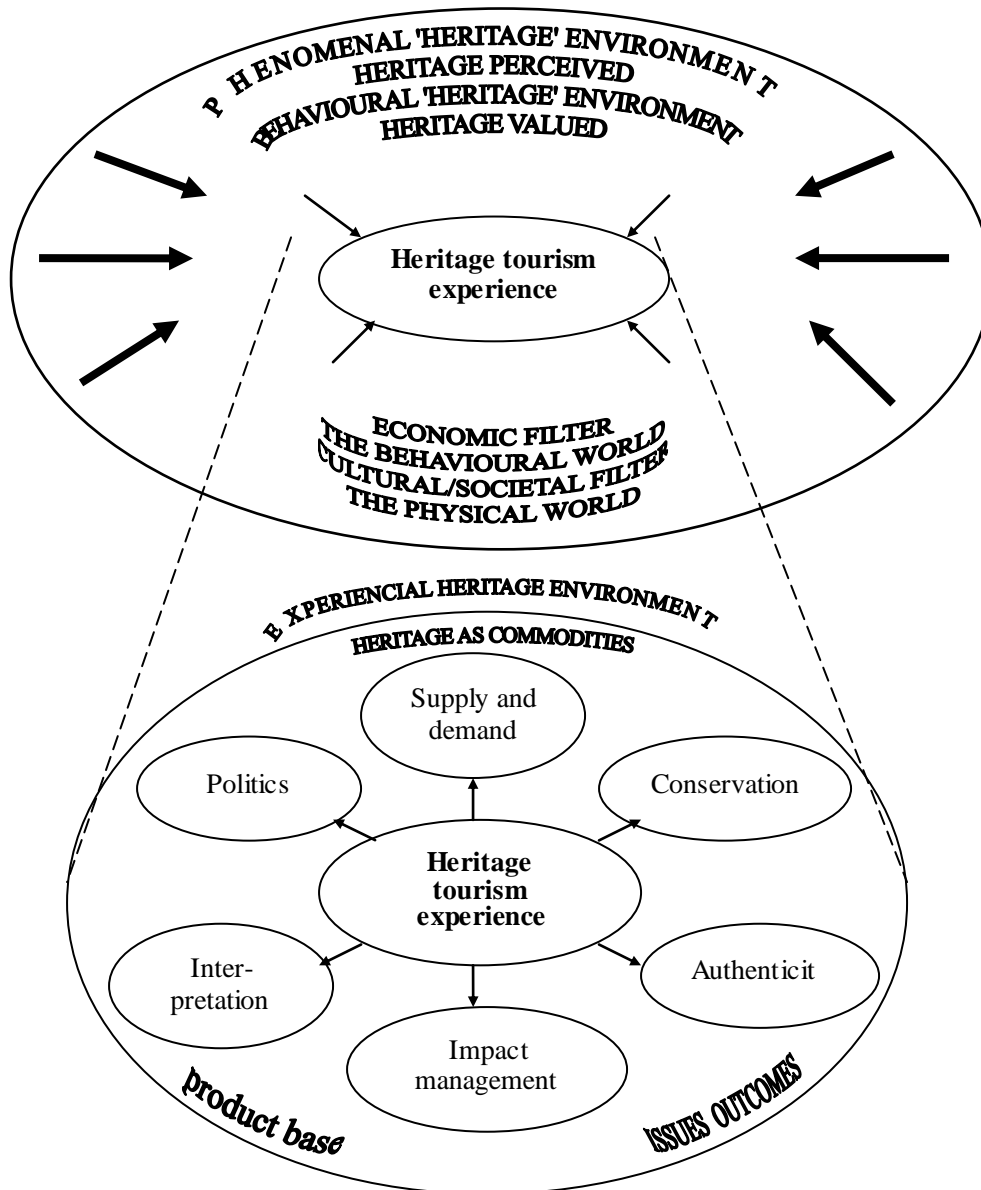
## 2.2. The subjective and multi-use nature of heritage :

In discussing the nature of heritage, Ashworth and Tunbridge (1999: 106) took it as “the contemporary use of the past”. They noted that:

“the interpretation of the past in history, the surviving relict buildings and artifacts and collective and individual memories are all harnessed in response to current needs which include the identification of individuals with social, ethnic and territorial entities and the provision of economic resources for commodification within heritage industries ”

Schouten (1995:21) pointed out that visitors are not primarily looking for scientific historical evidence, but are looking for an experience, a new reality based on the tangible remains of the past, and that “heritage is history processed through mythology, ideology, nationalism, local pride, romantic ideas or just plain marketing, into a commodity.” History is what a historian regards as worth recording and heritage is what contemporary society chooses to inherit and pass on (Tunbridge and Ashworth, 1996). Therefore, the subjective nature of heritage lies in that it is not merely the past, but is shaped by the present and the selective use of elements of the past. Timothy and Boyd’s (2003) model (**Figure 2.1**) illustrates this **subjective attribute** of heritage (Ashworth and Tunbridge, 1999). The contemporary uses can be categorized into two major functions: first, heritage is exploited for economic purposes as a primary component of strategies to promote tourism, economic development and rural and urban regeneration; second, it helps to define the meanings of culture and power and is exploited politically and, thus, has crucial socio-political functions (Graham et al., 2000).

**Figure 2.1 A model of heritage and heritage tourism phenomena (Source: adapted from Timothy and Boyd )**



Source: adapted from Timothy and Boyd, 2003

### 2.2.1 The social and political use and consumption of heritage

Heritage is a knowledge-based cultural product and a political resource (Graham et al., 2000). As such, knowledge conveyed by heritage may always be compromised and negotiated, depending on specific social and intellectual circumstances (Livingstone, 1992). This raises the question of “Whose heritage is it?” This question was expanded upon by Graham et al. (2000), who were concerned about why a certain interpretation of heritage is promoted, whose interests are advanced or oppressed, and

in what circumstances the interpretation is conceived and communicated. These questions form fields of contestation and dissonance which will be further addressed in **Section 2.2.3** of this chapter.

Building upon Lowenthal's (1985) notion of the social and political uses of heritage, Graham (1999) further noted the functions of heritage as validation and identity. The identity reflected by heritage is multi-faceted as it relates, by definition, to a range of human attributes, including language, religion, ethnicity, nationalism and shared interpretations of the past (Guibernau, 1996). The sense of belonging to place, that is fundamental to identity, is itself a heavily contested concept. Central to the entire concept of identity is the idea of the *Other*, groups with competing and often conflicting beliefs, values, and aspirations (Douglas, 1997, Graham et al., 2000). As for the notion of otherness relating to outside visitors, Robinson (1998) pointed out that conflicts may arise from the different "legitimated" processes of manufacturing heritage and tradition and consuming or commodifying culture:

It is not that conflict situations arise solely from inherent cultural differences; they also derive from the process involved in the construction, accentuation, and promotion of cultural identities. The logic of consumptive behavior drives these processes and creates "otherness" as a necessary precondition for tourism encounters. The tourism industry legitimates the manufacture of heritage and tradition. (Robinson, 1998: 31)

Here arises the issue of inclusion and exclusion in which, again, dissonance may be unavoidably embedded.

### **2.2.2 The economic use of heritage.**

While heritage has socio-political attributes as discussed above, it also exists at the same time as an economic commodity (Graham et al., 2000, Larkham, 1995), and it is logical that the treatment of history as a quarry of resource possibilities from which heritage products can be created leads naturally to the possibility of its commercial exploitation (Tunbridge and Ashworth, 1996).

The contemporary approach to heritage as an economic phenomenon and part of a wider economic system can be justified on three economic grounds, namely, it can be a driver of economic regeneration, it can fund site preservation and development, and certain economic uses may be less damaging than other alternative uses or mere neglect (Laws and Pan, 2004). In addition, as Seale (1996) noted, heritage is part of the cultural stock of the community and this not only serves

community cohesion, provided that dissonance is not excessive, but it also has potential for commodification if properly used for community development.

The most visible and obvious of such economic uses is in heritage tourism and heritage, however defined, makes up one of the most important resources for both international and domestic tourism (Tunbridge and Ashworth, 1996). Ideally, an important role for heritage tourism to play is to generate revenue which flows back to heritage resources and brings economic benefits to host communities in terms of both improving their quality of life and providing a significant means and motivation for locals to manage their cultural heritage and sustain their unique traditions (du Cros, 2001). However, as many researchers have noted (du Cros, 2001, Graham et al, 2000, Drost, 1996, and Vogt et al, 2004), the practical operations of cultural heritage tourism are not always compatible with these objectives for a variety of reasons. Meanwhile, this form of heritage exploitation once again raises questions such as, “Who defines heritage?”, “What is to be conserved?”, and “Whose heritage is it?” in a new dimension and aggravates the conflicts and contestations which exist intrinsically in heritage, the manifestation of which, especially in a developing context, will be discussed later in this chapter.

### **2.2.3. Contestation and dissonance in heritage**

Heritage is multi-sold and multi-consumed. The range of different uses of heritage and its importance to so many people for various reasons have made heritage a major arena of conflict and contestation. (Graham et al, 2000). Olsen (2000, cited in Timothy and Boyd, 2003) identified three types of heritage contestation. The first occurs with two or more groups claiming the same or overlapping heritage where the same place has different meanings for different groups, and each group believes that its view is correct while the others' is not. Jerusalem is an example of this type of contestation (Olsen and Guelke, 2003). The second is division within one group over what aspects of their heritage to emphasize and share with the public. Lowenthal (1996:156) contended that “what heritage does not highlight it often hides”, and provided an example of a women's league in a small California town that wished to commemorate with a memorial plaque the prostitutes who worked there during the gold rush. The city council opposed the action because members were ashamed to



share that portion of their past with outsiders. The third form of heritage contestation is about indigenous versus colonial perspectives, relating to two different groups competing with parallel heritages often leading to questions about whose or which heritage should be preserved. This is manifested in the cases of American Indians and post-colonial South Africans.

Graham et al. (2000) noted that the content of heritage is very likely to reflect dominant ethnicities i.e. power. In any of the above cases, the administration in power supports and portrays the heritages and cultures that function best for its purposes (Timothy and Prideaux, 2004). It is usually the case that the prevailing themes of heritage allow little space for the heritage of “others”. This notion is supported by Cosgrove (1993), who believed that control of the media of representation (of which heritage is one) is vital in determining the trajectory of contestations in which cultural hegemony is the goal, although “others” may, or may not, accept the message as intended.

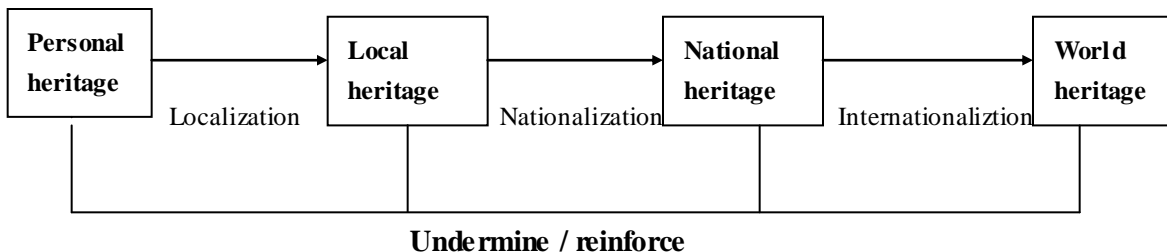
Tunbridge and Ashworth’s (1996) examination of what they termed “dissonance” is the most sustained attempt to conceptualize heritage contestation and its consequences. According to Tunbridge and Ashworth (1996), the idea of dissonance in heritage involves a discordance or lack of agreement and consistency, which will naturally raise the question: “between what elements does dissonance occur?” This, in turn, allows a new classification to be constructed based on the types of such dissonance, in terms of dissonance in commodification, place products, multi-use (cultural, political, economic; and among races, religions, languages, classes, gender, disabilities and non-disabilities, etc.), content of messages, and so on. Also, this concept may be understood further as a state of psychological tension caused by the simultaneous holding of mutually inconsistent attitudes or the existence of a lack of consonance between attitudes and behaviour (Sears et al. 1995, cited in Tunbridge and Ashworth, 1996). Sears et al. (1995) pointed out that dissonance is intrinsic to the very nature of heritage and, thus, selection is unavoidable, which means that all heritage is someone’s heritage and therefore, logically, not someone else’s. Any creation of heritage from the past thus disinherits someone completely or partially, actively or potentially. This disinheritance may be unintentional, temporary, of trivial importance, limited in its effects and concealed, or long term, widespread, intentional, important and obvious.

With the ubiquitous nature of dissonance, heritage and its conservation cannot be examined adequately without addressing the implied questions: “Who decides what is heritage?” and “Whose heritage is it?” or “Who owns the heritage?” and “Is it possible to reconcile conflicting claims to such ownership?” As argued by Tunbridge and Ashworth (1996), this really requires an acknowledgement of the potential effects and costs of disinheritance so that decisions can be made, at best, as to who inherits and who does not in particular cases, in pursuit of realistically pragmatic policies for an overall and long-term balance between different segments of society.

#### 2.2.4. Scales of heritage and contestation

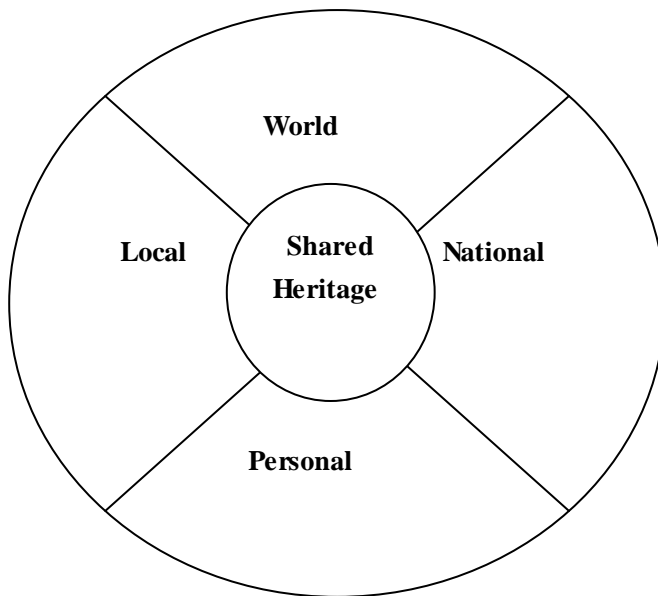
People, heritage and places are linked together in a complicated and dynamic way, and heritage is a major instrument in the creation of identity by associating the present people with their past through varied uses of heritage, whether socio-political or economic. However, more often than not, one of the two elements (the present and the past) in the socio-political and economic dichotomy of heritage uses is discordant, either with the other or within itself (Graham et al., 2000). This discordance is exacerbated due to different scales of heritage. Heritage is not homogeneous. It exists at different levels or scales, including the world, national, local and personal scales (Graham et al., 2000; Swarbrooke. 1994, LeBlanc, 1993, Timothy and Boyd, 2003), and heritage developed at different levels may not be complementary and harmonious, any one scale having the potential to undermine the others. This can be better perceived from **Figure 2.2**. from Graham et al. (2000:182). But in terms of the heritage tourism experience, the various scales may all be linked by “shared heritage” as noted by Timothy and Boyd (2003:14) (**Figure 2.3**). However, this does not necessarily mean that sharing always occurs in a harmonious way. In fact, the involvement of tourists at different scales and from different countries and regions may even aggravate tensions.

**Figure 2.2 The interaction of heritage at different spatial scales**



Source: Graham et al., 2000

**Figure 2.3. Scale of heritage and heritage tourism**



**2.2.4.1. Personal heritage:**

Personal heritage is something each individual possesses, cherishes, conserves, and would like to share with others, such as pictures, souvenirs, a family house, special persons in their family traditions, etc., which may remind them of their past and their origin (LeBlanc, 1993). Timothy and Boyd (2003) noted that personal heritage attracts people who possess emotional connections to a particular place, and family history researchers, and it has become an important aspect of heritage tourism. The Church of Jesus Christ of Latter-Day Saints in Salt Lake City, USA, is an example; every year the church genealogical library attracts thousands of people of diverse backgrounds who travel from many parts of the world to search for their roots and to support personal identities.

Ironically, however, there are occasions when local people's affinity for a place and sense of belonging are frustrated, when they are involuntarily displaced from the heritage place where they have lived for generations. One reason for such relocation may be the development of the site as a tourism resource for visitors from other regions or countries to come to appreciate, enjoy, and even share by looking either for their roots or for "perception of their own heritage" (Porial et al., 2001:1048). This happens more often in developing countries where heritage tourism is deemed an important economic strategy (Wall, 1996). If not properly handled, forced relocation will unavoidably

bring the intrinsic dissonance of heritage to the surface, which is a focus of this thesis.

#### **2.2.4.2. National heritage:**

National heritage is pervasive and it is difficult to imagine heritage without national museums, archives and theatres, monuments and heroes, and so on. Nation-states need national heritage to consolidate national identity, absorb or neutralize potentially competing heritages of other social-cultural groups or regions, combat the claims of other nations upon its territory or people, and, to be explicit, justifying a “we were there first” argument (Graham et al., 2000).

All governments consider it a responsibility to foster, conserve, and propagate a distinctive national heritage, with “cultural hegemony” (Cosgrove, 1993:6) as an implied goal. This “cultural hegemony” policy toward heritage of minority and unprivileged groups of people can apparently strengthen the national cohesion and cultural unity, but some unintentional costs also result. Black and Wall (2001) noticed the tension between the classical or nationally-defined cultural identity and the local or vernacular forms of culture revealed in the case of Prambanan, Indonesia, where local dance performance is ignored and compromised with all government efforts being focused on projecting and promoting a classical image of national (Javanese) culture in order to develop an international tourism market. Turnpenny (2004) contended that the widely-accepted orthodox approach to understanding cultural heritage, which typically reflects a national perspective, has actually led to the creation of an ill-defined concept which focuses on the form and fabric of built heritage while ignoring the intangible and material aspects of culture which are elements integral to community perception of cultural heritage. This may cause local frustration and loss of motivation for heritage conservation and may also prevent heritage managers from considering issues beyond traditional characteristics of history, archaeology or architecture.

The contestation in the national-local paradigm should not be overlooked. To attain mutual toleration and incorporation calls for integrated management, or a “joined-up” policy, as described by Turnpenny (2004:295).

#### **2.2.4.3. Local heritage**

The term “local” covers a wide range of spatial possibilities extending from a region within a

nation-state to the precise location of an event. Much heritage is intrinsically linked to specific physical locations (Tunbridge and Ashworth, 1996), directly or indirectly.

Since identity is a major motive for the creation of heritage, it is not surprising that heritage is the principle instrument for shaping distinctive local representations of place. Therefore, local authorities and communities are enthusiastic about maintaining and emphasizing heritage which can identify them as distinct from others, be it for economic or social and political reasons. However, multiple heritage identities can result in one heritage being differently defined, interpreted, claimed and even fought over on different scales (Graham et al., 2000). This potential contestation between the necessity of a unified national identity and local divergence is intrinsic. Cases like Wales in U.K. (Turnpenny, 2004), Prambanan in Indonesia (Black and Wall, 2001), and the native American and Inuit people in the United States and Canada (Boniface and Fowler, 1993, Tunbridge and Ashworth, 1996) are evidence of this point.

Wall (2001) pointed out from a heritage tourism perspective that diversity is both an asset and a challenge. He maintained that diversity provides the opportunity to develop distinctive tourism products and to cater to specialized market niches, but at the same time creates challenges for the development of strong national identities and may even lead to fragmentation and political dissension. Therefore, how to balance divergence is a big issue in heritage conservation and development.

Graham et al. (2000) further argued that, in many cases, the practice of architectural and urban conservation, which intends to conserve the local character, may well tend towards a standardization of forms, a homogenization of places and thus a reduction in local distinctiveness. They presented three reasons explaining why heritage intended to enhance local identity may actually lead to its diminution: 1. standardization of professional practice; 2. global companies repeating successful examples to minimize risk; and 3. a “catalogue heritagization” at the level of design detail caused by the reproduction of demonstration models around the world by heritage planners and managers.

This international influence on local heritage does not only come from investors and practitioners but also comes from international visitors whose preferences direct in one way or another the commodification of local histories, cultures and customs. As Graham et al. (2000)

concluded, it is the external international world that actually creates and consumes local ethnicities and cultures, and the search for a distinctive local identity through local heritage may lead to the loss of that distinctiveness through standardized reproducible forms.

#### **2.2.4.4. International / World heritage**

The universal appeal of a common heritage for humanity seems to fit naturally with global development (Tunbridge and Asworth, 1996; Robinson, 2000). Claims for the global heritage are reflected in the existence of international associations and intergovernmental organizations charged with designating, maintaining and promoting global heritage, of which UNESCO is typical. Based on the belief that “World Heritage sites belong to all the peoples of the world, irrespective of the territory on which they are located” (UNESCO, 2000:2), UNESCO seeks to encourage the identification, protection, and preservation of the world’s cultural and natural heritage that is perceived to be of outstanding value to humanity through an international treaty called the Convention Concerning the Protection of the World Cultural and Natural Heritage (WHC) adopted in 1972 (UNESCO, 1972) (See **Appendix 2.** for WHC operational details).

However, the concept of a world heritage may be challenged by identity and meanings at national and local scales. The global and local heritage may not in all facets be in conflict, as there may be consensus that the local uniqueness is of global stature and attracts a global market, which could, in turn, bring significant economic advantages to the locality. Potential contestation, however, may still spill over into actual conflicts (Graham et al., 2000). Local people may value heritage differently from outsiders. This means that fundamental distinctions may exist between global and local claims on the past (Tunbridge and Ashworth, 1996, Graham et al., 2000). For this, post-colonial South Africa and the American indigenous people are good cases in point. Similar cases where contestations and conflicts are aggravated by international tourism on the world heritage sites can also be found in countries within a developing context in Southeast Asia (Wall, 2001; Timothy and Prideaux, 2004, Wall and Black, 2005). As all heritage, by being someone’s, must disinherit someone else (Tunbridge and Ashworth, 1996), world heritage cannot be a mere inclusion of local and national heritages, as argued by Graham et al. (2000), but rather may become a denial of the two, unless the

other scales can be adjusted to accept global values, and vice versa. This discussion naturally leads to the questions posed earlier: “Whose heritage is it?” and “Who decides what is heritage?”

As for the ownership, despite UNESCO’s claim of a world heritage which should belong to and be protected by the international community as a whole, the “world heritage” in practice is not protected by any world government, but by sovereign national governments, and is actually managed by the local community. Thus, drawing on Graham et al. (2000), local economic concerns and social-political priorities are often accorded primacy over international heritage priorities. Furthermore, when global heritage and its expression in international tourism conflict with local heritage, the latter should take precedence over the former.

Despite the protection claim of the international community, UNESCO actually lacks enforcement power. It is unable to provide the world community with an independent means of intervention into the physical management, accessibility provision, political presentation, and economic use of recognized global heritage, especially when these are desperately needed in some cases, such as at Mount Taishan and Zhang-jia-jie in China (Xie, 2001 ) and Ha Long Bay in Vietnam (Lask and Herold, 2005) where tourism development on each of the sites has risked the well-being of the world heritage itself.

The question “Who decides what is heritage?” is equally difficult to answer or is subject to many conflicting answers because so many actors are involved in the process (Graham et al., 2000). Theoretically, any group who is legitimately the owner of a heritage could decide, i.e., local people, the nation-state, or the international community. Much has been written on heritage at national and local levels, but increasing globalization and the promotion of the concept of world heritage have resulted in growing roles for international elements in decision making. This is manifested in varied forms of international involvement in heritage conservation as well as resource exploitation. UNESCO and other funding bodies, like the World Bank, aim to conserve heritage for all of humanity and to protect it for future generations. There are also international private sector investors or partners who see the economic benefit of heritage as a resource, mainly for tourism. Last but not least, international tourists are increasingly recognized as playing a pivotal role in influencing the economic

use of heritage and its interpretation, particularly when it comes to world heritage sites. The implication of this international involvement is substantial and both potentially positive and negative for world heritage in developing countries in terms of its conservation and the life quality of local people.

### **2.2.5. Some special issues of heritage dissonance incurred by world heritage designation and tourism in developing countries**

The heritage contestation and dissonance discussed above may be exacerbated in a developing context where resources are scarce and where people are still striving to survive. On the one hand, their traditional ways of using resources may conflict with the prevailing norms of using heritage (Walker et al, 2001); on the other, drawing on Olive (1997), development of the heritage sites may often change and challenge local control over and access to use of the heritage resources.

The identified issues of contested heritage relating to tourism in developing countries are, though apparently not limited to, contested meanings of heritage within an international-local paradigm; problems of relocation (contested space); inadequate institutional capabilities and knowledge and skills to become involved; and limited funding resources versus over-dependence on international funding and foreign investment. Each aspect will be discussed in turn.

#### **2.2.5.1. Contestation in international- local meanings of heritage**

Much has been mentioned earlier about heritage contestation between global and local levels. However, as noted by Black and Wall (2001), tension between global-local perspectives is pronounced more than ever when an international organization becomes directly involved in the selection, conservation and presentation of a heritage which not only has to be defined at international and national levels, but which often has a different meaning, value and expression at the local level. In studying cases in Indonesia and Thailand, they found that the values which local people attach to a heritage are different from, though no less important than, the values perceived by experts, professionals and government officials and that the local values which could have made the monuments more relevant to domestic and international tourists are often ignored. They maintained that there must be something missing if the meaning of a site is defined largely by experts from other



places rather than the local people living around it, with a global culture often displacing local culture (Wall and Black, 2005).

Similar contentions have been made by Turnpenny (2004) who insisted that community engagement be the solution for the traditionally ill-defined concept of cultural heritage, and by Harrison (2005b) who pointed out, by drawing on cases in Mexico, Kyrgyzstan, Cambodia, Vietnam and India, that the meanings of the world heritage sites for local people may be quite different from those propounded by national tourism marketing agencies and UNESCO.

In addition, this phenomenon could be exacerbated in developing countries when the governments place high value on “classic” and “official” culture for political reasons such as promoting the national identity, and even more for economic reasons such as attracting international tourism (Black and Wall, 2001) when tourism revenue is an important source of national income. Under such conditions, local people’s aspirations and the meanings they hold for heritage sites are often ignored either unconsciously or on purpose as trade-offs by heritage promoters.

#### **2.2.5.2. Contested space and problems of relocation**

The cases in developing countries like Indonesia and Thailand show that one typical step in the process of creating an historical park for conservation and for tourism tends to be the removal of existing people and houses surrounding the monument (Black and Wall, 2001). The implication of relocation is profound on local people. It can change the traditional subsistence of the local people and deprive them of the opportunities to benefit from tourism. It also impairs their affinity to and dismantles their vital relationship with the heritage place (Daher, 2001). Even worse, due to inadequate compensation for relocation and failure to find an alternative means of subsistence to secure their life when land is lost and their traditional lifestyle is changed, frustration and resentment may easily arise among displaced residents. This may lead to extreme behaviour that threatens the heritage site, for instance, using temple stones for building material (Wall and Black, 2005) and even making deliberate depredations. At the very least, short-term thinking towards the heritage sites will likely lead to negative consequences in the long course of heritage conservation and may ultimately bring about the demise of tourism on the heritage site.

The issue of contested space is also manifested in the competition for space between cultural heritage sites and growing populations and a range of land uses, where the value of the heritage site may be deemed less than the value of competing land uses and, thus, it may face the possibility of damage or destruction. Dredge (2004) noted the potential for conflict between residents and the need to preserve the area's rich Neolithic heritage in Liang-Zhu, China, and argued for cooperative planning to mitigate these problems. Another case is Xia Ma Fang, a component of Xiaoling Tomb which was designated as a UNESCO World Cultural Heritage Site in 2003. A national highway was planned to be built which would have to go through the place where Xia Ma Fang is located. There was a big debate over whether Xia Ma Fang should be relocated to give way to the national highway, and pleas were sent to State Council of China for solving the conflicts and helping make the decision. The result was the monument did not move, and the highway went just beside it<sup>1</sup>.

### **2.2.5.3. Inadequate institutional capabilities and involvement knowledge and skills**

Mitchell (2002:39) noted that “the synoptic or comprehensive rational planning model<sup>2</sup> does not seem well suited to deal with complexity and uncertainty”. Wall’s (1996) analysis of South-east Asian cases revealed that this is particularly so for heritage planning in a developing context. Many developing countries (including China) adopt such a top-down planning approach either because of their long-existing political system which favours this planning tradition or because of the relative scarcity of capital and expertise, so that national government takes on the roles of planning both heritage conservation and heritage tourism with experts from other places or even other countries invited to take charge of the plan-making or, at least, to consult. The result is, with over dependence on “outsiders” which consequently denies opportunities for local people to be involved and voice their ideas, as Wall (1996, 2005) noted, plans tend to focus upon physical elements and ignore local needs. They may actually disadvantage many of the people that the plans are supposedly designed to help, through the strategies recommended by the plan and by the concepts upon which the plans are based.

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<sup>1</sup> <http://www.chinanews.com.cn/n/2003-08-15/26/335617.html>, and  
<http://bbs0.house.sina.com.cn/treeview-652067-1920044-4750-1793-3-0.html>

<sup>2</sup> Synoptic planning: See Mitchell p38

Another problem is the local community's low capacity to participate in decision making and inadequate knowledge and skills to become involved so as to benefit from tourism activities (Aas et al, 2005; Reed, 1997; Timothy, 1996)

#### **2.2.5.4. Limited funding sources and over-dependence on international funding resource and foreign investment**

Heritage conservation in developing countries always faces the challenge of limited funding (Nuryanti, 1996). The annual Chinese government funding for 119 national designated "Scenic Spots and Historical Sites" (including world heritage sites) totaled only \$1.25 million USD while in Korea, the annual government funding for its 20 national parks is equivalent to around \$37.5 million USD (Xie, 2001). Limited funding sources may drive heritage managers to focus on short-term objectives and economic benefits from heritage sites.

Over-dependence on international funding and foreign investment is another pressing issue that complicates problems concerning heritage conservation in developing countries. According to Daher (2000), foreign aid comes from two major sources: one is UN aid projects; the other is investment of foreign enterprises. Both Daher (2000) and Wall (2001) criticized UNESCO operations at world heritage sites suggesting that they tend to "freeze" the authenticity and museumize the environment which may deny local development opportunities and segregate the heritage from modern life. Daher (2000) contended by examining the case of Jordan that, rather than producing "catalogue heritagization",<sup>3</sup> as termed by Ashworth (1998), very few projects of international investors have attempt to sustain a living environment. External pressures exerted on the government for public participation are translated into something that satisfies funding requirements, rather than being undertaken out of a genuine belief in such approaches. Furthermore, Burns (2001) warned that the dominance by foreign enterprises of tourism in developing countries may distort development and create dependency. This is echoed by Daher (2000) who pointed out that a high proportion of the income generated by tourism in the developing world (like Jordan) does not remain in those countries but returns to the big tourism corporations and large financial institutions of the developed world,

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<sup>3</sup> The standardized styles in micro-scale redesign of either public open spaces or heritage restoration or renovation in conserved areas tend, according to Ashworth (1998), to constitute a kind of '*catalogue heritagization*'.

foreign aid needs to be re-evaluated and leakage and “structural dependence”<sup>4</sup> should not be ignored.

To reiterate, dissonance is intrinsic to heritage at all scales. However, heritage can be mobile, highly flexible, reproducible and malleable in that it can be interpreted in many different ways for numerous and even conflicting purposes, sequentially or even simultaneously (Graham et al., 2000). Thus it may be possible, through planning and management, to fulfill the need for identification and other uses of different people at different scales. Quoting Graham et al. (2000:255), “Globalism, nationalism, ethnocentrism, and localism can in many cases be reconciled once the problems are recognized and mutual claims respected.” Frost (2004) also contended with his study on the heritage of the pearl industry in Broome, Western Australia, that it is possible to integrate a number of cultural traditions and themes into an experience that adds to the understanding of the past while not excluding the history of minorities. Nevertheless, this may not happen automatically but, rather, a comprehensive heritage planning and management strategy taking all relevant factors into consideration is highly necessary even though it may not solve all the problems.

### **2.3. Between dissonance and harmony: a space allowing for heritage planning and management**

One could easily be dismayed by the above discussion of heritage issues and might conclude that heritage is really unmanageable. However, a position could be adopted between assumptions of automatic harmony and dissonance, which may provide space for heritage planning and management. Tunbridge and Ashworth (1996) believed that some dissonant issues can be ignored or tolerated, some can be avoided, while some others can be at least mitigated in various ways and to various extents through planning and management interventions. Nevertheless, one apparently should not expect the interventions of a heritage plan to be a panacea that will solve all problems.

In order to address the above issues within a heritage plan, one needs first to answer such questions as, “What is a heritage plan?”, “Who should it plan for?”, “What should a heritage plan achieve?”, “What role should tourism play in heritage conservation?” and “What are the limitations and challenges for heritage planning and its implementation, especially in a developing context?”

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<sup>4</sup> Structural dependence has two meanings: on one hand, an individual factor cannot function effectively without the whole organizational structure within which it exists and on which it depends; on the other, an organization structure cannot function effectively without a certain individual factor which exists within the structure and on which the structure depends (Huang, S., 2004). The second meaning is used in this paper.

### **2.3.1. What is a heritage plan?**

Although the term “heritage plan” is frequently used by researchers and scholars, an orthodox definition is difficult to find in the literature (many defined “heritage” and “plan/planning”, but not a “heritage plan”). Planning is usually understood as a process used to develop a strategy to achieve desired goals or objectives, to resolve problems and to facilitate actions (Mitchell, 2002 ), and it is “concerned with anticipating and regulating change in a system, to promote orderly development so as to increase the social, economic, and environmental benefits of the development process,” (Murphy, 1985:156). A **heritage plan** then should be, with particular regard to heritage resources, the identification of possible desirable future end states, taking social, economic, and environmental factors into consideration, and development of courses of action to reach such end states. **Heritage management**, on the other hand, following Mitchell’s (2002) definition of “resource and environmental management”, should be actual decisions and actions concerning policy and practice regarding how heritage resources and their environment are appraised, protected, allocated, developed, used, rehabilitated and restored, monitored and evaluated. Defining the two terms leads to the notion that, with different emphases, the heritage plan goals are not identical to management goals, for their time frames may be different for example, although they are definitely inter-related. This means that a heritage plan can not take care of all facets of heritage conservation while certain responsibilities ought to be shouldered by management, for instance, the detailed capacity of visitor parking or the quality of tour guides. However, the heritage plan should set the direction. It should establish goals and address such questions as “Who should it plan for?” and “What should be achieved?” To answer these questions, the concept of sustainable development and its implication should first be examined.

### **2.3.2. Heritage conservation and sustainable development**

#### **2.3.2.1. The contested concept of sustainable development**

Sustainable development was defined in the Bruntland Report, *Our Common Future*, as meeting “the needs of the present without compromising the ability of future generations to meet their needs.”(WCED, 1987:43) Since then, in spite of criticisms and debates, this concept has been embraced by more and more disciplines from the environmental sphere to economic, social and even cultural policy, and heritage conservation as well (Stubbs, 2004). Heritage (both natural and cultural)

is considered a resource to be sustained, with its ever-rising natural, cultural, economic, and socio-political issues which have inevitably to be subsumed into the notion of sustainable development. It is clear that the idea of sustainable development has brought about a fundamental shift in understanding the relationships of humanity with nature and away from the conventional people-dominant outlook, especially in the “North”, which has been based on the view of the separation of the environment from socio-economic issues (Hopwood et al., 2005)

However, the paradox existing within the concept hampers its application and effectiveness in solving practical problems (Butler, 1993; Wood, 1993; Daly, 1993; Wall, 1991, 1997, 2002; Hopwood et al., 2005). Wall viewed sustainable development as an oxymoron, contending that, while “sustainability” requires a long-term perspective and something that is sustained should ideally endure and exist in perpetuity, “development” implies change, a progression from an existing situation to a new and superior state. This understanding reveals the irreconcilable contradiction in the concept which implies the difficulty and unavoidable dispute in its actual application.

Nevertheless, on the other hand, as he also pointed out, the ambiguity and imprecision of the concept suggests its flexibility and adaptability and enables the very phrase to be used in many different ways subject to the context. It can be embraced by different interest groups from governments to environmentalists to local communities who may have varied and even conflicting perspectives but who may be brought to a common table for a dialogue where a basis for cooperation has initially been established (Wall 1997, 2002; Strange, 1997, 1999; Rydin, 1997).

### **2.3.2.2. Sustainability principles and perspectives**

#### **2.3.2.2.1. Principles**

Based on environmental assessment initiatives, and in an attempt to combine concerns with environment and socio-economic issues, Gibson et al. (2005) helpfully summarized eight principles of sustainability or sustainable development (the two terms are interchangeable as indicated in the work), which are: 1. Socio-ecological integrity; 2. Livelihood sufficiency and opportunity; 3. Intra-generational equity; 4. Intergenerational equity; 5. Resource maintenance and efficiency; 6. Socio-ecological civility and democratic governance; 7. Precaution and adaptation; and 8. Immediate and long-term integration (See details in **Table 2.1.**) He emphasized the interconnection and interdependence of society, economy and ecology which he believed should be in a series of

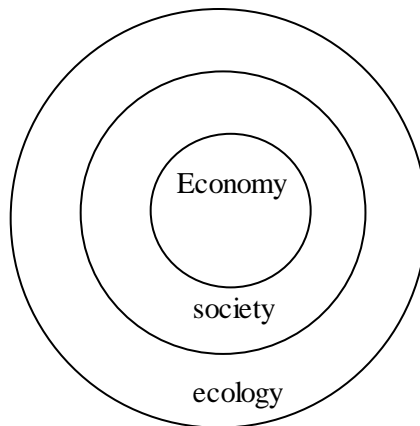
concentric rather than interlocking circles with the circle of economy inside the circle of society which, in turn, is surrounded by the of ecology circle, implying that anything in the smaller circles that undermines the larger (and vice versa) weakens the whole (**Figure 2.4**). These principles help to clarify the ideas of sustainable development and provide a useful basis for evaluation of the different practices guided, or presumed to be guided by this concept. However, as Gibson pointed out, compromises and tradeoffs are rarely avoidable in reality, and to achieve positive results in all categories may be extremely difficult when what we now do, and regularly propose, satisfies none of the principles (2005). Furthermore, context is always crucial which implies that the design of decision-making processes for specifics of contexts will be at least as important as the principles outlined for sustainability. Both Gibson's principles and the limitations he identified are relevant and helpful in addressing the questions of this research - the consequences of the UNESCO World Heritage designation in a developing context for conservation and local people's well-being.

**Table 2.1. Sustainability principles**

- 
- 1. Socio-ecological integrity:** Build human-ecological relations to establish and maintain the long-term integrity of socio-biophysical systems and protect the irreplaceable life support functions upon which human as well as ecological well being depends.
  - 2. Livelihood sufficiency and opportunity:** Ensure that every one and every community has enough for a decent life and that everyone has opportunities to seek improvements in ways that do not compromise future generation's possibilities for sufficiency and opportunity.
  - 3. Intragenerational equity:** Ensure that sufficiency and effective choices for all are pursued in ways that reduce dangerous gaps in sufficiency and opportunity (and health, security, social recognition, political influence, etc.) between the rich and the poor.
  - 4. Intergenerational equity:** Favor present options and actions that are most likely to preserve or enhance the opportunities and capabilities of future generations to live sustainably.
  - 5. Resource maintenance and efficiency:** Provide a larger base for ensuring sustainable livelihoods for all while reducing threats to the long-term integrity of socio-ecological systems by reducing exactive damage, avoiding waste and cutting overall material and energy use per unit of benefit.
  - 6. socio-ecological cavity and democntratic governance:** Build the capacity, motivation and habitual inclination of individuals, communities and other collective decision making bodies to apply sustainability requirements through more open and better informed deliberations, greater attention to fostering reciprocal awareness and collective responsibility, and more integrated use of administrative, market, customary and personal decision making practices.
  - 7. Precaution and adaptation** Respect uncertainty, avoid even poorly understood risks of serious or irreversible damage to the foundation for sustainability, plan to learn, desgn for surprise and manage for adaptation.
  - 8. Immediate and long term integration:** Apply all principles of sustainability at once, seeking mutually supportive benefits and multiple gains.
- 

**Source: Gibson, 2005**

**Figure 2.4. :** Circles of sustainability



Concentric Circles: Economy immersed in society, society immersed in ecology

**Source: Gibson, 2005**

#### **2.3.2.2.2. Perspectives**

Based on a literature review, Hopwood et al (2005) identified three broad views on sustainability as: 1. *status quo*, that sustainability can be achieved within the present structures; 2. *reform*, that fundamental reform is necessary but without a full break from the existing arrangements; and 3. *transformation*, that a radical transformation is needed as the roots of the problems are the economic structure of and power relationships in society (See **Table 2.2.** for details). They concluded that reform is better than doing nothing and transformation, though essential, may not be immediately feasible.



**Table 2.2. Three broad views of sustainable development**

Views	Contentions	Representatives
Status quo	Sustainability can be achieved within the present structures; the need for change is recognized, but adjustments should be made without any fundamental changes to society, means of decision-making or power relations; development is identified with growth ; and economic growth is taken as part of the solution	Governments, business, Ecological Modernizers
Reform	Fundamental reform is necessary but without a full break from existing arrangements; large shifts are needed in policy and lifestyle, like changes in socio-economic structures, increasing participation in decisions, improving the quality of human life and modification to the world economy, but this school would locate the root of the problem in imbalance and lack of knowledge and information rather than in the nature of present society, and believe in the key being to persuade governments and international organizations mainly by reasonable argument to introduce the needed major reforms	Academics, mainstream NGO experts, some officials in governments and public agencies,
Transformation	The roots of the problems are the very economic and power structures of society a radical transformation is needed; the mounting crisis in environment and society are interconnected and social and environmental system risk breakdown if radical change does not occur; the school has a strong commitment to social equity, with a view that access to livelihood, good health, resources and economic and political decision making are connected	Deep ecologists, social cornucopians, eco-feminists, and eco-socialists

**Source: summarized from Hopwood et al. (2005)**

The strong commitment of the transformation view to social equity and its emphasis on the interconnection of livelihood, health, resources and economic and political decision making is of particular value to this study. It holds that in the absence of people having control over their lives and resources, inequality and environmental degradation are inevitable. Sustainable livelihoods, according to Scoones (1998), comprises the capabilities, assets (including both material and social resources) and activities required for a means of living. A livelihood is sustainable when it can cope with and recover from stresses and shocks, maintain or enhance its capabilities and assets, while not undermining the natural resource base. The author of this research takes sustainable livelihood as an appropriate approach to solving or at least mitigating the identified heritage problems, particularly for the developing countries, where a large population is still “existing below the poverty line” and “do not know where their next meal is coming from”, quoting Wall (2004:3), who also sees a sustainable livelihood approach as a promising way to sustainability, and where, with no alternative means of

subsistence to sustain their life, “those poor and hungry people will often destroy their immediate environment in order to survive” (WCED, 1987:28 ).

### **2.3.2.3 Sustainability and heritage planning**

#### **2.3.2.3.1. Sustainability principles for heritage conservation**

In responding to sustainability with respect to heritage, Rodwell (2003) proposed principles involving: “1. the wise use of resource to ensure their continuity of supply; 2. minimum intervention to fabric and cultural identity (physical, social, economic, artistic); and 3. constructive evolution as opposed to destructive evolution.” It should be noted that these principles accept the supply function of heritage (whose “clients” could be people from near and far) and allow change and development (but only constructive), and that the proponent takes heritage conservation and development as dialectical but potentially complementary.

Heritage conservation emphases changed over time. An emphasis on conserving the heritage resource itself was giving way by the late 1970s to the provision of more attention to visitor management during 1980s, and then to greater attention to the human dimension of heritage in terms of the allocation of resources in the 1990s (Hall, 1998). Hall believed that heritage management should provide services not only for visitors but also for all the stakeholders i.e. the individuals, groups and organizations with an interest in a common heritage management problem or issue and who are directly influenced or affected by the actions or non actions taken by others to resolve the problem or issue (Gray, 1989; Hall, 1998). The author of this thesis argues, drawing on Robinson (1999), that the local communities living in and around the heritage site, with people who may or may not directly participate in heritage-related activities, are important stakeholders who should not be ignored. They are the very people who are bound to live with the consequences of whatever goes on at the heritage site, positive or negative (Wall, 1996). The sustainability of their lives should be an essential part of heritage sustainability as a whole.

#### **2.3.2.3.2. Strategic heritage planning**

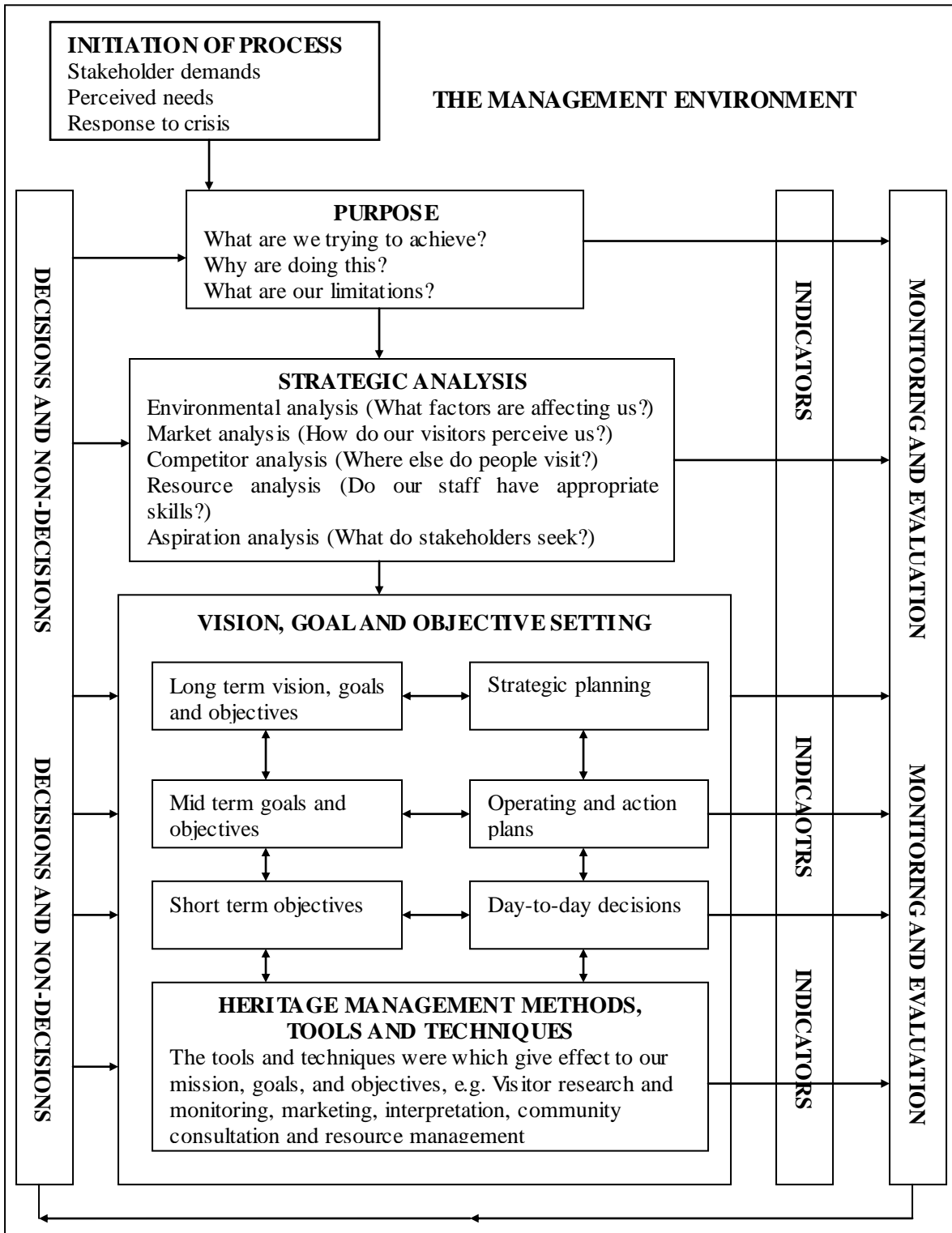
Based on his ideas described above, Hall (1998) advocated strategic planning for heritage to address issues identified in the previous section, and thus move heritage conservation practice toward

sustainability. Strategic heritage planning, according to Hall, is the process by which an organization effectively adapts to its management environment over time by integrating planning and management into a single process. The heritage plan, then, is the document which guides future directions, activities, programs and actions. He suggested that,

The outcome of the strategic planning process is the impact that the process has on the organization and its activities. Such impacts are then monitored and evaluated through the selection of appropriate indicators as part of the on-going revision and readjustment of the organization to its environment. Strategic planning therefore emphasizes the process of continuous improvement as a cornerstone of organizational activity, in which strategic planning is linked to management and operational decision making (Hall, 1998:14).

Targeted at fulfilling the mission of conserving the heritage while maintaining visitor access and meeting stakeholder demands, according to Hall, the strategic heritage planning process includes six components which are: 1. (identification of) purpose; 2. strategic analysis; 3. mission, goals, and objectives; 4. actions, operations, and strategies; 5. indicators, monitoring and evaluation, and 6. decisions and non-decisions. (See **Figure 2.5** for details). The fact that strategic heritage planning focuses on the planning process and, particularly, on monitoring and evaluation for adjustment and revision is likely to encourage public participation and provide opportunities for stakeholders, ideally, particularly those disadvantaged and ignored in the formal synoptic planning such as local residents, to join in the decision making or at least make their voice heard and their aspirations known and considered in the decision making process.

**Figure 2.5 Elements of a strategic heritage planning process**



Source: Hall and McArthur, 1998:21

However, contexts may have significant implications for strategic heritage planning practice. As

Wall (1996) noted, in many developing countries, public participation in (tourism) decision making is merely a form of tokenism. Although strategic planning is now increasingly recognized as an essential process (Hall, 1998) in the western countries, it is still a novel concept in many developing countries like China. Limited initiatives could be found in urban planning while there are almost none in the heritage field, judging from the limited literature available on planning in China (Yeh and Wu, 1999; Zhang, 2002a, 2002b; and Ng and Tang, 2004). It is difficult to judge how long it will take and to what extent it could be accepted and applied within the specific Chinese context, since a shift to strategic heritage planning principles may amount to a fundamental resetting of purposes and priorities.

The concept of sustainability and its particular relevance to heritage conservation has been discussed. To sum up, it seems we have to accept the anthropocentric nature of sustainable development (Lee, 2000) since, as human beings, we can hardly go beyond our limits but unavoidably define needs from a human standpoint. Both development and sustainability (of the resource and environment) are means rather than ends. The ultimate goal is to guarantee a healthy, secure, and equitable well-being of our own as well as that of the future generations, no matter at a global, national, regional or local level. We can make a difference by working out the best ways to follow the principles in their own right and by making a balance in application and practice between the two conflicting ideas of sustainability and development so as to achieve our long-term ultimate goals.

### **2.3.3. The nature of a heritage plan and its capacity to address heritage issues**

#### **2.3.3.1 A means rather than an end**

Based on the above discussions, planning for the conservation of heritage is more for people, or the long-term well-being of people. Referring to the “who” and “what” questions raised about heritage planning at the outset, it should be the different stakeholders, especially local residents, that should be planned for. Therefore, in addition to planning for managing and conserving the heritage resource, another priority of a heritage plan should be to benefit the local people, sustain their livelihood, help them maintain a harmonious relationship with their heritage environment, and

improve their long-term physical and cultural well-being.

Likewise, tourism on the heritage sites should be a means to improve heritage conservation and, at the same time, to benefit local people and enhance the quality of their life. As noted previously, heritage tourism on different levels can bring in revenue but, at the same time, can exacerbate the contestation and dissonance of heritage. This is particularly the case in some developing countries where tourism competes for resources with other, often traditional resource-based, subsistence of local people (Wisner, 2002; Walker et al, 2001). Wall (2004) argued that tourism must be inserted into an existing economy and, ideally, should not replace this economy but be complementary to it. Therefore, sustainable livelihoods are advocated as a useful approach (Wisner, 2000; Wall, 2004) to incorporate tourism into the existing pattern of livelihood strategies of the local community so as to enrich the means by which they sustain their life and, hopefully, to reduce or mitigate contesting issues (such as space contestation and structural dependence).

#### **2.3.3.2 Plans for mitigating and reducing contestation and dissonance, and for the local people:**

It is now possible to summarize what a heritage plan could do. In addition to planning for the common concerns for a heritage site, such as resource preservation and visitor management (which will not be elaborated here not because they are unimportant but because they are beyond the focus of the specific discussion here), a plan can and should do the following:

1. Identify the meanings that the heritage bears with an “inclusivism” rather than “minimalism” approach, using the terminology of Tunbridge and Ashworth (2000:271), so that the heritage can really represent the identity of the local people.

2. Establish it as a goal that heritage conservation and development, including tourism development, should support the sustainable livelihoods of local people (Hall and McArthur, 1998; Murphy, 1985; Wall and Wang, 2005).

3. Recognize the two contesting but interdependent emphases on the heritage site that require coordination: heritage resource preservation and heritage tourism, with resource conservation being prioritized as the foundation for tourism (Xie, 2004; Xie and Zheng, 2005).

4. Encourage stakeholder collaboration and local involvement and empowerment (Wall and

Wang, 2005; Zhang, 2002a). Specify in the goals that stakeholders, especially disadvantaged groups, should share in the benefits and should get involved in the decision making concerning heritage conservation and development so that they have a sense of belonging toward the heritage and, therefore, are more likely to conserve it spontaneously. Depending on the context and specific situation, positive interactions may range from consultation, cooperation, coordination, collaboration, and partnership which could be put in a continuum from “loose” to “tight” relationships (Long ,1997; Arnstein, 1969, see **Table 2.3** and **2.4**).

5. Make explicit monitoring and evaluation commitments, providing a space for stakeholders to participate or, at least, for dialogue and consultation so as to make sure the indicators for evaluation are developed such that they conforming to local needs and priorities.

**Table 2.3. Four forms of positive relationships between stakeholders**

<b>Relationships</b>	<b>Descriptions</b>
Cooperation	Stakeholders working together towards a common end or resolving a shared problem
Coordination	A more formal stakeholder relationship in which two or more stakeholders create and/or use rules that have been established to deal collectively with their shared management problem or environment.
Collaboration	Refers to the interaction of stakeholders with one another in the context of a common management problem or environment, in which they use a shared set of rules and/or structures in order to act or decide on issues which related to that problem or environment.
Partnership	More advanced stakeholder relationship in which there are typically “added dimensions of cross-sectoral” representation and the definition of geographical boundaries.

**Source: Adapted from Long, 1997**

**Table.2.4. Arnstein’s eight rungs on the ladder of citizen participation**

<b>Rungs on the ladders of citizen participation</b>	<b>Nature of involvement</b>	<b>Degree of power sharing</b>
1. manipulation	Rubberstamp committees	Non-participation
2. Therapy	Power holders educate or cure citizens	
3. Informing	Citizens’ rights and options are identified	Degrees of tokenism
4. Consultation	Citizens are heard but not necessarily heeded	
5. Placation	Advice is received from citizens but not acted upon	
6. Partnership	Trade-offs are negotiated	Degrees of citizen power
7. delegated power	Citizens are given management power for selected or all parts of programs	
8. Citizen control		

**Source: adapted from Arnstein, 1969**

### **2.3.3.3 Limitations and challenges for heritage planning and implementation in a developing context**

It is becoming realized increasingly that context plays a crucial role in the transferability and applicability of approaches that may work well in their birthplace but may fail elsewhere, not because of inherent flaws but because of the change of context (Patton, 1997; Gibson, 2001; Mitchell, 2002). The context may impose limitations on the planning process and its implementation, influencing the extent to which the plan can address a wide range of issues, and whether or not ideas can be adapted to the specific situation without impairing major principles. Understanding the context is the first step.

In many developing countries, the long-tradition of top-down planning and management and the hierarchical political and social system do not favour, let alone facilitate, stakeholder participation and local involvement (Wall, 1996; Mitchell, 2002, Aas et al, 2005). Although a few cases show a positive move toward decentralization in China (Zhang, 2002a, 2002b; and Ng and Tang, 2004), including a UNESCO demonstration project of stakeholder collaboration in Lijiang, China (UNESCO, 2003), the degree of participation mostly is in the “informing” and “consultation ” stages, referring to



Arnstein's (1969) "ladders of citizen participation" (**Table 2.4**). Local people, who are supposed to be an important stakeholder of the heritage site they live by, tend to be ignored in and excluded from the heritage planning process either unconsciously or on purpose to reduce the complexity of the process.

In the absence of a clear blueprint from the Brundtland Commission for sustainable development, it is natural that different interpretations and emphases exist in developed and developing countries. To the latter, the priority regarding sustainability is to meet the basic human needs of its present citizens and to ensure economic development (Mitchell, 2002). For instance, the Chinese government (PRC, 1994, 1997) set national economic development and environmental conservation (implicitly limited to the natural environment) as priorities of sustainable development, believing economic growth to be the only way to eradicate or even alleviate poverty (Chan and Ma, 2004). Economic growth does not necessarily mean equitable benefit opportunities and, so far, the "trickle-down" effect has not worked successfully in the developing countries with poverty problems unsolved and a widening gap between the rich and poor (Hopwood et al, 2005; Wall, 2004). With economic growth as the priority, governments are very likely to be short-term thinkers, as manifested in many of economic policies, for example, foreign investment which possibly results in structural dependence and economic imbalance. They seldom think about the long-term sustainability of local livelihoods. Relating to heritage planning, many long-term planning ideas may not be accepted, let alone implemented.

Lack of cross-sectoral coordination and cooperation, commitment to implementation and, lack of an organizational culture for monitoring and evaluation have been identified as a problem in much of the developed world (Mitchell, 2002; Seasons, 2003; Hall, 2000) and are exacerbated in the developing context (Chang et al. 1996). As mentioned, it is very difficult and unlikely for a government to be committed to and take effective measures concerning heritage degradation and local involvement and benefits when its priority is economic growth to deal with debt and deficit (Chan and Ma, 2004). Similarly, with different priorities and responsibilities, the departments find it difficult and may be reluctant, or even may not bother, to communicate and cooperate: joint initiatives are often required but are hard to make. Another limitation, as Seasons (2004) noted, is that many

organizations are change averse, avoid criticism and are content with the status quo. This makes evaluation and consequent improvement extremely hard to achieve. Evaluation is essential to improve quality of plans in terms of their usefulness and problem-solving capacity and it should be incorporated as an important part of the whole planning process (Patton, 1997).

Lack of means is another pressing challenge for heritage planners in developing countries. Inadequate means may include shortage of money, knowledge and skills for planning and management, as well as the capacity to collaborate among organizations and government departments. Such joint activity is usually required in the planning and implementation process. This lack of means, especially money and skills, makes it difficult for locals to participate even if they are willing and given the chances. This leaves the plan to the hands of “outsiders”, such as international organizations or institutes, and the experts or specialists from other places or even other countries. Local involvement then becomes mere tokenism, more for satisfying funding or other requirements (Wall, 1996; Daher, 2000). These problems constitute the very limitations and barriers for heritage planning which, itself, is aimed at problem solving. Finally, Smith’s (1985) three notions of problems regarding plan and implementation in developing countries are worth mentioning. They are: 1. government bureaucracies which are ineffective, inefficient and not task oriented; 2, managerial leadership skills which are poor; and 3) corruption which is well entrenched.

In summary, a shift is needed from synoptic planning to more integrated strategic planning. Even so, it is still unrealistic to expect a heritage plan to solve all problems existing in heritage conservation. Contestation and dissonance are intrinsic in heritage, with old issues ineradicable and new ones arising in a dynamic, ever-changing society. Both heritage conservation and tourism on the heritage site are means to achieve an overall well-being of a heritage site including resource, tourism, and local life. In addition to planning for managing and conserving the heritage site, another prioritized goal of a heritage plan should be to benefit the local people, sustain their livelihoods, and improve their long-term physical and cultural well-being.

The multi-functional nature of heritage determines that a multi-sectoral perspective is essential (Wall, 2004). Planning for heritage should be integrated with other planning processes for the heritage

site, and for the region where it is located, e.g., joining hands with those sectors that plan the economy and tourism for the region. Relevant international organizations may need to be involved through designation as a World Heritage Site and international tourism. Many such organizations operate outside of the control of a heritage plan. Trade-offs between sectors may be necessary in the interests of the greater good (Wall, 1997) This requires communication and cooperation among different planning and administrative departments as well as various stakeholders, which may be a daunting task. Heritage planning can not do everything, but should be arranged such that it can do what is within its reach.

### **2.3. Plan evaluation: a literature review**

Evaluation is required to improve a plan's quality and appropriateness in terms of usefulness and problem-solving capacity. It should be an important part of the whole planning process (Patton, 1997) and, because of this, a review of relevant plan evaluation literature was conducted

#### **2.4.1 Defining plan evaluation**

Evaluation is the “systematic gathering, analyzing and reporting of information about a program, service or intervention for use in making decisions.” (Mayne and Hudson, 1992:2). Comprehensive evaluation, as defined by Rossi and Freeman (1993), is research and analysis covering the conceptualization and design of interventions, the monitoring of program interventions, and the assessment of program utility. Patton (1997) pointed out that evaluation (the practice) differs from evaluation research: evaluation research tends to be knowledge-oriented and conclusion-oriented, and he argued for a utilization-focused evaluation which is action-oriented and decision-oriented (also see Cronbach and Associates, 1980). Evaluation forms the critical final link of any policy or program development process (Hoernig, 2001). Evaluation has three basic goals: to provide information, to enable better future decisions and to provide accountability (Chelimsky, 1997; Rossi and Freeman, 1993). Focusing on the utility of an evaluation, Patton (1997) identified three primary functions of evaluation: judge merit or worth, improve programs and generate knowledge.

#### **2.4.2 Different “schools” of evaluation**

From planning literature, Talen (1996a) identified four types of evaluation: 1. evaluation prior

to plan-making, which includes evaluation of alternative plans and analysis of planning documents; 2. evaluation of planning practice, including studies of planning behaviour and description of the impacts of planning and plans; 3. policy implementation analysis; and, 4. evaluation of the implementation of plans. This research is mainly concerned about analyzing relevant plan documents and identifying the impacts of the plans and their implementation on one group of their “clients”, local communities.

There are two divergent schools of plan implementation evaluation: one is performance-based and the other is conformance-based (Laurian et al., 2004). These two approaches rely on different sets of assumptions about the functions of plans. The conformance-based approach focuses on planning outcomes and the linkages between plans and actual development. It assumes a direct relationship between the plan objectives and the outcomes of the plan (Wildavsky, 1973; Talen, 1996a). It also assumes that the policies in the plan are specific enough (as a blueprint) to guide development and that the degree to which development adheres to, or departs from, these policies can be measured, in either a qualitative or a quantitative way (Laurian et al, 2004). The performance-based approach, on the other hand, focuses on planning processes and considers the plan as a guide for future planning decisions, rather than a blueprint (Alexander and Faludi, 1989; Baer, 1997; Faludi, 1987; Mastop and Faludi, 1997). In this view, a plan is considered to be implemented as long as it is used or consulted in decision-making processes. This approach maintain that when departures from a plan are rational or necessary, the plan may be considered implemented even though planning decisions depart from its policies or even the initial goals.

Given the nature of this thesis research and, since the impacts of the plan on local people’s lives are to be studied, first the plan itself and second its implementation (its outcomes on the ground) will be evaluated. The conformance-based approach is pertinent, but the performance aspect should not be totally ignored. This means that certain aspects like reasonable departures, the uncertainty existing in implementation, and the ways that plans are used will also be taken into consideration. Connecting the goal and outcomes of a plan does not rule out the influence of other factors (Talen, 1996a). While it is true that uncertain factors associated with the process of implementing the plan may influence the

final outcomes in varied ways, over-emphasis on performance or process is likely to trap evaluation in the mud of uncertainties, leaving a moving target for evaluators in their attempt to assess the achievement of goals (Talen, 1996a).

According to Patton (1987, 1997), one major contribution of the professionalization of evaluation has been articulation of standards for evaluation. The standards make it clear that evaluation ought to be useful. Real-world circumstances are too complex to be routinely handled through the application of any isolated evaluation approach. Patton called for a comprehensive approach which he termed “Utilization-focused evaluation” and which was defined as:

the systematic collection of information about the activities, characteristics, and outcomes of programs to make judgments about the program, improve program effectiveness, and/or inform decisions about future programming.... (It is) done for and with specific, intended primary users for specific, intended uses. (1997:23)

Patton focused on “intended use by intended users” (1997:20), and contended that the evaluators should facilitate judgment and decision making by intended users rather than acting as a distant, independent judge. Weiss (1988) made a similar point, stating that “what evaluators should aspire to achieve in the area of utilization is influence, not the status of philosopher-kings whose dictates determine program future”. Intended users are more likely to use evaluation if they understand and feel ownership of the evaluation process and findings, and they are more likely to understand and feel ownership if they have been offered the opportunity to be actively involved (Patton, 1997, Smith, 1988, Reineke, 1991). In this light, according to Patton, (1997) evaluation means more than examining goal attainment. It also encompasses implementation, program processes, unanticipated consequences and long-term impacts. Therefore, researchers may not only use conventional research methods to gather data and information, but also use management information system data, program monitoring statistics, or other forms of systematic information which may not be research-oriented (e.g. newspapers, internet information, etc.).

Patton’s utilization-focused evaluation is singled out here for discussion as it is particularly meaningful in helping me to understand, accept and use an evaluation strategy to meet my research objectives. It is influencing the trend in evaluation toward more use-values and, thus, involving

stakeholder and target population (Rossi and Freeman, 1993).

### 2.4.3 Stakeholders' participation in evaluation

With the emphasis on utilization of evaluation, there has recently been an increased attention to stakeholders' interests and their participation in the evaluation enterprise (Burby, 2003; Barrick and Cogliano, 1993; Reineke, 1991; Ayers, 1987). Ayers (1987) identified stakeholder-based evaluation (SBE) as typically allowing concerned groups to participate at the planning and review phases of an evaluation study. He reviewed the application status of SBE and analyzed its merits and disadvantages. To mitigate the disadvantages of SBE, he proposed a modified model of SBE which he termed Stakeholder-collaborative Evaluation (SCE). The comparison he conducted between SBE and SCE is presented in **Table.2.5**.

**Table 2.5. Comparison of typical SBE and SCE approaches**

<b>Stakeholder-Collaborative</b>	<b>Stakeholder-Based</b>
Evaluator and concerned group representatives jointly plan, administer and report results of an evaluation, for which the stakeholder groups are viewed as being primarily responsible.	Concerned groups provide evaluation planning and report review input to an evaluation study, for which an evaluation professional is responsible.
<b>Characteristics</b>	
stakeholder control evaluator influence evaluation study primarily formative small-to-mid-scale internal	stakeholder influence evaluator control evaluation research attempt at summative larger-scale external
<b>Predicted Results</b>	
higher acceptance greater stakeholder skills result greater utilization political pressures on stakeholders	lower acceptance fewer stakeholder skills result lower level of use potentially fewer political pressures

**Source: Ayers, 1987**

Reineke (1991) also argued that expanding stakeholder involvement in evaluation and designing evaluations to support that involvement holds considerable promise to improve the use of evaluation information and, furthermore, leads to better use of evaluation findings. To involve locals in evaluation effectively, he noted that it is necessary to establish conditions that foster active

participation in the evaluation process. He suggested four practices/activities for quality stakeholder involvement in evaluation studies, which are: 1. identify stakeholders (to answer the question, “Who should be involved?”); 2. involve stakeholders early and continuously (to answer “When involvement should occur?”); 3. involve stakeholders actively through dialogue or collaborative inquiry to answer the question, “How should stakeholders be involved?”; 4. establish a structure or framework which is based in content familiar to stakeholders and help them identify key issues within the local settings and keep dialogue focused (to answer the question, “How can involvement be made meaningful to stakeholders?”). Evaluation activities that include stakeholders in the evaluation process, such as their early and continuous involvement in evaluation design, data collection and data analysis, can help them to see the connection between evaluation and decisions.

This stakeholder participatory approach is of particular pertinence to the research topic of this study. However, the matter is the extent to which these ideas can be applied in the Chinese context, where there is not an adequate system and policy in place, or even none in certain levels and places, to facilitate local involvement and public participation.

#### **2.4.4 Conditions for successful evaluation**

Returning to evaluation in general, several conditions for successful evaluation practice need to be discussed. It is necessary to raise these issues here because they are very likely to influence and her field study.

First, plans should be in place and should be available for evaluation i.e., plans should be conducive to evaluation with goals, objectives and policies being clearly worded (Seasons, 2003). There must be sufficient political or administrative support and a positive “organization culture” for the evaluation so that the evaluation result will actually influence decision making (Hoernig, 2001, Seasons, 2003).

Second, sufficient resources and time to conduct the exercise should be available, and a skilled, experienced, ethical and knowledgeable evaluator or evaluating team should also be guaranteed (Guba and Lincoln, 1989; Rossi and Freeman, 1993).

Third, once the conditions in terms of feasibility of evaluation and a supportive environment are met, an effective framework needs to be developed by determining the focus of evaluation, type

of evaluation, the evaluator, the participation of key players and the process to be followed (OECD, 1999)

Fourth, after a framework is set up, a series of strategic issues should be addressed which are presented in **Table 2.6**.

**Table 2.6. Strategic issues which should be addressed prior to the evaluation practice**

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a.	The evaluation context which includes program users, clients and stakeholders, users of the evaluation findings as well as the external political, social and economic environment.
b.	The timing of evaluation which needs to be appropriate to the budget, program or decision-making cycle of the evaluation clients and stakeholders.
c.	The right research questions which should be relevant in scope and topic, and which should address key issues or problem areas (Rossi and Freeman, 1993)
d.	The methods to be used which must suit the research question, ensure adequate reliability, and validity of data, and meanwhile be appropriate to the availability of time, data, resources and skills.
e.	Appropriate analysis to the research questions, the data collection methods, and availability of resources, a powerful expression of which, in many case is a logic model illustrating the connections between goals and objectives, inputs, outputs and outcomes.
f.	Findings, recommendations, and alternative actions to be drawn from the evaluation, while judgments to be reserved for the clients to make (Weiss, 1984).
g.	Careful consideration to the presentation of results of evaluation to ensure they be conveyed and communicated to the right people at the right time and in the right way, so as to enhance the use of the results.

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**Source: developed based on Hoernig, 2001**

Finally, to reiterate, since use and influence is essential for useful evaluation practice (Patton, 2008), participation of key stakeholders is an essential factor contributing to the use of findings and should be encouraged and facilitated. Their input can be used to identify key issues and problem areas, and also to define the internal and external context of the organization, policy or program (Hoernig, 2001). Their participation may secure their support and the use of the evaluation findings (Weiss, 1998).

#### **2.4.5 What are the characteristics of a good plan (the written document) ?**

The planning literature is surprisingly limited when it comes to indicating what constitutes a good plan (Baer, 1997). Berke and French (1994) noted that the planning profession has generally



avoided this normative question and focused instead on the methods and processes of plan-making. This point has been echoed by others exploring the appropriate criteria for evaluating plans (Dalton and Burby, 1994; Stiffler and Boswell, 1994)

Nevertheless, the plan remains one of the planner's primary tools to influence future development. Baer (1997) pointed out that criteria should be available to guide professionally approved standards of practice. By examining the various meanings given to plan evaluation and distinguishing the several stages during the plan-making process where evaluation can appear, he presented a composite table of pertinent criteria to illustrate the concept of "a good plan". He listed 60 items grouped into eight basic classes. They are: 1. adequacy of context; 2. "Rational Model" considerations; 3. procedural validity; 4. adequacy of scope; 5. guidance for implementation; 6. approach, data, and methodology; 7. quality of communication; and 8. plan format (Baer, 1997: 338-39). But Baer maintained that planners and evaluators should not take this as an approved recipe and should not expect that mechanically following these steps will assure professional competence; but rather, they should develop such criteria of their own as they work on a plan.

A detailed discussion of Baer's evaluation criteria will not be provided here. Instead, based on his proposed list, the researcher has formulated questions pertinent to her focus as criteria to guide her evaluation task. With the research objectives in mind, which are to study and evaluate how well the plans<sup>5</sup> of the UNESCO-designated World Cultural Heritage sites in China address local needs and involve local communities, with special focus on impacts including tourism impacts as a key function of the local communities, the criteria for examining and evaluating the target plan (the written document) are presented in **Table 2.7**.

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<sup>5</sup> It means the conservation plan as prerequisite for UNESCO WH designation. And maybe the tourism plan for heritage site (if there is one) will also be referred.

**Table 2.7. The plan evaluation criteria developed by the researcher for this study**

<p><b>Adequacy of context</b>          Is the political/legal context of the plan explained?          Is background information presented          Is it clear who the plan is for?          Is the purpose of the plan explained?</p>
<p><b>Adequacy of the content</b>          Are the plan makers clear about the criteria they will use to guide their planning formulating and assessing? Are the criteria made explicit or implicit?          Are problems specifically identified or just implied?          Are goals and objectives explicitly identified, or implied, or difficult to find in the plan?          Is the capacity or adequacy of existing infrastructure and organizational system described?          Are tradeoffs permitted?</p>
<p><b>Policy guarantee (permits to ensure policy going)</b>          Are there any means mentioned in the plan as how to achieve its goals and objectives?          If yes, what are they?</p>
<p><b>Adequacy of scope</b>          Have all the possible or pertinent issues been considered (e.g. physical, social, economic, political psychological, and cultural?)          Have issues of efficiency and equity and predictability been considered?          Has the distribution of costs and benefits among different stakeholders and interests been considered?          Have relocation implications and impacts been considered?          Have financial implications been considered?          Has feasibility in the larger political context been considered?</p>
<p><b>Guidance and guarantee for implementation</b>          Are implementation provisions mentioned in the plan and are they appropriate?          Are there priorities for implementation?          Is there a time span for the implementation?          Is there provision for scheduling and coordinating of implementation proposals from stakeholders?          Can proposals be taken while implementation?          Is there a program or proposal for an impact analysis?          Is the agency or person responsible for implementation identified?          Can the responsible agency or person realistically be expected to implement the plan?</p>
<p><b>Approach, data, and method</b>          Is the plan based on a wide spectrum of data where feasible          Are stakeholders included as a data source?          3. Is the plan sufficiently flexible to allow for new data and findings to be fed in?</p>
<p><b>Quality of communication</b>          1. Is the client or reading public identified?          2. Are the proposals/recommendations/conclusions of the plan consistent with objective?</p>

**Source: adapted from Baer, 1997**

The workability of a set of criteria lies to some degree in their flexibility. This set of criteria may be adjusted and improved according to situations met with in the evaluation practice, including

the field work.

#### **2.4.6 How to evaluate plan implementation?**

Going beyond the never-ending debate between conformance-based and performance-based advocates, Patton (1997) took utilization as the essence of evaluation of the plan and its implementation. He suggested that there is nothing wrong with having program-level and system-level goals, but such goals ought to lead to desired outcomes for clients. Therefore, this utilization-focused approach can actually be termed **outcome-based evaluation**, avoiding both the narrow goal-outcome linearity of the conformance-based approach and the risk of being overwhelmed by too much uncertainty inherent to the performance-based approach.

While researchers sustain their concern with the need to better understand the actualization of plans (Bryson, 1991; Healey 1986; Healey et al., 1982; Schon 1982), except for very limited research done in this direction (Talen, 1996a, 1996b; Laurian et al, 2004), little knowledge or experience has been reported on plan evaluation in terms of their actual implementation. Even less exists on the implementation of a heritage plan. Since a strong and transparent framework is believed to be a necessary step for the task of evaluation (Shipley, 2003), and although Patton's (1997) outcome-based evaluation is proposed and designed for plan evaluation in general rather than specifically for implementation evaluating, its utilization-focused outcomes framework for conceptualizing outcomes that are meaningful and measurable can be usefully drawn upon.

The framework presented by Patton (1997) distinguishes six separate elements that need to be specified for focusing an evaluation on participant or client outcomes: 1. a specific participant or client target group; 2. the desired outcome(s) for that target group; 3. one or more indicators (see **Appendix1** for definition) for each desired outcome; 4. details of data collection; 5. how results will be used; and 6. performance targets. Further elaboration for each element and its relevance to this study is presented in **Table 2.8**.

**Table 2.8. Patton’s outcomes –focused evaluation frame work and its relevance to this study**

<b>Elements</b>	<b>Detailed interpretation</b>	<b>Relevance</b>
1. Identify a specific participant or client target group	<p>a. Identify some definite group (including certain sub-groups) that is expected to benefit from and attain outcomes as a result of program participation.</p> <p>b. To be as specific as necessary to conceptualize meaningful outcomes, and make sure that an intended outcome is meaningful and appropriate for everyone in the identified target population.</p>	<p>Applying to this study, the particular target population is the local community. But outcomes of the plan implementation may be different for subgroups like people in the heritage tourism industry and people out. It is important not to ignore those who are out.</p>
2. Specifying desired outcomes	<p>Regardless of choices of language (e.g. expected outcomes, intended outcomes, client goals, client objectives ), what is important is that there must be a clear statement of the target change in circumstances, status, level of functioning, behavior, attitude, knowledge, or skill, with other outcomes as maintenance and prevention also being considered.</p>	<p>Specify what goals should be covered in the plan particularly for the target population, for instance, what should the plan say about the heritage resource conservation and the local people, and whether enhancing the quality of local life is or should be a goal of the plan?</p>
3. Identifying and selecting Outcome indicators	<p>a. Indicator: a set of rules for gathering and organizing data so they can be assigned meaning. Indicators provide the basis for assessment of progress towards the achievement of the desired outcome</p> <p>b. Types of indicators: economic, social environmental indicators; sustainability indicators; indicators supporting life quality</p> <p>c. Key point: make sure that the indicator is reasonable, useful, and meaningful measure of the intended client outcome</p>	<p>Select the set of indicators most appropriate for evaluating the plan based on the identified goals/desired outcomes, for instance, sustainable livelihood indicators might be of consideration</p>
4. Details of data collection	<p>a. Outcome in evaluation is more important than in the details of refining methods.</p> <p>b. Questions proposed to guide data collection: 1. What existing data will be used and how will they be accessed? Who will collect new indicator’s data? 2 Who will have oversight and management responsibility for data collection? 3. How often will indicators data be collected? How often reported? 4. Will data be gathered on all program participants or only a sample? If a sample, how selected?</p>	<p>The proposed questions implicitly suggest a stakeholder/client involvement data collection process, which will also be applied in this study to its greatest extent within the context limitation. Methods for Participatory Rural Appraisal might serve a workable data collection strategy</p>

5. Performance target	<p>a. A performance target specifies the amount or level of outcome attainment that is expected, hoped for, or required.</p> <p>b. The best basis for establishing performance targets is past performance, or, if past performance unavailable, referring to other comparable programs, or review the evaluation literature.</p>	Ideally indicators are best collected and examined longitudinally, from quarter to quarter, and year to year. Given the time limit of the field work of this research, parallel literature review may serve a effective way to facilitate in working out a performance target.
6. How results will be used	<p>a. This is to make sure that the data collected on the outcomes identified will be useful.</p> <p>b. the evaluator should always keep in mind that the ultimate purpose of evaluation is use its results for further improvement</p> <p>c. The best way is to push the intended users at every stage of the utilization-focused evaluation to think seriously about the implication of design and measurement decisions for use.</p>	Relating to this study, the researcher should try as she can to involve the local people and the relevant plan users in every stage of the evaluation process of her research.
Sources: Innes, 1990:5; MacLaren, 1996; Patton, 2008; Pal, 1997; Cartwright, 2000; Federation of Canadian Municipalities, 2001; Seasons, 2003		

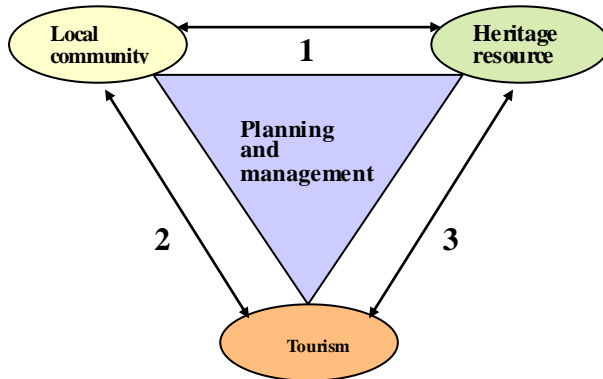
Patton’s utilization-focused framework was used to guide the design of the strategy used in this research.

#### **2.4.7. Criteria and indicators for evaluation**

##### **2.4.7.1. An evaluation framework**

Although some researchers principles of sustainability including criteria of sustainable tourism and sustainable tourism management (Campbell, 1996; Garrod and Fayall, 2000; Swarbrooke, 1999 ) Few practical assessments of heritage tourism planning and practice in specific locations have been undertaken, partly owing to the lack of standardized evaluative criteria and partly because heritage tourism has emerged only in recent decades as a research interest. Deriving from the aforementioned principles, building upon Ross and Wall’s Ecotourism Paradigm ( 1999), a framework is proposed that indicates the ideal relationship among three relevant variables: the heritage resource, the local community and tourism (with quality visitor experience as the essential element) (**Figure 2.6.**). It is maintained that the sustainability of heritage tourism lies in a healthy relationship among the three aspects. Ideally, the heritage resource, local community and tourism may each contribute positively to the others in synergistic and symbiotic ways.

**Figure 2.6. An evaluation framework for heritage tourism**



Source: Adapted from Ross and Wall's (1999) Ecotourism Paradigm.

Note: Tourism planning and management should ensure healthy and mutually beneficial relations between: 1. heritage-local, 2. local-tourism, and 3. tourism-heritage.

It is believed that by examining how a tourism plan intervenes in and influences the relationship among the three, we can evaluate how tourism is occurring on the World Heritage Sites in China. To be specific, we should examine whether the three elements are identified and addressed in heritage and tourism plans and their subsequent implementation, and explore the following three aspects of the relevant plans:

1. They should protect the heritage resource and its environment. It should maintain the integrity and authenticity of the heritage resource, finance conservation, and increase conservation awareness and understanding among tourists and locals.

2. They should enhance the local economy and promote local community well-being. It should promote pride in the heritage among the local people and, provide means of living for them, especially those whose livelihoods are affected by use limits placed on heritage resources, and promote local involvement in both benefit sharing and decision making.

3. They should provide quality tourism experiences with the heritage attractions. It should provide agreeable service facilities, and provide tourism products for visitors to have both enjoyable and learning experiences.

#### **2.4.7.2. Relevant indicators**

Indicators are “a set of rules for gathering and organizing data so they can be assigned meaning” (quoted in Seasons, 2003). The use of indicators is increasingly common among managers and researchers for site-specific assessments of social and biophysical changes and impacts (Stankey et al., 1990; Wallace, 1993). Indicators can be qualitative or quantitative. Quantitative indicators (including the presence or absence of attributes) are defined as measures of quantity, such as number, percentage or share, rate, or ratio, while qualitative indicators are defined as as people's judgements and perceptions about a subject (CIDA, 1997).

For the purpose of this study and to assist evaluation, relevant indicators (**Table 2.9**) have been developed to go with each criteria discussed above<sup>6</sup>. Adherence to each criterion is necessary for the conservation of heritage and development of sustainable tourism at the heritage sites. These indicators are grouped into three themes: resource conservation, visitor experience and local involvement, and they are classified into two types: quantitative and qualitative.

The initially developed indicators were incorporated in the questionnaire surveys and interview questions. They were tested and refined during the researcher’s preliminary field research by inquiry with the relevant experts and professionals (selected individuals were consulted multiple times for feedback), on-site observations, and tests of the survey questionnaires and interview questions in the field with a small group of people. The indicators presented in Table 2.9 are the refined ones.

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<sup>6</sup> Site-specific indicators were refined on the basis of these generic indicators to guideline the researcher’s field research in terms of designing questionnaire surveys and interviews, and observations as well

**Table 2.9. Indicators for each criterion:**

<b>Criteria</b>	<b>Corresponding indicators</b>
<b>Sustainability of heritage resource conservation</b>	<b>Quantitative indicators</b>
	<ol style="list-style-type: none"> <li>1. resource integration and authenticity               <ol style="list-style-type: none"> <li>a. the condition of existing cultural and natural heritage resource</li> <li>b. the condition of the resource environment -air, water, plants, soil, etc</li> </ol> </li> <li>2. laws and institutional guarantee for conservation</li> <li>3. status of participation of the local communities in conservation in terms of number or percentage of local villagers in the conservation force</li> <li>4. monitoring mechanism</li> <li>5. share of tourism revenue going back to finance conservation</li> <li>6. resource and environmental education (education centre, presence of codes of behavior towards the resource)</li> </ol>
	<b>Qualitative indicators</b>
	<ol style="list-style-type: none"> <li>1. resource integration and authenticity in terms of the perception of the interviewees and the surveyees.</li> <li>2. status of participation of the local communities in conservation in terms of the perception of the interviewees and the surveyees.</li> <li>3. resource and environmental education in terms of the perceptionso f the interviewees and the surveyees.</li> </ol>
<b>Sustainability of tourism (quality visitor experience)</b>	<b>Quantitative indicators</b>
	<ol style="list-style-type: none"> <li>1. competitive quality tourism products</li> <li>2. information availability for tourists in terms of information centre, road signs</li> <li>3. quality of guides and interpretations in terms of their education and certification statistics</li> <li>4. tourist purchase of local commodities in terms of the statistics of expenditure</li> <li>5. safety for tourists in terms of facility and policy guarantee</li> <li>6. extent of tourist use of transport provided by the heritage site in terms of relevant statistics</li> <li>7. method of waste disposal</li> <li>8. architecture style and material used for building indicated by the management data</li> </ol>
	<b>Qualitative indicators</b>
	<ol style="list-style-type: none"> <li>1. information availability for tourists in terms of the visitor perception</li> <li>2. quality of guides and interpretations in terms of the visitor perception</li> <li>3. tourist purchase of local commodities in terms of the visitor’s desire to buy local commodities as souvenirs</li> <li>4. tourists’ perceptions toward the locals</li> <li>5. frequency of tourist-local interactions by both visitor and local perception</li> <li>6. tourist perception of the authenticity of heritage attraction</li> <li>7. extent of use of transport provided by the heritage site in terms of the visitor perception</li> <li>8. architecture style and material used for building by observation</li> </ol>
<b>Sustainability of</b>	<b>Quantitative indicators</b>



<p><b>Local community (heritage tourism-related local involvement)</b></p>	<ol style="list-style-type: none"> <li>1. decent livelihood opportunities in terms of percentage of local employment in tourism, and also other surviving means (locals selling products to tourists or souvenir stores, etc.)</li> <li>2. poverty incidences and alleviation in tourist areas in terms of management data presentation</li> <li>3. numbers of tourism businesses owned and operated by the locals</li> <li>4. percentage of staff employed by tourism businesses from the local communities, and job structure of the locals (percentages of local job opportunities)</li> <li>5. local communities' share of profits from tourism (parking fee, entrance fee, etc.)</li> <li>6. tourism income of the locals, and the average percentage it takes among their total income</li> <li>7. training for locals to acquire competence and skill for participating heritage conservation and heritage tourism</li> <li>8. local's accessibility to heritage as tourism resource and use of tourism facilities in terms of regulation or favourable policy.</li> <li>9. percentage of leaders of heritage conservation and tourism from local community</li> <li>10. statistics of relocation and compensation</li> <li>11. statistics concerning education opportunity in general of the local people</li> </ol>
	<p><b>Qualitative indicators</b></p> <ol style="list-style-type: none"> <li>1. decent livelihood opportunities as was perceived by local villagers and management people respectively</li> <li>2. degree of local community participation in decision making relating to heritage resource conservation and tourism development as was perceived by local villagers and management people</li> <li>3. poverty incidences and alleviation as was perceived by local villagers and management people</li> <li>4. local involvement in tourism as was perceived by local villagers and management people</li> <li>5. Local income from tourism as was perceived by local villagers and management people</li> <li>6. sufficiency and effectiveness of local training as was perceived by local villagers and management people</li> <li>7. relocation and compensation as was perceived by local villagers and management people</li> <li>8. identity of the local villagers represented by the heritage and the local villagers' pride in and sense of belonging to the mountain.</li> </ol>

## 2.5. Summary

This chapter set up the conceptual framework of this thesis research through relevant literature review. First, heritage, its categorization and multifunction as well as the contestation and dissonance among levels of heritage were discussed. Heritage tourism as a major form of economic use of heritage resource was defined. Heritage planning as a strategy to mitigate and alleviate the contestation and dissonance was discussed. Also, literature of the

evaluation of plan and plan implementation as the instrument to approach the research questions was also examined. Finally, criteria and corresponding indicators with heritage resource, tourism, and local community as the three basic themes were developed for the purpose of evaluation practice for this research.

## **Chapter Three: World heritage: A Chinese contextual review**

### **3.1. World Heritage in China**

#### **3.1.1 China and WHC of UNESCO**

China ratified the UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage (WHC) and became a contracting party in 1985. On October 29, 1999, China became a member state of the World Heritage Committee. In 1986, China began to identify and nominate sites on its national territory to be considered for inclusion on the World Heritage List. Since its first inscription in 1987, China has been moving up the road of gaining world heritage enlistment. So far (as of November 2007) China has had 35 UNESCO listed World Heritage Sites, ranking the third in the world only next to Italy and Spain, with 24 of them being cultural heritage, 6 being natural heritage, and 5 being mixed cultural and natural heritage (UNESCO, 2007)<sup>7</sup>, such as Mount Taishan.

#### **Chinese enthusiasm for World Heritage Sites designation**

While artificial attractions such as theme parks saw declining tourist markets in the 1990s, heritage sites became increasingly favored by visitors, both domestic and international (Dong, 2006). They stimulated substantial increases in local revenues. For instance, the annual tourism revenue of Mount Huangshan reached 200 million Yuan (about CAD\$ 28.6 million<sup>8</sup>) after its inscription on the World Heritage List in 1990 as against 5 million Yuan (CAD\$0.71million) before the inscription. Similarly, the income from the entrance fee of the Ancient City of Pingyao reached more than 5 million Yuan (CAD\$0.71million) in 1998 after the UNESCO designation as against 0.18 million (CAD\$25,700) in 1997. At Mount Taishan, the tourism revenue in 1987 was 182 million Yuan (CAD\$26 million). After the UNESCO world heritage enlistment in 1987, its annual tourism revenue kept growing and had reached 6.6 billion Yuan (CAD\$0.94 billion) by 2005. Among many other factors, tourism has undoubtedly acted as a major force to motivate the Chinese government, especially at the local level, to be actively involved in the preparation and application for UNESCO

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<sup>7</sup> UNESCO World Heritage Center: <http://whc.unesco.org/>

<sup>8</sup> Here 1:7 is the rate of Canadian dollar: RMB Yuan as is adopted in this research.

World Heritage designation. This implies much pressure on the conservation of these world heritage sites for the over-riding importance of tourism to World Heritage sites in China may act as a threat, if poorly planned and managed. (UNESCOa, 2004)

### **3.1. World heritage conservation in China**

#### **3.2.1. Legal and statutory framework for heritage conservation in China**

As a country with ancient history, China's government claims responsibility for heritage conservation at the national level. "The Law of the People's Republic of China on the Protection of Cultural Heritage" (LPCH) was adopted and went into effect in 1982 and later revised and approved by 9th People's Congress in October, 2002. It states in Article 2. that "the states should protect cultural heritage of historical, artistic or scientific value", with the major goals as, "strengthening the protection of cultural relics, inheriting the splendid historical and cultural legacy of the Chinese nation, promoting scientific research, conducting education in patriotism and in the revolutionary tradition, and building a socialist society with cultural, ideological and material progress"(China State Administration of Cultural Heritage, 2002). Similarly, the Environmental Protection Law of the People's Republic of China was approved and took effect in 1979 and was revised in 1989. It defines natural heritage, or "Natural conservation areas" as one of the element of "environment" (People's Congress of PRC, 1989). In article 17, it states that "Chinese governments at various levels shall take measures to protect regions representing various types of natural ecological systems, regions with a natural distribution of rare and endangered wild animals and plants, regions where major sources of water are conserved, geological structures of major scientific and cultural value, famous regions where karst caves and fossil deposits are distributed, traces of glaciers, volcanoes and hot springs, traces of human history, and ancient and precious trees. Damage to the above shall be strictly forbidden." (People's Congress of PRC, 1989)

These two sets of legislation constitute the fundamental legal basis for governing cultural and natural heritage conservation in China. In addition, several other relevant laws and regulations at the national level have been developed over the years. The following laws and regulations summarized in Table 3.1 constitute the present legal and statutory framework within which world heritage conservation and development in China are proceeding.

**Table 3.1 Legal and statutory framework of world heritage conservation and development in China**

<b>Laws and Regulations</b>	<b>Year of Issue</b>	<b>Level</b>
1. The Law of the People's Republic of China on the Protection of Cultural Heritage	1982, revised in 2002, by China State Administration of Cultural Heritage via People's Congress of China	National
2. Environmental Protection Law of the People's Republic of China	1979, revised in 1989, by China State Environmental Protection Administration via People's Congress of China	National
3. The Rules for the Implementation of the Law of the People's Republic of China on the Protection of Cultural Heritage	2003, by China State Administration of Cultural Heritage via State Council of China	National
4. Interim Regulations of People's Republic of China on the management of scenic spots	1985, by Ministry of Construction of P.R. China via the State Council of China	National
5. Regulations of the People's Republic of China on Nature Reserves	1994, by China State Environmental Protection Administration via the State Council of China	National
6. City Planning Law of the People's Republic of China	1989, by Ministry of Construction of P.R. China via People's Congress of China	National
7. General Specification on Tourism Planning	2003, by China National Tourism Administration via General Administration of Quality Supervision, Inspection and Quarantine of People's Republic of China	National
8. Measures for protecting and managing China's World Cultural Heritage	2006, by China State Administration of Cultural Heritage and Ministry of Culture of P.R. China	National
9. Opinions on Strengthening and Improving the Management of the World Heritage Protection	2002, by State Administration of Cultural Heritage via State Council of China	National
10. Recommendation on the Safeguarding of the Beauty and Character of Landscapes and Sites	1962, by UNESCO	International
11. Convention concerning the Protection of World Cultural and Natural Heritage	1972, by WHC of UNESCO	International
12. The Florence Charter (as an addendum to the Venice Charter of 1965)	1981, by ICOMOS and WHC of UNESCO	International
13. Suzhou Declaration on International Co-operation for the Safeguarding and Development of Historic Cities	1998, by WHC of UNESCO	International

Nevertheless, it can be seen from the table that there is not a particular legal instrument which

world heritage managers can actually resort to. The only two national documents directly relevant to world heritage are: Measures for Protecting and Managing China's World Cultural Heritage, and Opinions on Strengthening and Improving the Management of the World Heritage Protection. They are specified as "departmental rules" rather than "laws, administrative regulations" (State Administration of Cultural Heritage of China, 2007), which implies that they have little legal enforcement capacity. In fact, it has been noticed by researchers (Dong, 2006; Yu, 2007, Su and Deng, 2006; Coates, 2005; Williams, 2005) that the UNESCO official documents have similar weakness in many other countries in addition to China. As was noted by some researchers (Xie, 2004; Dong, 2006), this inability to apply legal enforcement explains to some extent why over-development and destruction of world heritage in China can not be stopped nor brought to justice, even though principles of protection have been emphasized time and again<sup>9</sup>. This is particularly so when economic development and poverty eradication have been prioritized in the national development policy.

### **3.1.2. World heritage conservation under national policy of sustainable development**

#### **3.2.2.1. Understanding National policy of sustainable development**

*China's Agenda 21* was issued in July 1994. It set out the policy for long-term, integrated sustainable development and is considered to be China's overall guideline for national development (People's Republic of China, 1994). However, this policy of sustainable development is economically oriented (Ma, 2002). It aims at prolonged economic prosperity through environmental protection and enhancement of human productivity (State and Technology Commission & State Planning Commission, 1994<sup>10</sup>). Economic development is seen as the basis for quality of life and material well-being. Achieving balance between economic growth and environmental conservation is the core of the Chinese sustainable development policy. Also, in the *National Report on Sustainable Development*, presented to the United Nations General Assembly, the Chinese government states that:

China must firmly give priority to the primary task of developing her national economy so as to alleviate poverty and improve the living standards of the people. Economic development, as the nation's central task, is essential to raise social productivity, improving the competence

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<sup>9</sup> Mt. Taishan, Mt. Wudangshan, Zhangjiajie, Confucius Complex all suffered from damage of varied degrees. Xie, 2004

<sup>10</sup> State and Technology Commission, State Planning Commission. 1994. *The Priority Programme for China's Agenda 21*. <http://www.acca21.org.cn/> [3 March 2001].

level and living standards of the people, and achieving sustainable management of natural resources and protection of the environment .... Sustainable utilization of natural resources and maintaining a viable ecosystem are two of the most important foundations of sustainable development (People's Republic of China, 1997).

Within this context, “the heritage enterprise becomes energized by a sense of urgency because of the role that heritage is expected to play in ameliorating conflict and alleviating poverty” (Kirshenblatt-Gimblett, 2005, p8). The rich heritage resource was rediscovered after the focus of the Chinese government shifted from ideological struggle to economic development with Deng Xiaoping's adoption of the “open-door” policy in 1978. The government, accordingly, changed its policy for heritage conservation from passivity toward being proactive as the multi-dimensional functions of heritage were recognized and employed as a significant vehicle to help achieve its economic as well as social and political goals.

#### **3.2.2.2. Economic benefits from world heritage via tourism**

While China has a rich legacy of culture and tradition, the old values were not encouraged after the establishment of the Republic of China in 1949 as the ambition and ideal of Mao, the first Chairman of this new People's Republic, was to build a completely new country which belonged to the overwhelming majority of the working people. The traditional culture was mostly built on the traditional philosophies, religions and spiritual meanings that underpinned a hierarchical feudal socio-political system which Mao aimed to overthrow, and was thus taken as anti-revolutionary “Four Olds <sup>11</sup>” were to be cast away. Being carriers of the “Four Olds”, heritage, and cultural heritage in particular, was deliberately ignored and some was even deliberately destroyed during the Cultural Revolution.

The revaluation of heritage did not happen until after Deng's “Open-Door” policy in 1978. It was realized that heritage could be useful in boosting the local economy, and also help to solve funding problems for heritage site conservation (Chan and Ma, 2004), and that heritage makes up the most important resource for both international and domestic tourism (Tunbridge and Ashworth, 1996). With the promotion of tourism as a national strategy for developing the economy, more and more heritage sites were opened and presented to visitors. Heritage tourism became the most visible driver

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<sup>11</sup> The Four Olds: old ideas, old culture, old customs, and old habits.

to realize this economic use of the heritage resource.

The UNESCO notion of world heritage was quickly embraced by the Chinese government and then the tourism industry in China. The economic benefits from world heritage enlistment motivated site managers and governments of various levels to exert more efforts on applications for world heritage designation. In addition to data provided previously in this chapter on the revenue growth of several Chinese world heritage sites such as Mount Huangshan, the Ancient City of Pingyao, and Mount Taishan (see 3.1.2 of this chapter), the tourist reception data of several world heritage mountains presented in **Table 3.2** for the Golden Week<sup>12</sup> of October 2006 provide a further illustration. In addition to the existing 35 sites on the World Heritage List, China has had nearly 100 more sites in preparation for application for WHC nomination (Dong, 2006).

**Table 3.2. Golden Week of October 2006 tourist reception and entrance income of six World Heritage mountains in China**

Mountains as World Heritage Sites	Tourist Reception (10,000 person/time)								Entrance Fee (RMB ¥ Yuan)	Total (RMB ¥ million Yuan)
	May 1 <sup>st</sup>	May 2 <sup>nd</sup>	May 3 <sup>rd</sup>	May 4 <sup>th</sup>	May 5 <sup>th</sup>	May 6 <sup>th</sup>	May 7 <sup>th</sup>	Total		
Mount Taishan	1.6	3.24	3.36	2.63	2.40	1.59	0.81	15.63	100	15.63
Mount Wuyi	2	3.86	2.95	2.79	1.74	0.86	0.41	14.61	110	16.07
Mount Emei	1.51	2.30	2.85	2.9	1.72	1.54	1.51	14.33	120	17.20
Lushan National Park	1.16	2.20	2.53	2.30	1.55	1.20	0.77	11.71	135	15.81
Mount Huangshan	0.69	2.26	2.01	1.54	1.20	0.53	0.36	8.59	200	17.18
Mount Wudang	0.42	1.05	1.2	1.26	0.74	0.47	0.42	5.56	110	6.12

<sup>12</sup> Golden Week: refers to the three weeks of Chinese holidays, occurring in January or February around the Chinese New Year, May from 1st to 7th, and October from 1st to 7th. The Golden Week holiday system was approved by the State Council of the P.R. China on Sept. 18th, 1999. It was triggered off by the South-east Asian financial crisis of 1998, and was taken as a responsive initiative of Chinese government to stimulate consumption, spur the domestic economy, and promote domestic tourism.



As was noted by Dong (2006) and Xie (2005), local government officials' enthusiasm drives the desire for world heritage designation. According to the current selection and appointment system of government officials in China, a medium-level (towns, districts, municipalities, etc.) official serves as a 5-year term, which means they have to demonstrate satisfactory "political achievements" (career achievements) within these five years so as to get further promotion or otherwise step down from the position. Achievement in economic development, local growth in GDP in particular, under their leadership is usually taken as the most important indicator to evaluate "political achievement." The successful world heritage enlistment of a heritage site within the jurisdiction of an official would be considered a "gold medal" for their leadership for it would likely lead to a dramatic growth in the local GDP, and then to a further promotion. Such examples have been taken as role models by many local government officials (Dong, 2006) and are very likely to lead to abuse of the concept and practice of world heritage.

### **3.2.3 A new era: Quarrying heritage for a harmonious society**

#### **3.2.3.1. Socio-political use of heritage and world heritage**

Heritage is a knowledge-based, cultural product and a political resource (Graham et al., 2000). However, the knowledge conveyed by heritage may be negotiated and compromised, depending on specific social and intellectual circumstances (Livingstone, 1992). The Chinese attitude towards heritage has been closely associated with and heavily influenced by government goals and policies in different phases of economic and social development, which is reflected in the three phases of Mao, Deng, and Hu.

As was mentioned, heritage was discouraged and even discarded during Mao's regime (1949-1976) with the focus on "class struggles". To attain the goal of building a communist socio-economic system based on Marxist philosophies, which were believed to be scientific and revolutionary (Ogden 1995), Mao felt a strong necessity to set up a new socialist ideology based on equality, modernity and social advancement. This was to replace the old feudalist ideology which ruled China for thousands of years and whose hierarchical value was taken as a major impediment for developing socialism. Therefore, during the Mao period, conservation of heritage was not advocated.

The traditional meanings that heritage carried were obscured. Rather, taken as anti-revolutionary symbols, many heritage sites were destroyed to varying degrees during the Cultural Revolution while some others were preserved as “negative teaching materials” to serve the “class struggle”.

Heritage conservation in China evolved differently during Deng Xiaoping’s “reform and open-door” period (1978-1997). China’s emphasis was shifted from “class struggle” to economic development and heritage began to be considered more economically than politically. Deng’s notions, such as “socialism is not the same as shared poverty”, “development is the only hard truth”, “(We should) cross the river by feeling the stones under the feet”, and “No matter if it is a white cat or a black cat; as long as it can catch mice, it is a good cat”<sup>13</sup>, all revealed his eagerness and determination to develop the economy, even at the risk and cost of making mistakes. Under this guidance, he turned his attention to tourism as an economic development strategy. This had been merely a political activity during the Mao period (Xiao, 2006; Sofield and Li, 1998).

Deng pointed out, “We can earn more and quick money through tourism. Besides, there is no foreign debt”(Deng-79-01-06). He also noted that “Our country is huge, with many cultural relics and heritage” (79-01-17), and that “(developing) tourism can provide huge employment opportunities for the youth” (Deng-79-01-06)<sup>14</sup>. Heritage in China, therefore, started to be recognized and revalued as a tourism resource. Heritage rehabilitation and conservation became increasingly oriented towards economic consumption.

State support for the preservation of heritage is useful from the state political perspective because it strengthens national standing, both domestically and internationally (Tuohy, 1991: 201, cited in Shepherd, 2007)<sup>15</sup>. World heritage appealed to the proponents of the “open-door” policy for it could assist China to find standing on the world stage. In addition to this, and more importantly, the initial state policies concerning tourism were focused on the rapid development of foreign tourism, the assumption being that foreign tourism produces foreign exchange earnings (Shepherd, 2007). Unsurprisingly, the UNESCO idea of world heritage was quickly embraced in China by governments

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<sup>13</sup> Quoted from: Dr. Li Zhisui, *The Private Life of Chairman Mao*, Random House, 1994

<sup>14</sup> Quoted from: Xiao, H. (2005) *The discourse of power: Deng Xiaoping and tourism development in China*. In *Tourism Management*, 27:803-814.

<sup>15</sup> Tuohy, Sue 1991, "Cultural Metaphors and Reasoning," *Asian Folklore Studies*, 50, pp. 189-220.

to the tourism industry. The ardor for world heritage enlistment has kept growing since the Chinese government's ratification of the World Heritage Convention in 1985. The World Heritage Convention and its World Heritage List has been credited in China for fostering Chinese consciousness of and pride in conserving their heritage. It has helped China to pursue the technical requirements of international norm of professional heritage conservation, for a standardized conservation plan is to be prepared and submitted for consideration for nomination along with the other required application documents. This is believed to have been both cognitively and technically significant, particularly when China was still at the initial stage of heritage conservation after a long period of negating and ignoring heritage (Xie, 2001).

Nevertheless, practice has revealed that, in spite of the adoption of the world heritage concept, UNESCO's conservation ideal has been actually de-prioritized by the economic development goals of the Chinese government. Considering the poverty and productivity backwardness in China at that time as against the advancement of the developed countries in the world, Deng believed that it was reasonable to emphasize economic construction as an urgent cure through which to attain social and national stability. His "stone" and "cat" theories implied that costs were permitted for economic development under certain circumstances. The notion of world heritage was accepted in China within this context, more for its economic than for its conservation potential. The consequence of this is that, as noted by some researchers (Xie, 2004, Dong, 2006), conservation advocacy from the profession, the society and even the government keeps growing on the one hand, but damage and destruction of heritage keep increasing from tourism use on the other. Evidence for this can be found easily from some of the world heritage sites in China, such as Mount Wudang, Mount Taishan, and the Confucius Complex. Damage at all of these sites has resulted primarily from economic exploitation (Xie, 2004).

Heritage sites were promoted for their economic good during Deng's period while the traditional meanings and values that heritage carried were basically not underscored until Hu Jintao rose to the presidency of China. Although the achievements of Deng's economic development strategy are self-evident, some have argued that a sequel to this over-emphasis on the economy is cultural abdication and a "moral vacuum" that widely exists in Chinese society (Chu, Jiang, and Zhou,

2005; Liu, 2006). Mao's use of the Cultural Revolution to replace the old feudal tradition and moral beliefs with a new communist belief only succeeded in suppressing the old ideas but did not get the new ones firmly rooted in Chinese minds. Reflecting on the social reality after Mao, people began to doubt the communist beliefs that they previously followed. A moral vacuum was thus formed with the negation of traditional values and the loss of communist belief. Deng's "open-door" policy introduced the western market system and brought in with it some capitalist values which subsequently led to the ideological chaos and loss of morality in Chinese society. It is believed that Hu Jintao's advocacy of a "harmonious society" and his assertion of the core socialist moral system entitled the Eight Honours and Eight Shames<sup>16</sup> as a set of moral codes were essentially a response to the social problems defined as materialism, money worship, moral disorder, loss of culture and tradition, the pursuit of individual goals at the cost of collective advancement, the credit crisis, deception and fraud, and power abuse and corruption. (Xu, 2006).

States often make ideological use of heritage in order to consolidate new national identities and themes (Burns 1998; Hall 1999), and state support for the preservation of heritage is thus considered meaningful from the state political perspective in that it helps to strengthen national standing, both domestically and internationally (Tuohy, 1991: 201). Hall (1981), examining heritage in the communist eras of Eastern and Central European countries, also argued that in these countries, heritage and heritage sites were often used to depict the past in ways that reflected and endorsed communist beliefs, and heritage was often used for propaganda to reinforce concepts of national identity that supported the communist leadership's aims.

In his important speech at the Central Party School<sup>17</sup> that was indicative of his position of power and his guiding philosophies, Hu Jintao used a very populist tone to appeal to ordinary Chinese people and made serious note of the recent challenges China had been facing, especially with regards

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<sup>16</sup> Eight honours and eight shames: 1.Love the country; do it no harm 2.Serve the people; never betray them 3.Follow science; discard superstition 4.Be diligent; not indolent 5.Be united, help each other; make no gains at other's expense 6.Be honest and trustworthy; do not sacrifice ethics for profit 7.Be disciplined and law-abiding; not chaotic and lawless 8.Live plainly, work hard; do not wallow in luxuries and pleasures. Source of the official translation: [http://news3.xinhuanet.com/english/2006-10/18/content\\_5220576.htm](http://news3.xinhuanet.com/english/2006-10/18/content_5220576.htm)

<sup>17</sup> Central Party School: is the highest institution to train officials of the Communist Party of China. [http://en.wikipedia.org/wiki/Central\\_Party\\_School](http://en.wikipedia.org/wiki/Central_Party_School)

to income disparity as well as the need for "increased democracy" in China. This showed that Hu's administration has placed political reform as an important part of the agenda in the coming years, a tone that did not exist during the previous eras of CPC governance (Kuhn, 2005).

To attain his political goals, introspecting on the lessons from Mao's "politically negative" and Deng's "economically positive" attitudes, it is reasonable for Hu to draw support from the rich resource of Chinese traditional culture and philosophies. In fact, as was noted by the researcher, there is more attention now attached to heritage, and the culture and tradition it bears, than ever before in the history of the People's Republic of China<sup>18</sup>. In addition to the attention to the economic benefits of heritage like Deng, Hu is apparently also very keen on the traditional culture and values that are sustained in heritage, and would quarry heritage in support of "a harmonious society". Evidence can be found in several of his talks which expressed his positions in coping with domestic issues as well as dealing with international relations.

This concept of scientific development is based on the experience China has gained in its modernization drive and put forth in response to the trends of the times. It is also rooted in the cultural heritage of the Chinese nation.... The distinct cultural tradition of the Chinese nation that developed in the long course of history has exerted a strong influence on contemporary China, just as it did on ancient China. Putting people first, keeping pace with the times, maintaining social harmony and pursuing peaceful development: these values that are being pursued in China today are derived from its tradition. (Hu, 2006)

In this speech made at Yale University, New Haven, Hu clearly defined his attitude toward traditional culture and values. The socialist morality codes that he advocated are mainly drawn from the traditional Chinese philosophies such as Confucianism and Taoism which were reiterated in several of his other reports and speeches (Hu, 2006a; 2006b; 2007a; 2007b). For instance, he noted that Confucian ideology contained the ideal of "harmonious society" as well as rich ideological resources that were very significant for building a "harmonious society"(Hu, 2006b). The media are very efficient at communicating and publicizing Hu's guiding philosophies of a "socialist harmonious society". One particular instrument to be mentioned is the top-rating Lecture Room show on Channel 10 of Chinese Central Television (CCTV) which systematically introduced and interpreted Chinese

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<sup>18</sup> People's Republic of China: 1949-- present

ancient wisdom and philosophy in the form of a lecture series presented by well-know scholars and professors from Chinese Universities<sup>19</sup>.

Being inextricably linked with tradition and culture, it is logical that heritage is highly recognized and valued in present-day China, among which world heritage has won particular attention. In fact, several regulations concerning heritage and world heritage conservation have been made since Hu came to power in 2002 (Table 3.1). The importance attached to heritage can be found in various media, for instance, all the provincial and municipal governments in China vigorously promote heritage, especially world heritage sites, on their official websites on the internet and the promotion is usually accompanied by conservation advocacy, as was observed by the researcher<sup>20</sup>.

### **3.2.3.2. Implication for local communities**

Hu Jintao raised the CPC's great concern for the livelihood issues of the Chinese people in his official report to the Seventeenth National Congress of the Communist Party of China on Oct. 15, 2007 (Hu, 2007). This is especially encouraging in the sense that more attention is expected to be placed on the connection of world heritage sites to the livelihood of their local communities which was overlooked in the past eras and, in some places in China, has become an element to threaten social stability (Zhang and Wang, 2004).

Heritage is multi-functional, and heritage is subjective and selective (Ashworth and Tumbridge, 1996; Graham, 2003). This section reviews the evolution of how heritage and world heritage have been used in China by the government economically, politically and socio-culturally for the purpose of building a socialist country that is "politically stable, economically prosperous, and socially harmonious." World heritage sites in China display an international-national-local nexus with meanings and functions of the levels of heritage defined and redefined by the national government in light of the nation's varied economic, political, and social needs at particular times. Contestation and dissonance were manifested in multiple and selective uses. World heritage was embraced by China for both the economic good it brings through international tourism and the conservation concept it bears. Meanwhile, it added to the contestation and dissonance already embedded in the national-local

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<sup>19</sup> <http://www.cctv.com/program/bjzt/01/index.shtml>

<sup>20</sup> Taking Mount Taishan as an example: <http://www.mount-tai.com.cn/>

nexus of Chinese heritage. The voice of the local communities seems to be overwhelmed by national and international calls in the heritage chorus. China and Chinese heritage planners are challenged to determine how to use the multiple functions of heritage to mitigate the dissonance and serve its multi-layered stakeholders in a balanced way.

### **3.2. World heritage planning in China**

The World Heritage Convention of UNESCO requires that each state party that applies for World Heritage nomination should submit an application document kit among which a conservation plan and a tourism development plan for the heritage site are compulsory as a management guarantee (World Heritage Convention, 1997<sup>21</sup>). Therefore, the world heritage sites in China should have a standardized conservation plan available to guide the conservation as well as the development practice on the sites.

Operational Guidelines for the Implementation of the World Heritage Convention (WHC, 1997 and 2008) provide principles and criteria concerning the inclusion of heritage sites in World Heritage List. The same form approved by the Committee is used for the submission of nominations of cultural and natural properties. In addition to data on location, jurisdiction, and justification of the sites, the state party is also required to present the conservation and maintenance status in the application document for nomination. Documents about management and planning are supposed to be available and, also, extracts of other plans relevant to the site are also required to be included in the documentation, (WHC, 1997 and 2008). It is believed that this plan requirement of the WHC has played a significant role in the establishment, development, and standardization of heritage planning in China.

Natural heritage and cultural heritage are administered by several different administrative bodies in China. Cultural heritage is under the charge of the State Administration of Cultural Heritage which is responsible for applications for UNESCO world heritage nomination and administration of world cultural heritage in China. Natural heritage is under the charge of several bodies depending on their nature: the State Forestry Administration, the State Oceanic Administration, the State

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21 WHC(1997). Operational Guidelines for the Implementation of the World Heritage Convention. UNESCO.

Environmental Protection Administration, the Ministry of Land and Resources and Ministry of Agriculture. Once a natural area is considered to be qualified to apply for world heritage nomination, the Ministry of Construction will take over the organization of the application and then the management work for the enlisted world natural heritage site. The multi-sectoral administrative system makes it difficult to plan the cultural and natural heritage in a unified way.

### **3.3.1. Cultural heritage planning in China**

Literature retrieved from 1995 to 2007 on cultural heritage, more often termed “cultural relics” in China, reveals that the concept of planning was not really noted until very recent years (Yang, and Yu, 2004<sup>22</sup>), although the practice of planning in terms of conservation might have started earlier. Initially, cultural heritage planning usually was a sub-section of urban planning rather than on its own and it served the purpose of urban development. Independent heritage plans were rarely found until World Heritage was introduced into China in 1987. Even now, among the numerous heritage sites in China, those with independent heritage conservation plans are mainly the world heritage sites, as plans are a prerequisite for world heritage nomination.

The situation improved in 2003 when the State Administration of Cultural Heritage issued two official documents that require, for the first time, that independent conservation plans should be in place for the key cultural relics/heritage sites of national importance. One of these documents is “Specifications on compilation of conservation plans for the key cultural relics of national importance” and the other is “The approval methods concerning compilation of conservation plans for the key cultural relics of national importance”. The former document standardizes the format and specifies the details that cultural heritage conservation plans should provide. For instance, it specifies the requirements of the plan text, plan blueprints, and the interpretation and justification of the plan, etc. For the text of the plan, a plan framework is required in which the goals and principles of the plan should be identified. In addition an exhibition plan, which is essentially a tourism plan and a management plan, should be included in the conservation plan. The latter document listed the principles to be observed in evaluating and officially approving the cultural heritage conservation

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<sup>22</sup> Yang, L. and Yu, X. (2004) A review of the conservation and utilization of Chinese cultural heritage, *Tourism Tribune*, 19(4) pp85-91.



plan documents made under the guidelines of the former document. For the first time in the history of heritage planning in China, local community involvement was mentioned officially as an element for consideration. Article 11 of this document stated: “Bring forth management proposals, establish the content of day-to-day conservation and monitoring, and consider community involvement projects”(State Administration of Cultural Heritage, 2003, P3). In November, 2005, the State Administration of Cultural Heritage developed the "11th Five-Year development plan for cause of national cultural relics”. Goals and missions were identified in this plan. Among these, the management system of world cultural heritage was noted as a goal in the following terms: “Straighten out the world cultural heritage management system, improve the monitoring system and the system of expert consultation, and establish a long-term and effective management mechanism for world cultural heritage conservation” (State Administration of Cultural Heritage, 2005, P20). Also, the compilation of conservation master plans for some important temple grottoes and ancient dwellings, as well as the Great Wall, was emphasized as key missions in the plan.

Planning and plans have been progressively recognized officially in China, particularly in the last few years. However, implementation has received less attention. Local communities are stakeholders whose lives are most closely associated with conservation and development practice on heritage sites. However, very few recent heritage planning documents talk about the local community. Also, little academic research has been found in China on either heritage planning or local issues relating to heritage planning. Who should be involved in developing plans and how the plan should be developed are issues that have not yet been addressed.

### **3.3.2. Natural heritage planning in China**

The first nature reserve in China was established in Guangdong province in 1956. By 2006, 2,349 nature reserves had been established covering 15% of the continental territory of China (Bu, 2006). Under the umbrella of the Nature Reserve System, natural heritage in China is actually under three sub-systems: nature reserves, forest parks and scenic areas (Zhu, He, and Ji, 1996). Forest parks are under the charge of the State Forestry Administration. When a nature reserve is identified as a scenic area, the Department of Urban Construction of the Ministry of Construction will take charge of

it. World natural heritage sites fall into this system. Other nature reserves, depending on their nature, are in the charge of the State Oceanic Administration, the State Environmental Protection Administration, the Ministry of Land and Resources, and the Ministry of Agriculture. Therefore, the planning commitment for natural heritage in China is undertaken by varied departments with varied goals and objectives.

The Environmental Protection Committee of the State Council of China came out with “China Conservation Program” in 1987 which was the first programmatic document on natural protection in the history of People’s Republic of China. It provided overall strategies and basic principles for China’s biodiversity conservation. Research prior to 1997 was mainly focused on issues such as, 1. the categorization and quality analysis of the nature reserve, 2, the boundary and coverage of the nature reserves in terms of biodiversity protection; 3, the construction of a standardized and scientific management system; and 4, basic scientific research on nature reserves; 5, professional training for management personnel; and 6, public awareness. The sustainable use of natural resource to boosting the local economy was also raised as by a few researchers (Zhu, He, and Ji, 1996).

Plans and planning were rarely mentioned in official documents or academic papers pertaining to conservation of natural areas in China until the official document “Development Planning Program for China’s Nature Reserves” was jointly issued by the then State Environmental Protection Bureau and State Planning Committee in 1997. This document planned for a period from 1996 to 2010. It analyzed the construction and management status of Chinese nature reserves. The lack of a practical national-level development plan was recognized as one of the 5 major issues facing China’s nature reserves (SEPB and SPC, 1997).

As a follow-up, jointly with several other ministries and administrative units, the State Environmental Protection Administration (the then SEPB) produced another planning document in 2005: National Development Plan for Nature Reserves. It set goals and objectives for the conservation and development of nature reserves. Under the guidelines of this national plan, the majority of the national nature reserves in China developed independent master plans. This was considered to be significant progress in nature reserve planning in China (Bu, 2006).

In June 2007, the State Council of China approved a planning document entitled "11th Five-Year" Plan Compendium for National Cultural and Natural Heritage Sites Conservation, produced jointly by 8 ministries administrative units.<sup>23</sup> This was the first national-level special heritage conservation plan taking cultural and natural heritage as a unity. It provided for holistic planning for important strategies, measures, projects, and actions that would be taken concerning the conservation of national heritage sites during the period of the 11<sup>th</sup> Five-Year Plan. This plan played an important guiding role in the conservation of heritage sites (National Development and Reform Committee, 2007). This document planned for a period from 2006 to 2010. The major goals identified in this plan were to ensure:

Various types of heritage resources be properly protected, protection be strengthened, and various acts of destruction be effectively restrained; conservation facilities and equipment of the vast majority of the national heritage sites be markedly improved, scientific research and new technology and methods be effectively promoted and reasonably applied, and heritage conservation management decisions be based on scientific research; all heritage sites be provided with both a master plan and special plans so as to standardize the conservation and management commitments; the education role that heritage plays in popular science, environment, traditional culture, and patriotism be strengthened; heritage tourism be further developed on the basis of effective conservation. (2007)

During the 10<sup>th</sup> Five-Year Plan, the Chinese government input RMB 7,889 million (about CAD\$1.13 billion) on cultural heritage conservation, RMB 640 million (about CAD\$91.4 million) as a special fund for conserving key world heritage sites such as the Forbidden City, Potala Palace, etc., and a special fund of RMB 100 million (about CAD\$14.3 million) was assigned in 2006 for conserving the Great Wall (Sun<sup>24</sup>, 2006). This is evidence of a positive attitude towards heritage, and especially world heritage, conservation, and planning was one of the important commitments.

The above review suggests that the concept and practice of world heritage has provided a positive impetus to Chinese heritage conservation, particularly in recognizing the importance of planning and plans, although a deeper drive for more emphasis on heritage conservation may come

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<sup>23</sup> **8 departments** include National Development and Reform Commission (the original State Planning Commission), Ministry of Finance, Ministry of Land and Resource, Ministry of Construction, State Environmental Protection Administration, State Forestry Administration, National Tourism Administration, and State Administration of Cultural Heritage.

<sup>24</sup> Sun Jiazheng is the head of the Ministry of Culture, China. Numbers came from his speech at a press conference on Chinese cultural heritage conservation. [http://www.gov.cn/xwfb/2006-05/25/content\\_290621\\_2.htm](http://www.gov.cn/xwfb/2006-05/25/content_290621_2.htm)

from the expected economic gains, especially from world heritage through tourism. Greater importance has been attached to heritage conservation and planning in recent years which should be encouraging for conservators, planners and researchers. Now, at least, there are written documents, although cases may reveal a gap between them and actual practice. Little academic research was undertaken on Chinese heritage planning from 1987 to 2007, leaving a gap that this work addresses. Since there is little literature to refer to, it is difficult to examine how heritage plans have been developed and how well they have been implemented at Chinese heritage sites, including world heritage sites. This justifies the present research.

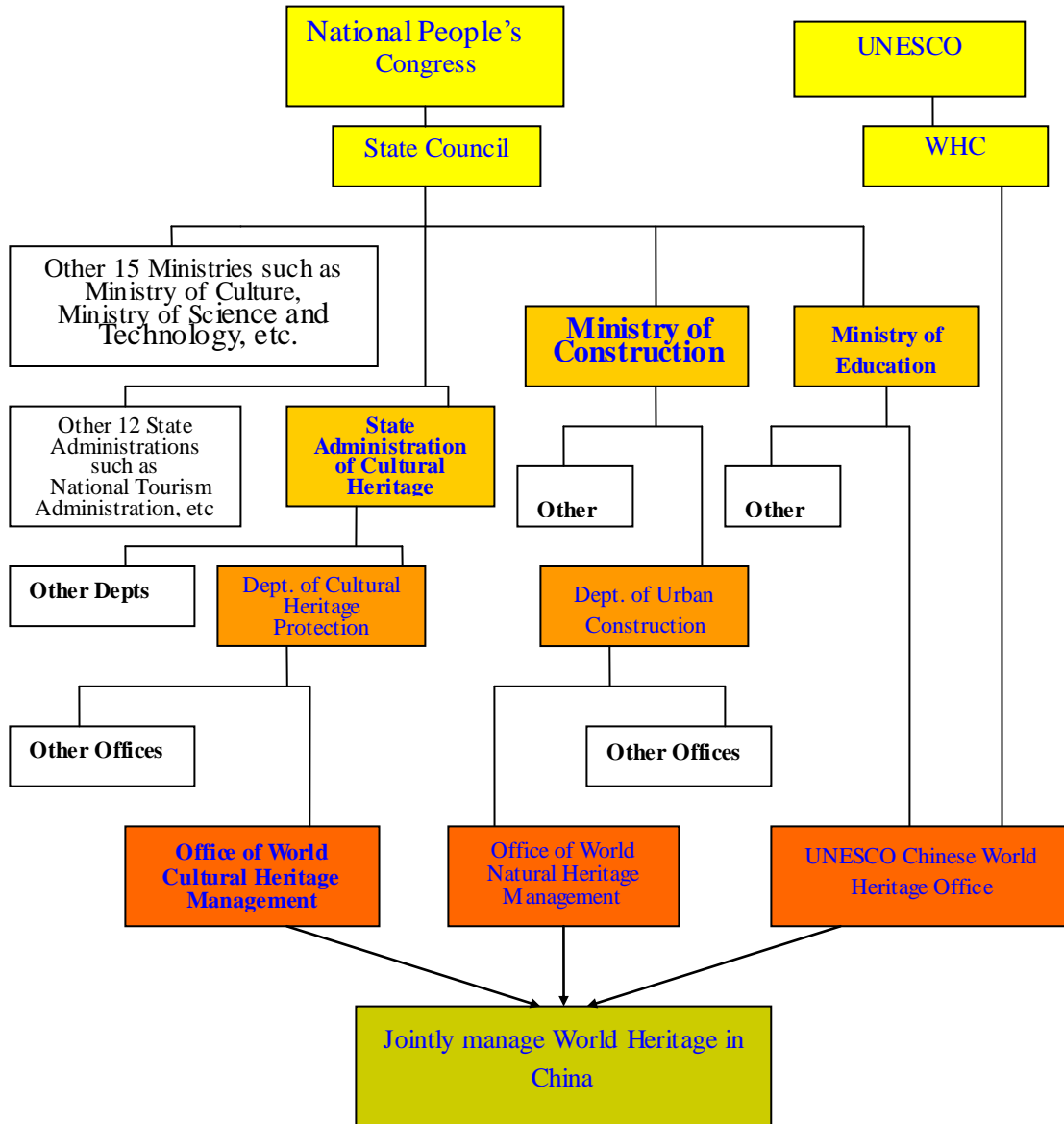
Nonetheless, based on the above discussion, and judging from the documents available, several pressing planning and management issues concerning world heritage conservation in China can be identified and these will be discussed in the next section.

### **3.4. Planning and Management issues of World Heritage Sites in China**

#### **3.4.1 Multi-sectoral and multi-layered management**

In China, as has been discussed, the work of protecting and managing world heritage is committed to three bodies which are all subject to the State Council but which are independent from each other: the State Administration of Cultural Heritage, the Ministry of Construction, and the Ministry of Education. The detailed relationships are reflected in Figure 3.1.

**Figure 3.1 Organizational Chart of World Heritage Management in China on the National Level**



Source: Summarized by the author

It can be seen from the figure that the work of protecting and managing World Cultural Heritage is under the responsibility of the Office of World Cultural Heritage Protection of the State Administration of Cultural Heritage, while the same responsibility concerning World Natural Heritage is taken by the Office of World Natural Heritage Protection of the Ministry of Construction.

The UNESCO Chinese World Heritage Office under the Ministry of Education is mainly responsible for certain protection commitments, including the application to the World Heritage Convention for the World Cultural and Natural Heritage designation of candidate heritage sites in China. Without a unified and independent executive department, with different departments bearing different goals and objectives, and with the lack of connection, coordination and efficient cooperation among them, it is very difficult to put the UNESCO approach to world heritage management and protection into effective practice in China (Xie, 2005; Dong, 2006; Zhang, 2006; Tao, 2005).

In addition, in principle, cultural heritage sites in China are classified into national, provincial, and municipal/county levels in accordance with their historical, scientific and aesthetic value, and thus should be under protection of the governments at the corresponding level. World Cultural Heritage, like other national-level cultural heritage in China, is national property and should be under the control and care of the national government. However, in reality, in most of the cases, the final responsibility for protection and management is left in the hands of the corresponding municipal/county level governments where the heritage site is located (Chan and Ma, 2004). This leads to management difficulties in terms of contestation and inefficiency.

On the one hand, the long-existing top-down management tradition and organizational structure give little space for flexibility and creativity to the bottom level governments and makes them take orders and follow rules from the upper levels. On the other, the problems of multi-level, confusing and overlapping functions among sections of governments, and multiple departments with often different objectives at the national management level lead to difficulty in forming clear conservation and management goals and in getting them down to the bottom executive body without misinterpretation. Even if clear policy and goals are formulated, it is a challenge to implement them in a desirable way for rights and responsibilities are difficult to define and when there are too many levels and sectors are in charge, nobody really takes responsibility. Every one claims a share of the benefits but no one wants to shoulder the responsibility of protection.

Meanwhile, it is also noted that the devolution of administrative responsibilities to the local governments in recent years (Wang Y., 2006; Skinner, 2003) enables the local governments to

interpret the mandate given to them by superintendent units and to selectively implement national and provincial policies in light of their local economic priorities (Skinner, 2001, 2003). This notion also applies to the situation of Chinese world heritage sites and may also contribute to management barriers in world heritage conservation in China (Xie, 2004).

### **3.4.2. Lack of funding**

Another problem is finance, which is also related to organizational deficiencies. As non-profit organizations, the heritage management bodies run on financial support from government. For many of the heritage sites, the governmental appropriation for conservation and management is very limited and is barely sufficient to support staff salaries (Zhang, 2003). This results in low capacity and low motivation for protection. Solutions must be found to the problem of lack of money for maintenance and renovation, and also for improving the living and working conditions of management staff.

Encouraged by economic reform and the national policy prioritizing economic development, the heritage sites management units are looking for ways to supporting themselves by taking advantage of the heritage resource. This creates opportunities for tourism development. Tourism is playing an increasingly critical role in these heritage sites because it brings about quick and visible economic benefits. At the same time it is a great management challenge as it endangers the heritage resources. Most world heritage sites in China are facing the danger of improper development for tourism and reception of tourists goes far beyond their capacities (Tao, 2001). The external developers are allowed by the administrative authority to invest in tourism and their desire is to maximize economic benefits which conflicts with the original intention of conservation (Xie, 2003). The heritage management mechanism displays its ineffectiveness in dealing with the conflicts (Wang H., 2006). Cases that support this notion are found such as the fire accident in Wudang Mountain, the cleaning disaster (painted architecture was cleaned using water from fire hydrants) in Confucius' Mansion and Temple, and the ropeways building on Mount Taishan, all of which are UNESCO World Heritage Sites (Xie, 2004; Zhou, 2004).

### **3.4.3. Economically-oriented conservation goals**

Directed by the national economic development policy and driven by the lack of funding, the

conservations goals for the world heritage sites in China, although it may not be stated in the planning documents, revolve around economic benefits. World heritage is a resource to drawn on for revenue generation or a “money-spinner” (Xie, 2004; Zhang, 2007; Lin, 2002). This is exacerbated by the desire for instant success and quick profits by local government officials (Chou, 2003). Usually when a heritage site is considered for WHC application, much money and effort is spent on preparation work, such as clearing up “illegal construction”<sup>25</sup> inside and around the site as well as relocating the residents. In the case of Dujiangyan Irrigation System, for instance, a huge sum of money was input to regulate the surrounding environment in order to meet the qualifications of world heritage enlistment, among which merely the dismantled buildings cost RMB ¥ 220 million Yuan (approximately CAD \$31.4 million) (Zhou, 2004). Early large financial inputs in preparation for the World Heritage application result in expectations of large outputs at a later date. This is an implicit management goal of almost all the world heritage sites in China.

Nonetheless, little information can be acquired on whether economic gains from world heritage can benefit the local residents and enhance their life quality, neither from the government nor from academic research, nor from data of the other world heritage stakeholders. Although the World Heritage Convention stresses the improvement of local well-being through developing economic activities such as tourism on the world heritage sites (WHC, 2001), and the idea of equity is a key principle of sustainable development that has been adopted by the Chinese government as a national development policy, there is little evidence to show that local communities have been considered important stakeholders such that they enjoy equitable benefits from development on the world heritage around which they have been living for generations. Enhancement of the life quality of the local residents is rarely found as a conservation goal for the world heritage sites in China, but rather, the local people are usually regarded as a problem for conservation and they are relocated (Jiang, 2003).

#### **3.4.4. Weak community involvement and participation**

The local community should be considered an important stakeholder of world heritage (Wall,

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<sup>25</sup> Illegal constructions: constructions which violate the regulation of the conservation and development related to the heritage sites.



1996; Wall and Black, 2005) and community involvement in heritage conservation and development should be an integral part of heritage planning and management (Hall, 2003; Timothy, 2003). However, community involvement and public participation are relatively novel concepts in China considering the thousands of years of feudal autarchy and they are emerging only slowly in some people's mind and in some segments of society. There is research on community involvement in heritage and tourism in developing countries (Wall, 2006; Ross and Wall, 1999a and 1999b; Timothy, 1999) but very few have examined the situation in China. For Chinese researchers, some of the main themes of research on world heritage and tourism are reform of the management system, resource-tourism relations, property rights, marketing and tourist reception (Zhang and Zheng, 2001; Tao, 2004), with inadequate examination of local people as how they are impacted and how best they can benefit from preservation and development. Chinese researchers showed little interest in community issues until the last decade of the last century (Bao and Sun, 2003) and then mostly introduced and discussed western theories with only a few empirical studies (Zhang and Wu, 2002; Hu and Zhang, 2002; Bao and Sun, 2003, Qiu et al., 2005; Xu et al., 2006). Research on community involvement can scarcely be found in terms of conservation and development of heritage, particularly world heritage. Review of the conservation plans of several world heritage sites reveals that local benefits were not recognized as a conservation goal and specified in the documents.<sup>26</sup> Thus, local voices have seldom been heard in the formulation of the plans. Weak local participation on the ground follows automatically.

Other issues, such as lack of a professional heritage planning team, lack of a stakeholder participatory planning process, and lack of a monitoring and evaluation system to guarantee plan implementation should also be noted, although again very little literature discusses or provides evidence to support these points. Evidence is expected to be provided through the author's field research.

### **3.5. Summary**

This Chapter reviewed the Chinese context for world heritage conservation and the status of

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<sup>26</sup> Conservation plans for Mt. Taishan, Confucius complex, Mt. Wuyi, Xiaoling Tombs etc.

world heritage planning in China. The nature of heritage leads unavoidably to contestation and dissonance which create challenges for planning and management. World heritage status adds to the challenges by introducing additional stakeholders. The development of a plan is required by World Heritage Convention and this has advanced Chinese thinking as attempts have been made to meet the requirements.

The evolution of cultural and natural heritage planning in China was reviewed. Heritage planning in China is still new when compared with western countries. The small body of literature dealing with heritage is mainly focused on management system reform, property rights, conflicts between resource conservation and tourism development, and there is little discussion of planning. Research is rarely found on plans, the planning process, plan implementation, monitoring and evaluation. However, common issues in Chinese heritage planning include: 1. Multi-sectoral and multi-layered management; 2. Lack of funding; 3. Economically-oriented conservation goals; and 4. Weak community involvement and participation; and 5. several other issues, such as lack of trained personnel and use of a professional heritage planning teams, lack of a participatory process to permit stakeholder involvement, and lack of monitoring and evaluation system to guarantee plan implementation. Such issues will be explored in detail in the case of Mount Taishan. The characteristics of this study area will be introduced in the next chapter.

## **Chapter Four: The Geographic and historic background of the research site<sup>27</sup>**

### **4.1. The location of Mount Taishan in China**

Mount. Taishan is located in central Shangdong province of China. Shandong is an eastern coastal province. The Shandong Peninsula constitutes the eastern part of the province. The province is in the lower reaches of the Yellow River and about 4,000 years ago was the cradle of the Dawenkou (near Mount Taishan) and Longshan cultures. It is located between the national capital city Beijing and the biggest commercial city, Shanghai (Figure 4.1). As one of the most important coastal provinces of China, it covers 156,700 square kilometer, has a coastal line of 3,100 kilometers, and a large population of 92.48 million. In addition to its economic, geographical, communicational, cultural and historic importance, Shandong province is also a popular tourist destination with its rich and diverse tourism resource. Mount Taishan and the Confucius Complex at Qufu, are UNESCO World Heritage Sites and, are two of its key inland tourist destinations.

Mount Taishan lies across the cities of Tai-an, Jinan and Zibo. Its main peak, Yuhuangding (Jade Emperor Summit) which rises to 1,545 meters above sea level, is located within Tai'an City. Tai-an is an important city of Shandong province in terms of tourism thanks to Mount Taishan, and is less than one hour's drive to Jinan, the capital city of the province.

The name of the city, Tai-an, is derived from Mount Taishan and implies that "the country is prosperous and the people live in peace." Tai-an is located in the eastern coastal economic belt, lying at the intersection of the Shandong Peninsula and the hinterland. It covers an area of 7,762 square kilometers with a total population of 5.5 million. Along with Mount Taishan and its beautiful scenery, Tai-an has won honours, such as "Excellent Tourist City of China", and "National Sanitary City."

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<sup>27</sup> Most of the information for this Chapter is mainly obtained and summarized from the official website of Taishan Administrative Committee: <http://www.mount-tai.com.cn/>, unless the sources are provided particularly.

# Context Map: The Location of Mount Taishan, China



Figure 4.1 Location of Tai'an

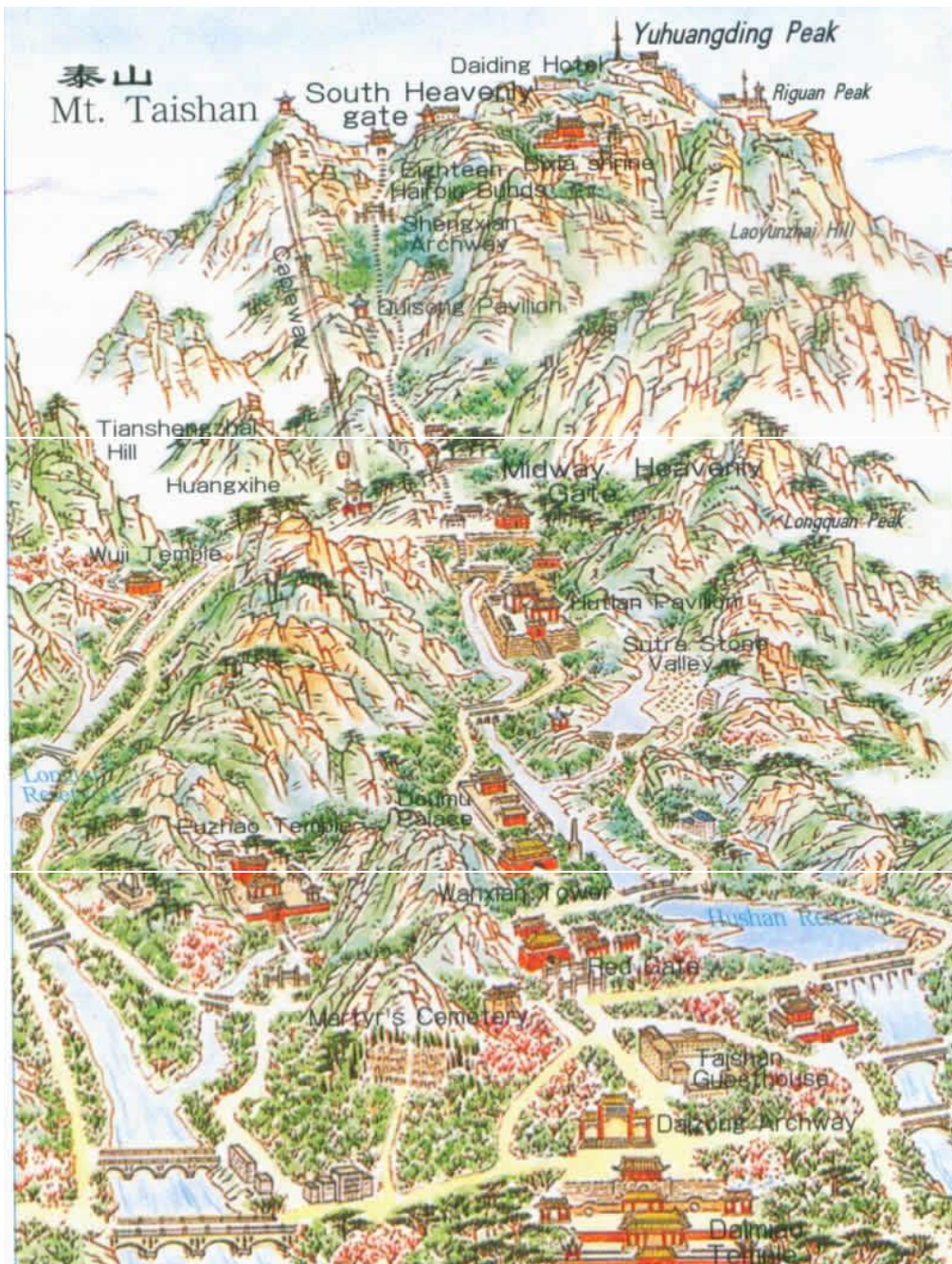
#### **4.2. Mount Taishan and its national and international influence.**

Taishan, covers an area of 426 square kilometers. Around 7,000 stone stairs run for 9 kilometers up the mountain from the foot to the peak, constituting the axis of Mount Taishan and symbolizing the route from earthly human life to sacred heaven (Figure 4.2). Taishan has been held in high esteem by the Chinese people since ancient times. The mountain was once called Mt. Daishan or Mt. Daizong and was renamed Mount Taishan in the Spring and Autumn Period (770BC-476BC). Daizong in Chinese means “the supreme of all mountains.” Taishan is known as the “First of the Five Sacred Mountains” which are all situated on the central plains of the country. It epitomizes splendid Chinese culture and history, and it is associated with sunrise, birth and renewal, and also with national prosperity and political steadiness.



**Figure 4.2 Picture of Mount Taishan (front side, climbing route)**

Historical records show that Mount Taishan became a sacred place over 1,000 years before the Christian era and was visited by emperors to offer sacrifices and to meditate in the Zhou Dynasty. In ancient times, the first thing for an emperor to do upon ascending to the throne was to climb Mount Taishan and pray to heaven and earth or their ancestors. It has been recorded that 72 emperors of different dynasties made pilgrimages to this mountain. These special ceremonies and sacrifices earned the mountain widespread fame. In addition, many poets and literary scholars also visited the mountain to gain inspiration. The grandiose temples and the numerous stone inscriptions and stone tablets are the best testaments to these visits. Mt. Taishan also played an important role in the development of Buddhism and Taoism. Local villagers all believe in the Goddess of Taishan who is worshiped in the temple on the top of the mountain. Many people from nearby provinces, such as Henan and Hebei, also make regular pilgrimages to Taishan.



**Figure 4.3 Mount Taishan: a detailed tourist attractions map** (Source: Taishan Administrative Committee)

Taishan Mountain is a natural museum abounding with cultural relics and artworks, combining natural scenery with cultural and historical elements (Figure 4.3). Historic architecture and relics can be seen, such as Heavenly Queen Pool, Red Gate Palace, Mid-Heaven Gate and Azure Cloud Temple. Stone carvings can also be seen all along the climbing route from the bottom to the top of the

mountain. In addition to this, Mount Taishan boasts unique natural scenery, including lofty peaks, deep valleys, spectacular waterfalls, enchanting rocks and the centuries-old pines and cypresses. The four wonders of the mountain are Sunrises from the East, the Sunset Glow, the Sea of Clouds and the Golden Belt along the Yellow River.

All the above attributes are great attractions to visitors. Mount Taishan was recognized by the State Council of China in 1982 as one of the earliest group of the National Scenic Spots and Historical Sites and was opened officially to visitors as a tourism destination, although visitation to this mountain has gone on for more than a thousand years ago. In 1987, Taishan was listed by the UNESCO World Heritage Convention of as a world natural and cultural heritage site, and, again, in 2006 it was designated as a UNESCO World Geological Park. These greatly boosted domestic and international tourism (Table 4.1).

**Table 4.1. Tourist Reception and Revenue of Taishan 1989-2005**

<b>Tourist Reception and Revenue of Taishan 1989-2005</b>				
<b>Year</b>	<b>The Scenic Zone</b>		<b>The mountain</b>	
	<b>Tourist Reception (Million person/time)</b>	<b>Revenue (Million RMB Yuan)</b>	<b>Tourist Entrance (Million person/time)</b>	<b>Ticket income (Million RMB Yuan)</b>
1989			1.286	3.858
1990			2.012	7.042
1991			2.10	8.40
1992			1.928	15.42
1993			1.524	22.86
1994			1.169	40.92
1995			1.396	41.88
1996			1.619	40.48
1997			1.694	55.06
1998			1.592	63.68
1999	2.456	96.20	1.682	86.05
2000	2.213	90.33	1.579	77.65
2001	2.076	116.21	1.544	101.37
2002	2.065	11.912	1.584	104.63
2003	1.561		1.1215	84.78 <sup>28</sup>
2004	2.30	153.28	1.656	136.11
2005	2.26	152.70	1.59	135.21

Source: Tai-an Municipal Tourism Bureau

<sup>28</sup> 2003 is the year of SARS which had a disastrous impact on tourism in China



### **4.3. The local population and their villages**

Technically, local population should be defined as the rural population living inside the Taishan Scenic Beauty and Historic Interest Zone (also Taishan Scenic Zone). Compared with urban people, the rural residents depend more on Mount Taishan to make their living and, thus, heritage designation is likely to affect them more significantly. Statistics showed that, in 2001, about 44,300 rural people lived within Taishan Scenic Zone in over 30 administrative villages located near the mountain with varying distances. It should be noted that not all the villages were relocated and people were originally widely scattered throughout the site. Only those who were located inside or closely around the mountain were relocated as required for the need of conservation. An accurate account of the number of relocated people was not available but the managers of Taishan Administrative Committee said that the total population impacted by relocation was approximately 4,000. Of the 30 villages, four villages were selected for detailed examination. They are Taiqian, Yingsheng, Baimashi and Lihang.

# Locations of the Four Villages near Mount Taishan

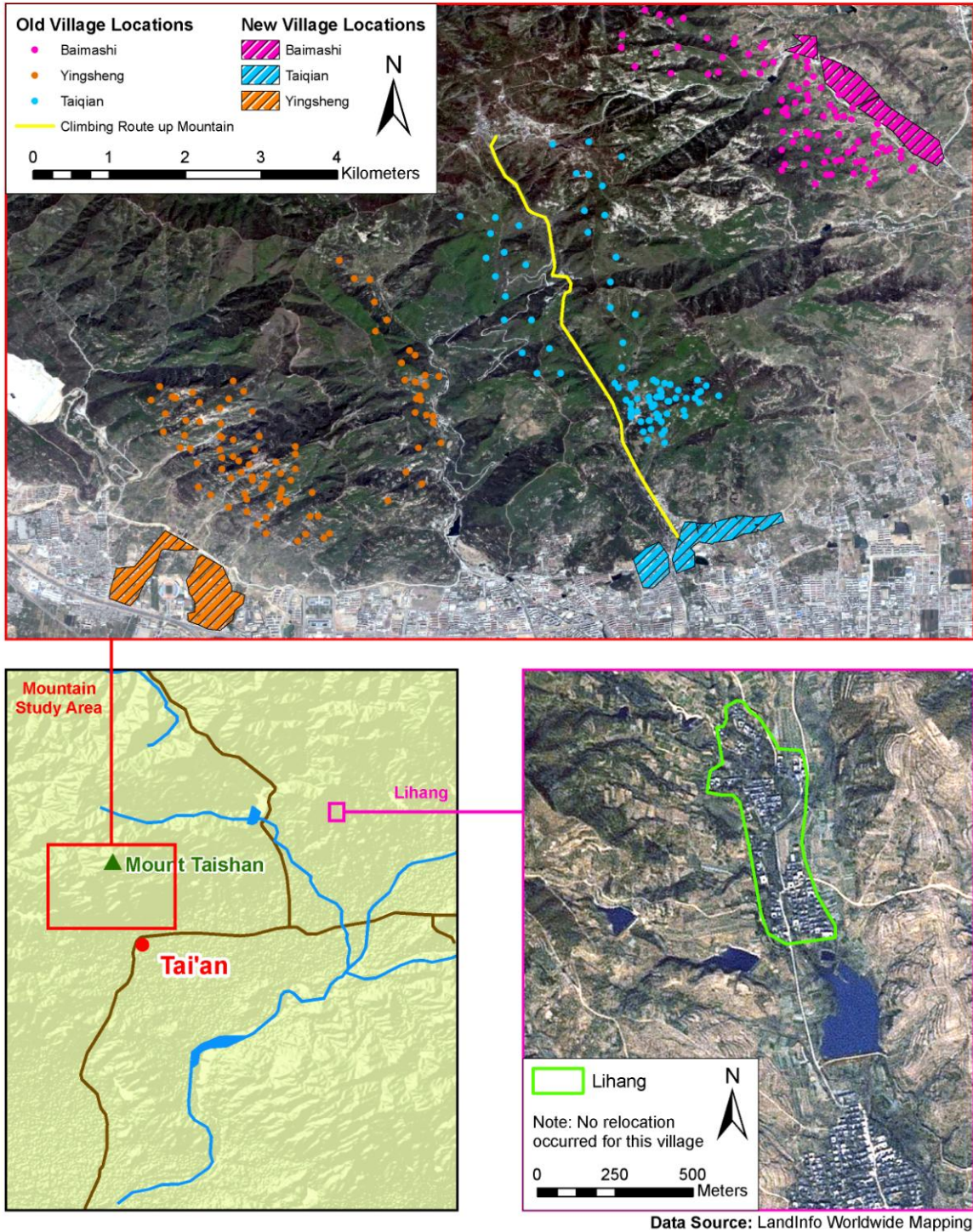


Figure 4.4: Locating the four villages under study

**Taiqian village** used to be situated in front of the entrance to Mount Taishan and some of the villagers lived inside the mountain before being moved by Taishan Administrative Committee. It is now the closest village to Taishan among the four selected villages. There are about 1,500 villagers and more than half of them experienced relocation. The whole village experienced livelihood changes due to Taishan's conservation as a world heritage site and due to the tourism on and around the mountain. As compensation, certain privileges to operate tourism service businesses were offered to Taiqian villagers and more than half of the villagers held jobs or ran small businesses, such as home-style restaurants and souvenir shops, along the climbing route to the mountain.

**Yingsheng village** was also located at the very foot of Taishan, on its southwest side, before relocation. This village had 532 families and a population of more than 1,600. Similar to Taiqian, Yingsheng was also impacted heavily by Taishan heritage resource conservation and tourism development, such as through relocation and loss of arable land. They were also offered certain preferential policies to enable them to work in Taishan-related tourism. Many of its villagers work in a hotel and a coach company, both of which are run by the village committee mainly catering to tourists to Taishan.

**Baimashi village**, situated at the northeast of Taishan, is only 2 kilometers from the mountain. There are about 1,100 residents in the village. This village was selected for study because, like the former two villages, the villagers' lives were also impacted by Taishan's conservation, although not as much as Taiqian and Yingsheng. For instance, much of their arable land was taken and the height and location of buildings in the village were strictly limited. Due to its location to the northeast at the "back" of the mountain, it was not directly involved in tourism on and around the mountain. However, they did manage to make a living from the mountain by developing cultural tourism to attract Taishan tourists to visit and stay in their village. Thirty out of 240 families were directly involved in tourism (Baimashi Village Committee, 2004).

**Lihang Village** is about 20 km from Taishan. There are around 1,000 people living in this village. This village is still traditionally rural in comparison to the other three villages which are urbanized to certain degree. It did not receive many direct negative impacts from the heritage

conservation of Taishan while it did benefit financially from tourism development on the mountain, although indirectly. The village developed rural tourism based on their natural, unpolluted resources, hoping to attract some of the tourists who visit Taishan. At the time of the research (2006), around 300 villagers were undertaking tourism-related businesses, such as running home-style hotels and restaurants, and planting and selling pollution-free organic vegetables and fruits to visitors.

The generalizability of case studies can be increased by the strategic selection of cases (Flyvbjerg, 2006). Bearing in mind that I will evaluate the implication of the UNESCO world heritage designation on the local people, and after the preliminary field trips to get primary information on the mountain and the villages, I chose the four villagers under the following criteria:

1) distance. The conservation plan for the world heritage mountain required relocation of some villagers for better conservation and management (Taishan Administrative Committee, 1987). It is likely that the closer the villagers lived to the mountain, the more chance they had to be relocated. The four villagers stood in varied situations: The majority of the Taiqian and Yingseng villagers used to live either inside or at the very foot of the mountain. 80% of the two village population were relocated; for Baimasha, located a bit further, only part of the population was relocated with some still staying in their old houses but much of their arable land was taken and the height and location of buildings in the village were strictly limited. Lihang village is much farther away from the mountain. They were not impacted from the UNESCO designation and conservation of the heritage mountain in terms of relocation.

2) involvement in tourism. All of the four villages are involved in tourism, though demonstrating varied patterns in terms of involvement and benefit. The degrees and opportunities of their involvement in tourism are also related to the relocation and compensation.

3) convenience of access. Not all of the villages in the scenic zone of the heritage mountain are accessible to researchers. I needed to get approval from the administrative committee of the scenic zone to enter the villages. Also, access depends on the willingness and availability of the leaders of the village committees to receive me. No village would allow the researcher to go directly to the villagers' houses without seeing the village committee leaders first and getting approval and a

guide.

4) Population is another factor for choosing the villages. The population of the 30 villages in the scenic zone range from 800 to 2000. The researcher wanted to choose villages with a similar population so that these villages could represent an average size.

These four villages represent varied situations in terms of their relationship to the world heritage mountain and its tourism, and they constitute appropriate cases for in-depth study. The research methods that were employed for this study will be discussed in the next chapter.

## **Chapter Five: Research design and methods**

### **5.1. Introduction**

This chapter discusses the research design, research methodology including research approaches and data collection methods employed. Section 5.2 presents the goal and objectives of the research which led to the research questions, and outlines the mixed-method research design used to combine a case study approach and an evaluation approach, as well as qualitative and quantitative methods; 5.3 discusses the methodology; 5.4 presents the research approaches employed in this study; 5.5 details the data collection methods; 5.6 describes the data collection practices employed in the field, and 5.7 discusses how data were analyzed.

### **5.2. Research design**

The primary objectives of this study are to examine whether the tourism plan and the conservation plan (as a prerequisite for UNESCO designation) of a World Heritage Site and their implementation address local needs and help local people benefit from the World Heritage Site around which they live. Also, implicitly it will examine the transferability and applicability of western heritage planning and evaluation approaches to the Chinese context. Meanwhile, by examining the plans and their implementation, an evaluation will be conducted on the operation of Mount Taishan, the world heritage site that was selected for study. The evaluation will emphasize heritage conservation, visitor experiences and local well-being. The ultimate goal is to provide knowledge and recommendations for sound heritage (including tourism on site) planning and management in a developing country like China so as to better address the needs and aspirations of the local people and improve the quality of their life while conserving the world heritage site for humanity. A case study approach and plan evaluation will be employed.

Based on the goal and objectives, a series of questions were formulated:

1. What are the goals and objectives that the tourism and conservation plans for the World Heritage Site are meant to achieve? What do they articulate concerning the local community and their lives?
2. Since tourism is one of the most important activities going on in world heritage sites, what

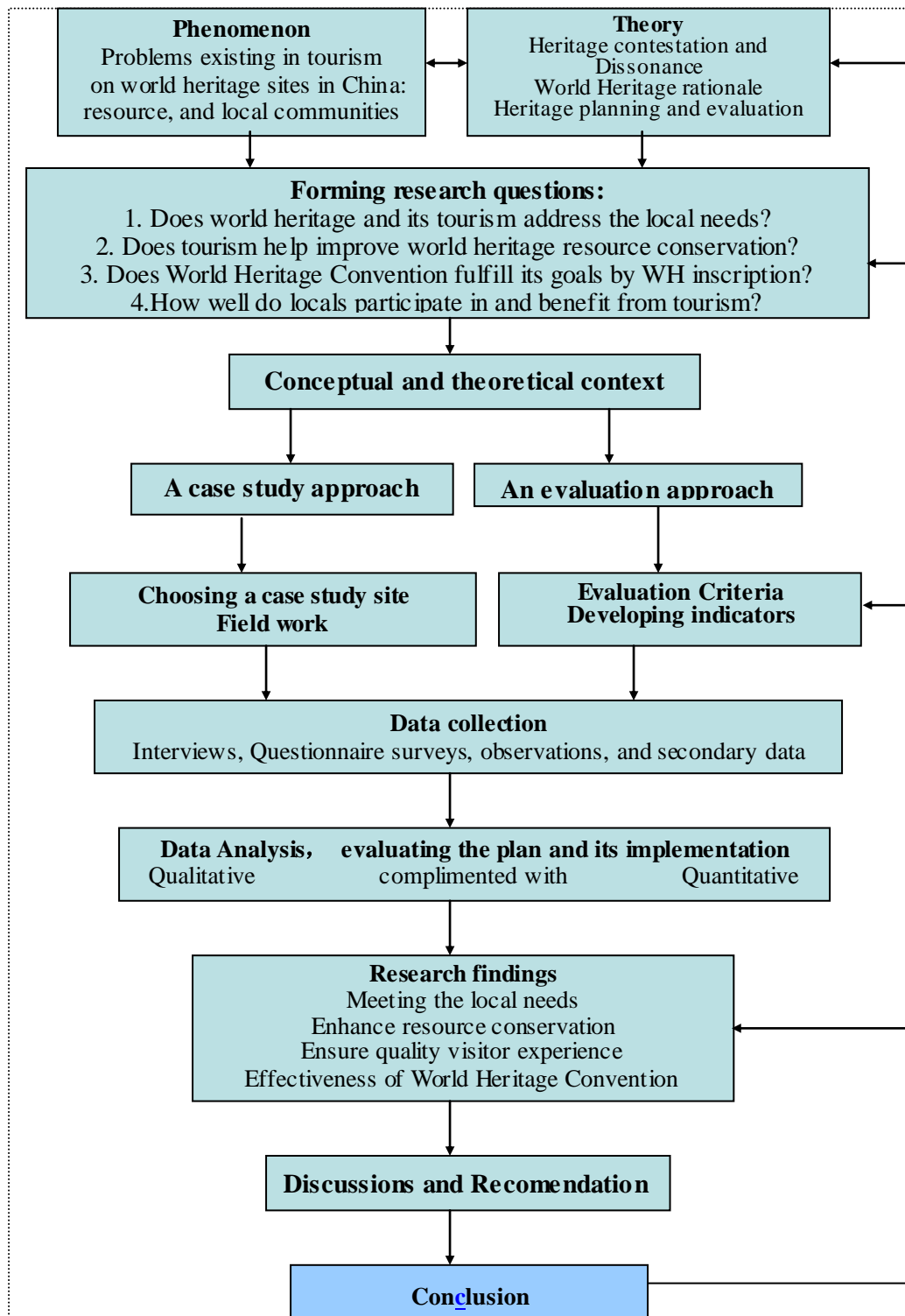
do the plans say about tourism and local involvement in tourism? Do local communities benefit from heritage-related tourism? Why or Why not?

3. How well have the plans been implemented at the research site? Has the practice on the ground matched the objectives? If so, how; if not, why? Did local communities benefit from the designation of the site as a world heritage site? If so, how? If not, why not?

4. Is local involvement and public participation in heritage and tourism planning as advocated much in the western world applicable in the Chinese context? Why or why not?

With these questions in mind, the following research steps were employed: 1. plan goals were identified; 2. key indicators were developed; 3. data were collected in the field; 4. data were analyzed; 5. An evaluation was conduct based on the data; and 6. findings were determined and suggestions were made. The whole research design is presented in **Figure 5.1**.

**Figure 5.1: Research design**





### 5.3. Methodological consideration

#### 5.3.1. Qualitative and quantitative research

A qualitative study is designed to be consistent with the assumptions of a qualitative paradigm and is defined as an inquiry process for understanding a social or human problem based on building a complex, holistic picture, formed with words, reporting detailed views of informants, and conducted in a natural setting (Creswell 1994). In contrast, a quantitative study, consistent with the quantitative paradigm, is an inquiry into a social or human problem, based on testing a theory composed of variables, measured with numbers, and analyzed with statistical procedures, in order to determine whether the predictive generalizations of the theory hold true.

Patton (1987) undertook a comparative analysis of the characteristics of qualitative and quantitative methods and examined the relative strengths and weaknesses of the two research approaches in terms of undertaking an evaluation study (Table 5.1).

**Table 5.1. Dimensions of Competing Methodological Paradigm: Qualitative and Quantitative**

<b>Dimensions of Competing Methodological Paradigms</b>	
<i>Qualitative/naturalistic Paradigm</i>	<i>Quantitative/experimental Paradigm</i>
Qualitative data (narratives, descriptions)	Quantitative data (numbers, statistics)
Naturalistic inquiry	Experimental designs
Case studies	Treatment and control groups
Inductive analysis	Deductive hypothesis testing
Subjective perspective	Objective perspective
Close to the program	Aloof from the program
Holistic contextual portrayal	Independent and dependent variables
Systems perspective focused on interdependencies	Linear, sequential modeling
Dynamic, ongoing view of change	Pre-post focus on change
Purposeful sampling of relevant cases	Probabilistic, random sampling
Focus on uniqueness and diversity	Standardized, uniform procedures
Emergent, flexible design	Fixed, controlled designs
Thematic content analysis	Statistical analysis
Extrapolations	generalizations

Source: Patton, 2008

Patton (1997) noted that qualitative methods permit the evaluator to study selected issues, cases,

or events in depth and detail. The fact that data collection is not constrained by predetermined categories of analysis contributes to the depth and details of a qualitative approach. Qualitative methods produce a wealth of detailed data about a relatively small number of people and cases, but provide depth and detail through direct quotation and careful description of situations, events, people, interactions and observed behaviours (Patton, 1987). The above discussion of the merits of qualitative methods suggests its suitability for stakeholder involvement and collaborative evaluation practices, although, qualitative approaches have often been challenged and criticized for their subjectivity, and their painstaking, time-consuming and uncertain analyses (1997).

**Table 5.2. A qualitative evaluation checklist**

- 
1. Does the program emphasize *individual outcomes* --- that is, are different participants expected to be affected in qualitatively different ways? Is there a need a desire to describe and evaluate these individualized client outcomes?
  2. Are decision makers interested in elucidating and understanding the internal dynamics of programs --- program strengths, program weakness, and overall *program process*?
  3. Is detailed, in-depth information needed about *certain client cases* or program *sites*, for example, particularly successful cases, unusual failures, or critically important cases for programmatic, financial or political reasons.
  4. Is there interest in *focusing on the diversity* among, idiosyncrasies of, and unique qualities exhibited by individual clients and programs (as opposed to comparing all clients or programs on standardized, uniform measure)?
  5. Is information needed about the details of *program implementation*: What do clients in the program experience? What services are provided to clients? How is the program organized? What do staff do? Do decision makers need to know what is going on in the program and how it has developed?
  6. Are program staff and other stakeholders interested in the collection of detailed, descriptive information about the program for the purpose of improving the program (i.e., is there interest in *formative evaluation*)?
  7. Is there a need for information about the nuances of *program quality* --- descriptive information about the quality of program activities and outcomes, not just levels, amounts, or quantities of program activity and outcomes?
  8. Does the program need a case-specific *quality assurance* system?
  9. Are legislators or other decision makers or funders interested in having evaluators conduct program *site visits* so that the evaluators can be the surrogate eyes and ears for decision makers who are too busy to make such site visits themselves and who lack the observing and listening skills of trained evaluators? Is *legislative monitoring* needed on a case basis?
  10. Is the obtrusiveness of evaluation a concern? Will the administration of standardized measuring instruments (questionnaires and tests) be overly obtrusive in contrast to data-gathering through natural observations and open-ended interviews? Will the collection of qualitative data generate less reactivity among participants than the collection of quantitative data? Is there a need for *unobtrusive observation*?
  11. Is there a need and desire to *personalize the evaluation process* by using research methods that emphasize personal, face-to-face contact with the program ---methods that maybe perceived as “humanistic” and personal because they do not label and number the participants, and feel natural, informal and understandable to participants?
  12. Is a *responsive evaluation* approach appropriate --- that is, an approach that is especially sensitive to collecting descriptive data and reporting information in terms of differing stakeholders perspectives based on direct, personal contact with those different stakeholders?
  13. Are the goals of the program vague, general, and nonspecific, indicating the possible advantage of a *goal-free evaluation* approach that would gather information about what effects the program is actually having rather than measure goal attainment?
  14. Is there the possibility that the program may be affecting clients or participants in unanticipated ways and/or having unexpected side effects, indicating the need for a method of inquiry that can *discover effects* beyond those formally stated as desirable by program staff (again, an indication of the need for some form of goal-free evaluation)?
  15. Is there a *lack of proven quantitative instrumentation* for important program outcomes? Is the state of measurement science such that no valid, reliable, and believable standardized instrument is available or readily capable of being developed to measure quantitatively the particular program outcomes for which data are needed?

16. Is the evaluation *exploratory*? Is the program at a pre-evaluation stage, where goals and program content are still being developed?
  17. Is an *evaluability assessment* needed to determine a summative evaluation design?
  18. Is there a need to *add depth, detail, and meaning* to statistical findings or survey generalizations?
  19. Has the collection of quantitative evaluation data become so routine that no one pays much attention to the results anymore, suggesting a possible need to *break the old routine* and use new methods to generate new insights about the program?
  20. Is there a need to *develop a program theory* grounded in observations of program activities and impacts, and the relationship between treatment and outcome?
- 

**Source: Patton, 1987:40**

The advantage of quantitative methods, on the other hand, is that they measure the reactions of a great many people to a limited set of questions, thus facilitating statistical aggregation of the data and comparison, resulting in generalizable findings. Although a quantitative approach is usually held as “preferable to qualitative ones” (Kuhn, 1970, Talen, 1996), some researchers have pointed out that being “scientific” is not the same as “objectivity” if the diversity and individuality of human beings as research target group are not acknowledged. In many cases, quantitative methods alone are not sufficient to address diversity and uncertainty existing and emerging in research (Patton, 2008, Mastop and Faludi, 1997).

There are conditions and situations in which qualitative methods are particularly appropriate in evaluation research. Patton (1997) provided a checklist that demonstrates the wide variety of situations in which qualitative methods can be used (Table 5.2). He maintained that, although the questions in the checklist are not a mechanical tool for making routine decisions, they can guide the complex and creative process of matching research methods to evaluation questions to find the most suitable methods for a particular research problem.

### **5.3.2. A call for triangulation**

Both qualitative and quantitative data can contribute to all aspects of evaluative inquiries (Cook, 1995; Sechrest, 1992, cited by Patton, 2008). Patton (1997) pointed out that neither of these two paradigms is intrinsically better than the other and recent developments in evaluation have led to an increase in the use of multiple methods, including both qualitative and quantitative data. Triangulation of methods has been commented upon positively by many researchers (Sharpiro, 1973; Freeman et al., 1979; Patton, 1987, 1997; Simmons, 1989; Rossi and Freeman, 1993). Triangulation,

emphasizes the use of a combination of methods and sources of information (Patton, 2002). The four basic types of triangulation are: 1. data triangulation, the use of a variety of data sources in a study; 2. Investigator triangulation, the use of several different researchers or evaluators; 3. Theory triangulation, the use of multiple perspectives to interpret a single set of data, and 4. Methodological triangulation, the use of multiple methods to study a single problem (Denzin, 1978).

Similarly, mixed methods research is advocated by Creswell and Clark (2007). They essentially emphasize the mixture of qualitative and quantitative approaches in many phases in the research process. Their work focuses on collecting, analyzing, and mixing both quantitative and qualitative data in a single study or series of studies. The central premise of mixed methods research “is that the use of quantitative and qualitative approaches in combination provides a better understanding of research problems than either approach alone” (Creswell and Clark, 2007, p5).

This does not mean the more methods used, the better is the research. Rather, decisions about methods should depend on the nature of the research and the context in which it is conducted. Shapiro (1973:543) indicated, “Research methodology must be suited to the particular characteristics of the situations under study.... An omnibus strategy will not work.”

Mixed methods research or research triangulation is perceived as being appropriate to the author’s research on the global-local nexus of a world heritage site in terms of complicated relations and issues. The research approaches and data collecting methods employed in this research are discussed in the following sections.

#### **5.4. Research approaches**

According to Patton (2002), the ideal qualitative methods strategy is made up of three parts: 1. qualitative data; 2. a holistic-inductive design of naturalistic inquiry; and 3. content or case analysis. Given the task of this study (plan and implementation evaluation), the approach of the research (case study), and the research questions raised (typically qualitative), it turned out that the use of a mixed method, with qualitative methods as the major approach and certain quantitative method as supplementary, is an appropriate strategy. A case study approach, an ethnographic approach, plan evaluation and, particularly, Participatory Local Appraisal (**PLA**) will be combined in this study.

### **5.4.1 A case study approach**

Case study is one of a number of research approaches, situated between concrete data taking techniques and methodological paradigms (Lamnek, 2005; Yin 2003). Rather than using large samples and following a rigid protocol to examine a limited number of variables, case study methods involve an in-depth, longitudinal examination of a single instance or event: a case. They provide a systematic way of looking at events, collecting data, analyzing information and reporting results. Case studies are used in developing in-depth analysis of a single case or multiple cases that generally answers questions which begin with “how” or “why” (Parks-Savage, 2005, quoting Copeland, 2008). As a result, the researcher may gain a sharpened understanding of why the instance happened as it did and what might become important to look at more extensively in future research. Case studies lend themselves to both generating and testing hypotheses (Flyvbjerg, 2006).

A case study is an empirical inquiry that investigates a phenomenon within its real-life context, and relies on multiple sources of evidence and benefits from the prior development of theoretical propositions (Judd et al., 1991). Case studies should not be confined within the limit of qualitative research and Yin (2002) pointed out that they can be based on any mix of quantitative and qualitative information.

This research is based on one case study conducted on Mount Taishan, a UNESCO world heritage site in China. However, this case again entails four sub-cases: the four villages selected for study of the implications of UNESCO world heritage designation on the life of the local villagers (refer to Chapter 4).

### **5.4.2 Ethnographic research**

According to Spradley (1979), ethnography is "the work of describing a culture"(p3). The goal of ethnographic research is "to understand another way of life from the native point of view" (p3). It is a broad approach to research characterized by the central role of the researcher and the use of multiple methods of data collection, including interviewing and observation. Researchers use ethnography to go inside of the social worlds, to see these “through the eyes” of their research subjects and to understand and explain these worlds in all their richness, complexity and specificity

With its broad implications for many fields (Spradly, 1979), an ethnographic approach was employed in my research as my study focus is the local residents. It turned out to be appropriate and effective to collect data through these ethnographic methods such as participatory observations, interviews and field work logs. The data collection methods will be discussed in detail later in this chapter.

### **5.4.3. Plan evaluation**

In light of the four types of evaluation (Talen, 1996a, refer to Section 2.4.2.), the consequences of the world heritage related plans (in terms of the documents) and their implementations on one group of “clients”, the local villagers will mainly be examined. To be more specific, the implications of UNESCO world heritage designation, mainly through tourism development, on resource conservation and local life will be examined and the relations among the three variables of a world heritage site (resource, tourism and local communities) will also be examined. The “stakeholder participation evaluation” method will be as much as possible in the evaluation practice. Stakeholder participation evaluation was already discussed in Section 2.4.3.

However, it should be anticipated that stakeholder involvement is contextually defined and may not be applied in its ideal matter in the Chinese context where there is neither an adequate system nor effective policies to facilitate local involvement and public participation (Wang, 2006). Nevertheless, it did serve as a principle in the author’s evaluation work in the field. The result turned out to be a localized adoption of SBE, which will be further discussed in Chapter Nine as research findings.

### **5.4.4 Participatory local appraisal**

Participatory Local Appraisal (PLA) originated from Rapid Rural Appraisal (RRA) which was defined by Conway and McCracken (1990: 223) as “a systematic but semi-structured activity carried out in the field by a multidisciplinary team and designed to acquire quickly new information on, and new hypotheses about, rural life.” They identified two central characteristics of RRA as first, the pursuit of optimal ignorance, which allows “appropriate imprecision” or not measuring what need not be measured, as it is better to be approximately right than precisely wrong; and second, use of

triangulation (See **Appendix 1** for definition)

With five features consisting of “iterative”, “innovative”, “interactive”, “informal”, and “in the field”, as concluded by Conway and McCracken (1990), effective RRA is intended to facilitate collection of data as quickly as possible and to do so by the informal interaction of the researcher with local people in their own environment. The emphasis of RRA is qualitative rather than quantitative. As Mitchell (2002) noted, Participatory Rural Appraisal (PRA), as one type of RRA, was designed to facilitate or stimulate community awareness and capability to conduct their own problem analysis and to share their findings. The role of the outsider became one of a catalyst, rather than one of an expert and the purpose is to empower the local people by encouraging their participation.

Chambers highlighted common principles shared by RRA and PRA (1994b:1254) as: A reversal of learning, learning rapidly and progressively, offsetting biases, optimizing trade-offs, triangulation, and seeking diversity. He put RRA and PRA (PLA) in a continuum to best elucidate their relations and characteristics (1994a: 959, **Figure 5.1**). A range of methods typically used for PLA (PRA) have been summarized by Mitchell (2002) from Chambers (1994a, 1994b, 1994c) and Conway and McCracken (1990) as secondary sources. These include semi-structured interviews, direct observation, visual models, and workshops.

**Figure 5.1. RRA and PRA(PLA) as a continuum**

<b>Nature of process</b>	<b>RRA</b> .....	<b>PRA (PLA)</b>
<b>Mode</b>	Extractive .....	Elective..... Sharing .....
<b>Outsider’s role</b>	Investigator .....	Empowering Facilitator
<b>Information owned, analyzed and used by</b>	Outsiders .....	Local people
<b>Methods used</b>	Mainly RRA plus sometimes PRA .....	Mainly PRA plus sometimes RRA

**Source: Chambers, 1994a:959**

The above-discussed approaches serve as strategic guidance for collecting both quantitative and qualitative data in the field. Reiterated by Mitchell (2002), there is no formula, menu or recipe to determine the right mix of methods. The choice will be made based on the system being studied and the creativity of the researcher.

## **5.5. Data collection methods adopted in this study**

Information available to a researcher comes from a great variety of sources and in various forms (Patton, 1987, 1997; Snavely and Wright, 2001b cited in Hoernig, 2001). The following methods have all proved to be useful in collecting data for this research.

### **5.5.1. Reviewing and analyzing relevant archival information**

Referring to Snavely and Wright (2001), a literature review is conducted in consideration of the nature of the information cycle and the interdisciplinary nature of the research question. At this point, the review of literature and relevant documents for this research is limited to examining the plans for both heritage and tourism relevant to the selected research site, other supporting government documents and statistics, and relevant sources and information in terms of newspapers and internet information. Availability of documents may be an issue as it is notably difficult to obtain a satisfactory collection of relevant plans for evaluation in developing countries where planning and evaluation are not as fully developed and available to the public as in the developed world (Timothy, 1996; Black, 1997).

While study of the plans will help to answer the research questions, the review of supporting government documents and relevant statistics can help to improve understanding of the current situation and the specific social and political structure the research should be put in.

### **5.5.2. Interviews**

#### **1) Key informant interviews**

Referring to Freeman et al. (1979), key informant interviews involve identifying, selecting and questioning knowledgeable leaders and experts in order to construct estimates of target problems and populations. They have value not only in being simple, quick and uncomplicated to implement but also in developing the support of influential people in the community which may be necessary and even vital for the continuation of the research. The major limitation of this approach is that it has the built-in biases of the individual and organizational perspectives of those being interviewed (Freeman et al., 1979). The leaders and experts at various levels, due to their lack of intimate knowledge or due to their “interests” that are limited by their professional standpoint, may fail to take into account all



segments of what may be a complex problem and society. Thus, it may not be possible through this method to reach an understanding of what the local people as a whole and different interested groups in particular really want. Nevertheless, key informant interviews are believed to be capable of providing knowledge of policy directions and a broad picture of the needs and services perceived as being important, and the characteristics of the population requiring them (Freeman et al, 1979).

## **2) Focus group interviews**

Such interviews involve a small group of people, typically six to eight, focused on a specific topic for one-half to two hours (Patton, 1987). Focus group interviewing was developed in recognition that many decisions are made in a social context, often growing out of discussions with people (Merton et al. 1956). However, unlike workshops, the focus group interview is indeed an interview, not a discussion. The participants are a relatively homogeneous group of people who are to reflect on the questions asked by the interviewer. Participants get to hear each other's responses and to make additional comments beyond their own original responses as they hear what other people have to say. It is not necessary for the interviewees to reach any kind of consensus or agreement. The object is to get high-quality data in a social context where people can consider their own views in the context of the views of others (Patton, 1987). For instance, focus group interviews were found to be particularly effective when interviews were done in Lihang village. Seven village committee leaders were gathered together and they answered questions and discussed certain issues raised by my questions among themselves through which I obtained quality data.

## **3) Informal conversational interviews**

The informal conversational interview relies entirely on the spontaneous generation of questions in the natural flow of an interaction, typically an interview that occurs as part of ongoing participant observation fieldwork (Patton, 2008). During an informal conversational interview, the persons with whom the researcher is talking may not even realize they are being interviewed. In many cases, the same person may be interviewed on a number of different occasions in an informal, conversational manner. This is particularly useful where the researcher can stay in the situation for some time, so that they do not have to depend upon a single interview to collect all the information

needed (Patton, 2008). The strengths and weaknesses of this method are presented in Table 5.4.

**Table 5.3. The strengths and weaknesses of informal conversational interviews**

<b>Strength</b>	<b>Weakness</b>
<ol style="list-style-type: none"> <li>1. It allows the interviewer to be highly responsive to individual differences and situational change.</li> <li>2. It allows the interviewee(s) to answer the questions in a most natural spontaneous way without much constraints and misgivings.</li> <li>3. It does not have to be organized.</li> </ol>	<ol style="list-style-type: none"> <li>1. It requires a great amount of time to get systematic information.</li> <li>2. It may take several conversations with different people before a similar set of questions has been posed to several respondents.</li> <li>3. This multi-time interviews bring more difficulties in data coding and analysis.</li> <li>4. It is more demanding in terms of the skills of the interviewer to than more formal, standardized formats.</li> </ol>

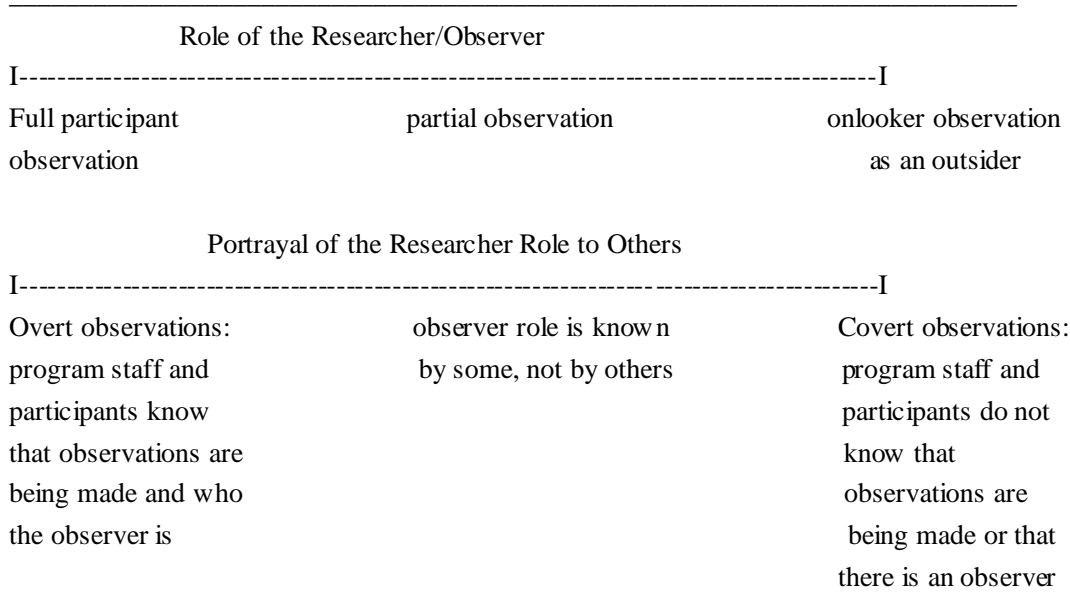
**Source: summarized from Patton, 2008**

### 5.5.3. Participant observation

Participant observation is a strategy which “simultaneously combines document analysis, interviewing of respondents and informants, direct participation and observation, and introspection” (Denzin, 1978:183). In participant observation, the researcher shares the life and activities of the people in the situation in order to develop an insider’s view of what is happening. This allows the researcher not only to see but also to feel what it is like to be part of the group (Patton, 1987).

However, it is not wise to think that “the ideal is always and only full and complete participation in the program” (Patton, 1987:76). Flexible switches along a continuum that varies from complete immersion as a full participant to complete “outsider” observation is sensible (**Figure 5.2**). Local people may not always embrace the researcher’s participant observation and may think of certain participation and observation practices of the researcher as obtrusive, as may the program staff who tend to take evaluation as a burden and tend to be change-averse and criticism-averse (Seasons, 2003a). It cannot be simply decided once and for all in a study how much the observer will participate. The extent of participation can change over time, as determined by the nature and the context of the research undertaken. Hence, the researcher will have to be flexible with her/his role as an observer, keeping to the principle: “to negotiate and adopt the degree of participation which will yield the most meaningful data” (Patton, 1987:76).

**Figure 5.2. Field Observation Continuum**



**Source: adapted from Patton, 1987**

#### **5.5.4. Questionnaire surveys**

Survey questionnaires are effective for social researchers who are interested in collecting original data for describing a population too large to observe directly, and careful sampling provides a group of respondents whose characteristics may be taken to reflect those of the larger population (Babbie, 2001). They are a good way to measure perceptions and attitudes (Jackson, 1999). In this research, 4 separate self-administered survey questionnaires with a 7-point Likert scale<sup>29</sup> were designed and administered in the field among the four key stakeholders: local villagers, tourists, tourism managers, and resource managers.

#### **5.5.5. Other facilitating methods**

In addition to the above-mentioned methods, additional procedures were used, such as land-use mapping and the taking of photographs.

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<sup>29</sup> A Likert scale (pronounced 'lick-urt') is a type of psychometric response scale often used in questionnaires, and is the most widely used scale in survey research. When responding to a Likert questionnaire item, respondents specify their level of agreement to a statement. The scale is named after Renis Likert, who published a report describing its use (Likert, 1932).

## **5.6. Data collection in the field**

### **5.6.1. Definition of field research**

Field research involves activities aimed at collecting primary data or information that is new rather than relying on published material and it involves face-to-face interviewing, surveys and direct observations (Rubin and Babbie, 2001). Field research follows a logical progression of steps. The researcher must first prepare for the field by examining relevant literature, by using informants to help frame the analysis, and by establishing initial contacts with the people to be studied in the field . In this stage, unstructured interviews are typically employed to ask questions for the conversational approach yields flexibility since an answer to one question may influence the next question the researcher wishes to ask (Wagenaar and Babbie, 2001)

Field research for this study was mainly conducted from late September 2005, after the ethic review application was approved by University of Waterloo, to January 2007 on 8 occasions. The researcher had to fulfill her teaching and research commitments in the university where she has been working and arrange the field trips outside of her committed working time. The research location is about a one-and-a-half hour's drive from the city where the researcher lives and works. The affiliation of the researcher to the university where she teaches was an advantage contributing to the successful entry to the field and was useful in establishing initial contacts with officials and management people considered relevant to this research. Through these people, the researcher got to know about or even got access to other people, such as the key informants including the village committee leaders and some other interested parties. By contacting these people, who were rich sources and information, a clearer idea of how to conduct the forthcoming interviews and surveys was obtained.

### **5.6.2. Three phases of the field research**

Basically, the field research occurred in three phases: the first was composed of preliminary research visits (late September to November, 2005); the second consisted of intensive data gathering (Mid-April to early December, 2006); and the third comprised follow-up field trips (late February to March, 2007).

#### **5.6.2.1 The preliminary research trips**

The preliminary research trips were 1-2 days for each village and occurred from late September to late November, 2005. During these trips, the following tasks were completed: 1. contacts for further research were successfully established; 2. observations were conducted to get familiar with the research locations and the people; 3. interview themes and questions as well as the questionnaire surveys were tested through inquiring with several relevant people (see Table 5.5 for information) In fact, prior to the first field trip, similar inquiries were made to test the indicators to be used for plan evaluation and those themes, questions and questionnaire surveys.

I contacted 7 experts and professionals altogether (Table 5.5) for their opinion and help with the indicators first, and then the interview questions and surveys were developed based on the indicators. This was done through a combination of phone calls, emails and meetings. With their feedback, the indicators were modified and the questions and surveys were improved.

**Table 5.4. The experts and professionals involved in the inquiry:**

Name	Professional or research field	Affiliation
Mr. Wang1	Tourism planning and management	Professor, School of Management, Shandong University, China
Mr. Ji	Tourism planning and management	Professor, School of Management, Shandong University
Ms. Song	Tourism statistics	Researcher, Tourism Statistics Research Center, Tourism Bureau of Shandong Province
Mr. Zhang1	Culture and heritage Study	Professor, School of History and Culture, Shandong University
Mr. Liu	Planning and plan evaluation	Researcher and official, Development and Planning Committee of Provincial Government , Shandong Province
Mr. Wang2	Tourism Management, Taishan Study	Professor and associate president, Taishan Research Institute
Mr. Zhang2	Tourism management and marketing	Associate Director, Tourism Bureau of Tai-an City, Shandong Province

#### **5.6.2.2. The intensive data gathering**

From mid-April, 2006 to the beginning of December, 2006, intensive field research was carried out involving 8 trips, with each trip lasting between 2 and 6 days. I stayed mainly in the hotels in the

city of Tai-an for the nights and worked either at Taishan World Heritage Site and in the four selected villages, or at the offices of the Tourism Bureau and Taishan Administrative Committee during the days, with one exception. On one occasion I stayed in a small family-run hotel in Taiqian village and interviewed relevant key informants including the owner of the hotel.

Before going into the details of these field trips, I should say that through the field research experience, I learned a lot about the “invisible rules” for conducting research in China. Personal relationships play a key role in research work in China. First, it is best to have someone who is a friend of both you and the key people in the research site and who can provide connections. For example, I first called the Taishan Administrative Committee (in charge of this world heritage resource) as a PhD student to express my hope to do field research at Taishan under their help and also my hope to collect secondary data and interview some of the committee personnel on the resource, tourism and the community. I was told that I had to wait for this to be reported to the “leader”. After a few follow-up calls and more than one week of waiting, I was told that I was welcome to do the research at Taishan, but that they were just too busy to receive me. Furthermore, the data (including the plan document which they told me was under revision) were not open to public. I then checked the telephone book and called the village committee of Taiqian at the foot of Taishan to express my hope for their help with my research. The person who answered the phone said they could not provide any support unless they got “word from the upper-level leadership” which meant the Taishan Administrative Committee which had jurisdiction over the village. Under this circumstance, I had to resort to the connections I had in Taishan. With the help of one of my students who works in the municipal government of Tai-an city and the help of one of my colleagues who I knew had some connections in Tai-an city, I finally got connected to an Associate Director of Taishan Administrative Committee, and an Associate Director of the Tourism Bureau of Tai-an city. With the help of these two officials in Tai-an, many obstacles in the way of my field research disappeared, and I was able to interview and survey the resource and tourism managers as well as the community residents,.

My activities during these trips included: 1. collecting secondary data; 2. conducting interviews

of various kinds with various people; 3. conducting questionnaire surveys; and 4. conducting observations.

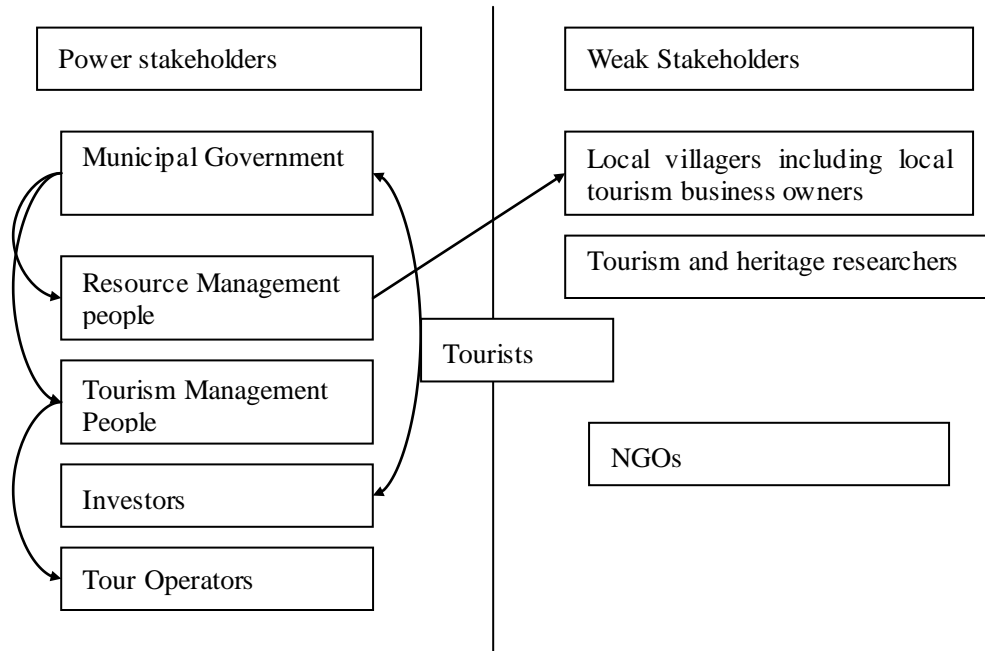
#### **5.6.2.2.a. Secondary data collection**

The secondary data consisted of three main types: 1. the plan documents and other documents from the municipal government and resource and tourism management bodies; 2. relevant statistics; and 3. other useful information in varied forms from newspapers, internet websites, and the visitor centre at the heritage site. Secondary data collection was aimed at obtaining existing knowledge and information concerning heritage tourism and resource conservation with the focus on local communities at the world heritage site, Taishan. The plan documents were a prerequisite for the practice of plan evaluation which was an important aspect of the research. The details are summarized in **Appendix 3**.

#### **5.6.2.2.b. Interviews**

First, the evaluation criteria with the corresponding indicators help to frame the interview themes in the author's mind. A brief review of the secondary data allowed me to reflect on and finalize my interview and survey questions, and also helped me decide on who I would interview. Since my research was focused on the impacts of resource and tourism planning and management on local communities, the major interested parties I identified were: local villagers, including local owners of tourism-related business, resource managers, tourism managers, municipal government officials, tourists, tour operators, tourism and heritage researchers, and investors (see **Figure 5.3**: The core of the Stakeholders of Taishan Tourism ).

#### **Figure 5.3 The core of the Stakeholders of Taishan Tourism**



I conducted totally 38 key informant interviews during these trips with all the interested parties except the investors who I was unable to contact and arrange interviews, although they were considered to be influential to the policy, planning and management of the heritage site. Together with several other interviews made before and after in Tai-an city and elsewhere, in total 53 people/times interviews were conducted. Of these, 5 were recorded and the others involved note-taking either during the interview or summarized afterwards on the night of the interview(s). Most people did not want to be recorded. In my personal judgment, some government officials and managers felt obliged to receive my interview (due to my being introduced to them by friends and superiors) but were very cautious about commenting on certain topics, such as the lack of coordination of tourism development and resource conservation in planning and management, and the involvement of local communities. Some villagers and tourism-related business owners were afraid to tell something “improper” and did not want “hard” evidence to be left. Therefore, most interviews were not taped with only a few exceptions. As for tourists, they were reluctant to be interviewed mainly due to their limited time spent at Taishan. In addition to some short structured interviews, more unstructured, conversational interviews were conducted without recording or note-taking. This turned out to be a more effective way to get information, opinions and ideas on sensitive topics as they felt safer and, hence, more willing to talk in casual conversation in an informal setting, such as an orchard, a field,



on a street corner, or in a café

Types of interviews and information on the interviewees are presented in **Table 5.5**. The check lists for the structured interview questions for the villagers and visitors, and the themes for the semi-structured and unstructured interviews for the all the interested parties are presented in **Appendix 4**.

**Table 5.5. Information on interviews and interviewees**

Types of Interviewees	Number of people	Nature of interview	Data obtained
Local villagers	15, with 2 of them receiving follow-up interviews	Structured, semi-structured and open-ended, chatter-style free conversation	One audio-recorded, the other with either on-site written notes or afterward summary notes
Village leaders	9, with 1 of them receiving follow-up interviews	Structured, semi-structured, open-ended, some being focus group	One audio-recorded, the other with written notes either on-site or summarized afterwards
Tourism-related Business owners on or around Taishan (locals but non villagers)	3, with 1 of them receiving follow-up interviews	Semi-structured, Unstructured, Open-ended	Written notes, and afterwards summaries
Tourism management officials	3	Semi-structured, unstructured, open-ended	One audio-recorded, the other written notes
Resource management officials	1 and with follow-up interviews	Semi-structured, unstructured, open-ended	Audio-recorded, written notes
Municipal Government officials	2	Semi-structured, open-ended, free conversation	Written notes
Tour operators	2	Semi-structured, open-ended,	Recorded
Tourism researchers	4, with 2 of them receiving follow-up interviews	Semi-structured, open-ended, free conversation	One audio-recorded, the other with written notes
Tourists	3	Structured, semis-structured	Written notes

#### 5.6.2.2.c. questionnaire surveys

During these intensive field trips, 4 self-administered questionnaire surveys with a 7-point Likert scale were carried out among 4 relevant groups: local villagers, resource managers, tourism managers and visitors. They are people who could contribute to the decision-making process and

people who are affected by planning and management decisions at the world heritage site (Stein et al., 1999). The purpose of the surveys was to examine the three aspects of sustainability of heritage tourism at Taishan: resources, community and visitor experience, through the views of these different stakeholders. The questionnaires were designed with a community perspective, which means that community-related issues received more attention in all four surveys. Demographic characteristics were also considered, such as age, sex, occupation, education, and income. These surveys add to validity and credibility of the research as the data complement the qualitative data obtained from interviews.

The author incorporated the evaluation indicators into the survey questionnaires. Both quantitative and qualitative indicators were applicable as many of the questionnaires are qualitative by nature even though the surveys generated quantitative data. As mentioned previously, the questionnaires were revised twice, once after the quasi-Delphi consulting, and the second time after briefly reviewing the secondary data collected and following several brief conversations (either on the phone or by on-site meetings) with the people at the research site with whom I established initial contacts and set time for further interviews. This is also a process of testing and modifying the indicators. Some of the indicators (e.g. gender issue of local involvement in tourism) were given limited attention as they were found not appropriate or meaningful in the actual context of the research filed.

All the questionnaires and interviews were prepared initially in Chinese. The survey questionnaire to tourists was made in 4 language versions: Chinese, Japanese, Korean, and English. It turned out that only the Chinese, Korean and English versions were used. A summary of survey distribution and returns is presented in **Table 5.6**.

**Table 5.6. Survey distribution and returns**

Type of questionnaire survey	Questionnaires distributed	Questionnaires collected	Valid
To locals	500	389	241
To tourists	500	350	230
To tourism management Personnel	20	20	18
To resource management personnel	60	60	52

### **1. Surveys among the local villagers.**

The questionnaire survey for local communities was composed of two sections: Section 1 contained 25 attitudinal statements aiming to see, from the community perspective, how tourism and heritage resources were used address their needs. Section 2 contained 2 open-ended questions together with questions soliciting demographic information.

The questionnaire survey was conducted in the 4 selected villages located around Taishan with varied directions and distances to the mountain (Figure 4.4): Taiqian, Yingsheng, Baimashi, and Lihang. Five hundred questionnaires were distributed, of which 389 were returned and 241 were suitable for analysis. The comparatively low percentage of valid questionnaires occurred because I was not able to reach all the villagers by myself although I went to the four villages on separate trips and was involved in the surveys. Time limitations intervened and the village leaders did not have adequate time and energy to go with me to each villager's home. At the same time, they seemed to be reluctant to let me go by myself. Therefore, one of the leaders suggested that I leave the questionnaires with them so that they could have them done at villagers' meetings. I decided it would be polite and wise to respect their suggestion rather than insist on doing it on my own. This increased the efficiency but reduced the validity as I noticed while sorting out the data that some sheets were exactly the same and I assumed that they were copied. I decided to remove questionnaires with identical responses. The demographic features of the valid 241 respondent will be presented Chapter Six as data analyzed. The details of the questionnaires can be referred to in **Appendix 5**.

### **2. Survey among the resource management people**

Originally, one questionnaire was designed for both the tourism and the heritage resource managers. However, by testing, I found that the two groups of people are in so much conflict in terms of their ideas about tourism development and heritage conservation (some of them were very uncomfortable with certain statements in the questionnaire and refused to answer) that I had to develop two different questionnaires.

The questionnaire survey for the resource managers was composed of two sections: Section 1 contained 27 attitudinal statements focused on three things: effectiveness of resource management, relations between the heritage resource and tourism, and balance among the resource, tourism and the community; Section 2 consisted of open-ended questions regarding the resource, tourism and the community. The questionnaires are presented in **Appendix 6**.

Sixty questionnaires were distributed and 56 were returned, of which 52 were valid. The people who completed the questionnaires were all officials and employees working in either the departments of Taishan Administrative Committee or units affiliated to Taishan Administrative Committee. Demographic features, such as age and gender, were not asked.

### **3. Survey among the tourism managers**

The questionnaire for the tourism managers was composed of two sections: Section 1 contained 24 attitudinal statements focused on the three themes: effectiveness of tourism management; problems in tourism management on the heritage site, and relations among management, tourists and local communities; and the distribution of tourism benefits and community involvement. Section 2 was comprised of one open-ended question to ask for any further opinions and suggestions relating to the resource, tourism and community. Twenty questionnaires were distributed to tourism management personnel, including officials and staff of both the Tourism Bureau of Tai-an city and Tourism Bureau of Taiqian District, Tai-an city. The small number reflects the small sizes of the two tourism bureaus. Eighteen were returned and were valid for analysis. Details of the questionnaires are presented in **Appendix 7**.

### **4. Survey among the tourists**

The questionnaire survey for tourists was composed of two sections: Section 1 contained 24

attitudinal statements with a community focus, aiming to see how tourists view heritage resources, tourism and community at Taishan. Section 2 contained 1 open-ended question to allow further comments, together with 5 questions to produce demographic information.

The tourist questionnaire survey was conducted on several trips and via several means: 39 were done by the researcher by either following the visitors down from the top of the mountain or stopping them at the foot of the mountain, or even finding them in the hotel lobby; 62 sheets were conducted by the researcher's assistant using similar methods. For these, the response and validity rate were high, except for a few visitors who had insufficient time before they had to leave with their package group or who were not patient enough to finish the survey. When the low season came and there were fewer visitors to Taishan, the researcher entrusted two tour operators to survey their patrons. This produced low rates of return and validity since the process could not be controlled by the researcher

To sum up, 500 questionnaires were distributed to tourists, with 350 coming back, among which 230 were valid for analysis. It turned out only the Chinese, Korean and the English versions were used. There were many international tourists at the heritage site during the period of the intensive field research. However, all of the questionnaires done through tour operators were completed by Chinese domestic tourists. The demographic characteristics of respondents will be presented in Chapter Six as data are analyzed and the details of the questionnaires for the locals can be referred in the **Appendix 8**.

### **5.6.2.3. The follow-up field trips**

In addition to the field visits discussed above, follow-up field trips were also made, mainly for the purpose of clarifying some uncertainties and questions arising from the interviews. Activities undertaken at these times included phone talks and meetings with some interested people, mainly in Tai-an but sometimes in Jinan where the researcher lives. These helped the researcher to further clarify some uncertainties and questions that arose when reviewing the earlier interviews. Usually the follow-up interviews focused upon a specific question and the interviewee felt freer and more relaxed to express their views, probably because of the mutual trust established during the first-round interviews. These follow-up interviews were a good opportunity for the researcher to hear true voices

from some people rather than the general, official statements made when previously interviewed in official places, sometimes under recording.

### **5.6.3. Observations**

The researcher also collected useful data through observations and participatory observation. The activities included:

- 1) attending as an observer a villagers' meeting convened by the village committee in Taiqian village.
- 2) chatting with vendors and observing their interaction with visitors and help to sell things to visitors
- 3) following a group of tourists who were on a packaged tour to Taishan organized by the travel agencies, talking to them (which could be considered to be an informal interview) and asking them to complete the questionnaire surveys when and where convenient.
- 4) Roaming the villages and the climb route to observe the people, facilities and surroundings concerning tourism and resource planning and plan implementation issues.

Pictures were taken as appropriate and I either wrote or recorded my narration of experiences and reflections of the day-time activities when going back to my residence at night. The data obtained from observations can be complementary to data collected via other methods.

### **5.7. Data analyses**

In this research, both qualitative and quantitative analytical methods were employed. According to Creswell (1994), data collection and data analysis can often occur concurrently in qualitative research. The author practiced this statement in her research. Before, during, and after the field research, the content of the plans and related documents and information was constantly referred to and reviewed with regard to the goals and objectives that the plans were meant to achieve and what was actually achieved, and with reference to the three aspects this research: the resource, tourism and community.

Besides the documentary analysis, the researcher also coded, classified, and summarized the

qualitative data which were analyzed and interpreted in a qualitatively way revolving around the themes of the research. Also, the data from the interviews were cross checked and analyzed.

As for the quantitative data obtained from the questionnaire surveys, statistical data analysis methods were applied with SPSS software. Frequency analyses with means and standard deviations and were generated for each questionnaire item. In light of triangulation principle, these quantitative data were further interpreted in light of the qualitative information.

## **5.7. Summary**

This Chapter discussed the research methodology and varied data collection methods used in the field. First, the research design is presented along with the research goal and objectives. A series of research questions are identified. Second, advantages and disadvantages of quantitative research and qualitative research are discussed. Triangulation of methods or mixed methods research was considered appropriate for the author's research with qualitative research yielding depth and insight while quantitative research increases generalizability. Third, research approaches as strategic guidance for the field research are presented, such as the case study approach, ethnographic approach, plan evaluation and, particularly, Participatory Local Appraisal (**PLA**). Fourth, the data collecting methods employed in this research were introduced, including questionnaire surveys, interviews of varied kinds, observation, and collecting and reviewing secondary data. Fifth, three-phase field research for collecting data was presented: the preliminary trips, the intensive data gathering trips, and the follow-up trips. Finally, data analysis was briefly introduced, emphasizing a mixed methods strategy. The findings of both quantitative and qualitative analyses of the primary data will be presented in the next two chapters, Chapter 6 and 7. The findings of analyzing the secondary data, mainly through evaluating the plan documents and their implementation combined with data obtained from observations will be presented in Chapter 8.

## **Chapter Six: Data Analysis**

Both quantitative and qualitative data obtained from the field through surveys, interviews and observations are analyzed in this chapter. The three sets of indicators were incorporated into the survey questionnaires and the data are analyzed from the following three aspects of heritage sustainability: resource conservation, tourism (focused on visitor experience), and local communities (focused on local involvement in heritage conservation and tourism).

### **6.1. Quantitative data Analysis**

This section presents the quantitative data obtained via four questionnaire surveys conducted among the different stakeholders of Taishan: local residents, Taishan resource managers, tourism managers and tourists.

#### **6.1.1. Survey results of local residents**

##### **6.1.1.1. Introduction:**

The questionnaire survey was conducted among residents of the 4 selected villages located around Taishan. The villages are at different distances to Taishan and their relations to Taishan tourism also vary. Taiqian is the closest village to Taishan among the four. A large number of the villagers hold a job or run a small business along the route to climb the mountain. Yingsheng is also located close to Taishan and many of its villagers work in a hotel and a coach company as the village mainly caters to tourists to Taishan. Baimashi, also situated only 2 kilometers from Taishan, developed tourism based on folk culture as part of the “bigger” tourism of Taishan. Lihang is about 20 km from Taishan and has developed eco-rural tourism, hoping to attract some of the tourists who visit Taishan. The content of the questionnaire survey may not apply to those villages that are apparently not involved in tourism relating to Taishan. For this reason, their situations were explored through key informant interviews. A modest number of questionnaires were administered with villagers by the researcher herself. The majority of the survey was carried out through village meetings: the researcher left the questionnaires with the village leaders and they helped to get them completed by the villagers while village meetings were taking place.

Five hundred questionnaires were distributed and a total of 241 out of 389 returned were valid for analysis. The response rate, even though it is not very high, is still reasonable. As for the characteristics of the respondents, Table 6.1 reveals that there is a sound ratio of male and female respondents. The majority of the respondents is aged between 18 and 50. They represent the main labour force of the villages. Almost a quarter (23%) identified themselves as working for the



government, which means their work was either relating to Taishan Scenic Beauty and Historic Interest Zone Management Committee (i.e. Taishan Administrative Committee) or in the village committees, Almost half (47%) worked in village enterprises (such as the coach company or hotels) as private business owners or workers. Those who identified themselves as farmers were undertaking agricultural work which may or may not have been related to tourism. The data show that the education level of the respondents was relatively low as 43% fell into the category of “senior high school and below”. This is to be expected among village people in China.

Considering the limitations of time and convenience of access, it is believed that the respondents can reasonably represent the attitudes and perceptions of local residents on the three main aspects of concern relating to Taishan: resource conservation, tourism development and local involvement. The data obtained from the 25 questionnaire statements are analyzed and presented according to these three major themes.

**Table 6.1. Demographic features of the local resident samples (N=241)**

gender	number	rate	age	number	Rate	occupation	number	rate
male	121	50%	18 and under	16	7%	government	56	23%
female	109	45%	18-30	23	10%	Village enterprises or Private business	113	47%
unidentified	11	5%	31-40	50	21%			
			41-50	114	47%	farmers	29	12%
			51-60	13	5%	students	22	9%
			60 and above	12	5%	other	11	5%
			unidentified	13	5%	unidentified	10	4%
education	number	rate	Family income (¥ Yuan/year)	number	rate			
Senior high school and under	104	43%	1500 and under	18	7%			
college	55	23%	1500-3000	97	40%			
bachelors'	24	10%	3000-4500	36	15%			
Masters' and above	15	6%	4500-6000	36	15%			
unidentified	43	18%	6000 above	25	11%			
			unidentified	29	12%			

#### 6.1.1.2. Local perceptions on resource :

Table 6.2 reveals local residents' perceptions on Taishan heritage resource conservation. The

majority of the local residents believed they had a high sense of the importance of protecting the heritage resources of Taishan (See S25). In fact, interviews with village people also confirmed this point. More than one of the interviewees told the author the story of a recent (as of 2006) mountain fire. When the villagers saw the smoke and fire, they all stopped what they were working at without hesitation and rushed to the fire spot with tools and fought the fire voluntarily. At the same time, they reported the fire to the Taishan Administrative Committee so that professional firefighters could come to the rescue. It was always the villagers who arrived first and took action in cases of previous fires at Taishan. A villager said, “We are the ones who take the mountain as our life, and we never thought of any gain or payment from the government as a condition to fight the fire.”

When asked whether the natural environment was destroyed by tourism development, 56% responded no and only 20% said yes (S22). This can be interpreted from two perspectives. First, the villagers are content with the existing status of resource conservation and, secondly, the villagers are positive and optimistic towards tourism which they hope will bring better prospects for them. However, most of them indicated that the past development of Taishan Scenic Area had not reflected their anticipation and requirements, and neither were they clear about the future development direction and goals (S20, S21). When asked if they would like to know the status of heritage resources and tourism in Taishan and to express their opinions, 39% expressed their reluctance to become involved to varying degrees, 21% did not express their opinion, while 39 indicated that they would like to know more about the situation (S19). Qualitative interviews shed some light on the reasons why the villagers lack enthusiasm about getting informed about resource conservation and expressing their opinions. “They would not listen to us”, said a retired village leader, “It’s merely a waste of time even if we tried to say something.”

**Table 6.2. Local responses on resource conservation on and around Taishan (N=241)**

	mean	Standard Deviation	Percentage						
			Totally disagree	Disagree Strongly	DisAgree	Hard to say	Agree	Agree Strongly	Totally agree
			1	2	3	4	5	6	7
S19 I hope to know about resource and tourism of Taishan and express my opinion.	4.1	2.1	17.8	3.3	18.3	21.2	9.5	7.7	21.2
S20 I think the passed development of the Taishan Scenic Area has reflected our anticipation and requirements.	3.2	1.7	17.4	21.2	23.7	16.6	11.2	3.3	6.6
S21 I am clear of the future development direction and goals of the Taishan Scenic Area.	2.9	1.7	24.1	27.8	16.3	13.3	9.5	4.6	4.6
S22 I think the natural environment has been destroyed by tourism development.	3.4	1.7	16.6	10.8	27.8	24.5	8.3	5.8	6.2
S25 I have strong awareness to protect the cultural and natural heritage of Taishan.	5.4	1.7	0.4	2.5	18.7	17.0	5.4	10.4	45.6

### 6.2.1.3. Local perceptions towards tourism development

The survey results show that local residents cherished high enthusiasm and anticipation towards tourism (Table 6.3). Almost all of them (95%, S1) indicated that they were always friendly towards tourists and many of them would offer help to tourists, even for free (61%, S5). The majority (68%) showed their willingness to work in the tourism industry (S2). Only around 20% agreed that the natural environment had been destroyed by tourism development. The majority (76%, S4) did not think tourist activities caused inconveniences to their life. All this information indicates that local residents in the Taishan heritage site have a quite positive perception towards tourism and expect tourism will bring a change for the better to their lives. Doxey developed an Irritation Index Model (IRRIDEX) for analyzing community attitudes towards tourists (Doxey, 1975). It represents a four-stage escalating irritation of residents as visitor numbers increase and competition for resources between visitors and local residents grows. The four stages are: euphoria, apathy, irritation and

antagonism. Putting the perception of the locals of Mount Taishan in tourists into Doxey's model, we may find that the locals are moving from Euphoria to Apathy. Tourism of the heritage mountain has been highly developed and locals' traditional ways of using the resource was actually denied by the UNESCO designation and conservation.

However, many of them either disagreed (44%, S13) or felt it hard to say (23%) when asked if they felt their quality of life was positively impacted by tourism. A majority (57%, S6) agreed that they enjoyed interacting with tourists. However, more than half (cumulatively 57%, S7) disagreed or felt it hard to say if their activities were a part of the tourists' experience. When asked about the consequences of tourist-local interactions, such as whether some of their thoughts were changed through interacting with tourists and whether interacting with tourists was an important source of information, the positive response was low (34.1%, S23; 25.8%, S24).

**Table 6.3. Local responses on tourism development on and around Taishan (N=241)**

	Mean	Standard Deviation	Percentage						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S1. I am always friendly towards the tourists at Taishan	6.3	0.9			2.5	2.9	7.5	32.8	54.4
S2. I'd like to work in tourism industry.	5.2	1.7	0.4	9.1	12.9	9.5	20.3	11.6	36.1
S4. Tourist activities do not make inconvenience to my life.	5.4	1.4	0.4	2.1	5.4	16.2	26.1	19.9	29.9
S5 I'd like to offer help to tourists, even for free.	5.2	1.6	0.8	1.7	15.8	20.3	13.3	20.7	27.4
S6 I can find fun in interacting with tourists.	5.0	1.5	1.2	3.3	12.0	26.1	23.7	10.0	23.1
S7 I feel my activities are an integrated part of tourist experience.	4.3	1.7	5.8	8.7	14.5	27.4	19.5	8.7	15.4
S13 My life quality is impacted by tourism more in better ways.	3.9	1.8	12.0	7.9	22.0	22.8	14.9	7.5	12.9
S23 I feel some of my thoughts are changed through interacting with tourists.	4.0	1.4	1.7	13.3	24.5	26.6	21.2	5.8	7.1
S24 Interacting with tourists make an important source for information.	3.6	1.5	4.1	17.4	32	20.7	16.6	1.7	7.5

#### **6.1.1.4. Perceptions towards local benefits and involvement**

The data also provide useful information for examining local benefits and local involvement (Table 6.3). Many respondents (58%, S3) held jobs or work related to Taishan tourism, but only a small proportion (29%, S8) were satisfied with their income from tourism. It appears that the Taishan Administrative Committee did not produce satisfactory incomes nor did it help to build community facilities for local people (S9, S10, and S11), although the management personnel, in interviews, indicated that they have provided channels or sources of income. However, local people did get reduced fees or free entrance to the world heritage site around which they live (S12). There was a high negative response to the inquiries concerning the opportunity to get training on resource conservation, tourism skills and livelihood options (S14, S15, S16). This may be one reason for the low involvement of the locals.

Local involvement in resource and tourism planning and management is low in terms of both involvement enthusiasm and involvement level. Many respondents felt that they did not have effective ways to get their voice heard and that Taishan Administrative Committee would not listen to them (75%, S18; 70%, S17). So, only a small number (39%, S19) of people were concerned about acquiring more information. The majority were not happy with the past development of Taishan Scenic Area, nor were they clear about the future development direction and goals (62%, S20, 68%, S21). This may be the reason why 39% expressed their concern, 21% felt it was hard to say, and another 39% felt disinterested when they were asked whether they would like to know the status of the heritage resources and tourism of Taishan and to express their opinions about them (S19).

Given the above findings, it is not surprising that only a few respondents answered the open-ended question, question No.26: "Presently the most serious problem existing in tourism development on Taishan that I am concerned about is \_\_\_". Some of the few answers were related to lack of opportunities for employment, lack of financial support, and lack of chances to have their voices heard. As for the follow-up question: No. 27: "The best way I hope to solve the problem is \_\_\_", even fewer responded, with one suggestion being "Think for us, and listen to us" and another being "More financial and policy support."

**Table 6.4. Local responses on local benefit and involvement (N=241)**

	mean	Standard Deviation	Frequency and percentage						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S3. My daily work is highly relevant to Taishan tourism	4.9	1.6	2.9	3.4	7.5	20.1	20.7	17.0	20.3
S8 I am satisfied with income from tourism.	3.4	1.8	19.9	15.8	13.7	22.0	13.7	10.0	5.0
S9 A good part of income is from Taishan Administrative Committee(TMC).	2.1	1.8	63.1	10.0	5.8	6.6	6.2	3.7	4.6
S10. TMC often provides us with welfare	2.0	1.6	66.0	7.9	6.6	5.9	10.4	3.3	0.8
S11 Quite a few facilities of our community are built by TMC.	2.8	1.8	34.9	19.9	12.9	14.5	3.3	11.2	3.3
S12 I enjoy a reduced fee or free entrance to Taishan.	6.2	0.9	0.4		1.2	3.7	12.0	39.8	42.7
S14 I can get training on how to interact with tourists.	3.0	1.7	19.9	23.7	28.6	11.2	5.0	4.1	7.5
S15 I can get training on heritage conservation.	2.8	1.6	21.6	29.5	24.5	9.5	5.8	5.0	4.1
S16 I can get training on options of livelihoods.	2.6	1.5	24.1	37.8	17.4	7.9	7.5	2.5	2.9
S17 The TMC listens to our opinion concerning resource and tourism.	2.8	1.8	38.2	9.5	22	9.5	2.4	4.1	4.1
S18 We have effective ways to express our opinion to TMC.	2.6	1.6	34.9	18.7	21.2	10.8	7.1	5.0	2.5
S19 I hope to know about resource and tourism of Taishan and express my opinion.	4.1	2.1	17.8	3.3	18.3	21.2	9.5	8.7	21.2
S20 I think the passed development of the Taishan Scenic Area has reflected our anticipation and requirements.	3.2	1.7	17.4	21.2	23.7	16.6	11.2	3.3	6.6
S21 I am clear of the future development direction and goals of the Taishan Scenic Area.	2.9	1.7	24.1	27.8	16.3	13.3	9.5	4.6	4.6

### 6.1.1.5 Summary

The villagers are fairly content with the present status of the heritage resource conservation which is mainly under the charge of Taishan Administrative Committee. They held high enthusiasm towards tourism which they anticipated would bring more benefits to their lives. However, although a high percentage of them indicated that they worked in tourism directly or indirectly, only a few were satisfied with the income that they received from tourism. They expressed friendly attitudes toward tourists, but they probably did not yet have much substantial interaction with tourists. They seemed to

lack motivation to participate in heritage and tourism decision making. Judging from the feedbacks of the survey questionnaires, this is very likely because they had not been provided with a channel to get their voice heard effectively and also because they lacked relevant skills and training. Hasty conclusions should not be drawn based on these quantitative data, and qualitative information obtained from interviews with some of the villagers, including their leaders, will be used to further explore these issues.

### **6.1.2. Survey results of the resource and tourism managers**

This section presents the data from the questionnaire survey conducted among the managers of the heritage resource and tourism. Resource conservation of Taishan is under the charge of Taishan Scenic Spot Management Committee (hereafter Taishan Administrative Committee, or the Committee), while tourism development is theoretically the responsibility of the Tourism Bureau of Tai-an city. The author heard of long-lasting conflicts and disagreements between the two management departments even before embarking on the field work. Originally, one questionnaire was designed for people in resource management and tourism. In order to get approval and support, a copy of the questionnaire was submitted to an associate director of Taishan Administrative Committee. He requested that the questionnaire be revised to cover more about heritage conservation rather than tourism. Since permission was required from him to get access to the resource management personnel, the author revised the questionnaires in light of his advice. The survey was done among the resource management staff with his consent and help. In fact, later in-depth interviews enabled me to raise the topics that were not addressed in the questionnaire survey and, thus, helpful qualitative data were acquired. Thus, the resource managers of Taishan Administrative Committee and the tourism managers of Tai-an Tourism Bureau received different questionnaires, although some of the questions were common.

#### **6.1.2.1. Data obtained from resource management personnel**

Sixty questionnaires were distributed and 56 returned, of which 52 were suitable for analysis. All respondents were officials and employees working in either the Departments of Taishan Administrative Committee or affiliated units. Demographic features, such as age and gender, were not

asked. The data were grouped into three themes: resource conservation, resource-tourism conflicts, and resource-tourism-local relations. They are presented in **Tables 6.5, 6.6 and 6.7** respectively and are discussed in the following sections.

#### **6.1.2.1.1. Perceptions on resource conservation**

All of the management personnel surveyed (100%, S1) agreed to varying degrees that conservation of Taishan owed a great deal to the UNESCO enlistment as a world heritage site. A majority (81%, S2) believed that well-established conservation laws and regulations guarantee the present achievement. In addition to the national legal framework discussed in previous chapters, it was pointed out that regulations and regulatory documents concerning heritage conservation in general existed for Shandong province and Taishan conservation, specifically in Tai-an city. These documents are compiled in a book (3 volumes) entitled “Collection of Laws and Regulations Concerning Taishan Conservation”. Policies, decisions and initiatives pertaining to Taishan heritage resource conservation are made accordingly (interview with a head of Taishan Administrative Committee). Sixty percent of them agreed that they had sufficient funding support for conservation, while 27% were unsure and 14% disagreed (S3). Almost three quarters (73%, S3) ascribed the present conservation status to effective regulation and control by the government (21% were unsure and 6% disagreed, S4), and even more (77%, S5) believed that a reasonable and efficient conservation management system was in place. An overwhelming majority (87%, S6) believed that the present conservation status owed much to the fact that the management personnel fully recognized the importance of conserving the authenticity of the heritage resources. Similarly, 87% (S7) believed that they handled the relationship of resource conservation and tourism development correctly. Three quarters (75%, S8) suggested that healthy coordination occurred among the departments (S8).

The responses to questions S7 and S8 were a surprise given other information that was received concerning conflicts between the tourism and resource management departments. Also, the great majority (73%, S9) recognize the positive participation of local residents to resource conservation as one element contributing to successful resource conservation. However, the author was also informed that the level and means of local participation were still under discussion. 84% responded positively



to the item, “Set up a communication and education centre, and provide signs concerning environmental protection to guide and remind visitors” (S10). There were indeed some environmental protection signs on the mountain mixed with signs to guide tourists, but no resource communication and information centre was found in and around the mountain. With respect to “Regular training for the management personnel on knowledge and skills about resource conservation and management” (S11), 73% responded positively.

**Table 6.5. Resource managers’ perceptions of resource conservation (N=52)**

The present conservation of Taishan heritage resource owes a lot to:	mean	Standard Deviation	Percentage %						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S1.Successfully enlisted as a world heritage site	6.3	0.9					28.8	13.5	57.7
S2.Well-established conservation law and regulations	5.7	1.1			1.9	17.3	21.2	30.8	28.8
S3. Sufficient funding support	4.8	1.3		5.8	7.7	26.9	28.8	23.1	7.7
S4. Effectiveness of regulation and control of the government	5.3	1.2			5.8	21.2	32.7	17.3	23.1
S5. The conservation and management system is reasonable and efficient	5.5	1.3		1.9	1.9	19.2	23.1	25.1	28.8
S6. The management personnel fully recognized the importance of conserving the authenticity of heritage resource	5.7	1.3		1.9	5.8	5.8	28.8	19.2	38.5
S7. Correctly handled the relationship of resource conservation and tourism development	5.7	1.2			5.8	7.7	26.9	28.8	30.8
S8. Healthy coordination among departments	5.3	1.1			5.8	19.2	34.6	25.0	15.4
S9. Positive participation of the local residents to resource conservation	5.0	0.9			3.8	23.1	50.0	19.2	3.8
S10. Set up communication and education centre, and provide signs of environmental protection to guide and reminding visitors	5.4	1.1			5.8	9.6	44.2	15.4	25.0
S11. Regular training for the management personnel on knowledge and skills about resource conservation and management	5.4	1.4			11.5	15.4	30.8	7.7	34.6

#### **6.1.2.1.2. Perceptions on tourism (resource-tourism conflicts)**

As it was mentioned, the researcher had read and heard about conflicts between resource and tourism managers, and so, part of the questionnaires was designed to probe this topic. Almost two thirds (65%, S12) of respondents agreed that conflicts between resource preservation and tourism development are getting worse (S12). In response to the statement that “the management system is not smooth and lacks interdepartmental coordination and cooperation”, 42% agreed while 23% disagreed and 10% were unsure (S13). More than two thirds (69.3%, (S14) believed that lack of funds for the construction of tourism infrastructure and lack of start-up funding for development were substantial difficulties for Taishan resource conservation as well as tourism development. Over half (53.8%, S15) believed that tourist facilities lagged behind demand and staff lacked knowledge of tourism management and awareness of the importance of service. Nevertheless, three quarters (75%, S16) disagreed with the statement that disputes were increasingly common between management staff and visitors. Only 8% (S17) agreed that more disputes were occurring between management staff and local residents. Similarly, 75% did not agree that more disputes were arising between local residents and visitors (S18).

**Table 6.6. Resource managers' perceptions of resource-tourism conflicts (N=52)**

Presently the most pressing difficulties and problems for Taishan resource conservation and tourism development	mean	Standard Deviation	Percentage %						
			Totally disagree	Strongly disagree	Dis-agree	Hard to say	Agree	Strongly Agree	Totally agree
			1	2	3	4	5	6	7
S12.The conflicts between preservation and tourism development are getting worse	5.0	1.5		1.9	21.2	11.5	28.8	15.4	21.2
S13. The management system is not smooth, lack of interdepartmental coordination and cooperation	4.1	1.3		9.6	26.9	21.2	26.9	13.5	1.9
S14. Lack of funds for tourism infrastructure construction, and lack of start-up funding as well	4.8	1.3		3.8	15.4	11.5	46.2	13.5	9.6
S15. Tourist facilities lags behind, and management staff are lack of knowledge of tourism management, and awareness of service	4.7	1.5		5.8	19.2	21.2	23.1	11.5	19.2
S16. more and more disputes between management staff and visitors	3.1	1.4	13.5	9.6	51.9	13.5	5.8	1.9	3.8
S17. more and more disputes between management staff and local residents	3.0	1.1	13.5	9.6	51.9	17.3	7.7	/	/
S18. more and more disputes between local residents and visitors	3.0	1.1	17.3	5.8	51.9	17.3	7.7	/	/

**6.1.2.1.3. Perceptions on local involvement (relationship between resource and tourism and local people)**

Most of the management personnel (90%, S26) recognized that local culture and customs are also resources for conservation and should be an important aspect of visitor experiences. Many of them (52%) did not agree that more and more conflicts were arising among heritage conservation, tourism development and community benefits, although approximately a quarter (26.9%, S19) were unsure and 21% disagreed. Similarly, a majority (57%, S20) did not think that heritage conservation and tourism had produced many negative impacts on the locals and that, therefore, local people should get more benefits from tourism. Nevertheless, an overwhelming majority (83%, S21) agreed

that local participation in resource conservation and tourism development was very necessary, and was an important aspect of the sustainability of both the resource and tourism. Most (73%, S22) (79%, S23) also agreed that benefits to local people from tourism and local participation in decision making on resource conservation and tourism development were not yet sufficient. Almost all (89%, S24) the managers also recognized that local participation was limited by local people's awareness and competence and that training related to resource conservation and tourism development should be provided for local residents (90%, S25). In addition, 92% (S27) agreed that an effective mechanism should be set up for local people to participate fully in benefit sharing and decision making concerning tourism development and resource conservation.

**Table 6.7. Perceptions of the relationships between resource conservation, tourism and local people (N=52)**

In terms of the relation among heritage conservation, tourism development and community well-being, you believe:	mean	Standard Deviation	Percentage %						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S19. More and more conflicts arising among heritage conservation, tourism development and community benefits	3.6	1.5	11.5	3.8	36.5	26.9	9.6	7.7	3.8
S20. Heritage conservation and tourism have produced a lot of negative impacts on the locals, and therefore, local people should get more benefits from tourism	3.6	1.2	1.9	13.5	40.4	13.5	26.9	3.8	
S21. Local participation in resource conservation and tourism development is very necessary, and it is an important aspect of the sustainability of both resource and tourism..	5.7	1.2			3.8	13.5	25.0	26.9	30.8
S22. Presently local participation in tourism benefit is not enough.	5.0	1.1		1.9	7.7	17.3	48.1	15.4	9.6
S23. Presently local participation in the decision-making on resource conservation and tourism development is not enough.	5.0	1.0			7.9	13.5	57.7	11.5	9.6
S24. Local participation is limited by their awareness and competence of participation	5.5	1.0			1.9	9.6	44.2	26.9	17.3
S25. Training relating to resource conservation and tourism development should be provided for local residents.	5.7	1.0				9.6	40.4	23.1	26.9
S26. Local culture and custom are also resources for conservation, and	6.0	1.0							

should be an important aspect of visitor experiences.						9.6	25.0	25.0	40.4
S27. An effective mechanism should be set up for local people fully participating in the benefit sharing and decision making of tourism	6.0	1.0				7.7	30.8	25.0	36.5

### 6.1.2.2. Data obtained from tourism managers

Twenty-five questionnaires were distributed of which 20 were returned and 18 were suitable for analysis. Fourteen respondents were officials and employees from the Tourism Bureau of Tai-an City and the other 6 were officials and employees in the Tourism Bureau of Taishan District, Tai-an City. Taishan is a district of Tai-an city. Demographic features, such as age and gender, were not solicited.

Similar to the previous two surveys, the data were grouped into three themes: resource conservation, resource-tourism conflicts, and resource-tourism-local relations. They are presented in Tables 6.8, 6.9, and 6.10 respectively and are discussed in the following sections.

#### 6.1.2.2.1. Perceptions on tourism development

All (100%) of those surveyed agreed that tourism development of Taishan owes a lot to the uniqueness and quality of the heritage resource, with 84% indicating that they “totally agree” (S1). Almost three quarters (72%, S2) concurred that enlistment as a world heritage site was a big advantage for Taishan’s tourism, although 17% were unsure and 11% disagreed. More than three quarters (78%, S3) believed that tourism development at Taishan was enhanced by good conservation and management of the resource and its environment (which are the responsibility of Taishan Administrative Committee) and an identical proportion (78%, S5) ascribed it to effective marketing and communication (which is the responsibility of the Tourism Bureau of Tai-an City). Almost three quarters (72%, S4) attributed it to effective regulation and control by the government (the Tai-an City municipal government) whereas 6% disagreed and 22% were unsure. Local participation was taken as another credit by two thirds (66%, S6) of the people surveyed. The author observed several participatory tourism activities that were hosted by local people, including the annual temple fair and the pomegranate-picking festival in Baimashi village at the foot of Taishan. Two thirds (67%, S7) agreed that tourism development of Taishan owed a lot to healthy coordination among departments while 28% disagreed. Almost three quarters (72%, S8) ascribed credit for the improvement of tourism

products at Taishan to the tourism bureaus while 17% disagreed and 11% were unsure.

**Table 6.8. Tourism managers' perceptions of tourism development by (N=18)**

The tourism development of Taishan owes a lot to the following:	mean	Standard Deviation	Percentage %						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S1. Uniqueness and quality of the heritage resource	6.8	0.5					5.6	11.1	83.3
S2. Successfully enlisted as a world heritage site	5.3	1.8	5.6	5.6		16.7	16.7	22.2	33.3
S3 Good conservation and management of the resource and its environment.	5.3	1.6		11.1	5.6	5.6	27.8	22.2	27.8
S4. Effectiveness of regulation and control by the government	5.2	1.1			5.6	22.2	27.8	33.3	11.1
S5. Effective marketing and communication	5.2	1.1			5.6	16.7	44.4	16.7	16.7
S6. Local participation in tourism	4.6	1.3	5.6		11.1	16.7	44.4	22.2	
S7. Healthy coordination among departments	4.6	1.4		11.1	16.7	5.6	33.3	33.3	
S8. Improvement and update of tourism products	5.2	1.5		5.6	11.1	11.1	22.2	33.3	16.7

#### 6.1.2.2.2. Perceptions on pressing issues of tourism at Taishan

In responding to questions concerning pressing tourism issues at Taishan, almost all (94%, S9) tourism managers agreed that the management system lacked interdepartmental coordination and cooperation. An overwhelming 88% (S10) also agreed that tourism service quality was not yet good enough. With respect to cut-throat competition among tourism businesses, over half (61%, S11) disagreed, 28% agreed and 11% did not comment. Therefore, this was not a major problem from the

Presently the most pressing difficulties and problems for Taishan tourism development in including planning and management	mean	Standard Deviation	Percentage %						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S9. The management system is not smooth, lack of interdepartmental coordination and cooperation	6.0	1.09				5.6	33.3	16.7	44.4
S10. Service quality is not good	5.3	1.0			5.6	11.1	44.4	27.8	11.1
S11. Vicious competition among businesses	3.8	1.8	11.1		50.0	11.1	5.6	11.1	11.1
S12. more and more disputes between management staff and visitors	3.4	1.4	5.6	27.8	5.6	50.0		11.1	
S13. more and more disputes between management staff and local residents	3.8	1.4		11.1	44.4	22.2	5.6	11.1	5.6
S14. more and more disputes between local residents and visitors	3.1	1.3	11.1	27.8	22.2	22.2	16.7		
S15. Shorter tourism stay and less tourism expenditure	5.2	1.7	5.6		11.1	5.6	33.3	16.7	27.8
S16. The conflicts between preservation and development are getting worse	5.5	1.3		5.6		5.6	44.4	16.7	27.8

**Table 6.9. Tourism managers' perceptions of pressing issues of tourism on Taishan (N=18)**

perspective of tourism managers. Only 11% (S12) agreed that there was a growing number of disputes between management staff and visitors, 40% disagreed and half (50%) were unsure. A majority (56%, S13) agreed that there were more and more disputes between management staff and local residents, but few (17%, S14) indicated more conflicts between local residents and visitors.

Shorter tourism stays and associated reduced tourism expenditures were considered by 78% (S15) to be a pressing issue and 89% (S16) believed that the conflicts between preservation and development were getting worse.

#### **6.1.2.2.3. Perceptions on the relationship between resource conservation, tourism and local people**

This part of the questionnaires is identical to that administered to the resource management personnel. However, results show some differences. Sharing similar views with the resource management people, two thirds of tourism managers (67%, S23) recognized that local culture and customs are resources for conservation and should be an important aspect of the visitor experience. However, in contrast to the resource managers, more of the tourism managers (67%, S17) agreed that more conflicts were arising among heritage conservation, tourism development and community benefits. Also, in contrast to the resource managers, two thirds (67%, S18) believed that tourism and heritage conservation had produced many negative impacts on local people and that, therefore, local people should get more benefits from tourism (S18). Similar to the resource managers, an overwhelming majority (89%, S19) agreed that local participation in resource conservation and tourism development was very necessary and is an important aspect of the sustainability of both the resource and tourism. Also, almost all (95%, S20) agreed that local benefits are currently insufficient and that local participation in the decision making on resource conservation and tourism development is also not enough (89%, S21). Most (78%, S22) also recognized that local participation is limited by the awareness and competence of local people, and (83%, S24) agreed that an effective mechanism should be set up for local people to participate more fully in the benefits and decision making concerning tourism development and resource conservation

**Table 6.10. Tourism managers' perceptions of the relationships between resource conservation, tourism and local people (N=18)**



In terms of the relation between heritage resource, tourism and community, you believe:	mean	Standard Deviation	Percentage %						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S17. More and more conflicts arising among heritage conservation, tourism development and community benefits	4.9	1.5			27.8	5.6	33.3	16.7	16.7
S18. Tourism and heritage conservation have produced a lot of negative impacts on the locals, and therefore, local people should get more benefits from tourism	4.9	1.4			22.2	11.1	33.3	16.7	16.7
S19. Local participation in resource conservation and tourism development is very necessary, and it is an important aspect of the sustainability of both resource and tourism..	6.1	1.2				11.1	27.8	5.6	55.6
S20. Presently local participation in tourism benefit is not enough yet	5.9	0.9				5.6	27.8	38.9	27.8
S21. Presently local participation in the decision-making on tourism planning and management is not enough yet.	5.7	1.0				11.1	33.3	27.8	27.8
S22. Local participation is limited by their awareness and competence of participation	5.1	1.2		5.6		16.7	44.4	22.2	11.1
S23. Local culture and custom are also tourism resource, and should be an important aspect of visitor experience.	5.7	1.4			5.6	27.8		27.8	38.9
S24. An effective mechanism should be set up for local people fully participating in the benefit sharing and decision making of tourism	6.1	1.1				16.7	5.6	33.3	44.4

### 6.1.3. Survey result of the tourists

This section presents data from the questionnaire survey conducted among tourists. Tourists are a key stakeholder of tourism. Their perceptions should be considered in discussing the relationships between the resources, tourism and local community, and their views are pertinent to the management of world heritage sites. As mentioned previously, the questionnaires were developed with a community perspective in mind with the result that community-related issues were given high priority in the formulation of questions.

The visitor questionnaire was prepared in four different languages: Chinese, Japanese, Korean

and English. It turned out that only the Chinese, Korean and the English versions were used in this research. The tourist surveys were conducted in two ways: 1. By distributing the questionnaires to tourists in a concentrated way in the tourist coaches of the travel agencies on their way back from the tour. The tourists that were surveyed were mainly on package tours and this practice was conducted four times; 2. By distributing the questionnaires to tourists in a random way by following the tourists down from the top or from the middle of the mountain, or stopping them at the foot of Mt. Taishan when they were done with climbing the mountain. These tourists were mainly backpackers. A total of 500 questionnaires (368 copies for package tourists and 132 copies for backpackers) were distributed via these two methods with a total of 350 being returned. Of these, 245 were from package tourists and 105 were from backpackers, among which a total of 230 were valid for analysis (136 from package visitors and 94 from backpackers). Invalid questionnaires were set aside because they were almost blank or because they appeared to have identical responses as if they had been completed in collaboration with other respondents.

The demographic features of the tourist respondents are presented in Table 6.11. Almost all respondents (91.3%) were Chinese and only a small proportion (8.7%) were international visitors. This is partly because the period during which the survey was conducted, from late October to December 2006, was during the low season for international arrivals at Taishan. One group of visitor surveys was conducted in late October 2006 with 12 Korean tourists with the help of the operator who organized the package tour. The other 8 surveyed international tourists were backpackers. All the other questionnaires were undertaken with the help of tour operators and were done with Chinese domestic tourists for reasons of convenience.

**Table 6.11. Demographic features of the tourist sample**

<b>Gender</b>	<b>number</b>	<b>Rate %</b>	<b>age</b>	<b>number</b>	<b>Rate %</b>	<b>occupation</b>	<b>number</b>	<b>Rate %</b>
Male	113	49	18 and below	18	7.8	government	56	24.3
Female	106	46.	18-30	94	40.9	enterprises	59	25.7
N/A	11	4.8	31-40	57	24.8	Self-employed	22	9.6
			41-50	23	10.0	farmers	29	12.6
			51-60	16	7.0	students	43	18.7
			60 and above	15	6.5	other	11	4.8
			N/A	7	3.0	N/A	10	4.3
<b>education</b>	<b>number</b>	<b>Rate %</b>	<b>Family income ( ¥ Yuan/month)</b>	<b>number</b>	<b>Rate %</b>	<b>Nationality</b>	<b>number</b>	<b>rate</b>
Senior high school and under	24	10.4	1500 and below	18	7.8	Canadian	5	2.2
college	50	21.7	1500-3000	41	17.8	American	3	1.3
bachelors'	99	43.0	3000-4500	91	39.6	Korean	12	5.2
Masters' and above	43	18.7	4500-6000	36	15.7	Chinese	210	91.3
N/A	14	6.1	6000 and above	15	6.5			
			N/A	29	12.6			

Over 65% of the surveyed tourists were aged between 18 and 40 years. More than half (55.3%) had a monthly income of RMB ¥3000-6000 (CAD\$450-850) which is an above-average income in China. Respondents were generally well-educated with 83.4% holding college education and above. Thus, respondents tended to be relatively young, with high educations and good earnings, similar to the characteristics of heritage tourists identified by Timothy and Boyd (2001). They noted that a high level of education appears to be one of the most important characteristics possessed by heritage visitors who tend to be better off financially and younger than those involved in many other types of tourism.

	mean	Standard Deviation	Percentage %						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S1. I visit Mt. Tai mainly for its beautiful natural scene.	4.9	1.8	5.2	7.4	11.3	13.0	17.4	26.1	19.6
S2. I visit Mt. Tai mainly for its history and culture.	4.9	1.5	0.9	5.7	10.0	28.7	17.0	20.9	17.0
S11. I think the heritage resource of Mt. Tai is well conserved.	4.4	1.5	4.8	7.0	15.7	23.9	25.2	13.9	9.6
S12. I think the ropeways destroy the heritage resource while providing convenience to tourists.	3.8	1.7	13.9	10.0	14.8	25.7	17.8	11.3	6.5
S13. I feel I have experienced the authenticity of natural heritage here in Mt. Tai.	4.6	1.4	3.0	5.7	12.6	23.9	28.3	19.1	7.4
S14. I feel I have experienced the authenticity of cultural heritage here in Mt. Tai.	4.6	1.5	3.0	6.5	11.3	24.8	26.5	18.3	9.6
S16. I think the tourist souvenirs can well reflect the characteristics of the local culture.	4.0	1.6	8.3	10.0	18.7	21.7	20.9	15.7	4.8
Remarks									

**Table 6.12. Tourists' responses on resources of Taishan and conservation (N=230)**

Surveys results are presented in Table 6.12.as they pertain to tourists' perceptions of resources, the experience of visiting and the local community, and the relationships between these three variables.

### **6.1.3.1. Tourists' perception of the heritage resources**

The data show that the majority of tourists recognized the attraction of Taishan as reflecting both its cultural and natural resource (63.1% for natural resources and 54.9 for cultural resources, S1 and S2). When asked about the authenticity of the heritage resource, over half of them made positive evaluations of their experience with the natural resources (54.8%, S13) and with the cultural resources (54.7%, S14) of Taishan.

The construction of a ropeway that facilitates the movement of visitors up and down the mountain has been a controversial issue at Taishan. Just over one third (35.6%, S12) agreed that, although providing convenience to visitors, the ropeways detracted from the heritage resource while an almost equal proportion (38.7%) were of the opposite opinion and a quarter (25.7%) felt that it was hard to judge. The ropeway management personnel, in interviews, suggested that the ropeways had been greatly welcomed by the visitors and contributed a very significant part of the revenue of the Taishan Administrative Committee.

As for resource integrity, over half (54%, S15) of responding tourists agreed that buildings and facilities were designed well to fit harmoniously into the environment, but almost a quarter (23.5%) disagreed and another quarter (23.5%) were unsure. Taking souvenirs as a reflection of the local culture which is considered to be an integral part of heritage resource, 41.4% believed that the souvenirs at Taishan could well reflect the characteristics of local culture but 37% thought the opposite and 21.7% took a neutral stance.

When summarizing their overall impression of the conservation status of Taishan resources (S11), almost half (48.8%) agreed that the heritage resource was well conserved, while 27.5% disagreed and 23.9% were unsure.

The above results show that approximately half of respondents to the various questions gave positive responses with the remainder being almost equally divided between negative or undecided responses. This suggests a substantial diversity of opinion among tourists concerning the conservation of Taishan's resources.

### **6.1.3.2. Tourists' perceptions of their experience at Taishan**

The degree of satisfaction of visitors is an important indicator of the sustainable use of tourism

resources and 10 out of the 24 statements in the questionnaire were concerned with this. Relevant data are reported in **Table 6.13** and are summarized below.

**Table 6.13. Visitor satisfaction with aspects of Taishan (N=230)**

	mean	Standard Deviation	Percentage %						
			Totally disagree	Strongly disagree	Disagree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S3. I think the entrance fee of Mt. Tai is reasonable.	4.1	1.5	4.3	10.9	20.4	22.6	26.1	10.0	5.7
S4. I am content with the traffic condition at Mt. Tai.	4.2	1.6	6.1	9.6	20.9	9.1	34.8	12.2	7.4
S5. I am content with the accommodation at Mt. Tai.	4.1	1.5	5.7	10.9	21.7	14.8	27.4	16.1	3.5
S6. I am content with the food and beverage at Mt. Tai.	3.8	1.6	6.1	11.7	36.1	9.6	21.7	9.1	5.7
S7. I am content with the sanitary facility at Mt. Tai	4.3	1.5	3.9	9.1	15.2	27.0	23.9	13.9	7.0
S8. I am content with the service provided by the tourist information center.	4.0	1.5	2.6	11.3	34.8	8.3	24.8	13.9	4.3
S9. I am content with the tour guiding and interpretation at Mt. Tai.	4.5	1.4	1.7	6.5	13.5	27.0	29.1	14.3	7.8
S10. I think the tourism security work is good at Mt. Tai.	4.4	1.4	3.5	4.3	18.7	22.6	27.0	18.7	5.2
S23. Overall I am content with my experience at Mt. Tai.	4.8	1.4	2.6	4.3	9.1	25.2	24.3	23.5	10.9
S24. If chances are given, I'd like to visit Mt. Tai once more.	4.9	1.6	3.5	5.7	9.6	20.4	20.9	23.9	16.1

Less than half (41.8%, S3) of the respondents agreed that the entrance fee (RMB ¥125 ≈CAD\$18<sup>30</sup>) to Taishan was reasonable. Approximately a third (35.6%) disagreed and 22.6% were unsure about it. Almost a half (47.2%, S5) were content with the accommodation, while a weak majority (53.9%, S6) were dissatisfied with the food and beverage provided in and around Taishan (S6). Substantially more (44.8%, S7) were happy with the sanitary condition at Taishan than were not (28.2%). Almost a half (48.7%, S8) expressed discontent with the service offered by the tourist information centre, while 43% found the information centre to be helpful (S8). A weak majority indicated that they were content with the tour guiding and interpretation available at Taishan (S9).

<sup>30</sup> CAD\$1=RMB ¥7 <http://www.ytrip-ts.com/map/menpiao.htm>

With respect to security, positive evaluations were provided by half (50.9%, S10) and negative assessments were given by 26.5% of respondents.

A majority (58.7%, S23) had positive overall evaluations of their experience at Taishan and a similar proportion (60.9%, S24), indicated that they would like to return should the opportunity arise. Thus, although substantial minorities of respondents either were non-committal or had reservations with specific aspects of their experience, suggesting that there is room for improvement, a small majority was satisfied.

### **6.1.3.3. Tourists' perceptions towards local involvement**

The perceptions of tourists towards local people and their needs may significantly influence the extent to which local people can become involved in tourism in and around their communities as well as tourism planning for the heritage site. The survey revealed that tourists to Taishan are enthusiastic about experiencing local culture and interacting with residents. Overall, they have a positive attitude towards the involvement of local people in tourism.

The survey revealed that tourists expect to have local ingredients in their visit. When asked if they would like to experience local custom and culture, including the life-style and the food of local villagers, a majority (55.7%, S17) expressed their consent. However, less than half (46.1%, S19) agreed they could get great pleasure from the participatory activities that are currently available to tourists at Taishan. This implies two possibilities: one is that the scenic spot does not provide such activities or that the activities that are made available are not attractive. Nevertheless, 63.9% (S20) indicated that they hoped to participate in activities through which they could interact with the local people. In responding to the statement "I think the tourist souvenirs well reflect the characteristics of the local culture" (S16), 58.7% of them either disagreed or were unsure. This implies that many tourists expect more local cultural flavour in the souvenirs that are available. However, more than half (52.6%, S18) of respondents agreed that they appreciated the hospitality of the local people. This corroborates the result of the survey among locals inquiring about their friendliness towards tourists at Taishan (See S1 of **Table 6.3** on locals). More than two thirds (67.4%) of respondents agreed that tourism to the heritage site should benefit the local people and 68.3% believed that local involvement in tourism was important to both tourism and the local community. This shows the positive perceptions that the tourists hold towards local involvement in tourism at Taishan.

**Table 6.14. Tourists' responses on local involvement (N=230)**

	mean	Standard Deviation	Percentage %						
			Totally disagree	Very disagree	Dis-agree	Hard to say	Agree	Strongly agree	Totally agree
			1	2	3	4	5	6	7
S16. I think the tourist souvenirs can well reflect the characteristics of the local culture.	4.0	1.6	8.3	10.0	18.7	21.7	20.9	15.7	4.8
S17. I would like to experience the local custom and culture (including the life-style and the food of local villagers)	4.6	1.5	3.0	5.7	13.9	21.7	27.0	18.3	10.4
S18. I can feel the hospitality of the locals.	4.5	1.5	4.3	4.8	15.2	23.0	27.8	16.1	8.7
S19. I can get great fun from the participatory local activities that the scenic spot has provided for the tourists.	4.4	1.5	3.0	7.4	13.9	29.6	23.0	14.8	8.3
S20. I hope to participate in activities through which I can interact with the local people.	4.8	1.4	1.3	6.5	9.1	19.1	29.6	21.7	12.6
S21. I think tourism on the heritage site should benefit the local people.	5.0	1.5	3.0	3.9	7.8	17.8	24.8	27.4	15.2
S22. I think local involvement in tourism is important to both tourism and the local community.	5.0	1.4	2.2	3.0	8.7	17.8	28.3	25.2	14.8
Remarks									

Data obtained from the tourist survey were analyzed to address three themes: resource conservation, tourist satisfaction and local involvement in tourism. More than half of the tourists surveyed, if not an overwhelming majority, held a positive view on the resource and its conservation at Taishan. Only a minority (35.6%) survey agreed that the ropeways destroyed the heritage resource. Most tourists were satisfied with their experiences and would like to return but it is clear, also, that there is room for improvement. The majority of tourists held a positive attitude towards local involvement in tourism and recognized the importance of locals sharing in the benefits of tourism. However, some deficiencies were also observed, such as in the cultural content of souvenirs and the opportunities to interact with local people. Data generated from further in-depth interviews are expected to clarify some of the uncertainties.

#### 6.1.4. Summary

This section analyzes the quantitative data obtained from the four surveys conducted with local



residents, tourists, resource managers and tourism managers pertaining to Taishan's heritage resource conservation, tourism development, and local involvement. The questionnaire surveys do provide useful insights but they probably do not tell the whole story. Qualitative data will be used to provide additional insights. The following section presents the analysis of the qualitative data obtained through the author's field research.

## **6.2. Qualitative data analysis**

### **6.2.1. Introduction:**

This section presents the qualitative data obtained from interviews with local villagers, resource managers, tourism managers, and tourists. Data obtained from observations in the field are also analyzed as a complementary part of the qualitative data. Similar to Section 6.1, qualitative data are also analyzed from the following three aspects: resource conservation, tourism (focused on visitor experience), and local communities (focused on local involvement in heritage conservation and tourism).

A total of 53 interviews, including key informant interviews, were conducted during my field trips with 45 people from the key interested parties: the local residents including local business owners, the resource and tourism management officials and personnel, local and relevant tourism researchers/planners, the tour operators and the tourists. Although the investors were also identified as an important stakeholder in terms of being influential to the policy, planning and management concerning the heritage site, but I failed to establish contact and arrange interviews with them. These interviews either are semi-structured, open-ended, or are unstructured and free-conversational. Like the questionnaire surveys, they also revolved around the focus of this research: how well world heritage and its tourism address local needs, and how well tourism helps improve world heritage resource conservation. The interviews are classified in Table 6.15.

**Table 6.15 Types of the interviews**

<b>Classification of Interviewees</b>	<b>Number of people</b>	<b>Nature of interview</b>	<b>Data obtained</b>
Local villagers (tourism participants and non-participants)	16, with 2 of them receiving follow-up interviews	Structured, semi-structured and open-ended, chatter-style free conversation	One audio-recorded, the other with either on-site written notes or afterward summary notes
Village leaders	9, with 1 of them receiving follow-up interviews	Structured, semi-structured, open-ended, some being focus group	One audio-recorded, the other with written notes either on-site or summarized afterwards
Tourism-related Business owners on or around Taishan (non local villagers)	2, with 1 of them receiving follow-up interviews	Semi-structured, Unstructured, Open-ended	Written notes, and afterwards summaries
Tourism management officials	3	Semi-structured, unstructured, open-ended	One audio-recorded, the other written notes
Resource management officials and personnel	4 and 1 with follow-up interviews	Semi-structured, unstructured, open-ended	Audio-recorded, written notes
Municipal Government officials	2	Semi-structured, open-ended, free conversation	Written notes
Tour operators	2	Semi-structured, open-ended,	Recorded
Tourism researchers	4, with 2 of them receiving follow-up interviews	Semi-structured, open-ended, free conversation	One audio-recorded, the other with written notes
Tourists	3	Structured, semis-structured	Written notes

## **6.2.2. Responses from Local communities**

### **6.2.2.1. On Taishan heritage resource conservation**

#### **6.2.2.1.1. Attachment towards Taishan and positive attitude on resource conservation**

Coinciding with the result of the questionnaire surveys, all local villagers interviewed showed their high attention and concern towards the conservation of heritage resource of Taishan. To these villagers, Taishan is their root, their life sustainer, and their asylum god. A villager termed Taishan as “a mother mountain” (Villager1, interview). Most of the villagers and their families had been living in and around Taishan for generations. They had an instinctive love for the mountain. Their ancestors passed traditional experiences of conservation down to them from generations to generation. For instance, a villager told that they know what kind of trees grows best in the mountain. Their ancestors

had the tradition of building their houses and fencing walls with scree or cobblestones found in the dried riverbed. They worshiped Taishan as a deiform mountain and would not quarry from its body, which is unlike the outside investors who quarry nearby or buy materials from other places. They believed that even the smallest cobblestone in the dried riverbed was blessed by Taishan and might bring good luck to the house built with it (Villager 2).

A leader of the Yingsheng Village who was also the general manager of a village-run hotel told me that local villagers were those who had the highest awareness and enthusiasm to conserve Taishan. If the Taishan Administrative Committee people work on conservation of Taishan out of their professionalism and for being paid, according to him, these villagers conserve Taishan out of their deep love for it and not for payment. He gave an example that there occurred a fire in Taishan in late fall of 2006. Some local villagers notice the billowing thick smoke from the mountain and they took action immediately without any hesitation. They put aside what they were doing and ran directly towards the spot with whatever tools at hand to fight against the fire, meanwhile, they also called the Taishan Administrative Committee to report about the fire so that fire workers could be sent. He said, “We may have some discontent with the Taishan Administrative Committee on certain issues. However, whenever Taishan is in danger, we always fight hand-in-hand with the committee and never stay back. Villagers are almost always those who notice fire first and appear first at the fire spot to fight against the fire. ... We know what Taishan means to us.” (Village leader 1a, interview). The leader of Tai-qian village also told the similar story when talking about their feelings toward Taishan --- as he put it, “Since what we eat and drink are from Taishan, we should take good care of it and protect it. All the villagers understand this better than anyone else ” (Village leader 4, interview).

The researcher was told by people from Taishan Administrative Committee about the phenomena that some villagers violated the conservation rules by cutting and stealing trees and quarrying rocks<sup>31</sup> from Taishan. So this question was brought to the villagers for their response. Some villagers interviewed denied this and said those thieves were definitely not from their villages but “outsiders”; some said that was rare to see but it could possibly happen when one had no other

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<sup>31</sup> Rocks from Taishan are quite expensive when made into tourism souvenirs which are called “Shi-Gan-Dang”, being listed in 2005 as National Intangible Cultural Heritage for the sacred and auspicious meanings they bear .

means to earn a living as there was an old Chinese saying, “Those living near the mountain live off the mountain, and those living near the sea live off the sea.”

#### **6.2.2.1.2. Consequences of resource conservation on the local villagers**

On one hand, these local villagers had no strong negation to the present status of Taishan resource conservation --- neither from the questionnaire survey nor from the interviews could the researcher find comments expressing overt disappointment concerning the Taishan Administrative Committee work of heritage resource conservation, and the researcher found many trophies and awards certificates in the meeting room of the Taishan Administrative Committees granted from higher-level departments in charge. On the other hand, complaints could be heard from the villagers constantly about consequences on their life resulted from resource conservation. Relocation was the foremost problem brought out which resulted in several other problems. Next to relocation was the problem of loss of the land and change of livelihoods.

##### **6.2.2.1.2.1. Relocation**

As is a big issue in many of the Chinese World Heritage Sites, relocation was concerned a lot by the interviewees who were the local residents. Relocation started soon after the UNESCO designation of Taishan as a world cultural and natural heritage in 1987, and it has not been completed until the time of the research as was indicated in the Taishan Conservation Master Plan (2000-2020). Before talking to the villagers, I got positive perceptions about the relocation issue concerning Taishan both from the leader of Taishan Administrative Committee and from the village leaders interviewed. The management people said that they input much effort in relocating the villagers who used to live in and close around the mountain for the purpose of better conservation. Basically new standardized residences were built in the new community near Taishan for the relocated villagers in light of the measure of area of their old houses in and around the mountain, and the villagers were compensated financially if their new houses were smaller than their old ones while they had to pay some due money for the extra area at the cost price if the new houses were bigger than their old ones. Asking if the villagers were willing to move out and further away from the mountain, I was told by the committee management people that most of the villagers were quite supportive to the course of

heritage conservation and were happy to move to the new community although there were a few who had some problems. The answer to my further question as how to deal with those problems was: communication, persuasion, negotiation, and regulation. The village leaders were those who did the detailed and substantial job of the communication and persuasion. They acted like a broker between the Taishan Administrative Committee and the villagers: on one hand, they had the responsibility of enacting the relocation policy of the committee; on the other, they also understood the feelings and difficulties of the villagers who had lived in the mountains for generations and who mostly shared a same family name with them as living in the same village as neighbors, close friends or even relatives. As how to resolve the dispute caused by relocation, a leader of Taiqian village, taking for instance, said that the relocated villagers in their village enjoyed the priority or privilege to be employed in village-run tourism company, and sustain their livelihood by working in the hotels or restaurants or selling souvenirs in the souvenirs stores lined up along the climbing route toward to top of the mountain.

Nevertheless, different voices were heard through the interviews with the local villagers. The interview with a fruit vender at the village street corner revealed that the policy of the relocation implied an order to take for the villagers. "It's but an order from the upper administration for us to obey.... It makes no difference for you to agree or disagree. You've got to move anyway once you are listed among those to move.... The only difference is how much compensation you could get."

The villagers told the researcher that they knew well about the value of Taishan and would support the heritage resource conservation, even though they were definitely reluctant to move from their houses where they had lived for generations, and which was especially difficult for the old people. Village meetings were organized by the village committee for education and communication. Village leaders also went to the families who felt difficult to consent to the policy to persuade them and bring them around. However, relocation was indeed a very big issue for them as it meant tremendous changes to their life. Interviews revealed the problems arising from relocation mainly in five aspects:

1. Moving out and away from the mountain went against the tradition and living habits of the

mountain villagers who were used to living in the mountain. They had been living there for generations. Even if their emotional attachment to the mountain could be overcome, it takes time and pain to change the living habits.

2. Many of the families who used to live in and around the mountain ran tourism-related business of varied types and scales and it guaranteed a fairly nice income to sustain their life. Moving out implied not only loss of good income but also loss of the means of making a living to some of them.

3. Many of the relocated villagers were not satisfied with the compensation, either because the reality did not meet the prospect they were promised, or because some promises were not kept at all.

4. Equity was another issue. Many of the villagers were ordered to move, but a few others stayed and continue their life and business in the mountain. Some relocated villagers had job opportunities offered by the village committee in the village-run business while some others did not, and some had better opportunities (better work and better income) than others. Those who stayed or had better opportunities, according to the villagers, were those who had relation or connection to both the village committee and the Taishan Administrative Committee.

5. Some villagers could not understand the reason why they had to move out of the mountain. They felt they had better sense and more local knowledge than those conservation professionals in terms of protecting Taishan. They could not be convinced why they could not live in the mountain as custodians to cater the tourists and to conserve the heritage resource as well.

#### **6.2.2.1.2.2. Loss of land, and change of livelihoods**

One other challenge resulted from Taishan world heritage resource conservation brought out most frequently by the villagers was their loss of land and change of livelihoods.

Similar to conservation of other natural heritage sites in China, the policy of “Returning farmland to forest”<sup>32</sup> was emphasized as an effective measure to control soil erosion at Taishan. The most impacted villages in Taishan Scenic Beauty and Historic Interest Zone of Mt. Taishan were those villages located in and close around the mountain. Three of the four villages under the

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<sup>32</sup> “Returning the farmland to forest” is a national policy developed and enacted by the central government and State Council of China, starting from 1999, not only applied to natural heritage sites and nature reserves, but also to vast western grassland and desert area of China.

researcher's investigation were among them: Tai-qian, Ying-sheng, and Bai-ma-shi. Taking Bai-ma-shi as an example, by 2006, it had a population of over 1100, while the arable land left to them was less than 0.20 square kilometers. It was a big challenge to face as how to sustain these people's life.

Positive messages were obtained from media and from the management people. It was reported that "Taishan District Government was exploring a long-term mechanism to guarantee the farmers who lost their land due to heritage resource conservation as well as urbanization to live in peace and enjoy their lives".<sup>33</sup> The report cited several measures adopted by the government in dealing with the challenge. These measures include: providing policy support and skill training for some young and middle-aged villagers to set up their own service business catering to the visitors of Taishan as well as urban residents of Tai-an city; providing them technology support and skill training in terms of growing high-income economic plants such as fruits and herbs; and establishing a social security system for the aged villagers in terms of pension and medical treatment. Interviews with the management people and the local government got further proof of the information. Encouraged with this, the researcher went to the villages and obtained further detailed information through observations and interviews with the villagers.

To sum up the information, several aspects are presented in the following:

**1. Loss of land:** The three villages, Taiqian, Yingsheng, and Baimashi, suffered most from loss of land due to heritage conservation and urban sprawl. Lihang village did not have the problem since it was located farther from Taishan compared the above three. As is mentioned before, less than 0.20 square kilometers of arable land were left to Baimashi Village which has a population of over 1100. Taiqian and Yingsheng were impacted by urban sprawl after relocation with almost all the land being purchased by the government and their traditional livelihoods being completely changed.

**2. Change of lifestyle:** Observation shows that Lihang village still looked like a village in its traditional sense with much rural atmosphere while Taiqian and Yingsheng were not any more. The two villages were more like town neighborhoods with cement or asphalt streets and neat and more

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<sup>33</sup> [http://www.dzwww.com/xinwen/xinwenzhuanti/ffcl/qlfj/t20051028\\_1239245.htm](http://www.dzwww.com/xinwen/xinwenzhuanti/ffcl/qlfj/t20051028_1239245.htm)

standardized houses which was the result of the relocation, although rural and traditional phenomena could still be seen from the dried local products such as mushrooms, red-chilly peppers and garlic hung on the front walls of the building as well as the fowls raised in the yards. There was a Local Food Street in Taiqian village where about 30 family-run restaurants lined up the two sides of the street serving local, homemade meals for visitors as well as residents of Tai-an city. The researcher was told that most of the owners of the houses and restaurants were local villagers with a few being outside investors. Baimashi villages still had some 30 families living in their old traditional houses which were actually designated for receiving tourists while the others were moved to their new village community in standardized buildings.

**3. Change of means of living:** Livelihoods changed most for the villagers of Taiqian and Yingsheng since they used to live in and very close to the mountain and they lost most of their land. By the time of the field research, more than 50% of the Taiqian villagers between 18 and 55 years of age were working in tourism related businesses and enterprises run by the village which were all under the umbrella of a tourism company owned and managed by the village committee. The others held regular or irregular jobs of varied kinds other than agricultural ones either with the help of the village committee or by their own means, either in Tai-an city, or in some other cities or provinces, usually known as “Nong-Min-Gong”(migrant rural workers). People reaching the retirement age did not work, but they enjoyed pension and medical benefits arranged by the village committee.

Yingsheng village had a similar situation with Taiqian. Over 160 out of 532 families of the village held private businesses, a majority of which were related to tourism services such as restaurants, hotels, and transportation, etc. People engaged in tourism related services made up 60% of the total labour force of the village.

Baimashi, however, demonstrated a little difference, although the villagers’ lives were also impacted by Taishan’s conservation and tourism. Unlike Taiqian and Yingsheng, there was still a small amount of arable land left to this village. Changing from their old traditional agriculture-featured livelihoods, the means of living of villagers were quite diversified: some were still working on the land, but more focused on growing high-income plants such as fruits and herbs;



some were involved in tourism by serving B&B services and home-made meals using their own houses; some left home and became migrant workers in the cities; and some, organized by the village committee, moved far to the north-west of China in group, and started their agriculture life there as contract farmers on the land bought there by the village committee. This will be discussed in detail in the part on “local involvement and survival” in this chapter.

Compared to the above-mentioned three villages, the structure of life in Lihang village did not change that much. Due to the distance away from Taishan, the ripple effect they got from the mountain’s conservation and tourism was much less, either in terms of positive ones or in terms of negative one. Without receiving as much direct consequence such as relocation and loss of land, heritage conservation and especially the tourism opportunities brought by this world heritage mountain was perceived by the villagers very positively.

**4. Policy support and financial assistance as compensation:** Interviews confirmed that governments of varied levels (Municipal, district, and the Taishan Administrative Committee) did provide policy support and certain financial assistance to help people of these villages (municipal and the Taishan Administration Committee). As noted by several village leaders, policy support from the government meant a lot to them. It was understandable considering the central and top-down institutional system they had long been in. Only with the government consent could they carry out what they had in their mind to adapt themselves to the change and to make the best out of what they had. Also, it was confirmed that pension and medical insurance system was implemented in three villages: Taiqian, Yingsheng, and Baimashi, which was enforced as a compulsory policy and supervised by the government, although all the cost were from the budget of the three village committees respectively. However, financial inadequacy had always been the biggest problem. According to some village leaders and villagers, financial compensation they were supposed to receive from the government for relocation and loss of land can not always be implemented in a satisfactory way. Also, some of the villagers were not happy at all with compensation standard for relocation and land requisition and felt the money they were offered was far from enough to use to cope with their life thereafter. Complaints came the most from those villagers who lost their old

houses or land with their traditional livelihoods while who did not have the guarantee of a long-term means to sustained future life, say, holding a job in the village-run tourism business.

**5. Nostalgia of the old to traditional life:** Qualitative data also showed that there were some villagers, especially the old ones who were nostalgic about their old life in the mountains. They were not used to the new houses/apartments, and the new style of life which caused discomforts both physically and psychologically. However, most young villagers interviewed, especially those who were financially well off preferred this change of their livelihoods. They preferred living like the urban people to farmers in the mountain. They liked their new and modern way of life, interacting with tourists, knowing more about the world, and making more money than they did farming.

**6. Equity issues:** Equity issues were raised again, mostly in the expression that relocation as not fairly arranged, compensation rules were not fairly implemented, and job opportunities were not equally distributed, and so on.

#### **6.2.2.2. On Taishan heritage tourism development**

##### **6.2.2.2.1. Local attitude towards tourism**

All the interviewees from the four villages showed very positive and enthusiastic attitude towards tourism. Each village had been actively seeking opportunities to develop tourism and benefit from it which they took as a strategy to survive the changes occurring in their life whether they liked it or dislike it. Observations also showed that local residents who worked in souvenir stores and restaurants or hotels in the mountain (lining up the climbing route) or at the foot of the mountain were polite and friendly towards tourists they interacted with. Some of them sometimes perhaps behaved a bit over-enthusiastic in persuading tourist to buy souvenirs items or having meals in their restaurants. Being asked if they felt any inconvenience caused by tourism or any offensiveness by tourists, almost no one in the villages said they felt like that. In fact, taking Doxey's Irritation Index as reference, the local people's attitude towards tourism and tourists were still between the level of "Euphoria" and "Apathy". This is an interesting phenomenon in that the reality of tourism development in Taishan started in the mid 1980s and was already dwelt in the deep-developed period between "consolidation" and "stagnation" coining Butler's terms (Butler, 1980). Potential social capacity for tourism was

visible there as the local villagers hoped to receive more tourists, although tourists always flood the mountain during the high seasons. Village leaders of all the four villages who were specifically in charge of tourism affairs expressed that one of their development goals was to increase the number of tourism reception year by year, and the increased tourist reception number was an important indicator for evaluating their work. One village leader put it as: “more tourists means more income, more income means happier villagers, and happier villagers means more satisfaction they have with our work” (interview with village leader 8).

#### **6.2.2.2. Current situation of local participation in tourism**

All of the four villages in this research were involved in tourism at Taishan at varied degrees and in varied ways. Tourism revenue made an indispensable part of their gross income.

**Taiqian village** was one of two earliest villages to participate in tourism at Taishan due to its geographic location. Many of the villagers who lived in and at the very foot of the mountain voluntarily undertook tourism related work either by running small family-owned service business, or selling local products such as tourism souvenirs even before collective moves organized by the village committee were taken in 1983. By the time of the field research, there were 5 hotels, one passenger transport service coach team with a capacity of 624 seats, 35 souvenir shops, tourist convenience stores, family-based restaurants, and a number of seasonal kiosks providing food and beverage as well as photo-taking services which lined up the tourist climbing route from the foot to the top of the mountain . They were operated under the umbrella of Taiqian Tourism Service Company affiliated to Taiqian Village Committee. There were about 1000 registered employees in the tourism company which covered more than half of the village’s total labor force and covered three quarters of over 400 families. According to the village leader in charge of tourism affairs, the tourism income made up to almost 70% of the annual total revenue of the village, and the average annual income of an employee was around RMB ¥ 5000-6000(equivalent of CAD\$ 710-860).<sup>34</sup>

**Yingsheng village** was the other earliest village that was involved in Taishan tourism. Similar to Taiqian, Yingsheng met challenges of relocation and loss of arable land due to Taishan

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<sup>34</sup> 1:7 is the exchange rate between Canadian dollar and Chinese RMB adopted in this thesis.

conservation as a world heritage site and urbanization. Unlike Taiqian, villagers of Yingsheng did not have as many opportunities to do tourism business in the mountain. But the advantage they had was that they owned a limited right of developing and using a peak named Shan-zi-ya which was attached to the major body of Taishan mountain but was somewhat independent. This resource permitted a big potential for them to develop tourism. With the permission of Taishan Municipal government and Taishan Administrative Committee, collective actions initiated by Yingsheng Village Committee of developing tourism at Shan-zi-ya was started as early as in 1988. Currently the village committee also owns a tourism company established in 1993. Tianwai Villa Entertainment Company Ltd. included a passenger transport coach team, a parking lot in middle of the mountain together with all the tourism service facilities, a tourism commodity market made up of small shops, three hotels, two restaurants and a travel agency. According to the village leader interviewed, the villagers employed in the company made up around 70% of the total population of Yingsheng Village (around 1600 residents of over 500 families). And the income from tourism and tourism-related service enterprises took almost 85% of the annual total revenue of the village.

**Baimashi village** is also located at the foot of Taishan with a direct distance of less than 2 km away from the mountain which is clearly in the vision if standing at the street corner of the village. In terms of tourism participation, Baimashi village committee actively seek opportunities by developing folk and cultural tourism which was unique of the village compared to Taiqian and Yingsheng. The village established a Tourism Development Office and organized about 30 families of the village (out of 240 families in total) to transform their old traditional houses into home-style hotels and receive tourists at home by serving accommodation, meals and also by letting the tourist experience their authentic farmer's life as well as selling home-grown fruits to tourist. It was told by the villagers that their average annual income from this tourist reception was around RMB ¥ 3000-4000 per family (about CAD\$430). The researcher saw 16 pomegranate trees planted in the big front yard of the family, the fruit of which, according to the house owner, were mainly sold to the tourists. They even had frequent visitors who came for a second or a third time. The scale of tourism development and the number of villagers involved were not as big as in Taiqian village and Yingsheng village.

Nevertheless, as was told by director of the Tourism Development Office of the village, serving tourism had become a newly emerged livelihood for them and they saw great potential of developing tourism in their village relying on Taishan, and would definitely explore for more possibilities for the villagers to benefit from participating in tourism.

**Lihang village** is located a bit farther ---15 km-- from Taishan compared to the aforementioned three villages. Tourism development in this village did not start until 2002. The village leaders told that they were comparatively remote from the urban area and were economically backward. They told that, since the village sat at the origin of the Huangqian Reservoir which supplied drinking water for the residents of the two cities, Tai-an city, and the city of Jinan which was the capital city of Shandong province, they were limited to develop industry with pollutions and the natural resource of their village was virtually untouched by industrial civilization. Therefore they believe they had the ideal advantage to develop ecotourism<sup>35</sup> in Lihang village. So far 90% of the population (over 300 people as against over 1000 residents as the total of the village population) living in the designated ecotourism area had been involved in tourism services. Taking the year of 2006 as an example, only the entrance fee brought in more than RMB ¥200, 000 (about CAD\$69,000) for them, and the annual income of each family engaged in tourism service was around RMB ¥ 1500-3000 (about CAD\$210-430). The visit to the designated tourism area revealed that ecotourism here was highly seasonal as almost no tourist was found in the area during the visit as it was in January and the cold winter weather prevented tourists from coming. Interviews with two families told that the male family members went to the cities working as migrant workers during this low season and the middle-aged female owner of a house told me she was very much thankful for ecotourism development here for one reason that they earned twice as what they did in the past for a year, and for the other reason that during the high season of tourism reception her husband would come back from the city to work home when they always had a busy and happy time of family reunion. The village committee expressed their strong interest in expanding ecotourism in their place and would hope for government funding or investment for joint further development.

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<sup>35</sup> It should be noted that the term “ecotourism” here used by the village leaders of Lihang does not mean ecotourism in its strict sense, but rather means “rural tourism featured by organic vegetables and fruits”

### **6.2.2.2.3. Local expectations towards tourism and existing challenges**

Both interviews and observations in the four villages revealed some positive and optimistic aspects of tourism undergoing in and around Taishan. However, problems were also exposed at the mean time. To summarize:

1. There are still many villagers hoping to participate in and get benefit directly from tourism while the capacity of tourism in terms of accommodating local participation is limited and the tourism labour market around Taishan tended to reach saturation considering the current operation pattern. Some village people have some ideas to enlarge their capacity to participate in tourism, but their ideas were not approved by the Taishan Administrative Committee mainly in the name of resource conservation. Some discontent and tension could be seen existing among some villagers.

2. Several village leaders reflected that many “outsider non-registered tour guides” (termed by the village leaders) also wanted to enter and get a share of the cake of Taishan tourism. However their nonprofessional behaviors damaged the image and reputation of the locals. They conducted their work secretly since they were not allowed in the mountain. They did not obey the rules nor did they pay tax and management fees. They misled tourist by low-quality interpretations and by directing them to have meals or purchase souvenirs with over-charged prices. Tourist would think they were cheated by the local people and would complain about it towards Taishan Administrative Committee. It was always the local villagers who got blame from the Committee. They did not know how deal with those non-registered tour guides since there wasn't a regulation made to regulate or ban them, and they hope Taishan Administrative Committee could take care of it by regulating the tour guide market and protecting the locals. The research did encounter a couple of those people, one persuading the researcher to buy and burn incense at a small temple-like place on the mountain and threatening the researcher with bad luck when he was refused; another offering very low-price guide with interpretations which was three time less expensive than regular guides.

3. Almost all the village leaders of the four villages expressed their anticipation of more financial support from the Taishan Administrative Committee and upper-level governments. They complained that they had some good projects for which they had confidence to attract investors, but the Taishan

Administrative Committee would not let them do so since those projects were not considered appropriate for development in the scenic zone of Taishan as a world heritage site. For some other projects approved by the Committee, it was difficult to attract investors, while the Committee only approved the projects but did not give them financial support. “Even if we have ideas, we could not do anything without enough start-up capital” said one of the village leaders (interview with villager leader 3).

4. Some villagers including the leaders expressed that they were not happy with the Taishan Administrative Committee because they thought the Committee banned them from developing tourism not solely out of the conservation purpose. One village leader pointed out, “They don’t allow us to develop tourism there and said it would destroy the world heritage resource. I am not convinced of that. Just look at what they are doing. Did the ropeways destroy the world heritage resource? Half of a pinnacle was blown off for building the first ropeway. Did they stop? No. Here comes the second, and the third..... They don’t allow us to use the resource for developing tourism, okay, but why they get outside investors to build a five-star hotel in the protected scenic zone?...Whose Taishan it is? It’s the Committee’s, not ours.... They should come to see how our life is like. We of course love Taishan and want to protect it, but how well can we protect it while we go hungry?” (interview with Villager 10)

In addition to the above problems, vicious competitions were also heard of among villages and among villagers. Apparently tourism was highly regarded as an important means of life-making now by the local villagers living around the mountain. With world heritage designation and conservation, tourism seemed becoming the most effective and acceptable way to practice their old tradition as “Those living near the mountain live off the mountain.”

#### **6.2.2.3. On local involvement and local survival in facing the change**

Local involvement here may refer to involvement in resource conservation of Taishan and involvement in tourism development at Taishan. Qualitative interviews with local villagers and observations in the field actually produced more data about local involvement in tourism than in resource conservation. This is possibly because interviewees were keener on talking about tourism in unstructured conversational interviews through which the research obtained the larger amount of the data, and also possibly because the level of their participation in resource conservation was still in a

relatively low level if positioned in the ladder of participation referring to Arnstein (1969). Therefore, it would be logical that more information about local involvement in tourism than in resource conservation is presented in the following.

#### **6.2.2.3.1. Local involvement in resource conservation**

Coinciding with the quantitative data obtained from questionnaire surveys, the local villagers showed strong willingness and a sense of mission of involvement in resource conservation. Almost all of them expressed their pride of Taishan being designated as world cultural and natural heritage.

However, not so much information was revealed if the villagers were organized or not by the Committee to undertake some work of Taishan resource conservation, nor were they offered regular or occasional training concerning world heritage site resource conservation. A village leader and a couple of villagers interviewed did mention that official documents emphasizing the importance of Taishan resource conservation with detailed rules attached for them to obey were sometimes read and communicated at villager meetings (mostly only CPC members<sup>36</sup> were convened). Judging from this, it could be inferred that villagers were mainly placed in the position of being educated and informed about resource conservation and some of them (CPC members) might be organized for undertaking some conservation work.

More stories were told as how the villagers were voluntarily engaged in Taishan conservation. As was mentioned, villagers usually were the first to notice and the first to be present at the spot when forest fires occurred. They served as efficient reporters or informers of fire accidents. They also assisted the forest inspectors of Taishan Administrative Committee to catch thieves stealing trees or rocks from the mountain. Villagers of Baimashi, for instance, since their village was adjacent to the foot of Taishan, voluntarily planted trees every year at their own cost which reinforce Taishan forest coverage and meanwhile beautify their living environment.

It could also be seen that some villagers did not have high motivation of participating in Taishan conservation. The view of “How well can we conserve Taishan while going hungry” was expressed more than once during the interview, especially from those whose life was impacted by

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<sup>36</sup> CPC member: China Communist Party members



relocation and loss of land while they did not benefit as they hoped from either compensation or tourism participation. It would be likely for the local villagers to ignore their duty toward Taishan once their right to it was deprived.

#### **6.2.2.3.2. Four patterns of local involvement in benefiting from tourism**

Local involvement in tourism was already discussed partially in the previous part in terms of current status of the involvement of the four local villages in tourism. As was indicated, the involvement of the four villagers varied in degrees. In fact their participation in tourism also varied in patterns.

##### **6.2.2.3.2.1. Taiqian village: Villagers as contractors**

In coping with difficulties of relocation and loss of land and gaining stronger competitiveness in tourism, in consulting with villagers, and being approved by the upper-level government (then the Taishan District government of Tai-an city), Taiqian Village Committee decided to set up a village-based tourism company, Taishan Tourist Service Company. Both the management people and the employees were all from Taiqian village. Village leaders automatically became the management team. They sorted out the resource and assets that they owned and got them ready for contracting out. A prerequisite was that eligible contractors must have household registration of Taiqian village. Bidding was conducted through both big-scale and small-scale village meetings. The winners of the bids would become the contractor of a certain tourism business, might it be a souvenir shop, or a restaurant, or even a hotel. Villagers could bid as a single person or in groups, i.e., it could be a single contractor, or a collective of contractors to win a bid. Terms and conditions were attached to the contracting. For instance, if one took the contract of a certain souvenir store, he/she first would have a basic salary offered by the tourism company as an employee of the company. He/she also had to promise an annually increased turnover to the company within the contract years. If the actual revenue went more than the promised turnover, the surplus would belong to the contractor(s); if the actual revenue went less than promised turnover, the contractor(s) had to pay the deficit with their own money. The contractors also had to accommodate certain number of employees depending on the scale of their business. Those employees were employees of the company rather than the contractors,

and they earned basic salaries from the company while they also got bonus from the contractor if business was good, but they did not have to be responsible for the deficit if business was bad. All the employees in the tourism company enjoy pension benefit and medical insurance arranged by the company.

As was told by the general manager of the tourism company, the total employment in tourism through the company (around 1000 people) covered more than half of the village labor force and families involved in tourism took three-fourths of the total of approximately 400 families of the village, while the income from tourism made up to 70% of the total revenue of the village. Tourism had become a vital means for their living. When asked how the tourism money was distributed and spent, the manager said that most of the money was used to pay the salary as well as the welfare benefits of the employees, a part was used for pension and medical insurance for the disabled and aged villagers (male at the age of 60 and female 55 and above), a part was used for paying governmental fees (including tax), and a part was used for children's education (all the school-age children of the village enjoyed free education), and so on. Apparently the entire village life was heavily dependent on tourism.

One question was always of concern to the researcher, particularly during the interviews: How did Taishan Administrative Committee or any upper-level governments react to or support your developing tourism? Answers from Taiqian village was that the committee and the upper-level governments was supportive in terms of certain preferential policies to encourage them to develop tourism as an alternative for livelihoods. Due to various limits, they could not provide much financial support for them which was badly in need at the start-up stage. Funding was always a problem most frequently raised by the villagers and the villager leaders.

#### **6.2.2.3.2.2. Yingsheng village: Villagers as share holders**

Interviews revealed that Yingsheng villagers started tourism-related businesses such as small souvenir shops and kiosks and family-style restaurants in the 1980s, and it was on an individual basis. With the increased tourism demand and the increased competition coming from adjacent villages, such as Taiqian, the village committee decided to organize the villagers to develop tourism

collectively which they believed could bring them more competitiveness. In 1993, with the compensation of land loss from the government being converted into shares, they established Taishan Tourism Industry Company Ltd. The shares of the company were distributed and held in the hands of Yingsheng villagers. The village leader of Yingsheng told that every one of the villager, regardless of age and gender, held a certain amount of shares of the company on its establishment. As share holders, one could get more or less dividends at the end of the year from the company no matter whether they were directly involved in tourism businesses or not. The company was managed by the village committee on behalf of the villagers. They hired professionals from outside and meanwhile trained their own villagers to run the company, and Yingsheng villagers made up to around 90% of the total employees of the company. By the time of the research, the company had a tourist site of its own, Shan-zi-ya, which was adjacent to the peak of Taishan (limited right of use and development), a passenger transport coach team, a parking lot in middle of the mountain together with all the tourism service facilities, a tourism commodity market made up of small shops, three hotels, two restaurants and a travel agency.

The coach and the parking lot with tourism service facilities were under the management of Tianwai Villa Entertainment Company Ltd. which was a subsidiary of Taishan Tourism Industry Company Ltd. This sub-company was established in 2003 dedicating to the development of tourism services while the general company expanded their business beyond tourism to fields such as real estate.

Tourism was still the “pillar industry” for the villager, told by the village leaders and the villagers. Apart from the dividends going to the villagers, a substantial share of the income from tourism were used by the village committee for village collective welfares for the villagers. Some facts were cited by the village leaders in the interviews: monthly life pension (RMB ¥ 80, CAD\$11) were offered to every aged villager (male 60, female 55); tap water, gas, and TV cables were installed for the villagers; asphalt streets and roads were built within the village community and connecting the community out; they purchased pension insurance for the villagers, and “One-Child-Guarantee” insurance was purchased for each family, too; they also set up a village clinic; and they practiced

retirement system for all the company employees; and also, all the children of the village enjoyed free nursery and primary school education.

Some of what the villager leaders told was confirmed by observations in the village. Similar to Taiqian, the village setting was visibly urbanized and villagers seemed quite proud of this and attributed this to tourism development. This could be understandable as “living like the city people” had been a dream for Chinese farmers who lived in poverty and backwardness for generations. Nevertheless, according to one villager, they still celebrated important occasions such as Chinese New Year in their traditional farmer’s way. The researcher was led by a village leader to several families for interviews and little complaint was heard about the village committee, and the villager leaders appeared proud of what they achieved. They particularly took pride in the fact that they did not ask a penny from the upper-level government nor the Taishan Administrative Committee. As asked if they would like to get some financial funding from governments, the answer was “Of course we would. We need it badly, but we understand the difficulty of the upper-level government ... .. and we know we won’t get it even if we ask... ..”

While the upper-level governments including Taishan Administrative Committee were understood in terms of not providing financial support, complaints were heard that the Committee did not give enough policy support to the village in developing tourism. A few villagers expressed their discontent concerning the limitation that Committee placed in the villagers’ developing tourism on Shan-zi-ya which was actually an integral part of Taishan the mountain. Talking of Shan-zi-ya, the researcher asked if a tourism plan had been in place for development. The village leader answered that they had found tourism planning experts from both Tai-an city and Jinan (the provincial capital) to do the plan. However, since there were disagreements between the Committee and the villager on certain issues, the plan was temporally suspended. When asked if the disagreement lay in conservation issues, the answer was “Yes”. However, a village leader said that they did not believe that the Committee constrained them for merely the sake of conservation, and he said “They are out of their own selfish purpose. They are also interested in the cake of tourism now” (interview with village leader 5). In response to the Committee’s constraint, the village leaders expressed their

concern that tourism had become an important means for them to make a living, and that they felt great pressure as the population of the village was growing and there were more aged villagers whose life burden they had to shoulder.

#### **6.2.2.3.2.3. Village committee as a coordinator**

Baimashi did not enjoy the advantage of participating in tourism as Taiqian and Yingsheng did. Taiqian and Yingsheng used to locate in and close at the mountain foot which entitled more privilege of tourism participation to them as a form of compensation for relocation. However, Baimashi did receive some negative impacts from Taishan resource conservation and urban sprawl as was mentioned in the previous sections. In coping with the difficulty incurred, the village also turned their attention towards tourism, taking advantage of the tourism market attracted by Taishan and employing the only but unique resource left to them: folk culture. Approved by the upper-level government, and through the villagers' meeting, a tourism development company was set up by the village committee in 2001 mainly dedicated to developing folk culture tourism at Baimashi village. Different from the other companies of the other three villages in this research, an impression was left to the researcher that the company of Baimashi village was just another title of the village committee --- what really functioned was the Tourism Development Office of Baimashi village committee. The researcher had a chance to conduct an interview with the director-general of the office and obtained rich information and insights from him.

According to the director-general, in the past, villagers who were involved in tourism mainly acted as mobile hawkers selling their local products along the roads where tourists might pass by or at the sites designated by the Committee to Taiqian village and Yingsheng village, and they were often expelled or squeezed out. Villagers responded very positively to the call of developing folk culture tourism in their village. Based on voluntary application, the village committee selected 20 families to start up the folk culture tourism program. The major theme was to let the tourist experience the local folk and culture by living in the farmer's families, having the farmer's home-made meals, and participating some of their traditional living activities. They financially helped (RMB ¥1,000/family, CAD\$140) the selected families to set up their service facilities for catering and accommodation. The

families were required to renovate their houses by keeping the old traditional style. They also organized and funded by the village committee to go out to visit and learn from villagers elsewhere in Shandong province who started folk culture tourism earlier and had rich experience in that. It turned out a success in that by the end of that year, the average income of these families from folk culture tourism was RMB ¥ 5,000 (CAD\$700).

The village committee was said to be a coordinator because, on one hand, they organized the families and get them ready for receiving tourists; on the other, they communicated with the travel agencies and persuaded them to bring tourists to Baimashi village. Once the tourists were there, they were distributed by the tourism office of the village committee to the families. They set the standards for the pricing of food and accommodation and tourists paid to them instead of paying to the families. It was believed an effective way to prevent villagers from overcharging the tourists. After, they would give 80% of the income to the families while the 20% left was almost all paid to the travel agencies as commission fees or as a way of promotion so that more tourists would be brought to the village. The committee itself did not really make much money from organizing this folk culture tourism.

Interviews with those participant families revealed that they were happy with the village committee's arrangement, and that the number of families involved in folk culture tourism had grown to almost 30. The owner of one of the families showed me with pride the old furniture, old utensils and farming tools, and some other personal heritage passed down to him from his forefathers. He told that they did not really value these "junks" until their value was realized through tourism. He also did paper cutting performance to those international tourists and sold the finished work to them. The tourists brought to them fell into two categories: one was international tourists and the other was tourists from cities of southern China such as Shanghai or Guangzhou who saw the village culture as very different. Another villager told that income from catering and accommodating the tourists was just a part of what they earned through tourism, and that more money now **was** actually made through selling local fruits or other products to the tourists. For example, pomegranates were very well known as a local fruit which could not grow in southern China. Some tourists came particularly at the right season, not only enjoying the folk and culture of the farmer's home here, but also brought back with

them boxes of pomegranates as gifts for friends and relatives.

Interviews with a couple of families who did not participate in the folk culture tourism revealed that quite a few families were not happy with the arrangement of the village committee to let those families stay and earn tourism money while forcing them to move to the new community of the village where houses were all built in unified modern style with their old houses being demolished and the land being used by the village for some other purposes. Nevertheless, some families still could benefit from tourism by selling their local products to tourists although they had much less opportunities than those families directly involved. Observations showed that pomegranate trees were planted fully in the villagers' yards as well as in almost the whole village. Some showed more or less discontent with the village committee and complained that the village committee only cared about a small group of people without keeping all villagers in mind, and that the Taishan Administrative Committee did not care about their life.

A village leader told that villager involvement in tourism was still low compared to Taiqian and Yingsheng since the capacity was limited by space and by resources, and that there were more people who could not benefit from tourism. He mentioned the tourism development plan they made with the help of tourism planning experts they invited from the cities, and said, "We would make the best out of what we have, yet we really have so little! ... We have many ideas that were written in the plan, but due to lack of funding, we can only develop part of them .....we need go step by step" (interview village leader 8). The majority of the villagers interviewed seemed unclear when being asked about the plan. When asked whether they were consulted concerning the plan, only two of them said "yes", and both of the two villagers were from the families involved in the folk culture tourism program.

The village leader also revealed that they would not give up their effort in taking advantage of this world heritage site. Folk culture tourism in their village was good but not enough. They were planning a very grand project --- they planned to build a "Taishan Cultural Exhibition Garden" which would cover an area of 8 square kilometers, and which, in the form of miniature landscapes, would provide Taishan visitors an opportunity to know and understand the extensive and profound cultures

of Taishan which was a typical representation of the Chinese culture. This project had been approved by the Taishan Administrative Committee and had found an international investor. Negotiations were underway concerning some details of construction, and it was expected that the garden would be completed and open to public by the end of 2010.

#### **6.2.2.3.2.4. Village committee as a partner with investor**

Located a bit farther from Taishan compared to the other three villages, Lihang village did not encounter the same problems of relocation and land loss incurred by world heritage designation of Taishan and its conservation. As one of more than 20 villages located in the jurisdiction of Taishan Administrative Committee and with a relatively close distance (15km) from the world heritage mountain, Lihang village also actively seek opportunities to participate in tourism through which they hoped to improve their living condition and alleviate the poverty of the village.

Interviews with the villagers and leaders revealed that the village used to be very poor and the family average annual income was less than RMB ¥800 (CAD\$110) before 2003. Their location close to a big reservoir which supplied drinking water for residents of two big cities restricted them from developing industry. The village committee and the villagers thought about the idea of developing ecotourism, but they were financially too weak to start it and they could not get substantial support from the upper-level government. Under such circumstances, they decided to attract some outside investors. They succeeded in finding one who would like to invest to build tourism infrastructure and facilities, such as roads, and a reception centre. For development purposes, they agreed to set up a ecotourism development company jointly with the investor holding 51% and the village holding 49% of the company shares. The two parties divided benefits based on the shares they held of the company. So far, the investor had invested RMB ¥800 million(CAD\$110 million) and the total investment of the tourism company was RMB ¥1, 100 million (CAD\$150 million).

The village leader told the researcher that they set up a ‘Picking Area’ for tourists to pick up the fruits and vegetables they like by themselves in the fields which was very much loved by tourists who can experience some farmer’s work and meanwhile take fresh unpolluted fruits and vegetable back home after the trip. It was told by the village leader that the village committee used a part of the



income from tourism to pay the farmers from whom they rented the land to set up the Tourist Picking Area and almost the rest of the income was used as follow-up investment to improve the tourism infrastructure and facilities.

It could be noted that those who benefited from ecotourism developed in Lihang village were only a small part of the total population of the village. The village committee apparently did not think about or hadn't had the time yet to think about the balance issue of tourism benefit. What they thought most for the moment, as one of the village leaders put it, was to "find effective ways to expand the scale and consolidate the market, and sustain the ecotourism in our village." (focus group interview with the village leaders) As for the question "What does it mean by saying to sustain ecotourism", the answer was to guarantee the steady increase of the numbers of tourists who would be attracted to visit the place, and to guarantee the increase of the income generated from ecotourism so that fund could be available for re-investment in and healthy operation of ecotourism in the village. This could be understood as the outside investor's emphasis on investment return. In response to the question whether they thought about the way to let more villagers in Lihang benefit from this ecotourism, the village leaders answered that more opportunities would definitely be available for more villagers to get involved when the scale and market got expanded. They admitted they recognized that long-term imbalance of tourism benefit distribution would produce discontent and conflicts which would in turn impair the sustainability of tourism in their place. However, so far the village leaders were primarily concerned about how to use the share of profit they got to pay the villagers from whom they rented the land by IOU notes at the beginning, and to initiate their plan of growing high-return vegetables and fruit trees which they saw a great potential market in the coming years and which could be well complementary with their ecotourism development.

The question whether they had a plan done before they developed tourism got positive answers from both the village leaders and the villagers living in the tourism area. They invited tourism experts to make the plan and villagers relating to this tourism development project, especially those senior villagers, were invited to participate in the planning by give their ideas and suggestions, some of which were taken and ultimately written into the plan. Furthermore, the so-far existent tourism

development was the result of the strict implementation of the plan. The only problem was that they could only implement the plan step by step due to lack of funds. Being asked if they felt the necessity of revising the plan based on the experience of the implementation they had done, they said they didn't. The researcher was promised a copy of the plan during the interviews when they said they didn't have one at hand but could get one to the researcher later. However, the researcher's later requests for the plan were denied with varied reasons.

Interview with villagers in Lihang village revealed that they were full of enthusiasm and high expectation of participation. They were positive towards tourism development in their village and they all said no when asked whether they felt annoyed by tourists and felt their life was disturbed by tourists. "We all hope that tourists would come. We cannot wait to welcome them. How could we feel disturbed?" (interview with villager 18). They expressed their friendliness towards tourists and hoped that tourists could have a pleasant experience there and would like to come back again.

The answer to the most pressing issue they currently faced with regard to tourism was the lack of funds. They hoped that governments could consider their situation and could give them some substantial financial support. The village head said that they recognized the limited capacity of ecotourism despite of the idea of expansion, and that it would not be realistic to have all the villagers get involved in tourism. Therefore, they were thinking about setting up a new project named "Eco-planting" --- growing high-income vegetables and fruit trees which was expected to bring in more income for the village. This will be further dealt with in the following section, "Local efforts other than tourism for survival".

#### **6.2.2.3.3. Local involvement in decision making**

Local involvement was identified in two levels as involvement in benefit sharing and involvement in decision making, and in a top-down development context such as China, the sharing of benefits is likely to precede involvement in decision making (Wall and Wang, 2005). The situation in the four villages under study proved this notion.

Taking Taiqian and Yingsheng for example, both of them exhibited high percentage of villager participation in tourism development, and this participation has reached a stage of saturation to some

extent. Villagers in Baimashi and Lihang were also very enthusiastic about involvement in tourism though the capacity was limited. However, data from both the survey and the interviews revealed that villagers had a low rate and somewhat low motivation of participation in decision making. A villager of Taiqian told me about the relocation they experienced, “We had no alternative. We were just doing what we told to do, not what we wanted to. ... Yes village meetings were held, for passing down the order, not for asking for opinions ” (interview with villager 9). A village leader also told that relocation was compulsory and that no one could go against it. What they could do was to implement the spirit of the higher level governments and they were told that was just compulsory for conserving this world heritage site and they had to let the villagers buy it. What else they believed they could do was to do as good as a job of arranging the life of the relocated villagers, to implement the compensation policy, and to think over alternative livelihoods in coping with the change and surviving.

To the question whether they were consulted or asked for opinion with regard to planning for Taishan heritage conservation and tourism development, the answers of most of the villagers interviewed were negative and that probably the Taishan Administrative people would organize meeting of the village head and the CPC secretary of the village committee<sup>37</sup> and asked them for opinions. Some villagers expressed that even they were given a chance to get their voice heard, it would be unlikely that their ideas were taken as was told by previous experiences, and it did not make much sense to go in for that formalism. Some villagers’ response was that planning was the job of those “upper-level” people’s and the experts, not their business to care for. A top village leader admitted that there were times when he was convened with his counterparts of other villages by the Taishan Administrative Committee for consultation relating to planning issues. They were asked to express that they would go in agreement with policies and strategies made by the Committee and would provide support as their duty by carrying out those policies and strategies in their villages, and meanwhile, he also expressed that he had to communicate and negotiate a lot with the Administrative people on issues of compensation, tradeoffs, resource access for tourism development, which were all

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<sup>37</sup> Like the other units and departments of Chinese society, the highest position of a village committee is the CPC secretary and the next to it is the village head, followed by several other village leaders in the associate positions.

those concerned by the villagers. “I feel the obligation to speak for the villagers, and that’s what I was elected for. I don’t want them to poke me in my backbone.”( interview with village leader 3). However, complaints were also heard from some villagers that these villager leaders were more like trumpet and watchdog of the Administrative Committee and they did not really speak much for the villagers.

Baimashi Village and Lihang Village, on the other hand, exhibited a relatively higher rate of participation in decisions which were mainly made by the village committee rather than the Administrative Committee.

More villager participation in tourism decision making was seen in Baimashi village than in Taiqian and Yingsheng. The director-general of the Tourism Development Office told that the folk-culture theme tourism was the brainchild of the village leaders, senior villagers together with the experts they invited at the very beginning. Villagers also proved that during the planning process, quite a few of them were asked for information and opinions, and their responses were considered and some of their ideas were adopted and was written into the plan. They were also consulted in terms of the form of how to get involved and to some extent they were made free of will to participate or not.

It was a similar case with Lihang village. Like Baimashi village, they also worked out a tourism plan of their own with the help of tourism experts invited from the cities, and substantial villager involvement in the plan was found. For instance, according to a village leader, a questionnaire survey was conducted by the planning team among the villagers living in the designated ecotourism area for information and opinions during the planning process, and qualitative interviews with the villagers were also done mostly in their houses for collecting further responses, many of which were considered, adopted, and reflected in the written plan. Villager interviews also indicated that they showed high enthusiasm towards this involvement. They were happy to be informed through the surveys or interviews, were willing to contribute knowledge and ideas and were happy when their ideas were valued by the planners.

To sum up, villagers’ involvement in resource and tourism decision making is still at a low

level. They were roughly in between the “informing” and “placation” stages if put in Arnstein’s “ladder of participation”, and they did not yet have the real power to affect the outcome of the process (Arnstein, 1969). Participation in decision making in terms of heritage resource conservation was even lower than of tourism development. Almost no positive responses were heard from the four villages about participating in making decision concerning Taishan resource conservation. This is likely because resource conservation of Taishan is under strict control of Taishan Administrative Committee which could give little space for villager participation in related decision making. This power of strict control is endowed by upper Chinese government due to Taishan’s importance in the country as well as in the world mainly for its designation as a UNESCO world heritage site.

There are relatively more positive responses about participation in tourism decision making than in resource as was presented above which was mainly in the form of providing information and opinions, and some of the ideas were adopted. However, it should be noted that villager involvement in tourism decision making is much lower in Taiqian and Yingsheng than in Baimashi and Lihang, although the former two exhibited a higher coverage of villagers sharing benefit from tourism. This is probably because villagers from Taiqian and Yingsheng mainly did their tourism-related business within the scenic area of the world heritage site where probably both the Taishan Administrative Committee and the villages believed decisions were supposed to be made by Committee, while villagers of Baimashi and Lihang did their tourism within their village territories where they had more power to decide.

#### **6.2.2.3.4. Local surviving livelihood efforts other than tourism**

Data obtained from the interviews and observations in the field show that heritage tourism mitigates somewhat the contestation and conflicts caused by UNESCO World Heritage designation of Taishan by providing business and job opportunities and income sources for the local villagers who were impacted most by this designation. However, not to mention the negative consequence and new problems tourism may bring about, tourism is apparently not enough to meet the livelihood needs of the overall local population whose life was more or less impacted by the world heritage conservation. Therefore some local efforts other than tourism were seen by some of the villages and villagers for

surviving the change.

**Yingsheng:** Tourism made up an important part of the income source of Yingsheng villagers, but it showed its inadequacy in supporting the livelihoods of the whole village due to its limits such as seasonality and vulnerability. For instance, told by a village leader, during the SARS period, the total revenue of the village dropped by almost 70% and they had an extremely hard time to maintain the healthy run of the village life. That made them realize that they cannot put all the eggs in **one** basket and they started to find ways other than tourism to support their livelihoods. Considering the limited resource they had as well as the overall economic situation of the country, they decided to develop real estate. Meanwhile they also set up some services targeting at serving the daily life of Tai-an citizens. All these business practices were put under the umbrella of Taishan Tourism Industry Company Ltd and most of revenues were submitted and redistributed by the limited company. It could be considered a collective and company effort, and villagers could always benefit with the company shares in their hands.

**Taiqian village** did similar things. They expanded their business beyond tourism and set up a Utilities Equipment Installation Center and a Water Supply Center and a supermarket which targeted the citizens of Tai-an City and the governmental units as well as the business companies located around. Again this was operated in contractor nature, and not all of the villagers could benefit from those businesses. The village head told that initiation of these livelihood efforts needed approval from the upper-level governments, and start-up funds were obtained from the village committee's financial budget as well as fund-raising among the villagers who wanted to participate, while they did not get any financial support from upper-level governments.

Some villagers in Taiqian used their own houses or back yards to run small home-style restaurants. This was an unorganized practice of villagers to seek alternative livelihoods. Observations revealed that there was a small street about 400-500 meters long lined up with about 20 to 30 small restaurants at two street sides. This street was at the edge of the village and was less than 1km away from the starting point of the climbing route leading to the top of the mountain. Interviews with several restaurant owners told that some tourists would go to have meals in their restaurants after

or before their climbing the mountain. However, more of their customers and especially those returning customers were residents of Tai-an city as well as residents from the adjacent cities who came just for enjoying the local farmer-style meals they serve. Being asked whether they had good business or not, one owner said it was okay while two others said it was good in summer while not so good in the other three seasons especially in winter when most restaurants along the streets were simply closed. It was seen during the researcher's trip on a mid June evening that the business was really good with people drinking and dining out in the yards instead of inside the houses. However, the trip in December could hardly see any visitors in the same street. A villager whose restaurant was closed during winters told that it was very cold in winter and he could not afford the electricity or other facility costs to keep the restaurant open with not as so many people to come as in summer. The restaurant owners told that they did not get any support from either the village committee or Taishan Administrative Committee, but they did not have to submit any profit they earned except the tax plus a certain amount management fees.

The researcher saw a small-scaled artificial lake nearby the food street where there were some charged tourism entertainment facilities such as boats and a couple of small-scale activity quarters dedicated for children. A villager told that this lake garden was built by the villagers under the funding and leadership of the village committee. One of its functions was to attract some of the visitors to Taishan to spend their money there, the other function was to provide an entertaining place for the villagers. However few people, neither the visitors nor villagers, could be found playing on and around the lake in June when was supposed to be the high tourism season.

Close to the lake garden was a home-style hotel named "Garden Hotel", It was a two story building with about 8 guest rooms and a front yard where some local trees and flowers were grown. This building looked very striking among the other building in the village. The owner of the hotel however was not a local villager. He told that he bought the house from the original owner who was a local villager and whose family moved into the city. He renovated and expanded the house and transformed it into a small hotel. The price of the hotel room was low (RMB ¥30/bed/night in a 3-bed room, about CAD\$4). He said they mainly received college students and pilgrims from other

rural areas in or out of the province, and the occupancy rate was high during high seasons. Being asked whether the local villagers were unhappy with his operation in the village as an outsider, he said, "I bought the house, I do my own business. I obey the national laws and the village rule. Why they should be unhappy? By the way, 4 of my seven employees are from the local village." He also told that not all of the restaurant owners were locals. Some of them rented the houses from the locals just for summers to do the restaurant business.

**Baimashi:** Folk culture tourism in Baimashi only solved livelihood problems for a small part of the village population. More villagers were faced with losing their lands and losing their traditional means of life. According to a village leader, the village committee searched for various solutions. They organized some of the villagers to undertake "Eco-planting", and "Eco-breeding". Eco-planting was to grow plants with high-economic return in the very limited field left to them, such as pomegranate tree, tea tree, herbs of Chinese medicine, etc. Eco-breeding was mainly focused on breeding a special red-scale fish (*Varicorhinus tracrolepis*) which was a unique and rare specie only found in the water area of Taishan and was very popular as a local traditional Chinese dish. They built a reservoir for a breeding base jointly with the *Varicorhinus tracrolepis* Research Center of Tai-an city, and the successful breeding practice turned out not only a remarkable scientific break-through but also remarkable economic income for the village. The most impressive move for Baimashi village was that they invested in the name of the village committee in Xinjiang, north west of China by renting 20,000 mu (=1,333.34 hectares) land and sent their villagers there to do farming as well as some other agriculture and animal husbandry development. In April 2004 they sent their first batch of people (9 families with voluntary enrollment) to Xinjiang to work on 500 mu (=33.33 hectares) land as contractors. There were over 40 families sent to Xinjiang by the time of the research. When asked about the outcome of the project so far and the responses from those expatriate villagers, the village leader's answer was "Positive!". He told that not all the villagers sent to Xinjiang were living on farming. Instead, the village set up an agriculture and animal husbandry development company in Xinjiang which for the moment were mainly engaged in setting up a Xinjiang date orchard of 1,000 mu (66.67 hectares), and a sheep breeding farm with the land they rented. He also told that their goal



was to develop into a multi-functional body entity covering farming, sheep breeding, feed processing, meat preservation and processing, and so on. When asked where did they get the fund to start and continue this, the village leader told that a small part was from the village committee finance while a big part were bank loans.

**Lihang:** Lihang village was located next to the biggest reservoir of Shandong province which supplied the drinking water for citizens of both Tai-an city and Jinan, the capital city of Shandong Province. Due to this special location, the village was strictly limited to develop industry while the other villages were encouraged to develop industry in the late 1980s and 1990s. Lihang village thus became one of the poorest village in Tai-an. They had to live on the government relief which was but a drop in the bucket to solve their problem. Ecotourism made a source they turned for to alleviate the poverty. According to the village leaders, ecotourism, however, was just one encouraging means which it could only help a small population of the village to get rid of poverty but could not solve the poverty problem of the whole village. Nevertheless, they were helped to see a more promising opportunity thanks to ecotourism. They found that visitors were very interested in the vegetables grown in the backyard to the villagers' houses where they would stay for the nights. The money that villagers earned from selling their backyard vegetables turned out more than that they earned from catering and accommodating visitors. Visitors believe vegetables in their village were definitely healthier than what they bought from the market in the cities as the later tend to bear more chemical fertilizers and pesticides which would be strictly forbidden in this area in case of polluting the reservoir water. In fact, as a village leader told, those visitors living in nearby cities introduced their friends to come to purchase vegetables. Some villagers even had constant customers. Many villagers outside the tourism zone also benefited by selling their vegetables to visitors even though they did not have opportunities to provide tourism services for the visitors as those villagers living in the tourism zone. "This made the cons of our special location into pros. The good thing is that vegetable growing with greenhouse technology is much less seasonal than tourism. We see a huge potential in that." as was expressed by a village leader (interview with village leader 2). He also expressed their hope for government support, more specifically, financial support. When asked why not inviting some

investors to jointly develop that vegetable project as they did with ecotourism, he said they wanted more self-control and wanted the money stay in the hands of the villagers rather than flow out of the village.

#### **6.2.2.4. Summary**

Local villagers expressed their strong and deep feelings towards Taishan which they took as their mountain mother and their asylum god. They expressed their support for Taishan conservation both verbally and with actions such as voluntarily joining the fight against forest fires and obey the policy of relocation for conservation purpose. However, villagers also reflected the problems and challenges they had to face because of the conservation of Taishan as a world heritage site. The biggest problems are relocation and loss of land due to the conservation of the world heritage site, and the problem of their livelihood loss or change resulted by the former two problems. Tourism developed in and around the site became an important alternative for sustaining the villagers' livelihoods. All the villagers interviewed showed their strong positiveness toward tourism and their high enthusiasm of participation. The four villages in the research demonstrated varied degrees and patterns in terms of participation in tourism details of which were discussed in this section. Challenges facing the locals and local anticipations relating to tourism were also analyzed based the qualitative data obtained from interviews and observation. Local perspectives on their involvement in both resource conservation and tourism were also presented in the last part. It can be concluded that local involvement in tourism is much higher than in resource conservation, and local involvement in benefit sharing of tourism is much higher than their involvement in decision making. Overall, local involvement in decision making was generally low in all the four villagers although each village demonstrated its unique characteristics.

#### **6.2.3. Perspectives of the management people**

Qualitative data obtained from interviews with the resource management people and the tourism management people are presented and analyzed in this part. Perspectives of the tourism researchers interviewed were categorized into the group of tourism management people as they tended to reflect more out of a tourism management perspective while they tried to maintain

academic neutrality between tourism development and resource conservation. Data of relevant observations were also included into the analysis, and some relevant secondary data were also referred.

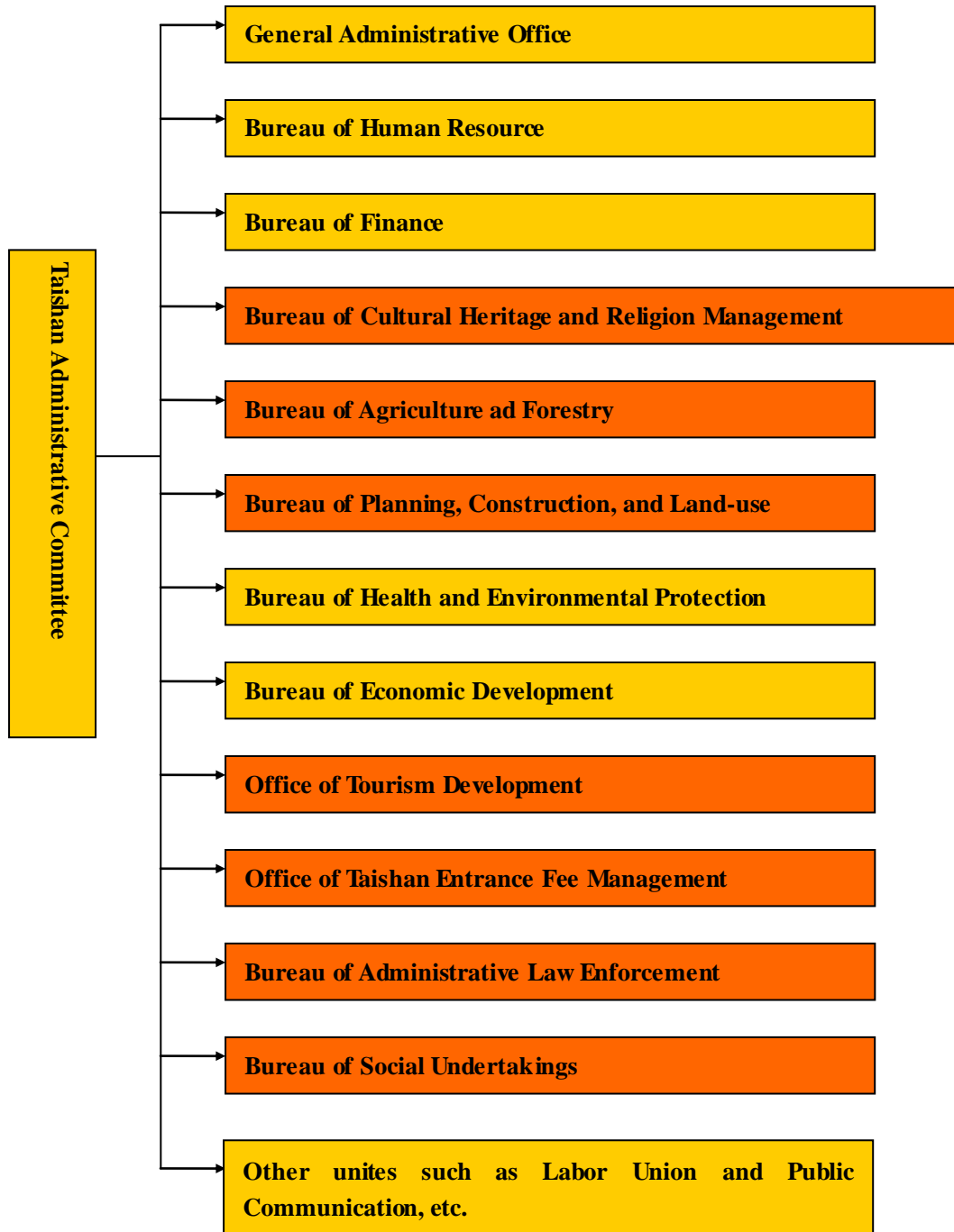
#### **6.2.3.1. Resource management people**

The document of the UNESCO designation of Taishan specifies that the responsible administration of Taishan is the Administrative Committee of the Scenic Beauty and Historic Interest Zone of Mt. Taishan of the City of Tai-an, Shandong Province (thereafter, the Administrative Committee). The Administrative committee naturally plays a key role in conserving the heritage resource of Taishan and it also controls tourism development at the mountain. Qualitative data were mainly generated from the seven interviews with 2 resource management officials (one received a follow-up interview) of Taishan Administrative committee, 2 management personnel who worked in a subordinate unit of the Committee, and 2 municipal government officials who used to worked in the Administrative Committee.

##### **6.2.3.1.1. On Taishan heritage resource conservation**

Although the Administrative Committee of the Scenic Beauty and Historic Interest Zone of Mt. Taishan is one of the Tai-an municipal government agencies like Tourism Bureau and the other bureaus, it is actually a mini government with a complete set of organizational structure with strong and substantial executive powers. For instance, it has its own Bureau of Finance, Bureau of Human Resource, Bureau of Economy Development, Bureau of Planning, Construction, and Land-use. It even has a Administrative Law Enforcement Bureau with a enforcement unit which has the substantial power to actually enforce the laws and punish the offenders. As a municipal official put it, considering the special position of Taishan as a world heritage site, the Taishan Administrative Committee governed this scenic zone in a relatively independent way from Tai-an Municipal government although to which the scenic zone was officially subordinated. It had the power and capacity to take charge of almost all the affairs within the scenic zone ranging from resource conservation to population management.

**Figure 6.1. The organizational structure of Taishan Administrative Committee:**



**Source: Taishan Administrative Committee Official Website<sup>38</sup>**

<sup>38</sup> <http://www.mount-tai.com.cn/jigou.htm>; and <http://zwgk.mount-tai.com.cn/zwgk/html/jigouzhenlei/index.html>

According to the resource management official from the Committee, they took Taishan heritage resource conservation as their primary mission, and all their work revolved around the conservation of this world heritage site. They had several major bureaus in the Committee to take charge of the conservation affairs. For instance, Bureau of Heritage and Religion Management is responsible for the historical, cultural and religious issues relevant to Taishan as Taishan was a very important religious mountain accommodating Taoism, Buddhism and Confucianism, and hence a sacred worship place for both the emperors and the common people. Nowadays there are still a lot of pilgrims of varied social levels coming to worship at Taishan each year. Conserving and managing those temples as well as other historical relics in the mountain becomes an important task of the Committee.

The Bureau of Agriculture and Forestry is responsible for the implementing the relevant policies and regulations. It is in charge of planning and managing the gardens, forest, and forestry production within Taishan Scenic Zone. It is also in charge of the agriculture issues in the zone. Bureau of Planning, Construction, and Land-use is responsible for implementing policies and regulations relevant to planning, construction, land-use, and resources (except cultural relics and forest). It is in charge of developing the master plan of Taishan scenic zone as well as various plans relating to the scenic zone such as detailed control plan of the zone, land-use plan, mineral resource conservation plan, and other special plans; and it is also responsible for organizing to implement these plans. Since Taishan Scenic Zone Administrative Committee is entrusted by World Heritage Center and levels of Chinese governments to take custody of Taishan, Bureau of Planning, Construction, and Land-use is the specific unit of the Committee to do this work. It has the power to grant administrative licenses in relation of planning, construction, land-use, and resources. It also undertakes work such as in-zone construction project bidding, the construction projects budget, and supervision of the construction, etc. The monitoring of geological disaster and conservation of geological relics is also under its responsibility. It is actually the most vital and powerful bureau of

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Taishan Administrative Committee. The bureaus of the Committee all resort to the Bureau of Administrative Law Enforcement for help with implementing their policies and regulations as the latter has the legal enforcement power.

The Bureau of Administrative Law Enforcement was established under the Taishan Administrative Committee in 2004 with the approval of Tai-an municipal government and in response to the need of unifying management and regulating market (Taishan Administrative Committee, 2007). Taishan Administrative Committee thus was endowed the substantial and concentrated law enforcement power. This was the first case in the management history of world heritage sites in China. For example, as was told by a management personnel, they effectively removed 21 villas at Tain-Wai-Cun which was considered as illegal constructions as against Taishan world heritage conservation. They also could take efficient measures to restrict and punish those who violated the rules of cultural and natural resource conservation of the mountain, for example, cutting trees and stealing rocks<sup>39</sup> from the mountain, or leaving kindling material or simply littering in the mountain. To sum up, the resource conservation task of the world cultural and natural heritage site of Taishan is specifically undertaken by the four bureaus of Taishan Administrative Committee: Bureau of Heritage and Religion Management, Bureau of Agriculture and Forestry, and Bureau of Planning, Construction, and Land-use, and Bureau of Administrative Law Enforcement.

Managers from the Committee told that they established Taishan information database for the purpose of both conservation and tourism, and this data base was partially connected to official Taishan information website and available to the public. They set up a heritage information centre and a tourism information and complaint centre. However the researcher's observation showed that tourism information centre was not efficiently used by the tourists while the heritage information centre was not actually open to visitors yet. For both conservation and tourism service purpose, they also put many sign board

The Committee people said that they strictly follow the requirements of the World Heritage Centre in some details such as placing many wood-made plates in the mountain for purposes of

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<sup>39</sup> Rocks from Taishan are quite expensive when made into tourism souvenirs which are called "Shi-Gan-Dang", being listed in 2005 as National Intangible Cultural Heritage for the sacred and auspicious meanings they bear.

directing, educating, interpreting, and providing regular training to the management personnel. They also distributed documents to the village committees for them to use to educate the villagers and raise their conservation awareness.

As was told by one of the Committee officials, they put significant effort in updating the conservation master plan the work of which started from 2004 and finished in 2006, and was expected to put to use in 2007. Once the new plan was approved by the State Council, it would replace the old plan which was developed in 1987, amended in a small scale in 1993, and was still in use by the time of the research. The researcher obtained the 1987 plan and a major part of the 2007 one. A detailed analysis and evaluation of the plans will be presented in the next chapter.

When asked if they had a unit for monitoring and evaluating their conservation work, a committee official told that they did not have an independent unit particularly for this purpose, but an annual internal evaluation was made for each of the bureaus and units of the administrative committee, and the Committee leaders would report to the upper-level government in charge.

Being asked about the unavoidable issue of the ropeways, an official told that this topic had always been controversial. It was controversial at the very beginning of its construction and debate had never ended. He expressed that the first ropeway was built for political purpose and the idea of building was from the central government and was beyond argument, while the second and the third were really the outcome of compromise among stakeholders. Yet the good thing was the latter two ropeways were built at the back of the mountain and did not damage the resource and the views as the first one did thanks to the proper planning and the selection of location.

#### **6.2.3.1.2. On Taishan tourism development**

An official of the Taishan Administrative Committee relayed that tourism was the second primary task they were engaged in as tourism was believed very positive to heritage promotion and resource conservation, and to the economic development of the scenic zone as well. They not only took the responsibility of heritage resource conservation of Taishan, but also had to take care of the life of the population (around 40,000) living in the scenic zone. Tourism was particularly meaningful for the latter. Since tourism was advocated by the World Heritage Centre for promoting the world

heritage site to all humankind, it would be wise for them to take tourism positively, “to base tourism in the heritage resource, and to nourish the heritage resource with tourism”(Interview with a Taishan Administrative Committee official). He took pride that the committee had a Tourism Development Office of its own. Its responsibilities were specified as: developing and implementing guidelines and policies relevant to tourism in terms of destination management and marketing; organizing and managing events and festivals in Taishan Scenic Zone; taking charge of administrative licenses for tourism businesses within the scenic zone; undertaking the communication and exchange with national and international famous tourism organizations and agencies; managing and supervising the service quality of tour guides, travel agencies, and tourism business within the scenic zone; undertaking the tourist service/information and complaint centre and the tourism safety management within the scenic zone, and so on.

In addition to this, they also had an Office of Taishan Entrance Fee Management which was independent of the other offices and bureaus of the Committee. As for the income from entrance fee, it was told that a major part (around RMB ¥70 million each year, about CAD\$10 million) of the income should be submitted to the municipal government as one of the annual financial income sources of the municipality while the remainder of the entrance fee income was distributed by the Administrative Committee. The income from the entrance fee was said to be mainly used in maintaining the tourism facilities on the mountain and as rewards and bonus for the management personnel of the Administrative Committee.

During the field trip the researcher was informed that the Administrative committee was thinking about organizing the work of developing a tourism development master plan for Taishan Scenic Zone. A follow-up phone call to the interviewee at the end of 2007 confirmed that this project had officially started in September, 2007 and that a national-famed multi-disciplinary planning expert team won the bidding as the successful tender and the plan was expected to completely come out and put into implementation by the end of 2009. Talking about this, again, they were quite proud of the fact that they were capable of taking care of the tourism affairs in the scenic zone without resorting to help of other governmental department(s) outside the scenic zone. The researcher asked why they did not join hands with the Tourism Bureau of Taishan District and the Tourism bureau of Tai-an city, they seemed unwilling to touch on this topic and simply expressed that they had enough capacity of doing the work well by themselves and believed it would be more efficient by doing on their own.

#### **6.2.3.1.3. On local involvement in both tourism and resource conservation**



The Bureau of Social Undertakings of Taishan Administrative Committee was designated to take charge of the administration work of the population within Taishan Scenic Zone. A management person interviewed told that with the readjustment of the boundaries of Taishan scenic zone, the population within the scenic zone was around 40,000. Among them, villages like Taiqian, Yingsheng, and Baimashi were the most closely related to Taishan conservation and tourism development as many of the villagers used to live in and close around the mountain and their lives were indispensable from Taishan even though most of them were relocated due to conservation purposes.

In accordance with the survey results, management officials and personnel interviewed expressed their positive attitude towards local involvement. As an official stated, “We take the responsibility to manage Taishan, but Taishan belongs to the country and the people.” He agreed that local people should benefit from the conservation and development of Taishan, and should get involved into these practices. However, as how to get the locals to benefit from and be involved in Taishan conservation and development, he did not talk much. He admitted that they did not think this topic much before, but he also maintained that they did consider the livelihood change of the locals and support and help them sustain their life by various means. He mentioned that they had quite a few preferential policies to help those local villagers whose life was impacted by relocation to rebuild their life and secure their livelihoods. For example, they designated that only Taiqian villagers had the right to operate tourism related business in the mountain of Taishan as more than half of the relocated population was Taiqian villagers. They also granted Yingsheng Village the operation right of the tourism coach group and the parking lot in the middle of the mountain as well as the Tai-wai-cun Square at the foot of the mountain. He believed that these protective policies were effective in helping those impacted villagers to get involved in Taishan tourism and not only sustain but even better their life. In response to some villagers’ complaints that they earned less than they did before moving out of the mountain, an official said that these villagers who used to live in the mountain before were involved in tourism on an individual and unorganized base, which might bring in more money for a small number of them but the majority of the villagers cannot benefit from it, and plus it was very difficult to manage them under that situation. The collective involvement under the leadership of the village committee which was actually taken as to some extent the smallest administrative unit in the administrative structure of Taishan Scenic Zone Administrative Committee was believed much more effective and easy for management, and the point was, as he pointed out, that many more villagers could benefit from tourism and the risk of seasonality of tourism jobs were reduced.

When talking about the problems and challenges concerning local involvement, the officials and management people presented the following facts and perspectives.

**Villagers’ low awareness and capacity of participating in conservation.** In terms of heritage

conservation, villagers were believed to have low conservation awareness. More than half the cases of violating forest fire rules and indiscriminate felling were found to be committed by local villagers. Due to limit of education, they were not only low in awareness, but also low in participating capacity in conservation. The committee hired some seasonal forest inspectors from the villagers and it turned out quite a few of them were not qualified in their work. Being asked whether they had provided training for villager participation in conservation, the answer was that they were not capable of providing wide-scale training for villagers due to funding insufficiency, although they did organize workshops and relevant meetings among village leaders training them with heritage conservation policies, regulations, and knowledge so that these villagers could pass what they learned through village assemblies. The officials expressed that they would think about making great effort in guiding and helping the villagers to participate in heritage conservation.

**Tension caused by relocation and demolition.** It was told that most of the villagers were supportive of relocation, while there were a small number of people did not cooperate. The most typical conflict was that they asked more compensation than the Committee could afford. “We do all the compensations strictly according to the relevant national regulations. ... Some villager threatened to kill himself we dared to touch his house; some would come to sit in our offices all day and insist that they would not leave until they were promised a better solution than they were offered. That seriously affected our normal work” (interview with a manager). Demolition problems were even worse than relocation problems. The Committee received national financial allocations for relocation so that relocated villagers could get a certain amount of money to rebuild their houses. However, some buildings were built within the scenic zone without the permission of the Administrative Committee and seriously violated the heritage resource integrity. Structures were built either by villagers individually and collectively or by some outside investors mainly for business purposes. These buildings were considered illegal and should be demolished without any compensation. These buildings became a challenge to their management. Many of them were judged as illegal and the owners were told to demolish them years ago but the demolition project were just unable to be implemented due to various reasons among which a big reason was they did not had the legal enforcement power. Thanks to establishment of the Bureau of Administrative Law Enforcement which empowered the Committee which now had its own law enforcement ranks and could handle the demolition issue at their own will within the guidelines of the state regulations. A personnel told that it took years for them to make effort in vain to demolish those Tain-wai-cun illegal villas till the establish the Law Enforcement Bureau thanks to which problems was solved within several months. However, conflicts existed, and they got a lot of complaints.

**Participating in tourism.** Almost all the interviewees believed that the Committee was very

positive about local villagers participating in and benefiting from Tourism. “We made preferential policies for those impacted most due needs of Taishan world heritage conservation,” said an official, “For instance, we allow those Taiqian villagers who were relocated out of the mountain to run tourism businesses as the only valid ones at designated places in the mountain, and protect them by restricting people of other villages to do business on the mountain. They have made big money from tourism at Taishan and we only charge them a certain amount of management fees.” (interview with resource management official No.1)

However, local villagers were considered a source of problems in terms of heritage conservation and tourism management. The first problem raised by the interviewees was that these villagers were too money-driven as they did business on the mountain which was reflected as:

1. Over charging the visitors during the high season. When the mountain was over crowded, visitors would find it difficult either finding a hotel bed or restaurant table or purchasing souvenirs. They even had to queue for a long time to use the washroom as was complaint by a visitor. In this case of seller’s market, some villagers were found to overcharge the visitors for which the Taishan Administrative Committee received a lot of complaints.

2. Not enough cooperation with management. For example, in order to make more money, some business owners refused to relocate for the need of implementation of heritage conservation plan, and they even threaten the law enforcement officials with killing themselves. Some hotels and restaurants did not take care of their garbage and sewage properly; some shops or restaurants could not meet the standards during health and sanitary checks and turned hostile when they were temporarily closed for education or financially punished which they believed had interfered with their business and made them lose money. Some of them were reluctant to pay management fees which was taken as the exploitation of the Committee.

3. Conflicts among villagers for economic benefits. Some villagers who live a bit farther from the mountain but still within the jurisdiction of the Taishan Administrative Committee, although they did not enjoy the privilege to do tourism-related business on the mountain as a compensation for relocation, tried to manage their way into the tourism business on the mountain. They became those mobile hawkers and illegal tour guides as mentioned by a Taiqian village leader in the interview, and these people did their business secretly which made difficult for the Committee to regulate and manage them. According to a management person, for one thing, these “guerrillas” disturbed the normal business order of Taishan tourism, and damaged the interests of those legal business owners; for the other, due to their illegal secret nature, they did not mind violating relevant rules and regulations, and drove for instant gains by even cheating the visitors. The researcher was approached by two of these secret dealers on the mountain during the field trips. One successfully persuaded the

researcher into buying a set of wood-carved souvenirs from him. The other offered guide service at a 1/3 of the normal price, and said she could find someone who sold joss-sticks at a lower price if I wanted to worship the Taishan Goddess. She turned impatient and alert when she was asked several questions and failed to make the deal quickly with the researcher, and then she gave up and scouted away quickly for someone else. According to the management person, cheating and misleading visitors of these people made up of a big part of the complaint cases that the Administrative Committee received from Taishan tourists each year. He said that although they were considered illegal, there wasn't an effective way for the Committee to catch and punish these people so as to terminate this phenomenon, and this ineffectiveness caused strong dissatisfaction from the legal business owners since they were always the legitimate targets of complaints from the tourists who did not know the real situation. The result of this was tension between the Committee and the local legal business owners, dissatisfaction between tourists and local villagers and the destination, and particularly the intensified conflicts between the local legal business owners and the villagers from nearby. The conflicts of the two parties led to incidents of hurting each other deliberately and even gang fighting which became a big headache of the Administrative Committee.

The Taishan Administrative Committee people expressed that due to previous focus of their work mainly on heritage resource conservation, they were not very experienced in tourism management and in response to this they set up the Office of Tourism Development and Research which was dedicated to tourism planning and management. It was informed that they were developing a tourism master plan for Taishan with the help of a national-renowned multi-disciplinary planning team, and with the plan as a guideline, they could develop a more detailed management plan and could definitely cope with the aforementioned problems more effectively. One of the officials interviewed also expressed the pressing need they felt to strengthen the villager management and the control of the tourism market. They also felt the need of strengthening the education of the villagers especially those illegal hawkers from nearby villages in terms of policies and regulations including punishment rules.

### **6.2.3.2. Perspectives of the tourism management people**

The Tourism Bureau of Tai-an City is supposed to be an important collaborator in presenting this world heritage sites to visitors from the world through developing tourism on the site. Interviews with some of the tourism management people from Tourism Bureau and units under its charge showed that the reality was far more complicated than the above assumption.

#### **6.2.3.2.1. On Taishan heritage resource conservation**

The tourism management people basically shared a similar positive attitude towards heritage resource conservation.

They believe that the UNESCO designation of Taishan as a world heritage site was positive to both its heritage resource conservation and its tourism development. They fully recognized that the heritage resource of Taishan was essential to Taishan tourism as well as tourism of Tai-an city, and tourism without considering resource conservation was not sustainable tourism. Therefore, they would be fully in favour of Taishan world heritage resource conservation. Most of the tourism management people interviewed affirmed the achievement of the Taishan Administrative Committee on heritage conservation.

Also, they attached high importance to Taishan resource conservation as they developed the master tourism plan of Tai-an city. The tourism master plan was basically centered around Taishan and it followed the principle of sustainable use.

However, they seemed not very enthusiastic to comment on Taishan conservation except the for the above-mentioned generalities. One official implied that they would do as they could when needed to conserve and promote Taishan world heritage sites and they were always supportive of resource conservation when they made Taishan-related tourism plans and policies although the monopolized management of the Administrative Committee of Taishan put them in a position of an onlooker and an outsider.

A local scholar who was recognized as contributing a lot to Taishan and Tai-an tourism spoke more frankly about his notion. He pointed out that some of the resource management staff did not really take long-term reservation goals to mind, and their working style was very bureaucratic and formalistic. They lacked expertise, professionalism and a responsible attitude. He cited the same example as was cited by a local villager: there were thousand-year-old trees on Taishan which were very precious and were key objects for protection. He saw those forest inspectors uproot the dried grass under the trees for fear that the dried grass would easily catch fire that would burn these precious trees. He believed this was an extremely unprofessional and irresponsible behaviour as it destroyed the soil and water conservation and will ultimately harm the trees. So he stated his opinions

several times to those people and suggested them to keep the grass or even cut the dried grass away from its root rather than to uproot the grass. However, nobody would listen to him. Being asked why his suggestions were not taken, he said they told them they just obeyed the orders and rules from above, yet he believed actually those people just would not bother themselves to do something better but more complicated. “They just did this work for work’s sake, not for the sake of conservation” (Interview with scholar No.2).

Another scholar noted that it was lack of an oversight mechanism for both resource conservation and tourism development on Taishan. He said the Taishan Administrative Committee was both the judges and players in the game, and it was not a reasonable and scientific management pattern.

#### **6.2.3.2.2. On Taishan tourism development**

Tourism management people of both Tai-an Municipal Tourism Bureau (TMTB) and Taishan District Tourism Bureau, Tai-an City (TDTB) complained much about the fact that they were edged out of Taishan’s tourism development and management. An official of the TDTB said it was ridiculous that they almost could not do anything about tourism on Taishan while the mountain was actually located in their district. He said it was even more awkward now that not only the mountain but also a considerable part of the land with its population was ceded to the Committee in the latest redefining boundaries of the Taishan Scenic Zone in 2004. Now the Committee had the right to decide almost everything including tourism in the Scenic Zone which was just like an enclave kingdom. “We go starving while we have a gold bowl in house.” (Interview with tourism management people No. 2)

The TMTB people maintained that Taishan is one indispensable part of Tai-an city and so was its tourism. They believed that it was unwise to segregate Taishan tourism planning and management from the Tai-an city’s tourism planning and management. For instance, most of the tourists visiting Taishan would look for food and accommodation as well as hopefully other activities in the city. Taishan should shoulder the responsibility of vitalizing the city’s tourism. Taishan’s tourism and Tai-an’s tourism were totally connected and it is unwise to block the TMTB from participating

Taishan's tourism but rather, it was necessary to have positive communication and cooperation among Taishan Administrative Committee and the TMTB so that both could play their due roles in Taishan's resource conservation and tourism development.

An official working on Tai-an tourism planning issues mentioned that the TMTB had an Office of Planning specially dedicated to tourism planning for Tai-an including Taishan. They organized a planning team with experts invited from Beijing and developed a new Tai-an Tourism Master Plan in 2004 based on the old plan in which Taishan's tourism was planned in an integrated way with tourism planning of Tai-an city. Since Taishan as a world heritage site was the most important tourism resource in Tai-an, the large part of the content was the plan for Taishan. However, while the other part of the plan was able to be put to implementation, the part for Taishan was just ignored by the Administrative Committee and could not be implemented. Now that the Committee thought about developing Taishan's tourism master plan on its own (it was actually started in March 2007), the TMTB's tourism plan for Taishan would have even less hope to be implemented. They were frustrated with this as it affected sound implementation of the other parts of the tourism master plan of Tai-an city as they are connected to each other as a holistic system. The tourism people also doubt whether the Committee's Taishan tourism master plan, if without an overall perspective, could well take Tai-an into consideration and whether Taishan's tourism under the Committee's plan could accommodate tourism of the city.

Although the Administrative Committee has its own limited tour guide force, package tours to Taishan from both domestic and international market were mainly undertaken by tour services in Tai-an city. These tour services were in the charge of Tai-an Municipal Tourism Bureau (TMTB). Interviews with the heads of two big tour services revealed that they had many complaints about Taishan tourism management, mostly on the fact that the Taishan Administrative Committee did not support their work although the majority of the visitors to Taishan were brought by them. There wasn't enough coordination and cooperation between them which was necessary in making the cake of Taishan tourism bigger so that stakeholders could be in a win-win situation. "Taishan is not only the Committee's. We should have the right to participate in some decision makings, or at least we

should have the right to be informed before a decision is carried out,” said a deputy head a big tour service (Interview with tourism people No. 7). He pointed out that they were seldom consulted nor inquired when some decisions were made which could greatly impact their business, such as the raise of the entrance fee or the ropeway fee as well as certain rules about visiting route, etc. His point was further proved by a piece of news that the research found on the internet telling about the latest raise of the fees of Taishan ropeways.<sup>40</sup>

The TMTB people also mentioned the issue of the lack of coordination and cooperation. In light of the negotiation of the two parties (TMTB and Taishan Committee) and the coordination of the municipal government, the only role that the TMBT could play in Taishan’s tourism seemed to be helping with the promotion of Taishan in domestic and international tourism market. One official said that they organized “Tourism Caravans” every year to promote tourism products of Taishan and of Tai-an city both in China and abroad. However, it turned out they “fought alone” instead of having the alliance or support from the Committee which they believed would be more effective. Also, they felt unreasonable that they were not allowed to get involved in the tourism development and management on Taishan as professionals as they were while they kept inputting much energy and money in promoting Taishan’s tourism, and that it reflected a Chinese old saying: they were just “making the wedding dress for someone else.”

Almost all the related experts and scholars interviewed believed that, as an important stakeholder, tourism bureaus of varied levels in Tai-an should not be excluded from Taishan tourism. Some maintained that the major task of the Taishan Administrative Committee should be conserving the rare and precious heritage resource of Taishan while the task of tourism development and management should be entrusted to Tai-an Municipal Tourism Bureau since the latter are more professional and experienced in tourism planning, development and management. In addition, it would be unwise for the Committee to think they could rely solely on its own strength to take care of Taishan tourism. Instead, they should fully make use of the Tourism Bureau’s existing resources of tourism planning and management, and they should actively collaborate with the TMTB and the

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<sup>40</sup> “The Raise of Taishan Ropeway Fees ‘Hurt’ Many Tour Services ” by Reporter Shi Nianjun, Jan. 21, 2008, Life Daily, [http://shrb.dzwww.com/shrbxw/zdxw/200801/t20080121\\_3165984.htm](http://shrb.dzwww.com/shrbxw/zdxw/200801/t20080121_3165984.htm)



TDTB so as to jointly develop and manage the tourism resource of Taishan, integrate Taishan tourism with Tai-an tourism, enabling the two sharing each other's resource and complementarily forming a tourism of mountain-city integration.

Experts also expressed their opinions on the issue of the ropeways under inquiry. The leading planner of Tai-an Tourism Master Plan who was also a well-known tourism professor in a well-known university in China noted that the ropeway at the front side of the mountain destroyed the axial views which were the core traditional views the visitors expected to enjoy as they climbed the mountain. Now all through their way of climbing, the visitors unavoidably see the ropes and the cables. It was widely believed that climbing from the Red Gate at the foot of Taishan, going through the Zhongtian Gate (in Chinese meaning 'Gate in the Sky') at the middle part of the mountain, and getting to Nantian Gate (in Chinese meaning 'South Heaven Gate') on the top of the mountain, the climbers would experience the triple aesthetic and artistic conception: the earth/ground, the sky, and the heaven which constituted the key of experiencing Taishan culture. It could be said that the ropeway damaged the soul of Taishan. Furthermore, the construction of the three ropeways brought in good money to the ropeway station and benefited the Committee, but it reduced the length of time of visitor's stay in Tai-an city and on Taishan as well. The business of hotels, restaurants and many entertainment places was impacted a lot. The ropeways benefited one stakeholder but disadvantaged many others, which were quite negative to tourism of both Tai-an city and Taishan in the long run. The majority of the experts and scholars insisted that the ropeways, at least the one at the front side of the mountain should be demolished. The failing effort of demolishment for so many years was mostly due to some certain power stakeholder who wanted to maintain their own interest.

#### **6.2.3.2.3. On local involvement**

The Tourism Bureau people were very positive toward local involvement theoretically. One official noted that local involvement would be very significant in answering the call from the central government on building "a harmonious society"<sup>41</sup> and "a new socialist countryside"<sup>42</sup> as local

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<sup>41</sup> Please see [http://en.wikipedia.org/wiki/Harmonious\\_society](http://en.wikipedia.org/wiki/Harmonious_society) for definition.

involvement, especially involvement in tourism could mitigate some social conflicts to a degree and improve the livelihood of the local villagers. It was also necessary to get the locals involved as they were the closest people to Taishan by living in and around it for generations with great attachment to the mountain and therefore they should not be excluded as outsiders. He indicated that he were not supposed to comment much on the local involvement in Taishan tourism as they themselves did not have many opportunities to get involved.

However, talking about local involvement in general in Tai-an, an official shared similar views with some resource management people, and noted that local involvement in tourism-related business operation was quite often seen while their involvement in tourism-related decision making was very low which was mainly because the villagers were normally low-educated with low capacity for participating. Even if they were offered opportunities to express their opinions, they tended to think only for their own interest and benefit, and they were lack of long-term and overall vision. If not properly handled, their involvement would lead to complication of the decision-making process. Some even worried that, despite the necessity of local involvement, it would be difficult and time-consuming to practice it within the current social and institutional context of China, and the return it produced might not worth the effort.

Interviews with people form the tour services revealed that they also had an ambiguous attitude towards local involvement. On one hand, they were supportive for local involvement in tourism, here mainly meaning tourism business and financial benefit; on the other, they were cautious about locals as some of the locals did not observe the rules of business. For instance, an interviewee said many of the illegal tour guides (guides without valid license) were villagers from some local villages, and the worse thing was that a few of them even pretended that they were licensed tour guides from his tour service (with high credit as a chain services in China) to gain tourists' trust. When their

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<sup>42</sup> The central government of China released an important policy document on building "a new socialist countryside," and established it as one of the primary objectives of the 11th Five-Year (2006-10) Guidelines for National Economic and Social Development. A new socialist countryside means advanced production, improved livelihood, a civilized social atmosphere, clean and tidy villages and efficient management. [http://english.people.com.cn/200603/08/eng20060308\\_248839.html](http://english.people.com.cn/200603/08/eng20060308_248839.html)

non-professional behaviours dissatisfied the tourists who did not really know the true story, his tour service became the target of complaints.

Nevertheless, Tourism Bureau officials admitted that in recent years they increasingly realized that the potential of the local culture should be further exploited as an integrated part of Taishan heritage resource, and they realized that local culture and local involvement should be a new pressing topic to examine in developing Taishan tourism.

The tourism experts and scholars were comparatively more in favour of local involvement. A scholar said books and journal articles of recent years reflected that local involvement was a new trend in tourism research and he agreed that local involvement was important in terms of balancing the negative impacts that the locals had no choice but to undertake with the positive impacts they deserve to enjoy. However, he pointed out that currently few tourism planners were found to have applied this concept into their planning practice. The failure of doing this lay in many aspects, one of which was the convention deep rooted in the planning people's mind and the other was institutional barriers.

### **3.3. Summary**

This part analyzes the qualitative data obtained from interviews with the resource management people and the tourism management people respectively integrated with data obtained through on-site observations. The analysis goes under three themes: resource conservation, tourism development, and local involvement, and examines the reflections of the two interviewed groups. It could be noted that the two groups shared many notions on resource conservation but had some disagreement and sometimes even opposing ideas on tourism development and management. As for local involvement, they shared similar positive notions and listed similar challenges.

#### **6.2.4. Responses from tourists**

As a key stakeholder of Taishan tourism, Tourists' perceptions should be included in exploring the triangle relations: resource, tourism, and locals. Data of this part were mainly generated from 3 interviews, one with a couple from Beijing, one with a Korean tourist, and one with a Canadian

tourist, and together with the researcher's observations.

#### **6.2.4.1. On Taishan heritage resource conservation**

Almost all the tourists interviewed expressed that they generally enjoyed the tour on Taishan, and were impressed by the beauty and the uniqueness of the heritage resource of the mountain. The Korean tourist said people in their country were very influenced and fascinated by Chinese culture, and Shandong's culture in particular in terms of Confucianism and Taoism. Mountain, with natural beauty integrated with human wisdom was a concentrated reflection of the history and culture. He was impressed that Taishan was well preserved considering the fact that it received so many visitors each year, and believed much effort must have been input on the conservation of this world heritage site which he thought was worthy of the UNESCO designation.

It was the third time for the couple from Beijing to come and climb this mountain. They were pilgrims to certain extent and came this time to fulfill a promise the husband's mother made to the Taishan Goddess. The old lady was originally born in Shandong province with a family tradition of worshipping the Taishan Goddess. They climbed from the bottom to the top on foot to show their piety. They burnt incense to worshiped the Goddess and thanked her for her blessing, and they also donated some money to the temple. They believed that climbing the mountain on foot, if health permitted, was also the best way to appreciate the beauty of the mountain the resource of which they believed was nicely preserved. They were the only tourists interviewed who were opposed of the ropeway construction. The husband said the destroyed part of the mountain due to the first ropeway construction was still not recovered yet with so many years passing by. "It not only damaged the mountain physically, it damaged the holy and spiritual element of Taishan" (interview with tourist No. 3). He said he was upset whenever he saw cable cars came and go high over his head as he climbed up the mountain. He believed the intangible spiritual value of Taishan should be valued and high-lightened rather than ignored, and the ropeway construction was an act of blasphemy. He also cautioned against the abuse of the worship tradition by certain temple people which were too much driven by money. Nevertheless they were fine with the conservation status of Taishan in general and were positive toward the Taishan Administrative Committee's work.

The Canadian tourist was quite positive to the resource conservation status of the mountain. He said he read about Taishan several years before his visit. As his first trip to Taishan, he was impressed by the natural beauty and historical uniqueness of Taishan, and was excited to experience in person what he read about the mountain. He felt that the climb itself also made up a best part of his visit to Taishan. He thought the place was well maintained and clean, and he was happy he made his trip off season so that he did not encounter crowdedness.

“I was impressed. I thought the place was reconstructed. It was very clean, it’s off the season and I did not experience the crowdedness as expected in May. I was impressed how it was well maintained and cleaned. I was very surprised that a couple of years ago I visited the Forbidden City. As such a world-renowned place, many parts of it was under disrepair. Many places were beaten-up...” (Interview with tourist No.2)

Being asked whether he felt the architecture or buildings on Taishan went in agreement with the surroundings or not, he said they all looked exotic to him, and that he didn’t go just to see the mountain, but also to see the history. He took those temples as part of the mountains. With regard to those small restaurants and souvenir shops, he believed that they looked nice as long as it was not too crowded. He added that he felt they were nice possibly because of the low season again when there were only a few visitors and not all the restaurants and shops were open. Being asked for the comment on the ropeways, he said the cable cars coming and going did not really bother him though apparently the construction of the ropeways did damage this world heritage mountain. It might be like a Catch-22, as he noted, and both cons and pros existed.

#### **6.2.4.2. On Taishan tourism development and management**

The interviewees all believed that Taishan is one of most important Chinese tourist destinations. Taishan’s tourism was “mature” coining one of the tourist’s words. They admitted that Taishan had sufficient tourism facilities, and they didn’t feel the same inconvenience as they might feel in some other “immature” destination. The credit as the earliest cultural and natural world heritage site made it always a big attraction to both domestic and international tourists, and they really enjoyed appreciating this unique and rare treasure of nature and humanity. However, many negative opinions were also expressed. Data collected from interviews revealed the following issues existing in Taishan tourism.

#### **6.2.4.2.1. Price**

The Beijing couple complained much about the prices about Taishan. Talking about entrance fee, they remembered the ticket from the Red Gate was RMB ¥ 60/person when they came in 2004, and rose to RMB ¥ 80/person in 2005 when they came again, and now (as of spring 2007) the tickets they purchased were RMB ¥ 100 for each person<sup>43</sup>. They maintained that price raise was not only limited to entrance ticket. They found every thing from hotels to restaurants to souvenirs was more expensive than their previous visit each time they came. The wife said they usually stayed overnight and caught the day-time train back to Beijing the next day, and she thought next time they would take the night train of the day to go back so as to save the hotel expense. When asked why they did not come during the low season when the ticket was cheaper (RMB ¥ 80 as of 2007), they said they had to work all year long and the time right after Chinese New year was the best time to come since they had several holidays and it was less crowded than in May or October although it was still in the high season which started from Feb 1 to November 30 each year.

Both of the Canadian tourist and the Korean tourist did not complain about the prices. The Canadian came in the beginning of December when it was in the low season. He expressed he enjoyed the quietness and cleanness in the time of the year, and also felt that the trip was worth the money he paid. The Korean came in May but was on a package tour so that he was not really sensitive and clear about the various prices.

#### **6.2.4.2.2. Capacity and quality**

The over-crowdedness was usually another problem in the complaint list of the visitors. A short conversation with a tourist (an informal conversational interview) during the researcher's one field trip on the mountain in May 2006 got a vivid description of the picture. When I followed him in the flood of the climbing people and moving slowly upward the mountain, he said "you can only see human hips when you climb up, and you can only see human heads when you climb down", and it was really the case without much exaggeration. The two Beijing interviewees also complained that

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<sup>43</sup> Latest news from internet told that the entrance ticket will be raised to RMB\$125/person starting from May 2008. <http://www.qlwb.com.cn/html/shandong/2007-2/28/0722802371462123qlwb.html>  
And the ropeway ticket price had already been almost doubled at the very beginning of 2008. [http://www.china.com.cn/travel/txt/2008-01/30/content\\_9618670.htm](http://www.china.com.cn/travel/txt/2008-01/30/content_9618670.htm)

they could not expect there were still so many people on Taishan even in such cold weather of early February. They had to wait for about 20 minutes at lunch time on the mountain to have a table available for meal in a restaurant, and the meal was okay but they felt they were overcharged as the prices of the dishes on the menu were covered with small tags with hand-written and probably new prices. The Korea tourist told that it took their group more than a half hour to line up for using the cable cars. He complained that the whole tour was in such a rush that he even did not have enough time to select and find suitable souvenirs for his friends. He did not like that people were so crowded and noisy in the temple when he wanted to have a quiet place to worship.

#### **6.2.4.2.3. Hawkers**

The hawkers and “illegal tour guides” made up the most frequent problem for complaint. The couple mentioned that they were almost followed. The Canadian tourist (Tourist No.2) noted that he was stopped a couple of times by the hawkers during his climbing. They would not let go without succeeding in selling. They were very persistent and would follow him for a long way that made him feel quite awkward. He said,

“... as a foreigner, they tend to mark you and identify you, and put on extra pressure. And you don't want to be impolite or rude.... Yet you are not interested. ...In twenty meters you have to beat off somebody. That's sort of awkward.... And the tourists want to spend money to buy things too, for the most part. I mean they like to shop and to buy things. I was happy to see that little restaurant on the top and to have a nice dinner there.... I feel bad not buying the seller's things. She was just trying to sell and to make a living. I felt hesitated if the quality was good or not, and if the thing was offered at a reasonable price. This comes the culture of bargaining which we are not used to. She knew I was not skillful about that, and most of the time I just gave up bargaining and ....” (Interview with tourist No.2)

The researcher met with similar situation as the interviewee during her field trip, approached by 7 people in one trip during the high season. They approached me and stuck to me. It could take fairly a long way until either you gave up and bought something or he/she gave up when finally figuring out they couldn't sell anything to you, and the stuff they tried to sell were more or less the same. It could be imagined how disturbing it would be when people toured the mountain not for research purpose, but for appreciating as much the historic and natural beauty as they could with the limit of the time

they had.

The Beijing couple also mentioned their unpleasant experience with the “illegal tour guide” for their first time of visiting Taishan in 2004. They were persuaded by a woman to buy a “packaged tour guiding” with a price they thought of as reasonable after bargaining, and it turned out they were misled to some “unofficial” spots and worship places and they had to pay a lot of money for the purchasing the burning incense and “contribution” they were compelled to pay under the guise of “free visit.” They told that those “guides” targeted at the backpackers or individuals who paid their first visit to Taishan.

#### **6.2.4.2.4. Temples**

In addition to the complaint from the Korean tourist about the noise and over-crowdedness in the temple, the Beijing couple felt that some temple on the top of the mountain was too commercialized, and profit-driven. They gave an example that the burning incense, or the joss sticks, were sold in the temples at a price two or even three times higher than those sold in the tourist shops at the foot of the mountain. The excuse for the difference was that they need pay the labour to carry the joss sticks to the top, and more important was that these joss sticks in the temple already bore the blessings and information from the god or goddess through the monks’ pray over them. Also, they complicated the worship process by adding new contents under various names and naturally people needed to pay more because they made people feel that they would not be fully blessed unless they did and paid for every step as suggested. The couple was not convinced that their piety had to be proved by paying more money.

#### **6.2.4.2.5. Information**

The Canadian tourist noted that convenient access to information was very important to tourists. However it seemed much of his knowledge and information about Taishan was obtained from the Lonely Planet. He felt a pity that he could not find helpful information in the hotel he stayed in Jinan. Since there was only one hour’s drive or train from Jinan to Taishan, and Jinan is the capital city as the political, cultural, commercial, and transportation centre of Shandong province, he assumed many tourists might want to stay in Jinan hotels for the nights and go to visit Taishan for the day while



many others who came to Jinan for business purposes might want to go and have a look at Taishan, the famous world heritage site, and thus many of them like him would prefer to find some information about Taishan in their hotel in Jinan before their actual visit. He said, if he were the Taishan people, he would think about promoting Taishan not only in Taishan, but also in Jinan, and let the information reach the potential tourists. He said he could not find helpful information at Tai-shan Train Station either, nor a tourist information service kiosk, nor even some brochures or a map which could direct them as how to get to the mountain.

#### **6.2.4.2.6. Bad tourists/visit monitoring**

Three of the interviewees mentioned that they noticed there were quite a few “bad tourists” on the mountain. Some threw garbage anywhere; some climbed up to some certain rock or architecture for taking photographs while these rocks or architectures were under protection, ignoring the plaque standing aside telling “Climbing is forbidden here” . The researcher even witnessed a fight between two tourists for who should be the first to climb a rock with calligraphies on to take photos. The couple also mentioned a quarrel between tourists in a restaurant for taking a dinner table at their previous visit. They said quarrels were also found between souvenir shop owners and tourists during almost each time of their visits. “It’s unpleasant and annoying even to see this happen, let alone having it happen to you. The more people and crowdedness there are, the more important it is to keep the order straight. They should find effective ways to stop people from having these bad behaviours, especially those who climb the rocks for photos.” said the wife of the couple.(interview with tourist No 3. and No. 4.) They hoped that the management authority would keep an eye on these issues.

#### **6.2.4.3. On local involvement**

Although some of them were bothered by the hawkers and were not content with the service quality of the restaurants and souvenir shops, all of the tourists interviewed agreed that Taishan’s tourism should involve the locals and let them benefit. They were also positive about the idea of interacting with the local people and experiencing the local culture and life, but they hope these

activities should be under proper arrangement and management so that they would not feel disturbed, and vice versa. The Korean tourist said he was very interested to know about how the life in the local villages was like. He also wanted to buy souvenirs not only related to Taishan but also related to the local folk culture. The Canadian tourist said he was totally in favour of local participation, and he maintained that it was very important in terms of management as how to get them involved and to benefit and at the mean time enhancing the visitor's experience rather than disturbing or even spoiling their experience. He suggested something off but close to the mountain to be organized, say, a market, where the locals could see their stuff and where tourist could do shopping. He also cited his experience with the Great Wall of China as a negative example which he believed Taishan should avoid:

“Great wall, it's like a zoo, too many commercial, people crowded and shouted there, selling things. It took away from the cultural heritage ambiance because people there... everyone selling stuff... and the roundabouts, etc, which really spoiled the authenticity people expected to have there.” (Interview with tourist No. 2)

Warning against turning Taishan and its surroundings into a Disneyland with some roundabouts stuff, he suggested something more local: “A local art show, or something like that... or, may be some nice restaurants with varied choices, some places for shopping... That could give us more choices and meanwhile give the local people opportunities.”

Generally speaking, they would like to see local people benefit from tourism without spoiling their visiting experience by too much commercialization that damaged the heritage authenticity.

### **6.2.5. Summary**

This chapter analyzed the qualitative data obtained from interviews with four major stakeholders: Taishan resource management people, tourism management people, local residents, and tourists. On-site observations were also integrated into the analysis as a complementary. Three themes were used to organize the analysis, i.e., each stakeholder's perspectives were examined on three aspects: resource conservation, tourism development and local involvement. This made it more convenient to synthesize and compare the perspectives of the four stakeholders. The synthesis and comparison will be presented in the following chapter.

### **6.3. Summary of this chapter**

This chapter contains the quantitative data analysis and qualitative data analysis for this research. The quantitative analysis is conducted using SPSS software and is based on the data collected from the four questionnaire surveys among local residents, resource management people, tourism management people, and tourists. In light of the evaluation model adopted for this research, three aspects of the heritage sustainability and their relations have been examined: resource conservation, visitor experience, and local involvement. The corresponding indicators developed for evaluation purpose are incorporated into the statements of the questionnaires. Accordingly, data obtained from survey questionnaires are grouped into three themes, namely, resource conservation, visitor experience, and local involvement, and analyzed under the three themes. Qualitative analysis is also conducted in the same pattern. This made synthesizing and comparing the result of the quantitative and qualitative data analyses easier. Qualitative analysis was based on the data collected from the field interviews which were also conducted among local residents, resource and tourism management people, and tourists. The interview questions and themes were also indicator-based. Decided by the research interest of this thesis, the interviews with local residents naturally had more weight over interviews with the other three mentioned stakeholders. The synthesis and comparisons of the data analysis will be presented in the next chapter, Chapter 7.

## **Chapter Seven: A stakeholder opinion comparison: data synthesis**

Generally speaking the result of the quantitative data analysis told a similar story of that of the qualitative one with the latter revealing more insight and focus of the issues. Based on the quantitative and qualitative data analysis, this section synthesizes and compares the perceptions of the varied stakeholders of Taishan: resource management people, tourism management people, local residents, and tourists. The comparison is made on three aspects: resource conservation, tourism development including visitor experience, and local involvement. The stakeholder opinions are summarized and compared in the order of: resource management people, tourism management people (including local tourism scholars), local residents, and visitors.

### **7.1. Resource conservation**

The Taishan Administrative Committee played a key role in conserving the heritage resource of Taishan, and all their work revolved around the conservation of this world heritage site. It administered almost all the issues of Taishan from resource protection, in-zone construction to the local villager's birth-control issues. It was in charge of developing as well as implementing the conservation plan. They did not have an independent unit particularly monitoring and evaluating their conservation work although an annual internal evaluation was made for each of the bureaus and units of the administrative committee, and the Committee leaders would report to the upper-level government in charge. They felt that Taishan conservation owed a great deal to its enlistment as a world heritage site. With government allocation and especially with tourism revenue, they have sufficient fund to implement various conservation tasks in which the conservation plan is included. This contrasts to the wide complaints of many other heritage sites' managers on being short of financial support. Endowed with substantial and concentrated law enforcement power, they could take efficient measures to restrict and punish those who violated the rules of cultural and natural resource conservation of the mountain, and they could efficiently fulfill the task of local relocation for conservation purposes. They believed that they handled the relationship between resource conservation and tourism development correctly. They were confident they could take good care of the conservation of Taishan under the leadership of the Tai-an municipal government.

The tourism management people basically shared similar positive perception towards heritage resource conservation and the merit of UNESCO world heritage designation. Most of them interviewed affirmed the achievement of the Taishan Administrative Committee on heritage conservation. They believed they fully recognized that the heritage resource of Taishan was essential to Taishan tourism as well as tourism of Tai-an city and they attached high importance to Taishan resource conservation as they developed the master tourism plan of Tai-an city which was basically centered around Taishan and followed the principle of sustainable use of Taishan heritage resource. However, it was implied that they would do as they could when needed to conserve and promote Taishan world heritage sites although the monopolized management of the Administrative Committee of Taishan put them in a position of an onlooker and an outsider. It was pointed by some tourism scholars that problems existed in Taishan resource management such as lacking of long-term reservation goals in mind, very bureaucratic and formalistic work style, and lacking of expertise, professionalism and a responsible attitude.

Local villagers expressed their strong and deep feelings towards Taishan which they took as their mountain mother and their asylum god. They expressed their supportiveness for Taishan conservation both in language and with actions such as voluntarily joining in the fighting against forest fires and observe the policy of relocation for conservation purpose. Local villagers believed they were those who had the highest awareness and enthusiasm to conserve Taishan due to their living dependence and root attachment to the mountain since ancient times. However, villagers also reflected the problems and challenges they had to face because of the conservation of Taishan as a world heritage site. The biggest problems are relocation and loss of land, and the problem of their livelihood loss or change resulted from the former two problems. They felt they received much more cost than benefit from this Taishan heritage resource conservation in reality although they knew they would stand alongside the government and protect the mountain.

More than half of the visitors to Taishan surveyed were positive about the authenticity and integrity of the natural and cultural heritage resource of Taishan. The issue of ropeways was controversial among visitors. Some enjoyed the convenience the ropeways provided while some

others believed they detracted from the heritage resource, and some believed the physical destruction caused by constructing the ropeway and the cable cars coming and going non-stop also destroyed the holy and spiritual element which was intangible but essential to the mountain. Generally speaking, visitors' overall impressions of Taishan's conservation status were positive. However, both the quantitative and the qualitative data showed a substantial diversity of opinions on some conservation issues such as the ropeways.

## **7.2. Tourism development**

Basically resource management people took tourism as the second primary task as tourism was believed very positive to heritage promotion and resource conservation, and to the economic development of the scenic zone as well. They indicated that they not only took the responsibility of heritage resource conservation of Taishan, but also had to take care of the life of the 40,000 population living in the jurisdiction of the scenic zone. Tourism was particularly meaningful for the latter. Also, since tourism was advocated by the World Heritage Convention for promoting the world heritage site to all humankind, they feel wise to take tourism positively, "to base tourism in the heritage resource, and to nourish the heritage resource with tourism"(Interview with a Taishan Administrative Committee official). Taishan Administrative Committee had a Tourism Development Office of its own taking charge of all of the tourism related issues of Taishan such as tourism licenses, events organization, service quality supervision.. They were also embarking on tourism master plan development project which was expected to complete by the end of 2009. They took pride in the fact that they were capable of taking care of the tourism affairs in the scenic zone without resorting to help of other governmental department(s) outside the scenic zone (including Tai-an Municipal Tourism Bureau), and they expressed that they had enough capacity of doing the work well by themselves and believed it would be more efficient to do it on their own.

Tourism management people definitely agreed that Taishan tourism was prosperous owing to the world heritage enlistment. Meanwhile, they complained that Taishan tourism was segregated from the overall planning and management of Tai-an city's, and they were actually excluded from Taishan tourism development. Tai-an Municipal Tourism Bureau (TMTB) had an independent tourism planning department and they input much money and energy in developing a master plan of the city in which Taishan tourism was essential. However, the Taishan Administrative Committee did not use the plan and was starting a tourism plan on its own. Although they undertook the mission of

marketing tourism of Taishan, the TMTB were short of coordination and cooperation from the Taishan Administrative Committee which rendered their work ineffective and inefficient, and more importantly, they were short of funds and financial support to do their marketing job well since almost all the revenue generated from Taishan Tourism was under the control of the Administrative Committee while as a key stakeholder of Taishan tourism, they could only do with the very limited financial allocation from the municipal government. Observation revealed that the TMTB did not have their own office building and the office place they rented was relatively small and simple. Some tourism scholars criticized the management system of Taishan, pointing out that it was not scientific and reasonable to let Administrative Committee be both the judges and players in the game. Tourism people called for fair opportunities and cooperation in Taishan's tourism.

Local residents cherished high enthusiasm and anticipation towards tourism and expected tourism could bring a better change for their life. They had been very actively seeking opportunities to develop tourism and benefit from it which they took as a strategy to survive the changes occurring in their life whether they liked it or not. The increased tourist reception number was taken as an important indicator for evaluating the work of the village committees. Taking Doxey's Irritation Index for reference, the local people's attitude towards tourism and tourists were still between the level of "Euphoria" and "Apathy" although tourism development in Taishan started in the mid 1980s and was already dwelt in the deep-developed period between "consolidation" and "stagnation" coining Butler's terms (Butler, 1980). Potential social capacity for tourism was visible there as the local villagers hoped to receive more tourists, although tourists always flood the mountain and exceeded physical carrying capacity during the high seasons. Villagers expressed strong wishes for fair opportunities to participate in tourism and for financial support from government to help them participate in and benefit from Taishan tourism.

The credit as the earliest cultural and natural world heritage site made Taishan a big attraction and a "mature" destination to both domestic and international tourists who basically were positive of their experience at Taishan such as convenience and the pleasure of appreciating this rare treasure of nature and humanity. However problems were also pointed out. Many domestic tourist complained of

the high and unreasonable entrance fee; some international tourists visiting during the high season were not happy with the noise, crowdedness and the service quality; persistent hawkers were a headache to both domestic and international visitors; Temples on top of the mountain were criticized as too commercialized and profit-driven; some complained that helpful travel information could not be obtained easily; “bad tourists” who quarreled, littered or did forbidden climbing were also raised as an issue spoiling visitors’ experience. These all suggested room for improvement.

### **7.3. Local involvement**

Both survey and interview data showed that most of the resource management people agreed that local participation in resource conservation and tourism development was necessary, and was an important aspect of the sustainability of both resource and tourism. They also recognized that local benefits from tourism and local participation in decision making on resource conservation and tourism development were not yet sufficient. Nevertheless, many believed that heritage conservation and tourism had produced more benefits for locals than negative impacts on them although they did consider the livelihood change of the locals due to relocation and made efforts supporting and helping them sustain their life by various means. The local villagers were considered a source of problems in terms of heritage conservation and tourism management, and the management people cited some challenges concerning local involvement such as villagers’ low awareness and capacity of participating in conservation, tension caused by relocation and demolition, and difficulties in managing and regulating the profit-driven villagers in their tourism-related business operation. They admitted that they were very much focused on conservation in the previous period and should develop a multi-dimension management pattern and should spend more attention on issues such as local involvement in their future work.

Tourism management people also recognized the necessity of local involvement in tourism although some complainingly told that they were not supposed to comment much on the local involvement in Taishan tourism as they themselves did not have many opportunities to get involved<sup>44</sup>. They maintained that local involvement in tourism-related business operation was quite often seen

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<sup>44</sup> An official complained that they (tourism management people) had to buy ticket like tourists if they wanted to enter the mountain for visiting or researching, which is indeed uncommon in China according to the researcher’s observation.



while their involvement in tourism-related decision making was low. They believed this was mainly because the villagers were normally low-educated with low capacity of participating, and if not properly handled, their involvement would lead to lengthening and complication of the decision-making process considering the current social and institutional context of China, and the return it produced might not be worthy of the effort made. Tour operators were not so enthusiastic. A tour operator expressed his negative concern that some non-professional behaviours of the illegal tour guides who were often local villagers ruined the tourist's trust and turned them into the scapegoat for tourist complaints. Nevertheless, both tourism bureau officials and local tourism scholars realized that the potential of the local culture should be further exploited as an integrated part of Taishan heritage resource, and they realized that local culture and local involvement should be a new pressing topic to examine in developing Taishan tourism.

All the local villagers surveyed or interviewed were very positive toward tourism and highly enthusiastic for participation when a few of them demonstrated somewhat low motivation of participating in Taishan conservation. Relocation and loss of land due to Taishan's conservation impacted their life and they took tourism as an important new livelihood strategy to sustain their life. The four villages in the research demonstrated varied degrees and patterns in terms of participation in tourism. They are: villagers as contractors, villagers as share holders, villagers as receptionists with the villager committee being the coordinator, and village committee on behalf the whole village as a partner with the outside investor. Here village committees rather than the Taishan Administrative Committee played an important role in involving the villagers. Nevertheless, local involvement still faced many challenges as were raised by the villagers interviewed: a nearly saturated market limited more villagers from participating in and this cause unfair play; outsiders came to share their "cake" through some special channel; they needed substantial support for their involvement from the government, the Taishan Administrative Committee, both in finance and in favorable policy and regulations. Vicious competition inside, among, and outside the village communities were also raised as a problem. It could be seen that the stress of life was pressing and they were desperately searching for all means more than tourism to sustain their life, such as vegetable cultivation in Lihang village

and purchase of arable land in North-East China for Baimashi village. It can be concluded that local involvement in tourism is much higher than in resource conservation, and local involvement in benefit sharing of tourism is much higher than their involvement in decision making while both of the two levels of involvement demonstrate deficiencies such as unequal opportunities, unequal distribution, inadequate governmental support. Overall, local involvement in decision making was generally low in all the four villagers although each village demonstrated its unique characteristics.

Although some tourists were bothered by the hawkers and were not so content of the service quality of the restaurants and souvenir shops, all of the tourists interviewed agreed that Taishan's tourism should involve the locals and let them benefit. They were also enthusiastic about the idea of interacting with the local people and experiencing the local culture and life, but they hoped these activities would be under proper arrangement and management so that they would not feel disturbed, and vice versa. Suggestions were made such as that something like a market could be organized off but close to the mountain where locals could sell their goods while tourist could do shopping, but meanwhile warnings against turning Taishan into a Disneyland model was also made. So to speak, tourists would like to see local people benefit from tourism without spoiling their visiting experience by too much commercialization that damaged the heritage authenticity. A comparative table, **Table 7.1** is presented as follows.

**Table 7.1 A Comparison of stakeholder opinions**

Opinions // themes	Resource conservation	Tourism development
<b>Resource management people</b>	<p>a. administered almost all the issues of Taishan from conservation to development  b. positive about UNESCO World Heritage Designation  c. in charge of conservation. plan implementation  d. think of themselves as efficient and effective on conservation  e. not happy with others interfering with the conservation affairs of Taishan</p>	<p>a. the committee took tourism as their second primary task as they believed tourism would benefit conservation and the local population  b. followed the call of the WHC of UNESCO and used tourism to promote and communicate Taishan to China and the world  c. the Committee had a Tourism Development Office of its own taking charge of all of the tourism related issues of Taishan..  d. the committee were proud of their independence in working on tourism</p>
<b>Tourism Management people</b>	<p>a. Positive about UNESCO designation and the current conservation achievement of Taishan  b. fully recognized Taishan as essential resource for tourism and attached much importance to resource conservation they developed Tai-an's tourism master plan  c. felt they were put in a position of onlooker and outsider.  d. felt they should benefit as they promote the mountain.  e. pointed existing problems in Taishan resource management such as lacking of long-term reservation goals in mind, bureaucratic and formalistic work style, and lacking of expertise, professionalism and a responsible attitude, etc..</p>	<p>a. they owed the prosperity of Taishan tourism to world heritage enlistment  b. complained that Taishan tourism was segregated from tourism of Tai-an city  c. while professional and authoritative, they were excluded from Taishan tourism development. They developed a tourism plan for Taishan but was not used by the Committee  d. Tourism scholars criticized the Committee being both the judge and the player in the game as unreasonable and unscientific  e. they called for fair opportunities and cooperation on Taishan tourism.</p>
<b>Local people</b>	<p>a. cherished strong and deep feelings toward Taishan as their mountain mother  b. supportive for Taishan resource conservation and did what they could  c. impacted by conservation in terms of relocation and loss of land which in turn led to livelihood challenges  d. felt they received more cost than benefit from Taishan world heritage conservation</p>	<p>a. cherished high enthusiasm and anticipation towards tourism  b. actively seeking opportunities to develop tourism and benefit from it.  c. took as a strategy to survive the changes occurring in their life whether they liked it or not.  d. still at the level between "Euphoria" and "Apathy" in Doxey's Irritation Index  e. expressed strong wish for fair opportunities to participate in tourism and for financial support from government to help them participate.</p>
<b>Tourists</b>	<p>a. more than half of the visitors were positive about Taishan Conservation  b. the ropeways were a controversial issue  c. some enjoyed the convenience  d. some complained about the physical destruction  e. some complained the cable cars destroyed the holy and spiritual element which was intangible but essential to the mountain</p>	<p>a. always a big tourism attraction as the credit as the earliest cultural and natural world heritage site  b. Tourist were basically positive to their experience at Taishan  c. Complaints existed such as high entrance fee, persistent hawkers, noise, crowdedness and low service quality at high seasons  d. unavailable information sources also impacted visiting experience</p>

<p><b>Local involvement</b></p> <p><b>a.</b> deemed local participation in resource conservation and tourism development as necessary but agreed that local involvement was not yet sufficient</p> <p><b>b.</b> many believed that heritage conservation and tourism had produced more benefits for than negative impacts on the locals</p> <p><b>c.</b> The local villagers were considered a source of problems for conservation and tourism management</p> <p><b>d.</b> many challenges of involving the locals in decision-making</p> <p><b>e.</b> Locals had low capacity for participation.</p>	<p><b>a.</b> recognized the necessity of local involvement in tourism</p> <p><b>b.</b> local involvement in tourism-related business operation was quite often seen while their involvement in tourism-related decision making was very low</p> <p><b>c.</b> the villagers were normally low-educated with low capacity of participating,</p> <p><b>d.</b> if not properly handled, their involvement would lead to lengthening and complication of the decision-making process considering the current social and institutional context of China,</p> <p><b>e.</b> Tour operators complained that the non-professional behaviour of the illegal local tour guide ruined tourists' trust and made them the scapegoat for tourist complaints</p>	<p><b>a.</b> highly enthusiastic for participation in tourism, and local involvement in tourism is much higher than in resource conservation</p> <p><b>b.</b> involvement in benefit sharing was higher than their involvement in decision making</p> <p><b>c.</b> tourism taken as an important new livelihood strategy to sustain their life.</p> <p><b>d.</b> Four villages demonstrated varied degrees and patterns of participation in tourism, and village committee played an important role in involving the villagers.</p> <p><b>e.</b> local involvement still faced many challenges, and deficiencies existed such as unequal opportunities, unequal distribution, inadequate governmental support.</p> <p><b>a.</b> supported the idea of involve the locals in tourism and let them benefit.</p> <p><b>b.</b> would like to interact with the locals and experience the local culture and life</p> <p><b>c.</b> hoped these interactive activities should be under proper arrangement and management so that they would not feel disturbed, and vice versa</p> <p><b>d.</b> made suggestions such as building a market close to the mountain where locals could sell their stuff while tourist could do shopping</p> <p><b>e.</b> warned against too much commercialization that damaged the heritage authenticity.</p>
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## **Chapter Eight: Evaluating the relevant plans**

Bearing the research questions (refer to Chapter 5) in mind, five relevant plan documentations about heritage conservation and tourism development on Taishan are evaluated under the specific context of heritage resource conservation and heritage tourism development in China:

1. World Heritage Committee Nomination Documentation of Mt. Tai (Taishan),
2. Master Plan for Taishan Scenic Beauty and Historic Interest Zone, the 1987 version,
3. Master Plan for Taishan Scenic Beauty and Historic Interest Zone, the 2007 version,
4. Tourism Master Plan for Tai-an City, and
5. Folk Culture Tourism Plan of Baimashi Village.

Guided by the knowledge obtained through reviewing the literature on plan evaluation as was presented in Chapter 2 and relating to the global-local focus of this research, the evaluation mainly involves three tasks:

1. Evaluation of the written documents. This includes examinations on: a. the development of the document; b. the content of the plan, including goals and objectives, content relating to resource, tourism, and local communities, content relating to management system and ropeways, and content about plan development approaches and methods as well as monitoring and evaluation where appropriate;

2. Evaluation of the implementation of the plans. This mainly includes implementation on: resource conservation and tourism development, relocation, management system reform or reinforcement, and construction of ropeways.

3. Evaluation of some special issues identified from a holistic examination of both the plan document and its implementation, such as the inclusiveness of goals and objectives in plan documents and the extent of goal and objective implementation, monitoring and evaluation, planning approach, and the local people's position in the plan document and its implementation.

It should be noted that the evaluation model adapted for this research (refer to Chapter 2) is applied as a guideline for the evaluation. The corresponding indicators, although not applied directly as they were in primary data collection by being transformed into statements of survey questionnaires

and interview questions and themes, were indirectly applied in the evaluation of the plans. They are consistently used for defining themes, sub-themes, and as evidence for the plan evaluations. Thus, information was abstracted from the plans and are used to formulate evaluations of the status of and relations among the three variables of the heritage mountain: resource, tourism and local community.

### **8.1. World Heritage Committee Nomination Documentation of Mount Taishan**

There was no formal plan for Taishan before 1987 when the mountain was designated by the WHC of UNESCO as a World Natural and Cultural Heritage site although prior to that, several programs with planning elements had been developed after 1949<sup>45</sup>. Together with the relevant regulations and annual reports, they provided guidelines to fall back on when taking care of the conservation and development issues of the mountain. Normally, the Taishan Administrative Committee made an annual report at the end of each year. It was usually composed of two parts: the former part was a summary of achievements, experience and problems with regard to the management of Taishan Scenic Zone over the year;, and the latter part presented the goals and objectives for the following year .

The World Heritage Committee Nomination Document of Mount Taishan started the formal planning history of Taishan. It is also the first western-style planning literature on Taishan. Also, the first master plan for Taishan came into being in 1987 because the UNESCO designation required a plan to be in place as an application requirement.

#### **8.1.1. The development of the application document**

The World Heritage Committee required that each state party should submit an application kit for any site of their country recommended for being nominated. This application kit included a standardized application form with some required documentation. The content of the form eventually formulated the World Heritage Committee Nomination Documentation of the site and it actually entailed some planning information. This is because, for filling up the form, the information of the following should be supplied: 1. identification of the property, 2. justification for inscription, 3. description, 4. management, 5. factors affecting the site, 6. monitoring, 7. documentation, and 8.

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<sup>45</sup> They took place in 1985, 1960, 1979 and 1980 respectively which were organized by the Taishan Administrative Committee.

signature on behalf of the state party. The required documentation include copies of site management plans and extracts of other plans relevant to the site, bibliography, photographs, slides and, where available, film / video, and address where inventory, records and archives are held, etc., which indicates that at least some relevant plans should be in place (UNESCO, operational guidelines). For the application of UNESCO world heritage nomination, the Taishan Administrative committee prepared the application kit including the application form and the required relevant planning document with the assistance of invited experts and got work done by 1987.

### **8.1.2. The content of the document**

The content of the document was composed of 5 parts: 1. Specific location; 2. Juridical data; 3. Identification, which further consists of resource description and inventory, maps, photos, history, and relevant books on Mt. Taishan; 4. Preservation and maintenance, which is the major part of the document under examination for this research, and which further consists of 5 elements: appraisal, agent responsible for preservation, history of preservation, means, protection and maintenance, and management planning; and 5. justification for inclusion on the world heritage list.

The documentation identified the Administrative Committee of the Scenic Beauty and Historic Interest Zone of Mt. Taishan of the city of Tai-an, Shandong Province (the Taishan Administrative Committee or the Committee ) as being responsible for both the protection and administration of Taishan. Therefore, the Committee was logically understood as being the key authority in charge of the planning issues in terms of heritage conservation and development of Taishan.

In the “Preservation and Maintenance” part of the document, seven problems with the preservation of Taishan were identified, four of which were related to the topic of the research. They were: 1. historically, some buildings were built in the scenic area and are incongruous with the surrounding atmosphere; 2. most of the preservation and management facilities are simple, crude, and incomplete; 3. during holidays and festivals, Taishan is inundated with tourists, making the management and administration very difficult. In intensively-used tourists areas, scenic spots have been damaged to a certain degree; and 4. some farmers are quarrying parts of the mountain for rocks and damaging some scenic sites to an ever-increasing degree.

In the Management Planning part of the document, it was specified that experts would be invited from Beijing University to assist in revising and amplifying both the short-term and long-term aspects of the programs of protection, management, and construction of Taishan (UNESCO, 1987). In fact the outcome of this effort was the first master plan of Taishan which was completed in 1987. This master plan will be examined later in this chapter.

It was also noted in the Management Planning part that the then administrative structure in Taishan was to be adjusted and the local government function strengthened in order to implement effectively the Taishan protection and management programs and relevant laws and decrees.

### **8.1.3. Monitoring and evaluation**

Monitoring issues were a required element by the “Operational Guidelines” that should be noted in the application document (UNESCO, 1997, 2001). However, no monitoring aspect was mentioned in this document. Evaluation was not mentioned either. This is probably because the document was made before the Operational Guidelines were issued.

### **8.1.4. Local people**

It can be judged from the document that attention was paid to issues such as the planning of Taishan, the resource authenticity and integrity, and tourism carrying capacity. Also, decentralization of power was also reflected in the strengthening of local government functions by adjusting the management structure. However, local people were not mentioned throughout the entire document except as a problem to be dealt with in terms of damaging the mountain by quarrying for rocks. In the document submitted by Taishan Administrative Committee to the WHC of UNESCO for nomination, the “local population” section was blank and marked with “no information” in brackets.

Checking out the “Operational Guidelines for the Implementation of the World Heritage Convention” enacted in February 1997 by World Heritage Committee of UNESCO aiming to facilitate the implementation of the World Heritage Convention, statements were found in the “General Principles” such as “participation of local people in the nomination process is essential to make them feel a shared responsibility with the state party in the maintenance of the site” (UNESCO, 1997). On the one hand, this at least shows that local involvement in conservation was appreciated by



UNESCO; on the other, it could imply that local people needed to be made to feel a shared responsibility they otherwise would not. Local responsibility was mentioned in the 1997 version while local benefit was not. Nevertheless, in the latest revised version of the Operational Guidelines, one of the state party's responsibilities is to "adopt general policies to give the heritage function in the life of the community." (P3, UNESCO, 2008). This could be interpreted as that the WHC realized the importance world heritage sites to local people's lives and that the UNESCO inscription should not affect the sustainability of the local lives.

From "problem" to "responsibility" to livelihood concern, the evolution of the WHC's understanding of the heritage-local relationship can be seen. This is significant in that it provides support in principle for the management authority to involving locals in Taishan World Heritage conservation and development.

## **8.2. Master Plan for Taishan Scenic Beauty and Historic Interest Zone (1987)**

### **8.2.1. The development of the plan**

At the time the field research for this study was undertaken, the Taishan Administrative Committee people indicated that the Master Plan for Taishan Scenic Beauty and Historic Interest Zone that was in use was a 1993 version which was almost the same as the 1987 version. A Committee official who I approached to access the plan stressed that since a newly revised plan was almost completed and would be sent to the State Council of China for assessment and approval, the old one would no longer be a good one for research reference. However, the researcher was not provided with the new one since it was barely finished and, since it was not yet approved, it could not be released to the public. Under such a circumstance, the researcher had to make do with the 1987 version of the master plan. The 1993 plan is believed to be very similar to the 1987 plan which was the only version that the researcher could acquire through unofficial channels.

The 1987 master plan was an explicit response to the territorial expansion of Taishan Scenic Beauty and Historic Interest Zone after it was designated as a key national scenic spot in 1982. It implicitly served the purpose for Taishan's application for the UNESCO World Heritage designation. The planning process of this master plan started in April, 1986 and lasted until May, 1987. Unlike the

previous official-driven approach, this plan was made by a planning team led by nationally-renowned geographers and tourism experts invited from Beijing University under the lead and organization of the Taishan Administrative Committee. The team also involved members of several governmental bureaus of Tai-an city such as the Bureau of Post and Telecommunication, the Bureau of Environmental Protection, Committee of Construction, and Bureau of Cultural Relics, in writing up six specialized plans which were an integral parts of this master plan. Although there was a significant shift from a government official-driven to an expert-driven process, little is known about what planning methods were used in developing and completing the plan except that a Committee official said that the planners studied a large quantity of literature and government documents, organized many meetings with people of relevant governmental bureaus and departments, and made numerous site investigation in the scenic zone.

### **8.2.2. The content of the plan**

This master plan is composed of two major parts: the first part is the plan written up by experts with two attachments: checklists of the natural and cultural landscapes mainly seen as attractions; the second part is a collection of the specialized plans of Taishan written by people from the varied governmental bureaus, including the Cultural Relics Conservation Plan, the Greening Plan, the Environmental Protection Plan, the Water Supply and Drainage Plan, the Power Supply and Distribution Plan, and the Communications Plan.

The expert work of the plan is composed of 14 chapters. After a brief introduction of Taishan geographically and historically and a resource evaluation, the nature and principles of this planning exercise were provided (Chapter 4), and the range of the planning and its overall layout were identified (Chapter 5 and 6). The next four chapters were respectively the road system plan (chapter 7), the conservation plan (chapter 8), carrying capacity analysis (chapter 9), and the tourism service facility plan (chapter 10). Chapter 11 was an account of phased construction and an investment budget. The existing status of the economy of the scenic zone and the land using situation of the main part of the scenic zone (that is the mountain itself) were examined in chapter 12 and then a vision of tourism development was provided in the form of several principles in Chapter 13. The authors used

the last chapter to examine the deficiency of the existing management system and called for the need to strengthen management powers.

### **8.2.2.1. The nature of Taishan and the planning principles**

There was no indication of goals and objectives in the plan. This could be because these western planning concepts and norms had not yet been introduced to the scenic zone planning system. Instead, the nature of Taishan scenic zone and the principles of the plan could be found in Chapter 4 which may be regarded as being more or less equivalent to planning goals. It said:

Briefly, in term of the nature, Taishan ranks the first among the Five Famous Mountains<sup>46</sup> in China. It is a miniature of the spirit and culture of Chinese history. ... It was worshiped by the emperors of each dynasty over the entire Chinese feudalist society, ... and it is the symbol of national unity. Therefore it is the spiritual pillar of the country and people of China. (P30, Taishan Administrative Committee, 1987)

In light of the above-mentioned nature and value of Taishan, it is specified in the plan that preservation should be taken as the prerequisite for all planning and construction work. Meanwhile, under the condition of preservation, there could be appropriate use of this heritage site, and it should be guaranteed that not only the present generation but also future generations will be able to use it and benefit from it. The plan emphasized the theme of “touring Taishan and appreciating its aesthetic beauty and the Chinese national spirit”, or, to plan and build “a multi-functional scenic zone centering around aesthetic tour, spiritual and cultural communication, and patriotic education which could be realized in activities such as mountain climbing, leisure, vacation, resort, and religious worship, etc”.

With these principles, it is stated in the plan that a small number of buildings needed to be constructed for the purpose of conservation and to provide tourist services. But the construction should be strictly controlled to make sure the buildings fit with the natural and cultural settings of the mountain. Also, certain ancient architecture on the mountain needed restoring while certain modern buildings that went against the authentic landscape needed to be removed.

Another principle raised in the plan was to “keep the mountain (Taishan) and city (Tai-an) as an integrated unity”. It pointed out that Tai-an city was developed thanks to Taishan should be a service base for Taishan. The mountain and the city should not be considered separately in terms of planning

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<sup>46</sup> The Five Famous Mountains in China: Taishan in the East, Huashan in the west, Hengshan in the north, Songshan in the Middle, and Hengshan in the South (different in Chinese Characters from the north Hengshan)

and management.

The plan also maintained that the ecological balance of the mountain should be maintained by banning hunting, grazing, quarrying for rocks and logging, and the economic activities of the villagers who lived within the scenic zone should be conducive to the conservation and construction of the scenic zone.

Concerning tourism, the plan also raised a principle that Taishan tourism should reflect the characteristics and uniqueness of Taishan. The people of Shandong province (where Taishan is located) should be the major market to target and, meanwhile, effort should be made to promote Taishan to the national/domestic and international markets.

It can be summarized that the general principles of this master plan reflect a goal of developing tourism under the condition of heritage resource conservation: to maintain and conserve the uniqueness and authenticity of Taishan heritage resource to better develop tourism on the mountain.

#### **8.2.2.2. The conservation plan**

As a part of the Taishan Master Plan, the Conservation Plan covers 17 of the 174 pages of the whole plan. Three principles were stated in the plan:

1. All development and use should prioritize conservation. When development conflicts with conservation, development should always give way to conservation.

2. The natural landscape and the cultural landscape are indispensable on Taishan, and they should be equally valued and should be protected as an integrated unity. The axial view at the front side of Taishan, the earth/ground—sky—heaven aesthetic and cultural experience of the visitors as they climb the mountain from foot to top, is of particular importance in terms of integrated conservation.

3. Management should be strengthened. Damaging factors (caused by visitors, local residents, developers) should be strictly controlled and forbidden. Tourism businesses should be mainly located at the mountain foot. The existing buildings and constructions on and around the mountain should be reexamined in light of the stipulation of this plan and those which are not in agreement should be transformed, removed or demolished. Newly-built things if needed should be aesthetically and

architecturally in harmony with the surroundings.

The conservation plan provided direct suggestions concerning the cliff steles, the ancient trees, the ancient buildings, unique geological sections, and rare species of flora and fauna.

The plan divided the scenic zone into four sub-zones: the first class zone, the second class zone, the third class zone and the peripheral zone. The first class zone covered all the specific spots on the mountain which were listed in the application document for UNESCO World Heritage designation and some other spots deemed to have high scientific and aesthetic values. It maintained that all the natural and cultural landscapes in this zone should be kept strictly in their original form while illegal buildings and buildings that were not in harmony with the landscape (including all the local settlements, the military barracks, and the government office buildings) should all removed. Small-scaled tourism service facilities were permitted in the second class zone on condition that they would not damage the landscape and environment and that their architecture style and interior decoration should be in harmony with the environment and reflect local characteristics. All the undeveloped scenic spots and places fell into the third class zone. The topography of these places should be under strict protection and future development should be under strict control. All the remaining areas outside of the first, second and third class zones were in the peripheral zone. Any construction in this zone should be approved by national authorities through application to the Taishan Administrative Committee.

Some detailed conservation management measures were also suggested in the plan. For example:

1. To establish Taishan Scenic Spot Visitor Information Centre.
2. To set up a multi-level management mechanism with legal enforcement power.
3. The local villagers living in the scenic zone should receive education about love for Taishan heritage and knowledge of the laws and regulations about heritage conservation.
4. Tourism reception exceeding the carrying capacity should be strictly forbidden.
5. Existing buildings within the scenic zone should not be expanded. Any construction should not be started without application to the Taishan Administrative Committee and approval by upper

level authorities.

6. No construction within the scenic zone should violate the master plan or the specialized plans. Scenic zone managers should not make personal gains at the cost of damaging the heritage resource.

#### **8.2.2.3. The tourism service facility plan**

The tourism service facility plan analyzed tourism capacity based on the existing (in 1987) hotels and restaurants on Taishan and in the city of Tai-an, identified existing problems, and expressed the following planning principles:

1. Reduce the number of hotels and shops on the mountain to the reasonable least and fully make use of the tourism service resource in the city.

2. The hotels and restaurants on the mountain should be simple, small in-scale, with local features, and flexibility considering seasonality.

3. The architectural style of all the buildings on the mountain should be in harmony with the surroundings.

4. The resource management centre and the tourism service centre should locate together at the entrance to the mountain. A few service points should be set on the climbing route where appropriate to provide the visitors with places to rest and have snack food and drinks.

In light of these principles, the plan gave suggestions on reducing the number of hotels and restaurants on the mountain, building two new high-end vacation resorts outside of the mountain, and building a cultural and commercial business street at the foot of the mountain. It also encouraged the residents living nearby to run B&B home-style hotels during the high season.

#### **8.2.2.4. Management system**

The management system of Taishan Scenic Zone was discussed in the last chapter of the master plan. It reviewed the process of how the Taishan Administrative Committee had come into being and expressed a positive attitude toward the existing management system. However, it maintained that there were still unresolved problems and that further improvements and reform were needed. Referring to the “Interim Regulations on the Management of Scenic Spots” issued by State Council of

China in 1985, it emphasized the necessity of endowing the Taishan Administrative Committee with more governmental functions and substantial power to enable it to manage the scenic zone effectively.

### **8.2.3. On the issue of Taishan Ropeway**

The issue of Taishan ropeway was discussed as an appendix to the plan document. It analyzed the pros and cons of the ropeway. The pros were summarized as:

1. Provides convenience for management personnel and staff to go up and down the mountain.
2. Provides convenience for the aged who want to get to the top of the mountain but can not make it without the ropeway.
3. Provides convenience for those who do not want to spend time and energy to climb the mountain on foot.
4. Satisfies the curiosity of some tourists toward the ropeway and cable cars.
5. Benefits the ropeway designer and operating company.
6. Benefits the foreign company who manufactured the ropeway system.
7. Provides employment opportunities (full-time: 82 people, seasonal: 240 people ).

The cons were summarized as:

1. Seriously damaged the main part of the Taishan scenic spot together with its vegetation. Locating the ropeway on the front side of Taishan was an unforgivable mistake. One-third of Guanyue Peak of Taishan was blown off due to the ropeway construction and a 500-meter-long, irreparable, “scar” of gravel was left in the front of the mountain which could be seen from 20 km away.

2. Seriously damaged the traditional view of Taishan. The 2072-meter-long ropeway, the supporting towers, the huge station and the modified area of the mountain surface were obtrusive and spoiled the visitors’ views as they climbed the mountain. It also destroyed the environment and the natural and cultural landscape of Taishan, reducing the quality of the visitor experience. It went against both the national and international regulations about heritage resource conservation.

3. Shortened the time required to climb and thereby devalued Taishan. It took the tourists only about 40 minutes to get off the train and take the bus and cable car to get to the top of Taishan. The

tourists lost the chance to take their time to see, know about, and appreciate Taishan's rich natural beauty and cultural and spiritual charms. This left tourists with an impression of a "funny ropeway and dull Taishan."

4. Convenient transportation by the ropeway brought more visitors to the top of the mountain and thus attracted more shops and restaurants to the top as well, leading to crowding on the top of Taishan.

5. The speed-up changed the structure of visitors' trips. It once took 2 days for a visitor to complete their trip at Taishan and they would stay in the hotels of Tai-an city for at least 1 or 2 days. The ropeway enabled more than 30% of the visitors to spend only one day or even half a day to complete their visit to Taishan. The ropeway station made money but the tourism businesses in Tai-an city lost money.

6. Huge investment but low returns. The ticket income could recover the investment in 15 years. However, an increase in ticket price was believed to reduce use.

The analysis led to the conclusion that ropeway construction on Taishan was a mistake. The benefit is partial and short-term, but the negative impact is widespread and long-term. Therefore, the plan strongly suggested that the ropeway should be removed. It also stressed that money should be taken from the ropeway operation revenue and used to restore the destroyed topography and vegetation caused by the ropeway construction.

#### **8.2.4. Implementation**

Although no clue could be found from the plan or from any secondary data concerning how and how well the plan was implemented, interviews and observations revealed to a certain extent the implementation situation.

It is logical that the Taishan Administrative Committee had responsibility for implementation with other related governmental bureaus under the coordination of Tai-an municipal government. A Committee manager said that they were satisfied with the 1987 version of the master plan and implemented the plan strictly as proposed. The 1993 version only had some small revisions when compared with the 1987 one and this could mean that the authority was happy with both the plan and



its implementation.

#### **8.2.4.1. Construction for both conservation and tourism development**

According to the management officials of Taishan Administrative Committee, construction on Taishan strictly observed the arrangements specified in the plan. If the plan said there should be no construction in a place, then there would not be buildings in that place. The number of the souvenir shops, restaurants and hotels was controlled and was reduced below the capacity defined by the plan, and a commercial street was set up close to the foot of the mountain where visitors could buy souvenirs. However, observation showed that although the street was there, there were not many sellers and even fewer buyers, and the whole street looked deserted. At the foot of Taishan was a three-story building with a yard and a sign at the gate indicating that it was the Taishan Advisory and Information Centre, yet no one was seen entering or leaving the building. The building was guarded by a lady sitting in a small room at the gate. She indicated that the place was not in use except for hosting some meetings organized by the Committee. This was different from the Tourist Information Centre which was located at the mountain foot beside the stairway leading to the top of the mountain. The Tourism Information Centre was better supplied with pamphlets and brochures, contact information for on-site tour guides, etc. Several staff were on duty but not many tourists were seen to enter.

Signs about conservation and tourism instructions were placed along the climbing route and at each specific attraction spot on the mountain. Nevertheless, tourists were often seen breaking the rules by climbing protected rocks to take pictures, totally ignoring prominent signs beside the rock indicating “Climbing the rock is forbidden.”

The washrooms on the mountain were increased in number and condition, as was noted by a frequent tourist. Another tourist complained that she had to line up for a long time to use the washroom. They both agreed that it was good thing they did not have to pay for using the washroom as was previously the case.

#### **8.2.4.2. Demolishing and relocation**

A Committee official said that they demolished or transformed most of the inappropriate

buildings on the mountain in light of the suggestions of the plan. They also relocated the villagers who used to live in the mountain areas defined as “First Class Zone” by the plan. The work was difficult to carry out at first, according to the official, but the establishment of the Bureau of Administrative Law Enforcement of Taishan Administrative Committee enabled them to complete the task. It was observed that, with the exception of the ropeways, structures conformed with the plan and villages were moved out of the “First Class Zone” to the outskirts of the mountain area.

#### **8.2.4.3. Management system reinforcement**

The plan called for further concentration of the power in Administrative Committee and this was done. The Taishan Administrative Committee, established in 1985, was reorganized into three units: Taishan Cultural Relics and Scenic Spot Management Bureau, Cultural Relics Bureau of Tai-an City, and Taishan Forest Farm. This facilitated a more unified management of Taishan and was a relatively new initiative in China at that time. Even though the Committee was endowed with governmental administrative functions by setting up several governmental departments and bureaus within the committee, it was more formal than substantial. A reshuffling of the management structure of Taishan occurred in 1996 when the Tai-an Municipal Government decided to merge the Tourism Bureau of Tai-an City with the Taishan Administrative Committee and the Cultural Relics Bureau of Tai-an City to form a new Taishan Administrative Committee with the Taishan Forest Farm as an independent unit. Thus the tourism management power was given to the Committee. In 2004, more enforcement power was given to the Committee when the Bureau of Administrative Law Enforcement was set up. At the end of 2004, Tai-an Municipal Government defined the Committee as a branch directly under its lead, thereby unifying management, inspection and enforcement in the Committee. This was believed to provide a strong system effective for Taishan management. Through this concentration of powers, the municipal government had easier and more effective control over the conservation and development of Taishan.

#### **8.2.4.4. From one rope way to more ropeways**

The plan strongly suggested that the ropeway should be removed to recover the integrity of Taishan heritage. However, this suggestion was not taken. On the contrary, two more ropeways were

built on Taishan.

A reviewing of official documents and media articles showed that the first ropeway was completed in August, 1983. The ropeway company imported construction materials even before they had applied to the provincial and national superintending departments for construction permission. The expert panel discussion turned out to be tokenism and some experts left in the middle of the meeting in protest<sup>47</sup> (Cheng, 2000). The ropeway was built anyway. The WHC of UNESCO lived with it when approving the enlistment of Taishan as a World Heritage Site in 1987. The WHC suggested removing the ropeway and this was written into the 1987 master plan but was not implemented. Second and the third ropeways were built and completed in 1993, both of which reached the top of the mountain. The ropeway company decided to extend and renovate the first ropeway in 2000 when their contract time was up, which was the time suggested in the master plan for the ropeway to be removed. The application from the Taishan Administrative Committee to the Ministry of Construction of China for this renovation and extension was refused (Ministry of Construction, 2000). The WHC of UNESCO was also said to have expressed concern about this although an official warning document was not issued<sup>48</sup>. Fourteen renowned Chinese experts on architecture, heritage conservation and tourism jointly issued an urgent appeal for the immediate cessation of the ropeway extension project. Nevertheless, the ropeway project was completed in September, 2000.

## **8.2.5. Other issues identified from the 1987 master plan**

### **8.2.5.1. Unclear goals and objectives**

No clear goals and objectives could be found in the plan although the “planning principles” go some way towards providing these. Some of the contents of the plan could be interpreted as objectives although they were also not expressed in a clear and explicit manner. The author considers these to be insufficient for a master plan, lack of specificity in this area potentially causing

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<sup>47</sup> See “Taishan Ropeway Triggered Debate Again”, by Cheng Xiaofei, Staff Reporter of the People’s Daily. October 23, 2000. <http://www.people.com.cn/GB/paper464/1742/281518.html>

<sup>48</sup> “Taishan may be removed from the World Heritage List” <http://tieba.baidu.com/f?kz=100797320>

implementation difficulties.

#### **8.2.5.2. Monitoring and evaluation**

Monitoring and evaluation are important planning functions. However, monitoring and evaluation were not addressed in the master plan. No information could be obtained concerning which organization was responsible for monitoring the implementation of the plan, or who was to evaluate the results of implementing the plan, or how that evaluation was to be conducted if there was one. Nevertheless, interviews with the resource managers revealed that the Taishan Administrative Committee was responsible for all of the tasks, from developing the plan, through implementation to evaluation.

#### **8.2.5.3. Planning approach**

The master plan was expert-driven. The officials indicated that they fully respected the experts' ideas and suggestions. The plan was made by a multi-disciplinary team consisting of experts on architecture, heritage resource conservation and tourism. No detailed information could be gained either in the plan document or through the interviews with the officials and personnel from the Committee. Nonetheless, there were some clues in interviews suggesting that the planning team studied a large amount of literature and data relevant to Taishan including the previous planning programs. They also did a lot of on-site investigation as well as interviews and consultations with the municipal government officials in charge and management officials of Taishan Administrative Committee. However, when asked if local villagers were interviewed and asked for their expectations and opinions the officials expressed uncertainty.

#### **8.2.5.4. Local people**

Local people who had lived in the heritage site for generations can be considered as both a part of the heritage and an important stakeholder. However, locals were scarcely mentioned in the plan. A thorough review of the plan indicated that they were mentioned in three places: 1. In the "Planning principles" chapter, it stated that "The economic activities of the local residents living within the scenic zone should be conducive to the conservation and construction of the scenic zone"; 2. In the "Conservation Plan" chapter, it stated that "all the local settlements ... within the core part of the

scenic zone which is to the north of the ring road should all be demolished and the shops and stores should be re-arranged in the specified locations according to the plan”, and “local residents living within the scenic zone should receive education on love of heritage as well as conservation laws and regulations, and should become conservers; otherwise they should be moved out of the scenic zone”; and 3. In the “Existing status of economy and land use” chapter, it stated that “in spite of the positive side of the local settlements in the scenic zone in terms of promoting tourism, some of the local people’s activities interrupted and damaged the conservation of the scenic zone” (Taishan Administrative Committee, 1987, P32, P58, P62, and P100). It can be inferred that local people were considered more of a problem than a blessing or a respected stakeholder in this master plan: they should be educated and regulated. This is the perspective that is presented in the UNESCO World Heritage nomination documentation for Taishan.

#### **8.2.6. Summary:**

In summary, this master plan was made mainly from inputs and perspectives of tourism experts. The plan is mostly about the sustainable use of the heritage resource by tourism by providing a high quality heritage resource base to support a high quality visitor experience. Much of the plan was implemented well, such as the construction and demolition of structures, the reform of the management system and the reinforcement of their power. However, recommendations concerning the Taishan ropeway were not implemented.

This section also identified several issues in the plan concerning lack of goals and objectives, lack of monitoring and evaluation procedures, an expert-driven planning approach, and lack of input or adequate consideration of the needs of local people.

### **8.3. Master Plan for Taishan Scenic Beauty and Historic Interest Zone (2007)**

The 2007 version of the Master Plan for Taishan Scenic Beauty and Historic Interest Zone had not yet been approved by the State Council of China when the research was undertaken. Thus, it was not then in use and the Taishan Administrative Committee would not give access to an unapproved document. Nevertheless, the researcher did obtain an incomplete version of this planning document

with some chapters missing. Of necessity, the evaluation had to be made on the basis of the available materials.

### **8.3.1. The development of the plan**

According to the managers, the new plan was undertaken by a planning team mainly composed of professors and experts from Tsinghua University, Beijing. The planning project started in 2004 and was completed at the end of 2006. The plan had been approved by the expert evaluation panel and had been sent to the State Council of China for official ratification.

The Tsinghua Planning team won the tender. The researcher was informed that although they were under the supervision of the Committee, they received full cooperation and support in terms of data and literature access, and were given space for independent thinking. Meetings were arranged to provide information and ideas, and to coordinate investigations of specific sites of the scenic zone. The communication between the planning team and the Committee was smooth and efficient during the planning process.

### **8.3.2. The content of the plan**

Unlike the 1987 plan, parts of which were written by some governmental bureaus, the new master plan was completely the work of the planning team. It plan is composed of 18 chapters: 1. General provision; 2. Resource evaluation; 3. Nature and goals of the plan; 4. Planning structure and land use pattern; 5. Land zoning control plan; 6. Capacity and scales; 7. Conservation and nature/forest plan; 8. Road and Transportation plan; 9. View and tour plan; 10. Tourism service facility plan; 11. Infrastructure construction plan; 12. Leisure and recreation management plan; 13. Residents and society management plan; 14. Land use coordination plan; 15. Plan phases and investment budget of early projects; 16. Management system; 17. Plan Implementation; 18. Supplementary provisions

This plan is more sophisticated and more complete as a standard planning document when compared with its predecessor. The following is an analysis of the plan in comparison with the 1987 version.

#### **8.3.2.1. Goals and objectives**

### **8.3.2.1.1. General goals**

Unlike the 1987 version, the 2007 plan clearly identified its overall goals as to:

1. Adequately conserve the cultural and natural heritage resources and the ecological system of Taishan, and to present in an integrated manner Taishan's social, cultural, and aesthetic values as well as its value for scientific research.

2. Develop tourism on Taishan in an appropriate way and pace and spatial distribution, and provide high quality visiting experiences in terms of appreciating, experiencing, and knowing about Taishan.

3. With a goal of being "intelligent" and "digital", establish the Taishan information management system, including: a tourism service system, early warning system, and fire monitoring system, and enhance the scientific component of Taishan management. Introduce ISO9000 and ISO14000 quality certification systems and gradually make the management of Mount Tai convergence with international standards.

### **8.3.2.1.2. Resource conservation objectives**

Resource conservation objectives were identified as:

Adequately and effectively conserve, preserve, manage, and exhibit Taishan as a world cultural and natural heritage site (84 specific sites), and guarantee the integration and authenticity of this heritage site and its surrounding environment.

Adequately and effectively conserve, manage, and exhibit Taishan's cultural resources (including 57 ancient architectural structures, more than 1800 steles with carved inscriptions, and more than 30,000 ancient trees), guarantee the continuity of Taishan's history, and guarantee the right of the future generation to appreciate and experience the integration and authenticity of Taishan's cultural and natural resources.

Preserve the topography and geomorphology of Taishan as well as their aesthetic value (including 64 sites of picturesque peaks and stones and 21 waterfalls and pools) and prevent the topography and geomorphology from being damaged. Try to return damaged sites to their natural conditions.

Preserve and protect the forest and the wildlife resource of Taishan, particularly local species. Control and reduce the introduction of alien species. Guarantee the integration and continuity of Taishan's ecological system. Try and improve those areas that have been heavily damaged to its most possible natural conditions.

Preserve and protect the natural water system of Taishan. Control and terminate human activities in various forms that damage the natural water system. Try to return heavily damaged sites to their natural conditions. Encourage and advocate recycling of water resources.

Conserve and protect the air quality of Taishan Scenic zone and its surrounding environment and improve the visibility. Control and terminate human activities in various forms that heavily impact the air quality of Taishan.

Protect the sacred and solemn atmosphere of Taishan by controlling various noise and light pollution. Control and terminate various human activities that are not harmonious with this atmosphere.

Encourage scientific investigations and research activities at Taishan under the condition of meeting the above conservation objectives.

Establish an information system on Taishan's cultural and natural resources, and periodically investigate, collect, and update the information on these resources. Conduct real-time monitoring and guarantee the making of scientific and effective management decisions.

Clarify the border of Taishan Scenic Zone and set distinctive markers in place to clearly establish the space to be managed.

Coordinate the construction and management of the peripheral areas to make them harmonize with the cultural and natural resources of Taishan.

#### **8.3.2.1.3. Tourism development management objectives**

Tourism development and management objectives were also identified:

1. On the condition of meeting the above-mentioned conservation goals, appropriately develop tourism activities in light of the value and characteristics of Taishan's resources, and guarantee the sustainable development of Taishan's tourism.



2. On the condition of not conflicting with the conservation goals, develop tourism on Taishan in an appropriate way (spatially and temporally) to provide high quality and diverse visitor experiences.

3. On the condition of fully considering resource conservation, establish a Taishan tourism service facility system at appropriate places and scales to provide tourists with necessary but strictly-controlled tourism service facilities.

4. Establish Taishan's tourism information monitoring system and reduce the imbalance of visitor distributions in terms of time and space.

5. Coordinate and maintain a healthy relationship between Taishan and Tai-an city as well as the city of Jinan, and enhance the sustainable development of the local economy on the condition of full and effective heritage resource conservation.

The objectives of phases of the plan were also addressed judging from the contents of the plan. However, this part was skipped in the copy of the plan that the researcher obtained so that they cannot be discussed here.

#### **8.3.2.2. The Conservation and nurture/forestation plan**

The new conservation plan was more sophisticated than the 1987 one. The heritage resource in Taishan scenic zone was planned in three ways: zoning, categorizing and classifying. The resource was divided into three zones: strict preservation zone, limited use zone, and facility construction zone. Each zone should be conserved or developed in light of its nature and function. The resource was divided into five categories: ancient architecture and relics, steles with carved inscriptions, ancient and rare trees, picturesque peaks and stones, waterfalls and pools, and ecology. Each category was specified in the plan in terms of conservation essentials. The resource was also divided into six classes: supreme class, first class, second class, third class, fourth class and fifth class resource.

In addition it was also specified in the conservation plan that a Taishan Conservation Fund should be established. This fund should only be used for conserving the zones, categories, and classes of the resource, and to demolish structures and relocate the residents living in the scenic zones. The plan suggested six possible income sources for this fund:

1. The major part of income should from Taishan entrance fees;
2. The compensation fee paid by various permitted construction projects for using the resource;
3. The franchise fees of the various tourism service operations, among which hotels should pay higher fees than restaurants;
4. Various special funds from national and local governments for cultural and natural heritage conservation. Special funds should be applied to special protection;
5. Fees charged for commercial use of the image of Taishan and its heritage, such as photography.
6. Donations. However, donations for commercial purposes should not be accepted. Donations should not be accepted from those who want their names carved on stones as a condition of making the donation.

### **8.3.2.3. Special plans related to tourism**

Three chapters in this plan discussed tourism particularly: Chapter 9 View and tour plan, Chapter 10 Tourism service facility plan, and Chapter 12. Leisure and recreation management plan. However, both Chapters 9 and Chapter 12 were abridged in the version the researcher obtained.

The tourism service facility plan was composed of 4 parts: planning principles, tourism facility categorization, tourism facility grading, and tourism facility spatial distribution. Four principles were stated in the plan: 1. Minimize tourism service facilities within the scenic zone on the condition that tourists' needs are met. As far as possible, place tourist facilities like accommodations, shopping, and food and beverage in the city of Tai-an; 2. Only allow essential facilities within the scenic zone and gradually adjust them as needed in the process of operation; 3. Make the best use of the existing facilities and make sure that they are rationally distributed in terms of numbers and classes; 4. Make sure that the tourism facilities within the scenic zone agree with the settings in terms of aesthetics vision and make sure they function efficiently with as little pollution as possible.

Categories of tourism service facilities (interpretation and consultation, food and beverage, accommodation, shopping, health, and tourism management), four grades or scales of service base, service centre, service sub-centre, and service points are specified in the plan. Detailed suggestions

were given for each item. The part on tourism facility spatial distribution mainly focused categorized and graded service facilities. For instance, the service base was placed in Tai-an city while service points were spaced along the trails and the stairways by which visitors climbed to the top. Details such as the number hotels beds and restaurant seats were also specified.

It was noted in the plan that the Tourist Information Centre at the Red Gate (Hong-men) should be improved. Service quality was emphasized in this part of the plan.

#### **8.3.2.4. Management system**

This chapter re-defined the border of the scenic zone which, according to a Committee official, solved a long-standing boundary problem. It also stated that the Taishan Administrative Committee, as a governmental agency, should have the overall responsibility for the management of the scenic zone and enjoy the main powers of plan implementation and enforcement of relevant laws and regulations. It also defined 12 administrative management functions and rights of the Taishan Administrative Committee, such as:

1. Implementing national and provincial laws and regulations related to scenic zones, forest, cultural heritage, and museums etc and developing and implementing regulatory documents concerning the conservation, management, planning and construction of Taishan in light of the Master Plan for Taishan Scenic Beauty and Historic Interest Zone as well as the relevant national and provincial laws and regulations;

2. Responsibility for conservation, management, planning and construction of Taishan as a National Key Scenic Zone, organizing the resource inventory, evaluation and use, and responsible for the conservation, management and monitoring of Taishan as a World Heritage site in light of the World Heritage Convention;

3. Responsibility for developing the master plan, including the conservation, management and construction plans of Taishan Scenic Zone as well as application to the supervisory departments for approval of these plan, and responsibility for the implementation of the plans;

4. Responsibility for the conservation of land, mineral resources, geological features and water resources of Taishan Scenic Zone, including responsibility for the audit and approval of applications for the use of these;

5. Responsibility for the overall management of the forest and forest park in Taishan Scenic Zone, including forest fire, pest and disease control, wild animal and plant quarantine, conserving rare species of flora and fauna, etc.; including responsibility for the inventory and issue of permits for forest land use and logging;

6. Responsibility for health and epidemic prevention, food hygiene, occupational health, hygienic monitoring of public places, environmental protection and sanitation management, including responsibility for issuing permit for food and beverage business operation within the scenic zone;

7. Responsibility for deciding on the location of business operations, including commerce, services, food and accommodation, advertisement, entertainment, transportation, etc., including responsibility for the monitoring the prices and supervision of these operations;

8. Responsibility for the security in the scenic zone, including roads and traffic, and the organization and management of tourist coaches;

9. Responsibility for staff training and the investigation, statistics, analysis, and management of customer services within the scenic zone, including publication and communication of information relevant to Taishan;

10. Responsibility for management of tourism, religion, and water conservancy within the scenic zone, including the construction, management and maintenance of the infrastructure and public service facilities of the scenic zone;

11. Responsibility for Taishan's ticketing management;

12. Responsibility for the conservation and management of the cultural heritage within the scenic zone (as well as of the whole of Tai-an city if the Bureau of Cultural Heritage and Religion Management of Taishan Administrative Committee is merged with the Tai-an Municipal Bureau of Cultural Heritage Administration), including the organization of scientific research and technical guidance of the cultural heritage conservation work, law enforcement and inspection work concerning

cultural heritage within the Taishan scenic zone, as well as penalties for violations of the cultural heritage conservation and management laws and regulations of the scenic zone.

It was also stressed that Taishan Administrative Committee should enjoy substantial law enforcement powers within Taishan Scenic Zone concerning such areas as resources, planning, construction, tourism, religion, forests, environmental protection, police, industry and commerce, hygiene.

To summarize, the plan stressed reinforcement of the management system and underlined the necessity of concentrating administrative and law enforcement powers in Taishan Administrative Committee.

#### **8.3.2.5. Implementation**

Since the master plan had not yet been approved by the State Council of China at the time of the field research, it had not yet been implemented so this could not be evaluated. However, implementation was mentioned in the plan. It was stated that the master plan should be announced to the public by Shandong provincial government once it was approved by the State Council. On its publication, the master plan should become the technical and legal reference for conservation, development, construction, and management. No-one should have the right to revise the plan without authorization. Any revisions should go through legal procedures. Everyone in the scenic zone should obey the master plan and follow the detailed regulations and methods developed for implementing the plan by the Committee.

It was further emphasized that The Taishan Administrative Committee should be responsible for deciding the location of all construction projects within the scenic zone to make sure that they were in agreement with the stipulations of the master plan, and such construction should be supervised by the Committee. All construction projects within the scenic zone should undergo EIA (Environmental Impact Assessment) and VIA (Vision Impact Assessment).

The master plan also clarified that the Ministry of Construction under the State Council of China was responsible for the examination and approval of certain special construction projects and the Committee of Construction of Shandong province was responsible for issuing the relevant permits

for these projects. They were:

Roads, ropeways, cable cars, trolley buses and escalators;

Artificial tourist attractions and relevant architecture; religious elements such as temples and Buddha images in the open, theatres, stadiums, recreation centres, gyms, and certain entertainment facilities;

Supermarkets and shops, warehouses and resident settlements;

Newly-developed scenic areas, sites and monumental objects;

Other projects that would possibly have negative impacts on the environment of Taishan Scenic Zone.

It was also specified that constructions for temporary use within the scenic zone must be removed by the end of the specified time limit. It was strictly forbidden to erect permanent buildings and other facilities on land assigned for temporary use.

#### **8.3.2.6. On the ropeways**

In contrast to the 1987 plan which addressed the issue of ropeways in one of its two appendices, the 2007 plan dealt with it in the main text in Chapter 8, Road and transportation plan. It indicated the acceptability of one passenger ropeway and one cargo ropeway to meet the needs of supply and emergencies. For passenger ropeways, the plan recommended keeping the Tao-hua-yuan ropeway and improving operations and management. It is suggested that operation start two hours before the sunrise and stop one hour after sunset. The Zhong-tian-men and Hou-shi-wu passenger ropeways should be removed within the planned period (by 2005). For cargo ropeways, Tao-hua-yuan cargo ropeway would suffice and the cargo ropeway on the top of Xi-yao-guan should be removed within the planned period (by 2005). The plan strongly rejected the build of any new ropeway(s) within Taishan.

### **8.3.3. Analysis of some issues in comparison with the 1987 plan.**

#### **8.3.3.1. Goals and objectives**

Unlike the 1987 plan, the new plan clearly stated general goals and objectives, including

resource and the tourism management objectives.

### 8.3.3.2. Monitoring and evaluation

Evaluation was not mentioned in either plan. However, the most recent plan did mention monitoring in Chapter 15, with plan phases and investment budgets for early projects presented in tabular form.

**Table 8.1 Conservation monitoring projects**

Major projects and Scales	Cost (RMB ¥) <sup>49</sup>	Input(RMB ¥)
1. Improve the conservation facilities of 44 sites in the scenic zone	200,000 / site	8,800,000
2. Improve the surrounding environment of 37 heritage(tourism) sites	100,000 / site	3,700,000
3. Establish visitor monitoring system		20,000,000
4. Establish Environment monitoring system		30,000,000
Total input		62,500,000

Source: Master Plan for Taishan Scenic Beauty and Historic Interest Zone (2007), p27

The recommended investment in conservation monitoring was 5.4% of the total investment budget of the early projects (Taishan Administrative Committee, 2007). The plan also assigned Taishan Administrative Committee to carry out the monitoring.

### 8.3.3.3. Planning approach

Not much information could be found in the available plan text regarding the planning approach. However, interviews with the resource managers who were involved in the planning process mainly for coordination and assistance revealed that it was an expert-driven plan. The planning team was made up of multi-disciplinary experts who did much research, reviewing literature and official documents, making on-site inspections, conducting surveys and interviews with some stakeholders, and exchanging opinions with the supervisory municipal government officials and the Committee management officials. When asked which stakeholders were consulted, an official said that surveys were mainly conducted among tourists while interviews, including focus group meetings, were mainly conducted among the government officials, the resource management officials and other personnel, and heads of some tourism enterprises such as hotel and restaurant managers and travel

<sup>49</sup> 1:7 is the rate of CAD\$:RMB ¥ adopted in this research.

service managers (Interview with resource management people No. 2). It was not clear if their opinions were accepted and how much they were reflected in the plan. No indication was obtained from the interviews that local residents were consulted.

#### 8.3.3.4. Local people

Consistent with the 1987 plan, the new plan did not say much about local people. Benefits to local villagers from heritage resource conservation and development were not reflected in either the goals or the management objectives of the plan. The local people were not explicitly identified as a problem for conservation and tourism in the new plan as they were in the old one. Nonetheless, the removal and relocation of the local settlements out of the scenic zone which was established in the 1987 plan was continued in the 2007 document (pp 24-25, p 26, p 30). Judging from the table of contents, Chapter 13, Residents and society management plan, of the new master plan mainly dealt with the local population. However, with only the headings available to the researcher, it is difficult to evaluate this part of the plan. These headings were: Article 96 Residents and society management zoning plan; Article 97 Residents and society management measures; and Article 98 Resident relocation phasing plan (Taishan Administrative Committee, p 25). It was further specified in Chapter 15 (Plan phases and investment budget of early projects) that 8.6 km<sup>2</sup> of land or 5.5% of the total land of the scenic zone, as indicated in **Table 8.2**, would be evacuated for other uses by removing the residents.

**Table 8.2. Infrastructure construction projects**

Number	Land use	Area(km2)		Percentage(%)		Average (m2 / person)	
		current	planned	current	planned	current	planned
00	Scenic Zone plan	56. 08	156. 08	100	100	2465. 7	7259. 5
01	Tourism Views	55. 21	32. 86	35.4	21. 1	872. 2	1528. 4
02	Tourism Facilities	0. 80	0.35	0.5	0.2	12.6	16.3
03	Residents and society	8. 60	0	5. 5	0	135. 9	0

**\* Note: the content of the table was abridged by the researcher.**

In Chapter 15, “Demolishing and relocating projects” (p 27), it was indicated that, in the short term, 11 settlements with a population of 7,160 in the non-residential zone and 8 settlements with a population of 14,730 in the decreasing-residential zone should be relocated/ In the medium-long term



22 settlements with a population of 23,910 in the decreasing-residential zone should be relocated.

These were shown in the following **Table 8.3**.

**Table 8.3. Demolishing and relocating projects**

<b>Title</b>	<b>Major projects and scales</b>	<b>Unit price (RMB ¥)</b>	<b>Investment (RMB ¥)</b>
1. Ropeways	Demolish Zhong-Tian-Men Ropeway		3,000,000
	Demolish Hou-Shi-Wu Ropeway		1,000,000
	Demolish the Ropeway on top of Xi-Yao-Guan		500,000
2. Office buildings in the mountain	Demolish and relocate all governmental office and civil company buildings on top of Taishan, totaling a construction area of 25,000m <sup>2</sup>	630 Yuan / m <sup>2</sup>	16,000,000
	Demolish and relocate all governmental office buildings and civil company buildings at Zhong-Tian-Men of Taishan, totaling a construction area of 6,000m <sup>2</sup>	240 Yuan / m <sup>2</sup>	1,500,000
3. Constructions owned by outsiders in the scenic zone located at the foot of Taishan	Relocate the municipal government currently located at the west side of Dai Temple which is an important part of the Taishan heritage site		
	Relocate Taishan Auto Company currently occupying the Ling-ying Palace which was also a part of Taishan heritage.		
4. Residential settlements	Demolish and relocate 11 resident settlements in the non-residential zone with a population of 7,160 and 8 resident settlements in the decreasing-residential zone with a population of 14,730	1240 Yuan / m <sup>2</sup>	814,300,000
Total	836,300,000		

It can be noted from the above table that the budget for demolishing and relocating the settlements was RMB ¥814,300,000 which made up 97.3% of the total investment budget for demolishing and relocating projects.

#### **8.3.4. Summary**

The above discussion evaluated the 2007 Master Plan for Taishan Scenic Beauty and Historic Interest Zone mainly based on an abridged version of the plan, supplemented by interviews with officials of Taishan Administrative Committee. The following elements were examined: how the plan

was developed; the contents of the plan in terms of goals and objectives, special plans relating to resource conservation and tourism development, management system, implementation, and the issue of ropeways. Some special issues were also examined and commented when they contrasted to the 1987 plan, such as: 1. goals and objectives, 2. monitoring and evaluation, 3. planning approach, and 4. local people. It was found that the 2007 plan was an advance on its predecessor in many aspects, such as the format and content of the plan, including more comprehensive resource and tourism plans. The plan 2007 plan built on the principles set in the 1987 plan concerning certain issues such as the management system and the ropeways. As for the local people, the new plan continued the policy of the 1987 plan by advocating the evacuation of the scenic zone by relocating all the local residents. The new plan provided a phased relocation plan and also specified a detailed and substantial budget for the relocation.

#### **8.4. Tourism Master Plan for Tai-an City**

The Tourism Master Plan for Tai-an City was an overall plan for tourism development in the city of Tai-an including its two districts, Taishan District and Daiyue District, 4 satellite county-level cities or counties under its jurisdiction, Feicheng, Xintai, Dongping, and Ningyang and, of course, the mountain of Taishan which is geographically located in Taishan District. The latter was considered in the plan as an integral part of the city and the key tourism resource that Tai-an city tourism development was centered around. The total planning area was 7762Km<sup>2</sup> and the plan had an expected life of 17 years divided into three phases: the recent period 2004-2005, the medium-term 2006-2010, and the long-term 2011-2020. This section will focus upon the part of the plan related to Taishan and the three elements of resource conservation, visitor experience, and local involvement.

##### **8.4.1. The development of the plan**

The Tourism Bureau of Tai-an City funded the development of this plan with a special funding allocation from government and they invited tourism experts from Beijing to undertake this project. The head of the planning team was a well-known tourism expert and a professor of Beijing Jiaotong

University. Interviews with an associate director of the Tourism Bureau and the head of the Planning Office of the Tourism Bureau who participated in the planning process revealed that the planning team was a very professional and experienced team which had previously undertaken a number of well-received provincial and municipal tourism plans. This tourism planning project started in 2001 and was completed in 2002. It was approved in 2003 by both an expert evaluation meeting and the supervising government body.

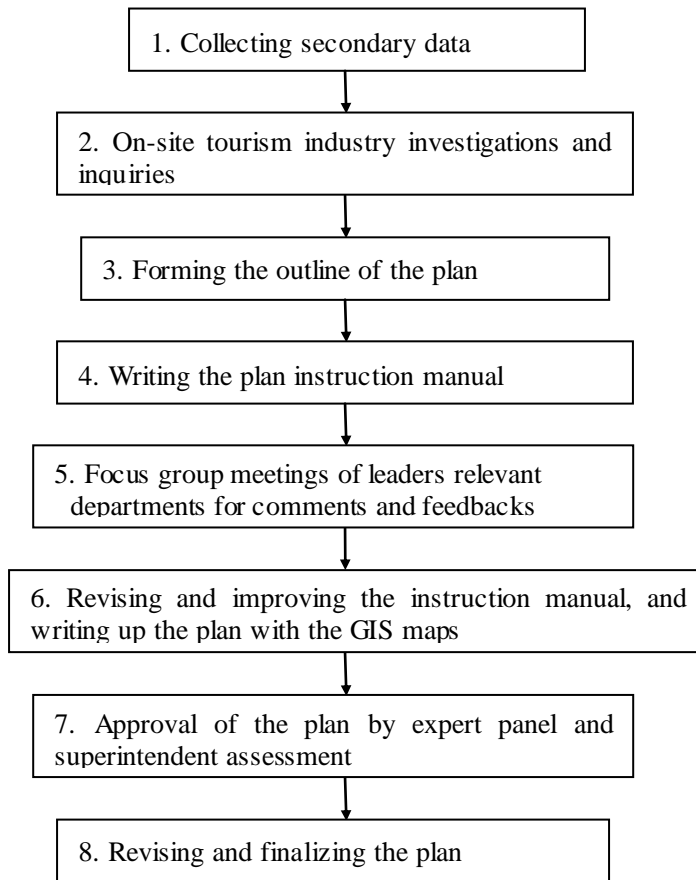
#### **8.4.2. Planning approach and methods**

##### 4.2. Planning approach and methods

It is maintained in the plan text that a zonal planning approach was adopted as used in the group's previous planning experiences. It entailed four planning bases, one overall outline, six main planning objects and two planning goals. The four planning bases were planning groundwork, development conditions (SWOT analysis), policies and legal regulations and current trends. The overall outline referred to the development strategy including the positioning, image design, strategic goals and objectives. The six main planning objects were tourism zoning, zone construction, market planning, key factors of the industry, supporting system, and a system of guarantees. The two planning goals were sustainable tourism benefits and sustainable development.

Their planning procedures were presented in the plan as:

**Figure 1. The planning procedures of Tai-an Tourism Master Plan**



Source: Tai-an Municipal Tourism Bureau, 2002, P5

Judging from the above approach and methods, it can be inferred that this is also an expert-driven plan. Some stakeholders could be involved in the planning process at certain stages such as 2, 5 and 7. These stakeholders were likely levels of governments, tour operators, big tourism business owners and experts. Tourists were also involved through responding to questionnaire surveys although this is not reflected in the presented planning procedure. However, no information could be found concerning whether or not local residents were involved in the planning in any way.

#### **8.4.3. The content of the plan**

In accordance with its regional planning approach and principles, the plan was composed of 19

chapters: Chapter 1 Regional planning background; Chapter 2 Tourism resource base; Chapter 3 Tourism industry base; Chapter 4 Tourism development conditions; Chapter 5 Tourism development strategies; Chapters 6, 7 and 8 Market planning; Chapter 9 Tourism products planning; Chapter 10 Industry factors system design; Chapter 11 Establishment of modern business system; Chapter 12 Tourism support system; Chapters 13 and 14 System of guarantees and sustainability; Chapter 15 Tourism zoning; Chapter 16 Zone plans; Chapter 17 Short-term plans; Chapter 18 Key projects plans, and Chapter 19 Tourism events planning.

For the purposes of relevance and efficiency, only the content of the plan that is relevant to Taishan and its tourism will be examined here.

It was stated in the plan that Taishan is the core tourism resource of Tai-an city. Being the head of the “Five most famous mountains”, one of the first enlisted Key National Scenic Spots, and the first UNESCO designated World Cultural and Natural Heritage site in China, Taishan enjoyed an irreplaceable position among Chinese tourist destinations. Almost all the Chinese people would hope to climb Taishan at least once in their lives (p18, p59). The plan proposed a moon-star spatial pattern in combining and arranging the tourism resources in Tai-an city - Taishan was the moon and the other tourism attractions were the stars around the moon (p18). Taishan thus held a key position in Tai-an’s tourism and The Tourism Master Plan for Tai-an City would unavoidably spend much effort in planning for Taishan.

#### **8.4.3.1. Tourism development strategies, goals, and objectives**

The plan aimed to enhance the brand name of the tourism products of Tai-an city; to enhance the tourism industry features of the city; and to optimize the system of guarantees. With respect to branding, the mountain-city integration strategy, the moon-star strategy, and World Heritage strategy were emphasized. The mountain-city strategy was to change the tour pattern from “touring on the top of Taishan (caused by the ropeways)” to “touring the mountain as well as the city”; the moon-star strategy was to combine the tourism resources of Tai-an city and Taishan, and the World Heritage strategy was to take full advantage of the global recognition of Taishan to package and market the tourism products of Tai-an city.

The plan stated two general goals: 1. to build Tai-an into a strong and competitive tourist city; and 2. as a long-term goal to strive to make tourism into a pillar industry with total tourism output making up about 10% of the city's GDP.

The plan was divided into three phases and the objectives of each phase were identified quantitatively way:

**Table 8.4 Phase objectives of Tai-an Tourism Master Plan**

Objectives	Phases		
	Adjusting and transitional period (short-term)	Rapid development period (medium-term)	Mature period (long-term)
<b>Time period</b>	2004-2005	2006-2010	2011-2020
<b>International tourist reception</b>	9,300 person/time	170,000 person/time	314,000 person/time
<b>Annual Increase</b>	9.7%	16.2%	
<b>International tourism revenue</b>	USD\$30 million	USD\$67.6 million	USD\$180 million
<b>Domestic tourist reception</b>	6 million person/time	7.5 million person/time	13.5 million person/time
<b>Annual increase</b>	6.8%	6.3%	
<b>Domestic tourism revenue</b>	RMB¥ 3.9 billion (USD\$560 million)	RMB¥ 6 billion (USD\$857 million)	RMB¥ 10 billion (USD\$1.43 billion)
<b>Total tourism output</b>	RMB¥ 4.2 billion (USD\$600 million)	RMB¥ 6.5 billion (USD\$930 million)	RMB¥ 11.5 billion (USD\$1.643 billion)
<b>% of city's GDP</b>	6.8%	7.9%	10%

(Note: the table is summarized by the author from the plan)

#### **8.4.3.2. Tourism products planning**

Chapter 9 of the plan discussed the planning of tourism products for Tai-an city. This chapter first defined 4 principles based in which the tourism products were planned: 1. resource base, 2. market needs, 3. varieties; and 4. sustainable development.

For resource base it stated that they should fully take advantage of the rich and unique historical, cultural and natural resources in the city of Tai-an, particularly of Taishan. For market needs, it stated that they should develop featured products in response to the characteristics and needs

of the markets, pay attention to market segmentation and target at right segment with the right products. For varieties, it stated that currently the tourism products of Tai-an city were lack of variety in types and inadequate in quantity, and it was necessary to develop diversified products according to the comprehensive analysis of the market. For sustainable development, it stated that the principle must be observed in the process of tourism product development to maintain healthy ecological environment and to avoid damage to the natural environment by developing tourism products.

Five types of tourism products were proposed in this chapter: 1. cultural and natural heritage tour for international, national and provincial visitors; 2. Eco-leisure tourism products for short-distant visitors in and adjacent to Shandong province; 3. Folk-cultural experience for national and urban provincial visitors; 4. short-term holiday or excursion products for short-distant visitors in and adjacent to Shandong province; 5. special products for international, national and provincial visitors mainly focused on special historical, cultural and natural tourism attractions such as calligraphies and steles, religious culture, ancient architecture, and geological adventure. It also included festivals and events such as the annual International Taishan Climbing Festival; and 6. comprehensive products such as large business shopping centre to attract both the urban and rural visitors of the city of Tai-an as well as other places of the Shandong province

It can be judged from the proposed 6 types of the tourism products that most of the products directly took Taishan as the major resource base, or at least used the influence of Taishan on the tourism market.

This chapter of the plan then suggested 6 tour routes, out of which Taishan was directly involved in five.

#### **8.4.3.3. Zones and zone plans**

Chapter 15 and Chapter 16 divided and planned for the tourism resource of Tai-an city including the mountain of Taishan. The tourism resource of Tai-an city was divided into 4 zones centering around Taishan both spatially and thematically: Zone 1: the root of the National Mountain (Taishan was so termed in the plan to emphasize its important role in nation culture of China and so branded for market promotion). This zone is located 30 km away from the front side of Taishan and is

well-known for its Dawenkou Culture Remains which is recognized as the origin of Yellow River Civilization in China. 2. the soul of the National Mountain. This zone started from Dai Temple at the near foot of Taishan and ended on the top of the mountain covering all the historical, cultural and natural attractions on the front side of Taishan; 3. the body of the National Mountain. This zone started from the top of Taishan and ended at the back foot of the mountain covering all the attractions (mainly natural) of Taishan; and 4. the rhythm of the National Mountain. This zone is located in the rural natural area at the back of Taishan and its nearest point is less than 10 km away from the mountain. It was considered in the plan an extension of the experience of visiting Taishan, and was featured with forest parks and rural folk culture. Lihang village, one of the 4 villages where the researcher did the field research for this study is located in this zone.

It should be noted that the whole zoning and planning were centering around the Taishan. If the part of plan specifically concerning Taishan could not be implemented successfully, the implementation of the other parts could not be guaranteed, and as a result the implementation of plan as a whole would be inevitably hampered.

#### **8.4.3.4. Recent-term plans**

Severn aspects were addressed in this part in terms of recent-term tasks (by 2005). They were: 1. to make sure to complete the sub-leveled plans including the tourism development plans for the counties and tourism development plans for some specific scenic spots; 2. to make sure to complete 21 prioritized tourism development projects, 12 out of which were directly located on the site of Taishan; 3. to carry out market promotion plans, emphasizing the image of “National Mountain”; 4. to carry out tourism business reform plans, including business of food and beverage, hotels, travel services, passenger transportation, and tourism commodities; 5. to carry out some specified human resource development programs; 6. to carry out the programs of attracting and enhancing investments mainly on three aspects: communicating supply and demand information, promulgate policies to encourage investments, and promoting investment projects; and 7. other recent programs in terms of management organization, legal regulations, security, and environmental protection.

#### **8.4.3.5. Key project plans**



Three out of the 6 key projects specified in this chapter were directly about Taishan. The key project plans were defined as conceptual plans in this chapter.

The **No.1 plan** is termed “the Soul of the National Mountain”. The goal of this plan was to better interpret and promote the cultural connotation of Taishan as the “National Mountain” which was a spiritual mountain and an epitome of Chinese history and culture. The plan was mainly focused on the traditional climbing route at the front side of the mountain. Instead of starting from the Red Gate, the very foot of Taishan, it extended the route further down south to the Haoli Hill and Naihe Bridge which used to be a place of cemeteries and tombs, and raised a concept of “triple spaces and one axis,” with the triple spaces meaning hell (Haoli Hill and Naihe Bridge), the worldly life (of Tai-an), and the sky and heaven (the mountain and its top), and “one axis” meaning the linear climbing route which made up the axis of the mountain. The purpose of this design was to enable the tourists to experience the three aesthetic moods of “hell-earth-heaven” as they climbed the mountain, and meanwhile to involve the city in Taishan tourism to realize the idea of “mountain-city integration.”

In order to maintain this three-space aesthetic mood and experience, it was suggested in the plan that the ropeway on the front side of Taishan should be removed when conditions matured.

A tourism information centre and a world cultural and natural heritage museum were proposed to be set up and the specific locations were suggested.

The **No.4 plan** was termed “Hou Shi Wu” (meaning in Chinese a depressed mountain area at the back of the mountain of Taishan). Hou Shi Wu is geographically a mountain area which was a part of Taishan and was at the north-east back side of Taishan. Hou Shi Wu was featured with unusual and perilous peaks, grotesque fantastic-shaped stones, and ancient pine trees. Statistics showed there were more than 1000 pine trees in the area that were over 300 years old. The goal of this plan was to fully take advantage of the natural heritage of Taishan and direct the tourists to know more about its world natural heritage, enrich the categories of Taishan’s tourism products which used to be dominated by cultural products in the past, lengthen the tourist stay at Tai-an with new products, and increase the sources of tourism revenue.

The No.5 plan was termed “Di Wang Gu” (meaning the imperial valley). The planning area was located in the east of Taishan with the central attraction being the imperial route that was taken by the emperors and the royal families of the Han dynasty in Chinese history to climb Taishan and worshiped heaven on the top the mountain. The supporting attraction was the steep cliffs lining up the trail and other natural scenes along the route. The goal of this plan was to diversify tourism products of Taishan by developing a new product with a historical, cultural and natural integration. It was hoped to alleviated the over crowdedness of the traditional climbing route at the front side of Taishan during the high season and peak period by encouraging tourists, particularly those repeat visitors to use this route and to experience and know more about the cultural and historical connotation as well as the natural beauty of Taishan.

The key project plans once more proved the planners idea of planning Tai-an’s tourism centering around the mountain of Taishan which was considered the soul of tourism of the city.

#### **8.4.3.6. Monitoring**

Monitoring was discussed in Chapter 13 and 14 (Guarantee system and sustainability). It maintained that the government should guarantee the implementation of the monitoring of the tourism plan and specified the monitoring contents as 1. monitoring the attainment of the strategic goals including the general goals and the stated objectives; 2. the development and construction of the tourism projects; 3. the development scales and the construction pace of the tourism industry; and 4. the sustainability of tourism resource, ecological environment, and social-cultural environment.

It also specified monitoring mechanisms such as: 1. to make sure that the superintendent governmental departments of varied levels to be responsible for the monitoring and implementation of the plan, and to clarify the responsibilities; 2. to establish the details and order of the monitoring work; 3. to take regular or irregular selective inspections and investigations, and to write monitoring reports; 4. to employ modern technological device such as tourism information system for monitoring; and 5. the government should develop corresponding measures in light of the monitoring result.

#### **8.4.3.7. Suggestions made on management system**

This plan criticized the existing management system of Taishan Scenic Zone and pointed out

that although the Taishan Administrative Committee could more effectively carry out policies and regulations relating to heritage resource conservation, development and management on one hand; on the other, it also exhibited disadvantages such as bulky organization, rigid mechanism, lack of vitality, and lack of adaptability to the ever-growing competitive tourism market. The suggestions it made were:

1. Strengthening the leadership of the Tai-an Municipal Tourism Bureau on the tourism development and management of Taishan.

2. Establish “Tai-an Tourism Management Committee” which should be directly under the governance of Tai-an Municipal government, and put the Municipal Tourism Bureau, Taishan Administrative Committee and the Municipal Bureau of Cultural Relics under this one umbrella with the tourism bureau in charge of tourism development and management while the Taishan Administrative Committee and the cultural relics bureau in charge of heritage conservation.

3. Meanwhile, establish Taishan Tourism Company in order to realize the separation of tourism business operation from tourism administrative and management. The company should entail the national and municipal governmental invested businesses as well as civil and private businesses, and it by nature should be a limited company with the majority of the shares being nation-owned or municipal government controlled, and with a modern enterprise system. Thus Taishan Administrative Committee should retreat from business operation of Taishan and should be mainly focused on the conservation and management of Taishan heritage resource.

#### **8.4.3.8. On the rope ways**

The ropeways were mentioned in Chapter 3, Tourism Industry Base, and in the section of Tourism Transportation Plan in Chapter 12, Tourism Support System. It suggested that the Zhong-tian-men (Central Heaven Gate)—Nan-tian-men (South Heaven Gate) ropeway and the Hou-shi-wu—Yuhuangding (the top of Taishan) ropeway should be removed while the Tao-hua-yuan ropeway should be reserved and its price should be raised. Furthermore, it also suggested that a new ropeway could be built at the back/north side of Taishan so as to replace the two removed ones.

#### **8.4.4. Implementation**

The plan did not give a clear identification as who was responsible for implementing the plan and how. Interviews with the tourism bureau officials and the head planner himself revealed that, since the organizer of the plan project was Tai-an Municipal Tourism Bureau, it should be the responsible body for the plan implementation. However, both these interviews and the researcher's on-site observations showed that the plan was not really implemented in terms of the part of Taishan. The reason of the failure of implementation was that, according to the interviews, Taishan was in the management scope of Taishan Administrative Committee, not Tai-an Municipal Tourism Bureau, and the Committee would not use the plan made by the Tourism Bureau. Furthermore, it was told by the both the Administrative Committee people and the Tourism Bureau people during the researcher's field trips that the Committee itself were preparing to make their own tourism plan. This was further proved by a piece of news on March 10, 2008 searched by the researcher from the internet<sup>50</sup> which told that the project of Taishan Tourism Master Plan organized by Taishan Administrative Committee was started officially on September 17, 2007.

#### **8.4.5. Issues identified**

##### **8.4.5.1. Sustainability**

Judging from the general goals and studying the plan text, it could be concluded that this plan was very much focused on two aspects of sustainability: 1. economic sustainability in terms indices and indicators such as annual revenue growth and the percentage it would take of the local GDP; 2. sustainability of the natural environment and resource Taishan heritage resource conservation which was emphasized in quite a few places in the plan. However, not much consideration was found in the plan about social sustainability, especially the sustainability of the local life and sustainable development of the local communities. That is to say, local well-being was not adopted as an indicator or a factor for consideration in planning and developing tourism.

##### **8.4.5.2. Monitoring and evaluation**

Like in the 2007 Taishan master plan, monitoring was mentioned in this plan with certain details as presented above while evaluation was not. The evaluation of the plan text for approval was

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<sup>50</sup> From "Taishan Experience" to "Taishan Model": Renovation on Planning for Taishan Scenic Zone. By Zhang Yanbo. Link: [www.davost.com/intelligence/vision/2008/03/10/1635021839.html](http://www.davost.com/intelligence/vision/2008/03/10/1635021839.html)

mentioned in the Planning Procedure of the plan. However, no specifications or comments could be found as how the implementation of the plan should be evaluated and who would do this job.

#### **8.4.5.3. Management system**

This plan discussed the management system in two aspects: 1. reforming the tourism-related decision-making and coordinating institution of Tai-an city; and 2. reforming the management system of Taishan Scenic Zone.

It was mentioned in the plan that as a tourism-related decision-making and coordinating institution, the Tai-an Municipal Tourism Management Committee (thereafter TMTMC) was founded in 1997 and was adjusted and enriched in 2000 with the mayor of Tai-an city being the director of the committee, the vice mayor who was in charge of tourism affairs of the city being the vice director, and the heads of 34 governmental departments of the city being the committee members, such as the Municipal Tourism Bureau, Taishan Administrative Committee, the Municipal Commission of Planning, the Municipal Commission of Construction, the Police Bureau, the Finance Bureau, the Environmental Protection Bureau, etc.. The office of the committee was placed in the office building of the Municipal Tourism Bureau, with the director and vice director of the Municipal Tourism Bureau being the office director of the Tourism Management Committee.

However, it was mentioned that the TMTMC did not operate effectively as was expected due to various institutional and management reasons. It was suggested that the TMTMC should be renamed as Tai-an Municipal Tourism Development Committee (thereafter TMTDC) with the mayors still being the heads of the committee and the heads of 34 municipal departments being the committee members, and with more focus on “Development” than “Management”. It specified that the planning sector of the committee (which was the planning committee of the municipality) should be responsible for tourism planning, and make sure that the tourism plan should be connected to and in agreement with the municipal economic and social development master plan, the urban development plan, and the industrial plans where necessary. It maintained that the financial sector of the committee (which was the financial bureau of the municipality) should bring tourism infrastructure construction into the municipal national economy plan, and should allocate sufficient funds for tourism marketing

and promotion. It also specified commitments to tourism development for the other sectors of the committee such as land use, transportation, agriculture, trade and commerce, communication, culture, education, religion, environmental protection, and so on. It required these sectors to establish system of responsibility, including setting up annual objectives and put these objectives and implementation under annual evaluation.

As for the reform of the management system of Taishan Scenic Zone, the plan analyzed the problems with the existing management system and pointed out that the governmental administration mixed with enterprises operation, the bulky and rigid mechanism, the redundant personnel, the ineffective operation and the lack of inherent vitality would hindered the improvement of tourism service, operation, and management, and would prevent Tai-an from being adaptive to the increasingly competitive national tourism market. It suggested that

1. As a short-term goal, strengthen the management power of Tai-an Municipal Tourism Bureau. Under the leadership of the TMTDC, the connection and coordination of Tai-an Tourism bureau and Taishan Scenic Zone Administrative Committee should be emphasized. Tai-an Tourism Bureau should take more charge over tourism management and service of Taishan Scenic Zone and Taishan Tourism Resort Area on aspects such as service standards, communication and promotion, and personnel training.

2. As a medium-term goal, set up Tai-an Municipal Tourism Management Committee which should be different from the previous TMTMC in terms of its substantial power and its composition. Instead of putting 34 governmental departments under its umbrella, the new committee should mainly unify four departments of Tai-an city: Tai-an Municipal Tourism Bureau, Taishan Scenic Zone Administrative Committee, Tai-an Municipal Cultural Relics Bureau, and Taishan Tourism Resort Area<sup>51</sup>, with the mayor in charge of tourism affairs being the director of the committee and the heads of the four departments being the vice directors of the committee. The purpose of this was to separate the business operation right from the management right. As the representative of Taishan resource owner, the Tai-an Municipal Tourism Management Committee including the Taishan Scenic

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<sup>51</sup> This is under the administration of Tai-an Municipal Economic Development Zone Administrative Committee.

Zone Administrative Committee should not directly undertake tourism-related and other business activities on and around Taishan. Instead, it should be mainly responsible for ensuring the sustainable use of the world natural and cultural heritage by supervising and protecting the cultural relics, natural resource as well as the overall environment of Taishan.

3. As a long-term goal, set up Taishan Tourism Company which should undertake the tourism-related business operations, and which should be a state-holding stock company and an aggregation of the existing tourism businesses. Therefore, the tourism business operation would be ideally separated from the Taishan scenic zone management.

#### **8.4.5.4. Planning approach**

It could be discovered from both the plan and the plan-related interviews that some stakeholders were involved in the planning process mostly in the form of information and consultation. Except the municipal government who was taken as the most important stakeholder (reflected in the goals), the other stakeholders did not have much chance to be involved in the decision making. Meanwhile, not all the stakeholders were involved. Some disadvantaged groups such as the local villagers were not mentioned.

#### **8.4.5.5. local people**

Local people were supposed to be an important stakeholder too since their life was unavoidably impacted by tourism development on Taishan in both good and bad ways, and therefore they were considered an important indicator in evaluating the plan. Reviewing the plan text could not find a place that mentioned local people --- neither in goals and objectives, nor in the detailed plan chapters. They were simply forgotten as the plan was developed. For instance, in chapter 13, human resource planning objectives did not mention whether local people should have any priority in the employment in Taishan and Tai-an tourism. Although expansion of tourism employment was emphasized, no policy advantage was mentioned for local villagers. Instead, emphasis was made on fostering local awareness of serving tourism. It said, “it is necessary to communicate to the local residents via public media such as newspapers, TV, and radio broadcasting the positive role that tourism plays in social and economic development, to foster among locals hospitality and politeness towards tourism and tourists, and to ensure a friendly social ambiance for tourism.”

#### **8.4.6. Summary**

This section reviewed and evaluated the Tourism Master Plan for Tai-an city and its application

using the evaluation model developed by this research with its relevant indicators. The approach of developing the plan and the content of the plan was reviewed. The development strategies, goals and objectives of the plan were particularly examined with respect to the Taishan-related issues which could be summarized into three aspects of sustainability: resource, tourism, and local people.

## **8.5. Folk Culture Tourism Plan of Baimashi Village**

The Folk Culture Tourism Plan of Baimashi Village was partially the product of a research project entitled “Baimashi folk culture tourism research project” funded by Tai-an People’s Political Consultative Conference (TPPCC)<sup>52</sup>. This project was a response to a report submitted by the village-based Baimashi Tourism Development Company. The report was “The research report on the feasibility of developing folk culture tourism in Baimashi village” in which strong desire was expressed by the Baimashi village people to develop folk culture tourism to solve the problem of land loss faced by the village and to help the villagers to survive and to build “Xiao-kang society<sup>53</sup>”.

### **8.5.1. The development of the plan**

As was indicated, the TPPCC funded the research project which was actually initiated by Baimashi village people. The plan was eventually written by the project team, yet according to the interview with the village heads, the village also input much in developing the tourism plan in terms of finance, human resource, and opinions. The project started in late 2003 and the plan got in place in March 2004.

### **8.5.2. Planning approach and methods**

Interviews and available literature revealed that this plan project was also expert-driven. However, the opinion of the villagers’, especially the village committee’s was fully respected. As was put by the village head who was in charge of tourism affairs, “We (planning experts and the villagers)

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<sup>52</sup> The Chinese People’s Political Consultative Conference (CPPCC) is a political advisory body in the People’s Republic of China. The organization consists of delegates from a range of political parties and organizations, as well as independent members, in China. The proportion of representation of the various parties is determined by established convention, negotiated between the parties. Like the Communist Party of China, the organization also has leveled organization bodies such as the central body, the provincial body and the municipal body. The TPPCC is the municipal body of the CPPCC in Tai-an city.

<sup>53</sup> Chinese leader Deng Xiaoping used the term “Xiaokang Society” in 1979 as the eventual goal of Chinese modernization. It is a term that describes a society of modest means, or a society composed of a functional middle-class. It is loosely equivocated to a “basically well-off” society whereby the people are able to live relatively comfortably, albeit ordinarily.



had very positive communications. We could express our ideas freely and experts listened to us patiently and often took our advice, particularly those concerning local folk and culture. They often consulted us and asked us for suggestions.” According to the interview with the head expert of the project who was a professor of a university in Tai-an city and who was born a local Tai-anese , the planning people went to the villager homes to chat with them to know better about the authentic local culture and meanwhile to know about the villagers anticipation and ideas. The villagers were very enthusiastic in providing information and ideas. In addition to interview, a questionnaire survey was also conducted among the villagers.

Nevertheless, the panel meeting for examining and approving the project was typically a conventional one: 7 out of the 9 members were government officials while the other two were professors.

### **8.5.3. Goals and objectives**

Explicitly stated goals could not be found in the plan document. However, it was stated at the beginning of the document that the purpose of the project was to help the farmers who lost their lands “to rapidly develop economy” and to help “build Xiao-Kang society.”

Three phase objectives were stated:

1. by 2004, the following should be finished: the approval of the project, the planning and design, the construction of some tourism infrastructure and facilities such as, renovation of the old farmer’s houses for visitors receiving visitors as home hotels; the pomegranate orchard, the tea field, the horse racing track (or the turf), the parking lot, roads, food and beverage supply facilities.

2. by 2006, the construction of new residential building village should be finished so that the villager could move to the new houses (or apartments) to give space to tourism reception with their old houses in the mountain village.

3. by 2007, a botanical garden integrated with and featured by Taishan folk culture and local life should be completed.

### **8.5.4. The content of the plan**

The project document or the plan is composed of seven chapters. The first chapter includes a

brief introduction of the implementation party of the plan, Baimashi Village Tourism Company, and a feasibility study report. Chapter two analyzed the conditions for developing folk culture tourism in Baimashi in terms of geography, tourism resource, transportation, and other existing tourism infrastructure. Chapter three analyzed the market. Chapter four contains the major details of the plan content including the planning principles, sub-projects and events planning, and functional zoning. Three major projects or tourism products were planned: 1. Taishan local life which again includes living in the farmer's house, doing the primitive farm work, tasting and appreciating pomegranate, tasting the local tea and learning about the process of making tea, etc.; 2. leisure and health activities which includes watching and learning horse riding, learning pottery-making art, and observing red-scale fish which were raised in a big reservoir at Baimashi and which is unique of Taishan; and 3. Taishan geological park --- the location of the village itself was a presentation of the geological history of Taishan, and even the stones that the village used to build their houses traditionally were of high value for geological research. Chapter five plan for the construction of tourism infrastructure including visitor services, road and transportation, energy supply, sewage, and communication, and health and security facilities. Chapter six dealt with environmental conservation issues. Specifications were made concerning the garbage and sewage processing, pesticides and chemical fertilizer use, tree planting, etc.. A height limit was also set for the purpose of conservation that no construction should be permitted beyond 200 meters above sea level, and quarrying and lumbering were forbidden. Chapter seven provided the three phases of implementing the project and the plan which was discussed in the section of "goals and objectives" above.

#### **8.5.5. Implementation**

Both the researcher's observations and interview data shows that the plan was implemented and the objectives of Phase One and Phase Two of the plan were mostly reached. The village tourism company was in charge of the implementation and their efficiency was evident. However, even though facilities were in place, operations were not necessarily all successful. Interviews and observations told that the most successful operation was the farmer's home hotels and their private pomegranate orchards. They brought in an annual income of RMB3000-5000 Yuan for those families

who were involved. In contrast, the horse racetrack and the red-scale fish projects were not very popular among visitors. Generally speaking the whole village, especially those who were directly involved in tourism were quite supportive and motivated in implementing the tourism plan.

It was written in the plan that a botanical garden integrated with and featured by Taishan folk culture and local life should be completed by 2007 as the third phase of the project implementation. The last trip of the field research to Baimashi village was made in the very beginning of 2007 and it was found that the this project probably could not be completed as expected in that the land using for this purpose had not been approved by the government department in charge of land and resource management. It was told by a government official of Taishan district that this botanical park project probably would not be approved by the government, and the stories behind it were too complicated to tell.

#### **8.5.6. Monitoring and evaluation**

No monitoring or evaluation effort was found with regard to the folk culture tourism plan. Phases of the plan were identified in the planning document. However, no word was mentioned as who and how to monitor the implementation of the plan, and no evaluation was found wither. During the interviews concerning the monitoring and evaluation issue, the village leaders merely emphasized that they made sure to strictly implement the plan as how it was written. Interviews revealed that neither internal nor external monitoring could be found. No evaluation on the implementation was made either. Interviews also revealed that the villagers seemed not yet familiar with the terms “monitoring” and “evaluation.”

#### **8.5.7. Local people**

The local village committee which was considered the representative of the local villagers was the initiator of the folk-culture tourism project and the undertaker of its implementation. Interviews with the village leaders and the villagers showed that local villagers were consulted frequently during the development of the planning document. Some decisions were made jointly by the experts and the local village leaders in charge of tourism issues in the village. Nevertheless, a village leader pointed out that they were not entitled to being involved in the final approval of the tourism plan and its

implementation (interview with villager leader 5). Relevant documents indicated that the members of the panel for expounding and approving the plan were only government officials and tourism experts with no village representatives.

#### **8.5.8. Summary**

The Folk Culture Tourism Plan of Baimashi Village was evaluated in this section. The initiation of the plan project, the content of the plan including its goals and objectives was examined. The planning approach and methods were noted. Its implementation as well as monitoring and evaluation issues were looked into. The role of the local villagers in developing the plan was identified.

#### **8.6. Synthesis of the evaluations**

In this chapter, five relevant plans were evaluated in light of the plan evaluation standards and criteria summarized from the literature. With the sustainability of the world heritage site in terms of healthy and symbiotic relations in the global-local nexus as the research focus, the status and relations of world heritage resource, tourism, and local community have been examined through evaluating relevant plan documents and their implementation at the world heritage mountain, Taishan. Some special issues were identified that reflect problems existing in the plans and implementation as well as in the heritage relations.

The result of the plan evaluations are synthesized and presented in the following comparative table, Table 8.5.

The findings of this chapter, in combination with finding of Chapter 6, qualitative and quantitative data analysis, will be discussed in the next chapter, Chapter Nine.

#### **Table 8.5 A comparative table of the evaluation of the relative plans**

<b>The plans</b>	<b>The development of the plan</b>	<b>Planning approach</b>
<p><b>World Heritage Committee Nomination Documentation of Mount Taishan</b></p>	<p>It was prepared during 1986 and 1987 by the heritage site management body; Taishan Administrative Committee, under the requirement of WHC as for application and designation and under the supervision of Shandong Provincial Construction Bureau .</p>	<p>Authority prepared and Authority-driven with experts involved.</p>
<p><b>Master Plan for Taishan Scenic Beauty and Historic Interest Zone (1987)</b></p>	<p>It was prepared by Taishan Administrative Committee and finished in 1987. It was developed as a prerequisite required by the World Heritage Convention for UNESCO world heritage designation.</p>	<p>Authority-driven with intensive experts involved and writing up the plan.</p>
<p><b>Master Plan for Taishan Scenic Beauty and Historic Interest Zone (2007)</b></p>	<p>It was undertaken by a planning team mainly composed of professors and experts from Tsinghua University funded by and under the supervision of Taishan Administrative Committee. The planning project started in 2004 and was completed in the end of 2006.</p>	<p>Expert-driven. Experts wrote up the plan with authority's supervision and input. A multi-disciplinary experts team did a lot of research with literature review, on-site inspection, surveys, etc.</p>
<p><b>Tourism Master Plan for Tai-an City</b></p>	<p>It was prepared by a tourism expert team from Beijing funded by and under the supervision of the Municipal Tourism Bureau of Tai-an city. This tourism planning project started in 2001, and was completed in 2002.</p>	<p>.Expert-driven. Experts wrote up the plan with authority's supervision and input. Application of scientific procedure and methods like interview and questionnaire surveys were mentioned.</p>
<p><b>Folk Culture Tourism Plan of Bainmashi Village</b></p>	<p>It was prepared by a planning team of tourism experts from Tai-an city under the supervision of the village committee and jointly funded by TPPCC, a governmental organization.</p>	<p>Expert-driven. Experts wrote up the plan with the input of the village committee which was supposed to represent the local villagers. Interviews were known to be used to collect data.</p>

<b>Goals and objectives</b>	<b>The content of the plan</b>
<p>Goals and objectives of neither heritage resource conservation nor tourism development was explicated although some of them such as resource authenticity and tourism carrying capacity could be found implicated in some parts of the document.</p>	<p>It was a written document with a plan nature, not really a plan in the strict sense, referring to the accepted norm of a plan (the plan evaluation criteria). It was mainly focused on conservation aspects with some precautionary notes on tourism development.</p>
<p>No clear goals and objectives could be found in the plan although the “planning principles” might reflect something similar but not yet equivalent to goals and they were not explicitly defined.</p>	<p>It was much more sophisticated and more complete as a plan with certain insufficiencies. Conservation was stressed and tourism development was also discussed in the 14 chapters of the plan.</p>
<p>Goals and objectives were explicitly stated in terms of general goals, resource conservation objectives and tourism management objectives. Tourism was underscored in this conservation plan with enhancing visitor experience as a major goal of the plan</p>	<p>It was a well developed master plan for both conservation and tourism. The plan was made up of 18 chapters with Conservation elements took a large part of the plan content with some special plans related to tourism being also made.</p>
<p>General goals and phase objectives were explicitly stated about tourism development and management of Tao-an city centering around Taishan. Resource conservation was stated as an principle in tourism development on Taishan</p>	<p>It was a well developed tourism master plan. Almost all the elements required for a decent plan could be found in the 19 chapters of the plan document including monitoring and implementation specifications. It was mainly focused on tourism development with a premise of resource conservation.</p>
<p>Though explicitly stated goals could not be found in the plan document, it was stated that the purpose of the plan project was to help the farmers who lost their lands “to rapidly develop economy” and to help “build Xiao-Kang society.” Phase objectives were clearly stated.</p>	<p>It was a brief tourism development plan, not as elaborated as No.3 and 4. Phases of the development were defined in the plan. It was mainly focused on tourism development with resource conservation as the theoretical premise.</p>

<b>The plan implementation</b>	<b>monitoring and evaluation</b>
<p>Much of the plan was implemented such as the conservation aspects. However, development specifications were not well observed such as the restriction of rope way building.</p>	<p>Monitoring and evaluation were not mentioned in the document although monitoring was required to be included according to the “Operational Guideline.”</p>
<p>Construction for both conservation and tourism was implemented as planned; Demolishing and relocation projects were also carried out with local villages being all moved out; management system was reinforced as desired. However, the suggestion of removing ropeways was not taken, instead, two more ropeways were built on Taishan in the years followed.</p>	<p>Neither monitoring nor evaluation was addressed in the plan, though interviews told that the Taishan Administrative Committee was responsible for implementing the plan and to evaluating the plan implementation</p>
<p>Implementation issues such as the responsible party (The Taishan Administrative Committee) for the implementation was specified in the plan. The plan was approved and hence not actually implemented yet by the time of the author’s field research.</p>	<p>Monitoring was discussed although evaluation was not.</p>
<p>No clear identification of the responsible party for implementation and how. Interviews and on-site observations showed that the plan was not really implemented in terms of the part of Taishan. Taishan Administrative Committee started a new Taishan tourism planning project on their own in September 2007 which may imply that this plan made by Municipal Tourism Bureau would not be implemented on Taishan either in the future.</p>	<p>Monitoring was mentioned with monitoring details specified while evaluation was not. The evaluation of the plan text for approval was mentioned in the Planning Procedure of the plan. However, no specifications or comments could be found as how the implementation of the plan should be evaluated and who would do this job</p>
<p>The plan was implemented and the objectives of Phase One and Phase Two of the plan were mostly reached. The village tourism company was in charge of the implementation and their efficiency was evident. Facilities were in place as planned. Certain projects were operated successfully such as the farmer’s home-style hotels and their private pomegranate orchards while some others were not such as the horse racetrack and red-scale fish. Villagers directly involved in tourism were supportive and motivated in implementing the tourism plan</p>	<p>Neither monitoring nor evaluation was addressed in the plan. Interviews revealed that neither internal nor external monitoring could be found. No evaluation on the implementation was made either. Interviews also revealed that the villagers seemed not yet familiar with the terms “monitoring” and “evaluation.”<sup>35</sup></p>

<b>Local involvement</b>	<b>Other issues</b>	
	<b>Administration</b>	
<p>Local people were not mentioned all through the entire document except as a problem to deal with in terms of damaging the mountain by quarrying for rocks. The “local population” section in the application form was blank and noted with “no information” in brackets.</p>	<p>The document identified Taishan Administrative Committee as responsible party for both the protection and administration for Taishan. It suggested that administrative structure in Taishan was to be readjusted and the local government function strengthened for effectively implementation.</p>	
<p>Local people were considered more of a problem than a blessing or a justified stakeholder in this master plan, and it was believed that they should be educated and regulated. This is in agreement with the notion about locals expressed in the UNESCO world heritage nomination documentation of Taishan.</p>	<p>The plan called for further concentration of the power to the Administrative committee, and it turned out they successfully made it, and through this concentration of powers the municipal government had an easier and more effective control over the conservation as well as development of Taishan.</p>	
<p>The benefit of the local villagers from the heritage resource conservation and development was not reflected in either the goals or the management objectives of the plan. There is an independent chapter, “Residents and society control plan” mainly talking about relocation including relocating the local residents in terms of phases, measures and costs.</p>	<p>The plan called for further concentration of the power to the Administrative committee, and it turned out they successfully made it, and through this concentration of powers the municipal government had an easier and more effective control over the conservation as well as development of Taishan.</p>	
<p>Reviewing all through the plan text could not find a place that mentioned local benefit --- neither in goals and objectives, nor in the detailed plan chapters while local hospitality toward tourists was called for.</p>	<p>This plan criticized the existing management system of Taishan Scenic Zone and pointed out its disadvantages such as bulky organization, rigid mechanism, lack of vitality, and lack of adaptability to the ever-growing competitive tourism market. It suggested that the Committee should join hands with other municipal bureaus on Taishan development issues through establishing a “Tai-an Tourism Management Committee”. It strengthened the leadership of the Tai-an Municipal Tourism Bureau on the tourism development and management of Taishan.</p>	
<p>Local villagers were consulted frequently during the development of the planning document. Some decisions were made jointly by the experts and the local village leaders in charge of tourism issues in the village although villagers were not entitled to being involved in the final approval of the tourism plan.</p>	<p>Taishan administrative issues were not mentioned in this village-level plan.</p>	



<p style="text-align: center;"><b>Ropeway</b></p>
<p>There is not any reference that could be found about the ropeway although in the 1987 master plan it was mentioned that the UNESCO World Heritage Committee suggested the ropeway should be removed.</p>
<p>The issue of Taishan ropeway was addressed as an appendix to the plan document. It analyzed the pros and cons of the ropeway and concluded that the ropeway construction on Taishan was a mistake and it should be removed, and that money should be taken from the ropeway operation revenue for the use of recovering the destruction topography and vegetation caused by the ropeway construction.</p>
<p>The plan maintained that one passenger ropeway(Tao-hua-yu) and one cargo ropeway (Tao-hua-yu)should be retained so as to meet the need of supply and emergency occasions while they other two should be removed in due time.</p>
<p>It suggested that the Taohuayuan ropeway should be retained and its ticket fees should be raised. Furthermore, it also suggested that a new ropeway could be built at the back/north side of Taishan so as to replace the two (to-be) removed ones.</p>
<p>Ropeway issues were not addressed in this village-level plan although villager interviews showed that most of them were opposed to ropeway construction while a few others were indifferent.</p>

## **Chapter Nine: Discussion and recommendations**

### **9.1. Discussion**

#### **9.1.1. Retrospection on the research questions**

It is necessary to review the research questions raised at the very beginning so as to have a whole picture of the research. The questions will be answered based on the research findings presented in the preceding chapters and will be then unfolded in detail in the followed discussions with regard to the three aspects of heritage sustainability: resource, tourism and local community.

#### **1. What are the goals and objectives that the tourism plan and conservation plan for the World Heritage Site are meant to achieve? What do they articulate concerning the local community and their lives?**

Tourism planning for Mount Taishan was entailed in the master conservation plans of this world heritage mountain. The latest conservation plan document (the 2007 version) explicitly stated the goals and objectives in terms of general goals, resource conservation objectives, and tourism management objectives.

The general goals of the conservation plan are clearly identified as:

1. Adequately conserve the cultural and natural heritage resource and the ecological system of Taishan, present in an integral way Taishan's social, cultural, and aesthetic value as well as its value of scientific research.

2. Develop tourism on Taishan in an appropriate way and pace and at an appropriated space and time, and provide high quality visiting experience in terms of appreciating, experiencing, and knowing about Taishan.

3. With a goal of being "intelligent" and "digitalised", establish the Taishan information management system, including: tourism service system, precautionary/early warning system, and fire monitoring system, and enhance the scientific component of Taishan management. Introduce ISO9000 and ISO14000 quality certification systems to Taishan and gradually make the management of Mount Taishan in convergence with international standards.

Twelve resource conservation objectives were identified as:

1. Adequately and effectively conserve, preserve, manage, and exhibit Taishan as a world cultural and natural heritage site (84 specific sites), and guarantee the integration and authenticity of this heritage site and its surrounding environment.

2. Adequately and effectively conserve, manage, and exhibit Taishan's cultural resource (including 57 ancient architectures, more than 1800 steles with carve inscriptions, and more than 30,000 ancient trees), guarantee the continuity of Taishan's history, and guarantee the right of the future generation to appreciate and experience the integration and authenticity of Taishan's cultural and natural resource.

3. Preserve the topography and geomorphology of Taishan as well as their aesthetic value (including 64 sites of picturesque peaks and stones and 21 waterfalls and pools), prevent the topography and geomorphology from being damaged. Try the best to recover those that have been damaged to its most possible natural conditions.

4. Preserve and protect the forest and the wildlife resource of Taishan, particularly those local species. Control and reduce the introduction of alien species. Guarantee the integration and continuity of Taishan's ecological system. Try the best to restore those areas that have been heavily damaged to its most possible natural conditions.

5. Preserve and protect the natural water system of Taishan. Control and terminate human activities in various forms that damage the natural water system. Try to restore those areas that have been heavily damaged to its most possible natural conditions. Encourage and advocate recycling use of water.

6. Conserve and protect the air quality of Taishan Scenic zone and its surrounding environment and improve visibility. Control and terminate human activities in various forms that heavily impact the air quality of Taishan.

7. Protect the sacred and solemn atmosphere of Taishan, control various noise and light pollution. Control and terminate various human activities that are not harmonious with this atmosphere of Taishan.

8. Encourage scientific investigations and research activities at Taishan under the condition of

meeting the above conservation objectives.

9. Establish the information system of Taishan's cultural and natural resource, and periodically investigate, collect, and update the resource information of Taishan.

10. Conduct real-time monitoring and guarantee to make scientific and effective management decisions.

11. Clarify the border of Taishan Scenic Zone, set distinctive markers to guarantee the certainty of management space.

12. Coordinate the construction and management of the periphery areas to make it harmonious with the cultural and natural resource of Taishan.

Meanwhile, tourism development management objectives were also identified:

1. On the condition of meeting the conservation goals, appropriately develop tourism activities in light of the value and characteristics of Taishan's resource, and guarantee the sustainable development of Taishan's tourism.

2. On the condition of not conflicting with the conservation goals, develop tourism on Taishan in an appropriate way and at an appropriated space and time to provide high quality and diversified visiting experience.

3. On the condition of fully considering resource conservation, establish Taishan tourism service facility system on appropriate spots and scales to provide tourist with necessary and strict-controlled tourism service facilities.

4. Establish Taishan's tourism information monitoring system, and reduce the imbalance of visitor distribution in terms of time and space.

5. Coordinate and maintain a healthy relation between Taishan and Tai-an city as well as the city of Jinan, and enhance the sustainable development of local economy on the condition of full and effective heritage resource conservation.

It could be seen that tourism was underscored in this conservation plan with enhancing visitor experience as a major goal. However, "feeding back" the resource conservation was not mentioned as a tourism development and management goal. Local communities and the local needs were

mentioned neither in the general goals nor in the objectives of resource conservation and tourism.

The Tourism Master Plan for Tai-an city was also examined since much of the content of the plan is planning for Mount Taishan as the soul of the tourism attraction of the city. General goals and phase objectives were explicitly stated about tourism development and management of Tai-an city centering on Taishan. Resource conservation was stated as a principle in tourism development on Taishan. However, similarly to the conservation plan, financially supporting resource conservation and local community was not mentioned in the plan as either a goal or an objective.

**2. Since tourism is one of the most important activities going on in World Heritage Sites, what do the plans say about tourism and local involvement in tourism? Do local communities benefit from heritage-related tourism? Why or Why not?**

Tourism was underscored in this conservation plan with enhancing visitor experience as a major goal of the plan. However, local involvement in tourism was not mentioned, but rather, locals were considered a problem to be solved and managed. They were relocated out of the mountain reserve for conservation and tourism development purpose. Nevertheless, research in Taiqian village and Yingsheng village revealed that quite a number of the local villagers were given opportunities and policy preference to get involved in the mountain-related tourism operations and businesses as a compensation for relocation and loss of their traditional livelihoods.

**3. How well have the plans been implemented at the research site? Has the practice on the ground matched the objectives? If so, how; if not, why? Did local communities benefit from the designation as a World Heritage site? How so, or why not?**

In terms of the conservation plan (judging from the 1987 plan), much of the plan was implemented well concerning the conservation objectives. Construction for both conservation and tourism was implemented well as planned; Demolishing and relocation projects were also carried out well with local villages being all moved out of the heritage mountain reserve; management system was reinforced as desired. However, development specifications were not well observed such as the control of the rope way building. The suggestion to dismantle and stop using the ropeways was not taken, instead, two more ropeways were built on Taishan in the years followed. As for the new plan

(the 2007 one), implementation issues such as the responsible party (The Taishan Administrative Committee) for the implementation was specified in the plan. However, the plan still waited to be approved by the State Council of China by the time of the field research so that it was not actually implemented.

As for the Tourism Mater Plan of Tai-an City, there is no clear identification of the responsible party for implementation and how to implement the plan. Interviews and on-site observations showed that the plan was not really implemented in terms of the part of Taishan. Internet news revealed that Taishan Administrative Committee started a new Taishan tourism planning project on their own in September 2007 which may imply that this plan made by Municipal Tourism Bureau would not be implemented on Taishan either in the future.

Examination on the Folk Culture Tourism Plan of Baimashi Village revealed that the plan was implemented and the objectives of Phase One and Phase Two of the plan were mostly reached. The village tourism company was in charge of the implementation and their efficiency was evident. Facilities were in place as planned. Certain projects operated successfully such as the farmer's home-style hotels and their private pomegranate orchards while some others were not such as the horse racetrack and red-scale fish. Villagers directly involved in tourism were supportive and motivated in implementing the tourism plan

It could be noted by the above examination on the plan implementation that the official plans of the relevant local governmental departments were more focused on the conservation and tourism development aspects of this world heritage mountain than on the local community well-being. Locals were actually ignored in developing those plans and they could not found in the goals and objectives of the plans but rather, they were taken as a planning and management problem to be solved through relocation. It could be seen from the latest plan document (the 2007 one) that local benefits were still not mentioned, and the only place mentioning the local people in the plan was in the relocation project of the plan articulating how and how many of the local residents should be relocated.

Nevertheless, local villagers did benefit from actual tourism development on Taishan as compensation of relocation and loss of their land and traditional livelihoods. Those who were directly

affected by conservation of the mountain as a world heritage site were permitted to participate in tourism services and hence make their living. However, interviews with those villagers who were involved in tourism revealed that, although they were in favour of the world heritage designation of Taishan, most felt they pay far more cost than what they could get from the world heritage mountain in both conservation and tourism. They exhibited high enthusiasm in participating in tourism and felt they were not given fair and enough opportunities of participation. Although the local government and the administrative authority did not underscore local participation in tourism on the world heritage mountain, villagers did make their own effort to participate. Those three villages (out of four under research) which were directly impacted by the world heritage designation and conservation demonstrated varied capacity, degree, and form of participation in tourism. It could be found that all the four villages were participating in tourism in an organized way mainly based on the village collective resources. What they all felt lack of and desired strongly to have was the financial and policy support from the Taishan Administrative Committee.

#### **4. Is local involvement and public participation in heritage and tourism planning advocated much in the western world applicable in the Chinese context? Why or why not?**

This research on Mount Taishan revealed that, due to political and socio-cultural context differences between the western and the eastern countries, the western advocacy of local involvement and public participation met many challenges in application in the practices of world heritage site in China. The challenges include:

*1. The political system and socio-cultural traditions in China is different from that of the western countries, and as a result the heritage planning and management traditions are also different.*

The 5000-year Chinese civilization was featured by slavery and feudalism with the exception of the recent 100 years of the Republic of China<sup>54</sup> and the People's Republic of China<sup>55</sup>. In the feudalist China, the Emperor was the highest ruler and all the hierarchical officials are his liegemen and let alone the grassroots people. Centralization was the characteristic of the ruling system and public participation was unimaginable. Bearing this long-cherished tradition, China entered the era of

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<sup>54</sup> Sun Zhongshan and Jiang Jieshi

<sup>55</sup> Mao Zedong and his followers

the People's Republic in 1949. Chairman Mao Zedong and his followers, with the guidelines of their Marxist belief, aimed to make Chinese Communist Party a party for the benefit of proletariat and the Republic of China for the grassroots people who were supposed to be the owner and master of the country. However, it turned out that this revolution was not as complete as the French Revolution and could not really bring China out of the feudalist ideology featured with power concentration, bureaucracy, and with the grass root people especially the farmers still at the bottom of the power hierarchy. This is also typically demonstrated in the relation of the world heritage site in China. It is unsurprisingly difficult for the local villagers who sat at the very bottom of the heritage hierarchy to take part in the decision making relating to the heritage and have their interests and aspirations be presented. Meanwhile, the traditional top-down management system added to the challenge of local participation in decision making.

Nevertheless, although local involvement in decision making is low at the UNESCO world heritage mountain, local people were provided with opportunities to be involved in serving heritage tourists as a compensation for the relocation, loss of land, and loss of traditional livelihoods means. These local involvements were defined, arranged, and administered by the Taishan Administrative committee rather than the local villagers' self-administration so that local villagers were not very satisfied in spite of the existing involvement while the heritage management people took the local villagers as more of a problem for heritage conservation and took involving the locals in heritage tourism as a route to solve the problem.

*2. The power relations in the nexus of world heritage site in China are different from that of the western countries.*

Unlike the western countries, there is not a local authority composed of local resident and representing the local interests that presides over the operation and decision-making of the heritage including world heritage in China. Instead, China entrusted the local government as the direct custodian to take care of the issues of the heritage including the world heritage. Take Mount Taishan for instance, the Taishan Administrative Committee which was a sublevel governmental department of Tai-an municipality has the dominant power over the administration of this world heritage



mountain. The Committee's conservation and tourism management goals were set to meet the needs of the local government, with the GDP growth as the essential focus. Local villagers turned out the weakest group among the various stakeholders of this heritage mountain. They were left out of the decision making circle and the degree of their involvement and benefit were not decided by their own will but were defined by the favour or preferential policy of the local government.

*3. The participatory capacity of the locals in China is different from that of the western countries.*

The participatory capacity of the heritage locals in China is relative low. First, the local awareness of participation in heritage-related decision making was low. This was mainly because the Chinese people were taught and formed the tradition of being obedient liegemen of the emperors all through the Chinese feudal history and people had been used to obey the orders from their superintendents. Although the new People's Republic of China claimed that the poor were equal to the rich and women were equal to men, the hierarchical sense and the obedient culture were still deep rooted in people's mind that influence their life and behaviours. This was found especially so in the author's interviews with local villagers during the field research: the author was always introduced to the villager leaders before being permitted to go to the villagers. While the supreme villager leader was there, it was always the supreme leader who talked while they other listened, or occasionally provided some supplementary facts supporting the supreme leader's ideas; when the villagers were with a village leader, it was always the leader talking to me while the other listening; In family interviews, it was always the elder member talking while the younger listening and the male member talking while the female member listening. Quite a few villagers felt it was not their business rather than the Administrative Committee's to care about the planning and management issues of Taishan heritage conservation and tourism development. What they most hoped for was the preferential policy and financial support from "the above". Meanwhile, the local villagers were given little space by the "above" for participating in decision making. The Administrative Committee people felt that the local villagers were more of being cared about their life than being invited to discuss planning and management issues which would be very likely to produce more troubles and low efficiency.

Second, the villagers' education background was relatively low. Questionnaire surveys and the interviews all found that the majority of the villagers had an educational background of senior high school and under with most of the 40-year-old and above only having junior high school education. Those who had education of college and above were mainly those who were relatively young and who worked in the village committee assigned or sent by the Taishan Administrative Committee. Many common villagers interviewed were relatively low-educated and lack of knowledge and information needed for participation in planning and management issues. Their involvement in tourism benefits through working in tourism services were also limited by lack of knowledge and skill.

Other factors such as lack of funds, lack of policy support, and poor departmental coordination also hinder local involvement and public participation in world heritage practices in China.

However, things may change as the socio-political context changes. Recently the Hu and Wen government<sup>56</sup> strongly advocated "concern for people's livelihoods"<sup>57</sup> and "concern for the three rural issues"<sup>58</sup>. Hope this may bring some positive change in world heritage planning and management system with more attention on the well-being of the locals and with more local involvement and public participation taking place. It is believed that the western call for local involvement and public participation still needs time and suitable opportunity to be better and fully applied in China although there is a vision there. Nonetheless, considering the difference in political and socio-cultural context, local involvement and public participation in world heritage conservation and tourism in China would be bound to differ from those in the western countries, and a localized norm that fits in Chinese context is hoped to be developed and accepted by both the government and the local people. The involvement models of the four researched villages presented in this research may provided some inspirations for localized involvement and participation in China.

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<sup>56</sup> Hu Jintao as the General Secretary and Wen Jiabao as the premier

<sup>57</sup> Concern for People's Livelihoods: emphasized in Hu Jintao's Work Report on the 17<sup>th</sup> National Congress of the Communist Party of China in October 2007 as a significant strategy to meet the goal of creating a "Harmonious Society." It was noted that he repeated the term "democracy" 60 times throughout his report which lasted over 2 hours.

<sup>58</sup> Concern for the Three Rural Issues: refers to three issues relating to rural development in mainland China, was emphasized throughout Premier Wen Jiabao's speech on the Workings of the Government in 2005 on the 2006 National People's Congress. Specifically these issues are agriculture (agriculture industrialization), rural area (reform on rural household registration system), and peasants/(farmers' quality improvement and tax relief)

Further discussions may go on the following aspects respectively: 1. plans and implementation of Mount Taishan and the transferability of the western plan and evaluation knowledge, 2. resource conservation, 3. power relations reflected through the ropeways, 4. management system, 5. tourism development and visitor experience, 6. local needs and local involvement, and 7. contestation and dissonance in the local-global nexus of the world heritage mountain.

### **9.1.2. Plans and implementations of Mount Taishan and knowledge transferability**

#### **1. A progress in the norm of the plan document**

Plan evaluation literature called for criteria for “a good plan” which should guide professionally approved standards of evaluation practice (Baer, 1997). According to Baer, a good plan should at least contain explicitly identified goal and objective. Evaluating the relevant plan documents of Mount Taishan revealed that no clear goals or objectives were identified in the earlier plan documents such as the world heritage nomination document of Mount Taishan (with a management plan entailed), and the 1987 version of the Mater Plan for Taishan Scenic Beauty and Historic Interest Zone. It could be inferred that unclear goals and objectives would cause difficulty and ambiguity in the process of implementing the plans and unavoidably affect the result of the implementation. This also caused difficulty for evaluation of the plan implementation. The latter plans such as the Tourism Master Plan for Tai-an City and the 2007 version of the Mater Plan for Taishan Scenic Beauty and Historic Interest Zone reflected have the goals and objectives clearly identified in the plan documents. If this could be seen as a progress of heritage planning in China, we could say that the western knowledge of heritage planning in the sense of plan document norm was accepted and applied in Chinese heritage planning and exerted a positive influence. Similar examples could also be found such as planning approach, implementation (e.g. who is responsible for implementation), and monitoring issues which were also mentioned in the latter plans. However, it should be noted that even though goals and objectives are identified in the latter two plans, enhancing the local life and address the local need were not identified as a goal or an objective in either of the plans. Meanwhile, none of the plans mentioned evaluation in the documents, which could imply that evaluation was not considered when the plans were made. No evaluation may mean no responsibility

to take for failure of implementation or distorted implementation of the plans. These are inadequacies of world heritage planning in china.

## **2. Planning approach and methods**

Planning approach and methods of the relevant plans are examined. Information on this aspect was not available in none of the plans, but was obtained from interviews with the resource and tourism management people. All of the four officially made plans were basically developed with an expert-driven approach and written up by the experts invited from outside --- They are mainly professors and researchers on heritage resource conservation and tourism development at well-known universities in China. They were invited by and meanwhile under the supervision of either the Taishan Administrative Committee or the Municipal Tourism Bureau of Tai-an City, both of which again were under the leadership of Tai-an Municipal government. This is to say that basically only two stakeholders were involved in the plan development: the experts and the municipal government with either the municipal tourism bureau or Taishan Administrative Committee as its representatives. The latter two governmental departments, although performing independent management functions to some extent, could not really make decisions on their own concerning strategies and policies. Experts were invited to participate for two factors: to provide technical advice on resource conservation and development; and to incorporate the needs and ideas of the municipal government into the plan they made while taking the national and UNESCO principles and policies into consideration. Whether the other stakeholders can participate or not was actually decided by the municipal government. Within this context, the western advocacy of stakeholder's participation in planning and decision making is not realistic in this context. Nevertheless, interviews revealed that there was improvement in the planning methods. Instead of merely sitting in the room studying the official documents and statistics, it was noted that the planners for the latter two official plans employed several methods to collect data from a broader scope of stakeholder. For example, the experts in charge of the tourist plan did a tourist survey for the planning purpose. They also convene tour operators to have workshops for information and perceptions. Although weak stakeholders such as the local villagers were not yet involved, it is still considered a positive influence of the western planning knowledge that the

Chinese heritage planners and decision makers have been moving toward broader involvement of the stakeholders in their planning process. However, Economic, socio-political, and institutional barriers are visible.

The village-base folk and culture tourism plan has some difference from the four officially made plans. Although the plan was finally written by an expert team, the experts were locals and they worked in Tai-an city and were very familiar with the mountain. The village head told they conducted interviews with the villagers and listened patiently to what they wanted. More villager consultations were found during the planning process.

### **3. Implementations**

Patton's (2008) utilization-focused outcomes framework is adopted in the evaluation practice of this research for conceptualizing outcomes that are meaningful and measurable. When no clear goals and objective are presented in the plan, it is difficult to tell whether the plan is implemented as was desired and whether the outcomes has met the intention of the plan. Under this circumstance, evaluation of the implementations turns out to be more about examining whether the content of the plans such as the constructions and relocation were implemented or not. It is found that most of the commitments specified in the plans were met. For example, the constructions for resource conservation and tourism facilities were completed. Villagers were relocated as was required in the plan. However, some certain commitments specified or suggested in the plans were not met. For instance, all of the four plans suggested indirectly or directly that the ropeway on the mountain should be removed, and due date was also specified. However, the ropeway is still in operation and even more ropeways were built. It could be seen that the plans were actually selectively implemented. The outcomes of the plan implementations are only meaningful and beneficial for certain stakeholders. The selective implementation of the plans reflected the power and interest pattern of the heritage mountain. It favors some certain client (coining Patton's term, 2008) such as the municipal government while disadvantages some others such as the local villages. Meanwhile, without an equitable inclusiveness of the stakeholders' needs, even though the major content of the plans were brought to the ground, the function of planning and management failed to some extent in terms of

mitigating the problems and maintaining a symbiotic relations among the three basic elements of the world heritage, resource, tourism and local life.

Although goals and objectives were clearly identified in Tourism Master Plan for Tai-an City, it is found that the plan was not used by the Taishan Administrative Committee. Since this plan was made by Tai-an Municipal Tourism Bureau, some other parts of the plan reflecting certain objectives were met on the ground in the city of Tai-an where tourism were under the control of the tourism bureau. However, since tourism on Mount Taishan was controlled by Taishan Administrative Committee rather than the tourism bureau, suggestions in the plan on tourism development and management of the mountain Taishan were not implemented, such as removing the ropeway, and reforming the Taishan tourism management system. Trade-offs could be found in the tourism master plan. For instance, although it strongly suggested removing two ropeways, it also suggested building a new ropeway at the back/north side of Taishan to replace the two. Nevertheless, none of the suggestions were implemented. This selective implementation again reflected that power issues played a key role in the planning and management of this world heritage mountain, and should be taken as an important element into account in evaluating the heritage plans and their implementations in the Chinese context.

#### **4. Stakeholder participation in evaluation**

Western plan evaluation literature widely called for stakeholder participation in evaluation (Patton, 3008, Burby, 2003; Barrick and Cogliano, 1993; Reineke, 1991; Ayers, 1987). However, the research did not find any official evaluation of the plan implementation for this world heritage site, and therefore stakeholder participation in this aspect is beyond discussion.

The researcher persistently made her effort on this call to involve the stakeholders who are supposed to use the plans and be impacted by the plans. In addition to studying the plan document and making observations on the site, the researcher interviewed relevant stakeholders such resource management people, tourism management people including the tour operators, tour tourists, and the local villagers. Questionnaire surveys were also conducted among the four stakeholders groups. Information and perception obtained from the surveys and interviews relating the plans and its

implementations as well as the contextual background of the development of these plans are very helpful to give insight and better understanding of the planning and implementation issues about world heritage site in China. However, the researcher's endeavor on involving stakeholders participating in evaluation met some challenges. For the management people, they did not welcome the idea of evaluation which sounded more like an inspection or judgment on their performance. Their refusal to provide the latest plan document was an indication of their caution against evaluation: they did not want to be evaluated. For the local villagers, they seemed not knowing much about the official made plans, and tradition of participation in plan evaluation had not been formulated among them, all though most of them were supportive of the evaluation by answering the questions the researched asked. The stakeholders' participation in evaluation was passive and limited. Compared to the SBE and SCE approaches advocated by Ayers (1987), the author's experiment in the field is more appropriate to be termed as SIE (stakeholder-informed evaluation) or SRE (stakeholder-referred evaluation). Access is another challenge. The researchers were able to make observations in certain villages and conduct interviews and questionnaire survey among certain groups of villagers and management personnel. These activities generally should get approved by the Taishan Administrative Committee leaders and the village committee leaders. Sometimes they had to request instructions from their superintendent bodies and the researcher had to wait long time for feedbacks, with disapproval sometime being the result of this long-time waiting. So to speak, judging from the case of Mount Taishan, currently it is not yet ready for Chinese world heritage planning and implementation to accommodate the western idea of stakeholder participation in evaluation, although some good initiatives were started (such as the researcher's practice) and some ideas of stakeholder participation in evaluation worked to a certain extent if not fully applied in as were desired. It is hoped that this good initiative could lead to better performance in the future as both the economy and society of China are in progress and learning from the western advanced knowledge has been a national development strategy in China.

### **9.1.3. Resource conservation**

The importance of heritage resources and their protection is underscored in almost all of the

conservation and tourism plans examined in this research. The main purpose of the UNESCO World Heritage designation is to prevent the cultural and natural heritage from impairment “with destruction not only by the traditional causes of decay, but also by changing social and economic conditions which aggravate the situation with even more formidable phenomena of damage or destruction”, and to “maintain, increase, and diffuse knowledge by assuring the conservation and protection of the world's heritage.” (UNESCO, 1972) In accordance with these guidelines, the 2007 version of the conservation plan of Taishan defined explicitly the conservation goals and management objectives. However, clear goals and objectives concerning heritage resource conservation could not be found in the other four plans that were examined. On the one hand, this may reflect the inadequacy of the other four plans which might be due to a variety of circumstances, such as insufficiency of knowledge, lack of financial and human resource. On the other hand, this also reflects progress with time in the planning work for China's world heritage sites. The goals of this conservation plan highlight three aspects: ensure heritage conservation, enhance the visitor experience, and improve the scientific information management system including a precautionary or early warning system, a fire monitoring system, and a tourism services system. Tourism is an increasingly important factor affecting the conservation of world heritage resources so that it has become unavoidably and very carefully dealt with.

Local benefits and local involvement were not mentioned in the three goals and the eleven conservation objectives of this latest plan. This reflects the lack of integrative thinking of the planners and the governmental organizers. They have not considered local people to be key stakeholders as they prepared the conservation plan. Interviews with the managers and local villagers support this interpretation. World heritage designation, while it has enhanced advocacy for and the efficiency of the conservation of Taishan's heritage resource to some extent, has actually segregated the local people from the Taishan heritage resources and their conservation.

On-site observations and interviews revealed that many of the projects in the conservation plans were implemented to varied extent. The Taishan Administrative Committee was efficient and effective in implementing conservation policies and projects. This is because they possess the power of



law enforcement and administrative empowerment from the municipal government reflecting the uncommon nature of Taishan as a world heritage site. They were widely believed to have done a good job in studying and protecting rare species of vegetation and the traditional architecture on the mountain. They were successful in demolishing illegal structures on Taishan and they relocated villagers from Taishan to better conserve and manage the mountain. They also promoted Taishan as a world heritage site to tourists under the guidelines of the World Heritage Convention. They were quite effective in regulating tourism operations on the mountain. However, some practices that are occurring on the ground do not match the goals and objectives. The ropeway building is a case in point. The construction of the ropeways, especially the first ropeway, severely damaged the heritage resources of Taishan and this damage cannot be reversed. Except for the village-level tourism plan, all other plans made suggestions about removing the ropeways<sup>59</sup>. Nevertheless, since the first ropeway was built in 1983, four other ropeways have been built in spite of unceasing opposition from national and international experts and other professional advisors. The Administrative Committee performed very ineffectively in dealing with this issue. The inability of the World Heritage Convention to enforce its recommendations is also exhibited in the proliferation of ropeways. In-depth interviews revealed that there was a complicated network of interests and beneficiaries behind the construction of the ropeways. These circumstances are relevant to the answer to the basic question: “What and whom should the heritage plans plan for?”

#### **9.1.4. Power relations reflected through the ropeways**

A review of the roles of the various players in Taishan’s operations reveals that the most powerful stakeholder in this world heritage is the municipal government. As the actual custodian of Taishan, the local government has substantial and dominant power over all practices on the mountain from resource conservation to tourism development. The World Heritage Convention is too remote and has hundreds of sites to think about so that it is unable to come to grips with the specific issues of Taishan. Both national and provincial governments attach great importance to the conservation of

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<sup>59</sup> The UNESCO world heritage application document did not state anything in the body of the text about the ropeways but it did make suggestions about the ropeway issue in an auxiliary document. The 2002 tourism master plan of Tai-an city suggested removal of ropeways and differed in this respect from the suggestions of the conservation plans. However, it also suggested that a new ropeway should be constructed.

Taishan but they cannot provide sufficient funds for conserving the mountain. As a result, a national policy was made that delegated responsibility to the local government to conserve the world heritage that is located within its jurisdiction. As a result of the delegation of power, the local government was essentially left to decide the means of conservation. Under this circumstance, the local government naturally chose to “use the mountain to conserve the mountain” and tourism has become the major means to achieve this. Construction of the ropeways was mainly driven by the need to expand tourism. Empowered and supported by the local government, and with the acquiescence of the upper level governments, investors successfully constructed the ropeways in the face of futile academic objections and protests. As a division of the local government, the Taishan Administrative Committee would naturally obey the orders from its superintendent as the top-down management tradition requires. The ropeway construction brought in many more tourists with positive financial inflows to the local government. In order to control the income from entrance fees, the Taishan Entrance Ticket Office was set up as a sub-department of the Taishan Administrative Committee. However, it is directly supervised by Tai-an municipal government. This means that the income from entrance fees go directly to the municipal government rather than the Taishan Administrative Committee. Thus, the mountain has become a cash cow of the local government. Furthermore, the local GDP and the associated economic and financial growth are taken as key indicators for the evaluation and promotion of the local officials. These local officials inevitably milk the cow as much as they can because it enhances their political prospects. To a great extent, practices on the mountain from planning to management and from conservation to tourism implicitly serve the economic and political objectives of the local government and the local officials. To return to the starting point, the conservation and tourism plans of Taishan are prepared more for the benefit of the local government than for improving the status of local people. So it is unlikely for the ropeways to be removed as was suggested by both the conservation plans and the tourism plans as long as the power relation and the management pattern of the heritage mountain keep unchanged.

#### **9.1.5. Management System**

The Administrative Committee of Taishan Scenic Beauty and Historic Interest Zone (the

Taishan Administrative Committee) is a governmental agency that is the management body for Taishan. It represents Tai-an municipal government and takes charge of the affairs of Taishan. The conservation plan called for the concentration of power in the Administrative Committee. Through several mergers with and separations from other governmental bureaus over the years, the Administrative Committee has become a fully-equipped governmental body.<sup>60</sup> Thus, as suggested in the plan, a management system with high independence and exclusive power has been established to take charge not only of conservation issues but also of the tourism development of Taishan. The Committee has a high capacity to execute decisions because of the law-enforcement power it has acquired.

This management pattern has both pros and cons. On the one hand, it enables high efficiency in carrying out the policies and regulations made by the authority. This is reflected in the effective implementation of some aspects of the conservation plans including conservation practices and tourism development construction, as well as practices like relocation of the local villagers. Orders are easier to give and to be taken under this mechanism with inter-departmental wrangles and dispute over trifles being minimized. It also possesses certain advantages in holistic administration which make it easier for the municipal government to take the issues of Taishan under its control. On the other hand, this process enables the Taishan Administrative Committee, with the municipal government behind it, as the dominant stakeholder of Taishan, to enjoy a monopoly in decision making. It essentially makes Taishan an independent kingdom and prevents other stakeholders from participating fairly in both benefit sharing and decision making. As a result, there is an extremely uneven distribution of benefits. Also, without checks and balances among stakeholders, bureaucracy and subjectivity, even prejudice, exist in decision making which may result in flaws in both policies and practices. The distribution of resources, including human resource, is not optimized as a result of the monopolistic management system. For example, the Administrative Committee has not made full use of the planning and management professionals who are affiliated with the Municipal Tourism Bureau for tourism planning and management of Taishan. This is a wasted opportunity. The uneven

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<sup>60</sup> With something like 12 sub-departments, it has its own tourism development office, bureau of planning, construction and land use, and bureau of administrative law enforcement, etc. Please cross refer to the presentation in Chapter 6 “Data Analysis” of this thesis.

distribution of benefits associated with this management system is very likely to result in dissension and distrust from disadvantaged stakeholders, and thus is a potential threat to the resources of the world heritage mountain and social stability as well.

#### **9.1.6. Tourism development and visitor experiences**

Annual visitor statistics show that the number of tourism visiting Taishan has increased about ten-fold since 1987. This suggests the success of the UNESCO world heritage designation in its purpose of sharing this treasure of humanity with the world through international and domestic tourism. However, it should be acknowledged that both international and domestic tourism have grown at equally rapid rates throughout much of China.

Visitors have high regard for the experiences gained from the unique natural and cultural heritage resource of Taishan. The Taishan Administrative Committee has been active in making efforts to improve the facilities and service quality of Taishan tourism. They have specified the building of a digital visitor information centre as a key goal in their latest conservation master plan. However, tourists generally express positive toward the resource quality of the heritage mountain.

Tourism is the most important economic activity on this world heritage mountain and the revenue generated from tourism on and around Taishan is important financial source for Tai-an city. Undoubtedly, tourism provides substantial income and employment opportunities for local villagers who have very high enthusiasm and strong will to participate in tourism practices. However, it can be argued that tourism was over-emphasized in the municipal strategy for a time. The ever-present strategy of the municipal government of “transforming a natural Taishan into an economic Taishan”<sup>61</sup> distorted the planning and management of Taishan until sufficient people realized that this emphasis was mistaken. It resulted in irreversible damage to the heritage resources. Nevertheless, even though the mistakes have been widely recognized, the local government has continued to place implicitly the economic goals at the top of Taishan conservation and tourism issues. Tourism preceded recognition of the need of heritage resource conservation and has resulted in deviations from the intentions of the World Heritage Convention.

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<sup>61</sup> A vice mayor of Tai-an city in charge of tourism issues once said this and it was taken as a principle for planning and developing Taishan. He also said that the top of the mountain should be developed into a prosperous city in the sky. The source is from the 12<sup>th</sup> issue of “New Trend”, 2004.

The local government emphasized tourism in terms of marketing and the provision of quality visitor experiences. Nevertheless, according to the responsible official from the Municipal Tourism Bureau, marketing results had been disappointing due to institutional barriers and insufficient funds. The construction of the ropeways, while providing convenience to some visitors and expanding the capacity to handle visitors, reduced the quality of the experience of some visitors and reduced the length of stay on Taishan. Previously, it took between one and three days, or even longer, to make a decent Taishan tour. The ropeways shortened most tours to less than one day. Many visitors now miss the challenge, achievement and aesthetic enjoyment of climbing the mountain on foot. They experience the profound beauty of Taishan in a rush from the cable cars and a short stay on the top of the mountain. However, the ropeways have increased the ability to cater to a growing number of visitors and the associated income from the sale of tickets but shortened length of stay, thereby reducing the sustainability of tourism in Tai-an city. The incomes of the hotels, restaurants and some chain businesses suffered an overall decrease as a result of the shorter stays as indicated in data provided by Tai-an Municipal Tourism Bureau (Tai-an Municipal Tourism Bureau, 2005). Also, the ropeways made it possible for a large number of visitors to gather at the top of the mountain in a very short time, greatly exceeding the capacity in the high seasons. In contrast, the traditional climbing route dispersed the visitors in a longer line and made the number of the visitors on the top less likely to go beyond the carrying capacity. The overcrowding has caused great inconvenience and, thus, visitor complaints about long queues and bad service quality. The number of visitors is not controlled during the high seasons and even the foot climbers have complained that “climbing Taishan is about watching other people’s hips when climbing up and their heads when getting down .... and watching the annoying cable cars come and go over your head when looking up.” Also, many tourists mentioned that they could not find interesting souvenirs to buy about Taishan. All these things reduce the visitor experience at Taishan.

Lack of communication and cooperation between Taishan Administrative Committee and Tai-an Municipal Tourism Bureau is another factor contributing to the inefficiency and insufficiency of tourism planning and management of Taishan. The monopolization of power of the Administrative Committee rendered the municipal tourism bureau unable to either provide input to Taishan tourism

in terms of planning and management, or benefit fairly from Taishan tourism. The tourism professionals who knew Taishan best were left out of its tourism planning and management. This is a waste of human resource and is unfavorable to the practice of sustainable tourism on this heritage mountain.

#### **9.1.7. Local needs and local involvement**

Neither the conservation plans nor the tourism plan mentioned local needs and local involvement in their goals and objectives. Rather, in the former document, locals were mentioned as threatening resource conservation and, therefore, they should be relocated out of the protected zones of the Taishan scenic area. In the tourism master plan it was mentioned that local people should be educated to improve the quality of services provided to tourists. Villagers mainly from Taiqian and Yingsheng were relocated as a part of the conservation plan to the outskirts of the mountain. These villagers, as well as other villagers that were interviewed, thus faced a change in, or the loss of, their original livelihoods. Inevitably, since there were few other options, they looked to tourism and tried desperately to participate in tourism to make a living. Although, some preferential policies were offered to the local villages that were impacted by relocation to encourage them to participate in tourism as an alternative means of livelihood, the status of local involvement in tourism was not satisfactory to the villagers. They were dissatisfied with a number of aspects as follows:

1. Unequal opportunities to participate, for the Administrative Committee and the Villager Committee decided who could or could not do what business;

2. Lack of financial support to help start tourism-related businesses. Only those who had start-up funds could have the opportunity to be contractors. The result was the rich became richer while the poor became poorer.

3. Lack of professional and skill training. Interviews revealed that the Committee did not provide much financial support for training the villagers and making them more capable of doing tourism-related business. At the same time, they complained about villagers' low qualifications.

4. Lack of opportunities to participate in decision making on issues closely related to their lives. Villagers were neither clear nor interested in the policy-making concerning heritage resource

conservation and tourism development. Their input was not sought when policies were made. They were observers and receivers of communications once decisions had been made. It was believed that the villagers were not capable of participating in decision making due to their limited education.

The villagers were inevitably impacted by UNESCO world heritage designation of Taishan. Their traditional livelihoods were greatly changed due to both conservation and tourism. In addition to the psychological adjustment associated with relocation, the primary challenge for the villagers was to find new livelihoods to meet their survival needs. The data analyses revealed that tourism was the most important livelihood means and local involvement in tourism was quite evident on Taishan. However, this involvement was mainly in benefit-sharing while involvement in decision making was limited. Villagers' voices representing their interest and concerns were not well heard by the decision makers. Also, an adequate mechanism was not put in place to enable all the impacted villagers to benefit from conservation and tourism of this heritage mountain in a relatively equal and ordered matter.

### **9.1.8. Heritage contestation and dissonance**

Various contestations and dissonance were found in the global-local nexus of the world heritage mountain. They make great challenges for heritage planners and managers.

#### **1. Contestation of heritage meanings**

As a UNESCO-listed world natural and cultural heritage site, Taishan is of outstanding universal value as defined by the WHC. Taishan is also considered a "national mountain." With its long history and abundant cultural attributes, Taishan bears very rich historical, religious, socio-cultural, and economic meanings. However, some of these meanings have been underscored while some others have been ignored in certain periods in Chinese developmental history. Contestations exist in this selective promotion of the heritage meanings. In ancient China, emperors of dynasties all went to worship the mountain for the justification and sacralization of their governance. In socialist China, during the Mao's period, Taishan was a symbol and witness of feudal rule and it was used as a negative case to educate people about class struggle. During the Open and Reform period, the economic potential of the heritage mountain outweighed the political meanings.

Taishan's economic functions were fully exploited through domestic and international tourism in the 1980s and 1990s of Deng's period. In more recent years, while its economic meaning is still emphasized more by the local municipal government, Taishan has stood for "stability and peaceful unification" as a national mountain in accordance with Hu Jintao's advocacy of "building a harmonious society". This is close to its literal meaning.<sup>62</sup> Nevertheless, the particular meaning of Taishan as a "mountain mother" to the local people was seldom mentioned. Moreover, the UNESCO world heritage designation of Mount Taishan required villagers to be relocated out of the mountain and they had to change their traditional way of life. This not only caused life challenges to them, but also hurt their instinctive love and attachment to the mountain and thus deprived them of their sense of belonging to and pride in Taishan. They may have felt the mountain suddenly was not theirs anymore. Being labeled as a world heritage site, the mountain becomes a common treasure of all humankind and, of course, a property of the country and the municipal government. The local villagers have been the weak and disadvantaged group at the very bottom of Taishan's stakeholder hierarchy. However, the local villagers' culture and customs that have been gradually formed over generations while living in and around the mountain are integral part of the heritage that should not be ignored nor marginalized while promoting other meanings of Taishan for other purposes. Taishan is UNESCO's mountain and it is the national and municipal governments' mountain but, in the first place, it should be the local villagers' mountain. Its meaning to the local villagers should not be undermined. Otherwise, the local villagers' identity they found in Taishan is hurt and the integrity of the mountain as a world heritage site is impaired.

## **2. Contestation of the heritage functions**

Contestation of the functions of the heritage mountain is mainly reflected in two aspects: 1. the conflicts of economic use of the mountain by the local municipal government and the resource conservation commitment of the mountain as a world heritage site, 2. the conflicts of its resource conservation function and its function of sustaining local life.

The intention of the UNESCO world heritage designation is to conserve the rare and fragile

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<sup>62</sup> The name of the city Tai-an comes from the name of the mountain Taishan. Tai-an in Chinese means "The country is prosperous and the people live in safety"



human treasure through promoting heritage tourism on the world heritage site to raise love and appreciation among the tourists as well as the local people so as to increase awareness and motivation to conserve the world heritage. For the UNESCO World Heritage Convention, the goal is to conserve the heritage resource while tourism development is an important means. However, the relationship between this goal and means is almost inverted when it comes to the local municipal government in China. Local economic growth is the priority of the local municipal government for them to meet the requirement of national development. The annual GDP growth is an important indicator for evaluating the local government's performance as well as the performance of the individual government officials for their further promotions. The local government looks at the heritage mountain more as resource to be exploited to help it fulfill their economic development commitment and so they attach more attention to the economic function of the mountain. This economic function is realized through tourism. The UNESCO designation may significantly add to the heritage mountain as a tourist attraction. Therefore, application for world heritage designation becomes a means for the local government to better use the mountain for its own development purpose. The inversion of goal and means causes contestation of the heritage functions. Such function contestation, if not properly and effectively mitigated, may cause negative consequences. An extreme example found at Taishan is the construction of the ropeways which is supported by the local government' but against the conservation principles of UNESCO and the national government of China, and the ropeway constructions have severely damaged the resource integrity of the heritage mountain.

Contestation of heritage functions is also reflected in the relocation of the local villagers for conservation priorities of Mount Taishan as a world heritage site. Contestation and dissonance are unavoidable sometimes (Graham et al., 2001), and tradeoffs are must occur (Hall, 2000). However, the multi-functional nature of heritage requires that the heritage planners and managers should take steps to mitigate the contestations as an important goal of heritage planning and management. It is maintained that the overall sustainability of heritage lies in the wise management and symbiotic relations of resource conservation, tourism development, and local community enhancement. Sustaining the local livelihoods and improving residents' life quality should be an indispensable

element of heritage sustainability, particularly for a world heritage site like Mount Taishan where international players are involved and locals were likely to be neglected when more priorities were set for planning and management of the world heritage site. Taishan planners and managers, under the leadership of the municipal government, did much work on mitigating the contestation between heritage conservation and local life, and provided compensations either in money or in the form of preferential policies to the relocated villagers. However, interviews with villagers revealed that the consequences of relocation are profound and the mitigation initiatives were far from adequate. Many unsolved problems still exist and conflicts may break out in the long run if they are not properly handled.

### 3. Contestation among the heritage stakeholders

Contestations are essentially disagreements among people, i.e. the stakeholders. The varied stakeholder contestations and manifestations are summarized in Table 9.1

**Table 9.1 Stakeholder contestations and manifestations**

<b>Stakeholders in contestation</b>	<b>Manifestations</b>
WHC of UNESCO vs. local municipal government	The local municipal government insisted of the Construction and keeping of the ropeways although WHC warned of removal time and again.
WHC of UNESCO vs. local villagers	Villagers were relocated for conservation priority of the world heritage site
national government of China vs. local municipal government	The national government warned that the first ropeway should be removed but the local government decided to keep it and built more ropeways.
Resource managers vs. tourism managers	People of TAC would not let people of the TMTB involve in tourism planning and management of Taishan
Tourists vs. local villagers	Tourists were followed by hawkers and were forced to buy low-quality souvenirs
Resource managers vs. local villagers	Conflicts and dissatisfaction of the villagers caused by implementation of relocation and inequity in relocation and tourism involvement arranged by the TAC
Tourists vs. pilgrims	Pilgrims considered the ropeways and cable cars violation of their divine God and Goddess and destroyed the holy spirit of the mountain. They attributed this to increase of tourists, and also complained about the overcrowding of the mountain with tourists
Tour operators vs. local villagers	Tour operators became scapegoat of the tourist complaints of low service quality because some “bad” local villagers pretended to be tour guides to provided low quality guide with low service fees which disturbed the tour guide market and confused the tourists
Local villagers vs. local villagers	Some local villager from other villages which were not relocated and thus were not eligible to do business on the mountain came to compete against the relocated and eligible villagers in the tourism business
Experts vs. local municipal governments	Experts called for removing the ropeways and restore the heritage resource integrity of Taishan while the local municipal government would not listen to them.

What are the meanings of the world heritage mountain? Whose heritage is it? What should a heritage plan do? These questions have been answered implicitly through discussing the contestations and dissonance of the world heritage mountain. Taishan's meaning to the local villagers and its function for enhancing local life should be noted and respected. This is in line with the sustainable use of this heritage mountain and it could also have positive implications for tourism on this world heritage site. The heritage resource, tourism, and the local communities are three interlinked elements that are basic to a heritage site and undermining any one of these elements will weaken the others. The goal of world heritage planning and management should be to mitigate contestations and dissonance and maintain symbiotic and mutually beneficial relations among the three elements. Otherwise, the merit of the UNESCO designation can be questioned if only tourism is promoted but the heritage resources are not conserved and local well-being is not improved.

## **9.2. Recommendations**

In light of the above discussion, some recommendations are proposed as follows:

### **9.2.1. Local government should cease to over-emphasize GDP and the economic exploitation of Taishan, and should expend more effort on reducing social problems and in conflict resolution.**

The local government was essentially the initiator and supporter of ropeway construction on Taishan. Other stakeholders were unable to prevent this. The damage from ropeway construction is much larger than that caused by other natural or human forces, such as fire or villagers cutting trees or stealing rocks. The problem lies in the system, not in the actions or inactions of a particular official. The evaluation and promotion system of local governmental officials should be reformed. GDP should not be the most important indicator for evaluation. Instead, the concept of Green GDP<sup>63</sup> should be introduced into the evaluation system of the government performance and official promotion. With regard to the mountain, the overall sustainability, including the status of heritage resource conservation and local well-being should also be considered in evaluations. Alleviation of

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<sup>63</sup> The **green gross domestic product** (green GDP) is an index of economic growth with the environmental consequences of that growth factored in. This concept was first raised in China by Premier Wen Jiabao in 2004. Refer to [http://en.wikipedia.org/wiki/Green\\_Gross\\_Domestic\\_Product](http://en.wikipedia.org/wiki/Green_Gross_Domestic_Product)

the stress on local people caused by Taishan's conservation and tourism development should be a governmental responsibility and an indicator for the commitment that should be taken as an indicator for the evaluation of officials. Reform is needed in the appointment system for world heritage-related officials, and the evaluation and promotion of these officials should be separated from the magnitude of economic gains derived from exploitation of the heritage mountain.

**9.2.2. Local government should acknowledge that it is just one of the stakeholders of Taishan and should pay more attention to the rights and benefits of local villagers**

In the current Chinese heritage management context, local government is supposed to be the custodian of world heritage sites. However, due to lack of effective supervision, the local government has actually played a role more akin to that of a dictator. This is not reasonable, especially when it is driven largely by growth in GDP. The management power over world heritage in China requires adjustment. A special oversight committee could be set up with substantial power to supervise and restrain local governments from abusing the heritage resource, to make sure that the local government acts as a reasonable custodian and one among a number of stakeholders, and making sure that the local villagers enjoy the right and benefits they deserve.

**9.2.3. The improvement of local well-being should be included in the goals and objectives for world heritage resource conservation planning and tourism planning.**

While Taishan is of universal value in the UNESCO sense and a national treasure of all Chinese people, it is also the "mother mountain" of the villagers who live closest to the mountain and whose lives are deeply rooted in the mountain. Local well-being is one aspect of sustainability. Local needs and interests should be explicitly articulated in the plans as a goal and the achievement of related objectives should be noted as an element for evaluating the sustainability of the heritage plan and its implementation.

**9.2.4. Local voices should be heard and local involvement in benefit sharing should be further improved in terms of equity. Means of greater local involvement in decision making should be sought.**

As disadvantaged stakeholder, the wishes and needs of local residents should be known and

considered. They should benefit from the conservation and development of the mountain. They should know where these processes will lead and whether they are likely to benefit from them. It is not realistic to advocate highly democratic participation for villagers within the current Chinese political and administrative environment which is still characterized by power centralization and top-down decision-making. Nevertheless, significant social progress in terms of public information dissemination and participation might have been expected over the 30 years of open-door reform policy with the promotion of increased devolution of decision-making power. It can be anticipated more local participation can occur in the future but, to achieve this, several things should be done:

1. Connect the meanings of the heritage mountain to the local life, making local people and their lifestyles part of the heritage mountain when thinking about conservation and development issues.

2. Establish a participation and distribution pattern that enables as many local people on and around Taishan as much to benefit from tourism. For example, in Yingsheng, every villager became a shareholder - a model that could be adopted elsewhere. The Taishan Administrative Committee could employ such a model to promote a wider distribution of tourism benefits.

3. Provide education and training for the villagers to increase their capacity and competency not only in benefit sharing but also in decision making. Such education and training should be a long-term program which should start as early as in the primary or middle school.

4. Local involvement in decision making regarding Taishan's conservation and tourism issues should specified and guaranteed in planning documents and incorporated into monitoring and evaluation mechanisms.

5. Means, such as tax exemptions for tourism-related businesses, could be used to encourage local involvement and to enhance local benefits.

**9.2.5. Tourism revenue, including the ticket income from Taishan, should be used in substantial amounts for conservation, tourism facility maintenance and to support local well-being**

Heritage tourism should contribute to both resource conservation and local well-being. While tourism cannot solve all the problems of the impacted villagers, it can and should alleviate some of

them. It is necessary to ensure, through written regulations, that revenue distribution should be directed at achieving the goals and objectives in the plans. A supervisory process should be put in place to ensure this as part of the processes of plan implementation and evaluation.

**9.2.6. An effective mechanism to supervise implementation, monitoring and evaluation should be established for heritage conservation and tourism planning**

As the main custodian of the heritage mountain, the Taishan Administrative Committee and the municipal government should strengthen their supervision and monitoring of conservation and tourism practices on the mountain. Also, provincial and national departments as well as the UNESCO World Heritage Committee should play stronger supervisory roles through various means, including legislation, administration, and use of the public media. Also, an independent body should be set up to evaluate the conservation and tourism practices on this world heritage site using criteria reflecting three aspects of sustainability: resource sustainability, tourism sustainability, and sustainability of local livelihoods and lifestyles. This evaluation body should be independent from the monopoly of the municipal government and should consist of representatives of a wide variety of stakeholders. It should ensure that the voices of all stakeholders should be heard and taken seriously.

**9.2.7. The legal context for heritage planning, including heritage tourism planning, should be strengthened**

Some regulations have been issued by the Bureau of Administrative Law Enforcement of Taishan Administrative Committee or its superintendent departments concerning heritage conservation and tourism management of the heritage mountain. However, no legal document or regulations were found about over-sight of the heritage and heritage tourism planning practice. For instance, no specification was found concerning the qualifications of planners, the structure of the planning team and whether the panel deciding the approval of plans should include representative of all stakeholders. Such items should be written in a legal document to guide plan making. Plans for world heritage sites should be made by qualified professionals. It is also necessary to ensure that the planners are not pressured unduly by powerful stakeholders as they develop the plans.

**9.2.8. Certain rope ways should be removed to optimize the spatial and temporal distribution of**

### **tourism on Taishan in the context of the larger context of tourism in Tai-an city.**

The construction of new ropeways on Taishan should be absolutely forbidden. Two existing ropeways could be retained: the Tao-hua-yuan passenger ropeway and the Tao-hua-yuan cargo ropeway. All others should be removed. During the high seasons, the number of the tickets sold to passengers should be controlled to avoid congestion on the mountain top. The majority of the visitors to Taishan are capable of climbing the mountain. If this was to occur, the spatial and temporal distributions of tourism on Taishan could be optimized since, with visitors dispersed on the climbing route rather than concentrated on the limited space at the top of the mountain. Visitors might obtain a more profound experience by climbing and by appreciating the scenery alongside the climbing route, both of which cannot be obtained by taking the ropeway. At the same time, this would enable longer visitor stays in Tai-an city with the potential of higher tourism expenses in the city. Such changes would be very positive to the overall sustainability of tourism on the mountain and in the city.

### **9.2.9. Crowding and seasonality of tourism on Taishan should be controlled and adjusted.**

The Chinese central government decided to cancel the annual Golden Week holidays in May in 2008 which helped reduce the extreme stress on the popular heritage sites in the country. However, as a countermeasure against the world financial crisis, the government recently adopted a new strategy of stimulating domestic demand. Both the crisis and the countermeasures will change the tourism market. Visits to heritage sites are likely to be encouraged by the government through various means as an aspect of stimulating the domestic demand. For instance, preferential policies were made to support travel agencies by providing them with subsidies so that they could attract tourists with lower-priced packages. Paid vacations are also starting among business as well as government employees. Tourism coupons were distributed to citizens. Under these circumstances, travel operators and the world heritage destinations are likely to ignore capacity limits to attract domestic tourists to cope with the difficult times. This could bring new stress to world heritage sites like Taishan. In any case, crowding and seasonality are long-term challenges for Taishan. Some adjustments could be considered and attempted. For instance, during the high seasons, discounts could be given for ticket pre-booking on-line or by phone for certain times of the day or evening; the number of the tickets

sold could be controlled; and during low seasons, favorable prices and diversified tourism products (such as experiencing local life) could be used to promote the heritage mountain to retired people and people with more flexible leisure time. In addition, the government could further adjust the vacation system so as to avoid over-concentration on tourism destinations like Taishan.

#### **9.2.10. The management system of Taishan should be reformed**

The Taishan Administrative Committee and Tai-an Municipal Tourism Bureau should join hands on Taishan's tourism planning and management issues. Better coordination is required between the two governmental bureaus. The Taishan Administrative Committee could focus more on conservation while leaving tourism planning and management to the tourism bureau. The two parties should communicate and cooperate to achieving a balance between resource conservation and tourism development, and to address other issues such as benefit distribution. Their work should be supervised and audited by a board of arbitration made up of all stakeholder groups including the local residents and the NGOs. This board of arbitration should be independent from the Tai-an municipal government which should be one of the stakeholders.

#### **9.2.11. The existing ineffective supervision of the WHC of UNESCO should be improved.**

With its world heritage enlistment influence, the UNESCO World Heritage Convention should play a more effective role in conserving the heritage resource and enhancing the quality of local life by providing stronger supervision of the party countries in their development of heritage tourism. Current supervision is ineffective and disappointing. The "Endangered World Heritage List" is an inadequate mechanism. More effective measures should be adopted. An international law concerning world heritage conservation should be established for the party members to observe. The supervising committee of the WHC should play a more active role in inspecting the world heritage status and the livelihood status of the local residents.

#### **9.2.12. The potential contribution of the local people and the local culture to the improvement of the tourism product should be further developed.**

While some believe that the tourism commodities of Taishan lack of variety and uniqueness, local people with local culture, and with their life as a dynamic resource, could be encouraged to



develop distinctive souvenirs. Financial assistance should be offered to local artisans with traditional techniques and folk arts skills to enable them to develop and produce tourism commodities with distinct local features. Local farm products like pomegranates and pollution-free food and vegetables could also be good tourism commodities if properly packed or processed. Experts who are dedicated to tourism commodity development research should probe the local culture and traditions to generate ideas.

**9.2.13 The local's over-dependence on tourism as livelihood means and the overall livelihood sustainability of the local villagers should be considered.**

The Taishan Administrative Committee and the municipal government should pay attention to the local villager's over-dependence on tourism. This is actually a potential threat to the overall livelihood sustainability of the local life considering the characteristics of tourism industry and employment such as seasonality and vulnerability to natural and socio-political turbulence, and it is also a threat to tourism itself and to the heritage resource as well. The voluntary efforts of the villagers to seek alternative livelihood means other than tourism (such as the Baimashi villagers going to Xinjiang for wasteland cultivation, and the Lihang villagers growing organic vegetables) should be encouraged and supported by the Taishan Administrative Committee and the municipal government both in finance and skill training, and via preferential policies. The authorities should actively help the villagers find varied means in addition to tourism to sustain their life. By doing so, the stress of heritage resource and tourism management would somehow also be reduced.

## **Chapter Ten: Conclusion**

### **10.1. Overview**

The goal of this thesis is to provide knowledge and recommendations for sound heritage (including tourism on site) planning and management in a developing country like China so as to better address the needs and aspirations of the local people and improve the quality of their life while conserving the world heritage site for humanity. The objectives of this study are to examine whether the tourism plan and the conservation plan (as a prerequisite for UNESCO designation) of a World Heritage Site and their implementation address local needs and help the local people to benefit from the World Heritage Site around which they live. The study implicitly examines the applicability and transferability of western heritage planning and evaluation theories to the Chinese context.

In order to establish research questions and a framework for analysis, literature is reviewed relating to heritage including world heritage, sustainable development, heritage resource sustainability, strategic heritage planning, and plan evaluation and implementation. Qualitative and quantitative research methodology and data collection methods applied in the field research are also reviewed. An evaluation framework is presented to guide the research and a set of indicators were developed for evaluation practice. The indicators were tested in the preliminary field research and revised for more feasible use in the field. Indicators were applied throughout the research work through incorporation into the survey questionnaires as statements and into the varied interviews as specific questions in structured interviews and themes to direct questions and answers in semi- and unstructured interviews. The indicators were also used as theme prompts in evaluating the relevant plans. Qualitative indicators were more useful in this study in producing information and data, and particularly helpful in providing insights.

A case study approach was adopted in this research. Mount Taishan in Shandong, China was selected as the study site for its fame as a world cultural and natural heritage site inscribed by the UNESCO World Heritage Convention among the earliest group of world heritage sites in China. Four villages located close to the mountain were selected for in-depth study. Therefore, the case study is actually composed of one major case, Mount Taishan, and four sub-cases: the four local villages.

The four villages share some similarities as local villages of the heritage mountain but demonstrate differences in their relations with the heritage mountain and its tourism. The case study was used for both explanatory and exploratory purposes. The outcomes and consequences of the UNESCO world heritage designation on the mountain and on the life of the local villages are explained. Also, given the data obtained and the method and result of the data analysis, this case study is also exploratory as it digs into the global-local nexus of the heritage mountain and provide insight into the complicated power relations among the varied stakeholders of this world heritage site. It is one of very few such studies in China to do this.

Both questionnaires surveys and interviews were employed in the field for obtaining quantitative and qualitative data, and the data are analyzed in both quantitative and qualitative ways. Heritage and tourism plans relevant to Mount Taishan are evaluated using a mixed method. Experiment of stakeholder participation evaluation approach was also conducted by the researcher in the field research, although it is found that there are quite a few contextual barriers for stakeholder participation in evaluation. An emphasis was placed on the implications for local people, particularly those living in four villages near the heritage site. The implications of the findings were then discussed in detail, particularly as they relate to resource conservation, ropeway issues, the management system of the heritage site, tourism development and visitor experiences, local needs and local involvement, and the contestation and dissonance existent in Mount Taishan which are basically resulted from UNESCO designation.

## **10.2. Restatement of the key points**

Very little literature could be found that evaluates the overall sustainability of a World Heritage Site through examination of relevant conservation and tourism development plans. Even less could be found about such evaluations for a World Heritage Site in China. In order to address this research gap, this thesis, by examining heritage and tourism plans and their implementation, evaluated the sustainability of Taishan, a UNESCO World Heritage Site in China. It also considered the effectiveness of UNESCO world heritage enlistment in achieving various goals. The evaluation primarily addresses three aspects: resource conservation, visitor experiences and local well-being,

with more effort being focused on the third aspect.

Local people living in and around the heritage site were believed to have taken the most costs while being often ignored and disadvantaged in terms of benefits. This is especially the case in a developing context like in China. The results of the study confirm this and it is this concern that prompted initiation of the research. While UNESCO world heritage designation had positive implications for heritage tourism promotion on the world heritage site, it is difficult or over-simplified to answer yes or no concerning UNESCO's merit with respect to heritage resource conservation and the local people's lives. The UNESCO's ideal of conserving the heritage resource through promoting responsible tourism on the heritage site does not coincide with the motivation of the party country to apply for the UNESCO designation, especially of the local government that is supposed to be the direct custodian of the heritage site. The case of Taishan tells a failure story of the UNESCO ideal of conservation. The construction of ropeways for tourism on Taishan which caused great damage to this heritage mountain was clear evidence of this.

Interestingly, although visitors complained much about over-crowdedness in the high season, low-quality services, featureless souvenirs, and over-charged entrance fees, the number of visitors to Taishan increases steadily. Although the UNESCO World Heritage designation impacted the local people's life greatly in terms of relocation and loss of arable lands that jeopardized their traditional livelihoods, local complaints were more about lack of or unfair access to opportunities and financial and policy support to participate in tourism operation and thus benefit from it. They embraced tourism with great enthusiasm and expectations, and regarded it as an important new means for their survival. Considering the tourism destination's life cycle theory, Taishan tourism seems to have lingered in the "Stagnation Stage" for decades and is slow to decline from the zenith of the sigmoid curve as was forecasted by Butler. Nevertheless, increasingly shorter tourist stays, reflected in the official statistics and through the field interviews, revealed an unsustainable aspect of the tourism of Taishan as well as Tai-an city.

The power-relationships reflected in the heritage nexus are another key issue. Concentration of the management powers into the Taishan Administrative Committee should have positive implications

for effectiveness and efficiency. This is, in a way, an example of progress in heritage management reform in China. However, in reality, Taishan Administrative Committee is an instrument of Tai-an municipal government. The key player is, at the same time, the referee. The municipal government is apparently the biggest winner in the game. This would not have been so bad if the local government officials had not been so driven by narrow economic objectives, making the heritage mountain a cash cow for their own purposes. In the Chinese context, government intervention produces high efficiency but, at the same time, it may lead to inequity. The short tenure of the officials has resulted in the priority given to short-term goals and even serious mistakes that have marred the heritage. It is a dilemma to find a way to get more independence for the heritage administration from the local municipal government while also keeping the high enforcement power in managing heritage affairs. Yet this is a critical issue for the long-term sustainability of the heritage.

Local villagers are at the very bottom of the heritage stakeholder hierarchy. They did not have time to complain about the costs and the change they had to live with in order that the world heritage mountain might be conserved, for they were striving to adapt to new livelihood sources. They were taking every opportunity they could to benefit from tourism to survive. Local involvement in the provision of tourism services is substantial in three out of the four villages under study. However, local villagers were unsatisfied with what they could get from tourism and the heritage resource. In fact, their share of benefits was very small compared with that of the government. According to the administrators as well as the villagers themselves, they were in the position of “being educated” and “being managed (as a problem)”. Local participation in decision making is still very weak in the Taishan case. It is a worthy objective to move from “being educated” and “being managed”, to “being informed” and “being consulted” and this may be a reasonable objective given the overall atmosphere of reforming in the country and the CPC’s national strategy that is intended to solve the farmers’ problems<sup>64</sup>. Nevertheless, from “being educated and consulted” to “participating and jointly deciding” would be a huge leap and many new conditions would be required to make this leap happen, such as enhancement of the participatory capacity of the farmers themselves, changes in the perceptions of

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<sup>64</sup> The Chinese central government called for concern and effective measures to deal with the farmers’ problems in the CPC meeting in October, 2008 in order to maintain social stability and harmony.

the local government and heritage management authority, and national progress in the direction of greater equity and democracy.

The UNESCO world heritage designation exacerbates contestations and dissonance at the heritage mountain. These are mainly manifested in three aspects: contestation of meanings of Taishan, contestations of functions of the mountain, and contestations among the various stakeholders of the world heritage site. It is contended that local villagers are the weak and disadvantaged stakeholder of the world heritage mountain with the meaning they share about the mountain being ignored and the function of the mountain to sustain their life being undermined by relocation. This reflects the failure of the heritage and tourism planning of this heritage mountain. It is therefore argued that Taishan's meaning to the local villagers and its function for enhancing the local life should be noted and respected. The heritage resource, tourism, and the local community are three fundamental elements to a world heritage site. They are interlinked and undermining any one of the three will weaken the others. The goal of world heritage planning and management should be to mitigate contestations and dissonance and maintain symbiotic and mutually beneficial relations among the three elements. The merits of the UNESCO designation should be questioned if only tourism is promoted but the heritage resources are not conserved and local well-being is not improved.

### **10.3. Research contributions**

The research contributions are summarized as follows:

1. It fills a research gap by evaluating the plans and their implementation for a world heritage site in a developing country like China, which has rarely been done before. It enriches the planning evaluation literature in this particular aspect.

2. It also advances the knowledge in this field by analyzing and identifying the relevant issues and providing corresponding recommendations, especially in the area of local participation in benefit distribution and decision making concerning the world heritage.

3. It examines the transferability of the western ideas in planning and plan evaluation in the eastern context, particularly in the aspect of local participation in heritage and tourism planning and stakeholders' participation in evaluation. Socio-cultural and constitutional limitations and barriers

were identified in the Chinese context.

4. It contributes to the planning evaluation literature by developing a set of indicators corresponding to an evaluation model, and testing, modifying, and applying them in the evaluation practice of this research.

5. It enriches to the heritage contestation and dissonance literature by providing an in-depth analysis of the varied contestations and dissonance existing in the complicated global-local nexus of Chinese world heritage.

6. It contributes to the local involvement theory by analyzing the four patterns and degrees of local villagers' involvement in heritage tourism operations and advances knowledge on the operational level of local involvement in world heritage in a eastern developing context.

#### **10.4. Future research possibilities**

The designation and management of world heritage are complex matters involving many stakeholders and the relationships between them have likely evolved over time and may differ in different places according to circumstances. It follows that many questions remain to be asked and answered. Nine topics will be raised that merit further investigation:

1. This thesis calls for reform of the management system of the World Heritage Sites in China, but it does not provide a detailed plan as how such a reform should occur. It would be very meaningful to do further research on this topic in order to develop a detailed reform program that is feasible in the Chinese context.

2. If time and funds were available, more in-depth and comparative research could be undertaken on the varied forms or patterns of local involvement in tourism based on the four patterns discussed in the thesis.

3. Local village women have played an important role in tourism as small business owners and many attendants on the World Heritage Site are women. Their changing relationship to the heritage mountain and the nature of their involvement in conservation and tourism is worth examining.

4. Tourism is now an important means of livelihood but it should not be the sole means for the local villagers to make a living. It would be meaningful to find ways to maintain sustainable

livelihoods for the local villagers by exploring livelihood diversification through means other than tourism. Successes of this type would also contribute to the sustainability of both the heritage and tourism by avoiding the locals' over-independence on heritage tourism

5. It would be interesting to compare Mount Taishan to other UNESCO-listed mountain heritage sites in China to assess their similarities and differences so as to see whether or not the research results of this thesis are applicable to the other sites in China. If not, then reasons for this would need to be sought.

6. Like in many other newly-developing fields in China, heritage conservation and tourism study in China draws much from the western countries as well as some other countries in the world that are relatively advanced in the field. A comparative study of Taishan and world heritage sites in other countries could be undertaken. The three aspects of sustainability, resource conservation, visitor experience and local well-being, and the indicators presented earlier in the thesis, could be used to organize such a comparison.

7. It would also be interesting to further investigate how the UNESCO World Heritage Convention might better function to oversee more effectively the sustainability of the world heritage sites.

8. Although this research has considered change through time, a more explicit longitudinal study might be valuable to the site management. Examining the evolution (from 1987 to present) of the relations among heritage resources, tourism, and local people's livelihoods would help in the further understanding of the impacts of UNESCO world heritage designation and tourism on the resource as well as the local lives. However, this would require much more resources, energy and time.

9. This research mainly focused on four stakeholders: the local villagers, the resource managers, the tourism managers and the visitors. Other stakeholders, such as the investors and NGOs, were basically ignored. Future research could examine their roles in heritage conservation and tourism, and include their perceptions so as to achieve a more comprehensive understanding of the relations among stakeholders and their relations to the world heritage site.



Resource managers, tourists, and local people constitute a triad that can each undermine heritage relations or can contribute to sustainability through mutually reinforcing actions. At Taishan, local people have been found to constitute the vulnerable segment in the existing pattern of resource use and decision making. Both heritage and tourism planners should take into consideration the needs of local people, and should adopt the objective of improving their quality of life through promoting tourism appropriately. Heritage should be conserved but not at the undue expense of local people who have lived in and around the heritage site for generations and, in fact, have been among its conservators. It is still an ideal in current China to empower local people to participate fairly in tourism benefits and related decision making. Nonetheless, the idea of local participation is not an unachievable utopia. It will be influenced particularly by three factors: the social progress of China, the local government's functions and its attitude towards local participation, and the local people's awareness, competence, desire and initiative to participate.

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## Appendices

### Appendix 1. Some relevant definitions

<b>Terms</b>	<b>Definition</b>
<b>Community</b>	A group of individuals that lives together in a specific geographical place, that maintains social relations among its members who recognize that they belong to such a community. This community, in its fullest expression, can be a nation, a region or a village” Source: the World Health Organization, cited in Garc á, I., Giuliani, F. and Wiesenfeld, E. (1999)
<b>Inclusivist approach</b>	A heritage resource management approach which is adopted whereby all heritages are at least accepted and perhaps even actively cultivated across a spectrum ranging from indifferent tolerance to interactive sharing. This is appropriate for addressing dissonance in the absence of overt antagonism. Source: Graham et al., 2000
<b>Indicators</b>	Indicators are a set of rules for gathering and organizing data so they can be assigned meaning. They fit into a larger information pyramid which is composed of primary and secondary data, and they can be further aggregated into indices. They provide the foundation that is monitored on a continual basis to identify trends and patterns, and is then analyzed through a formal process of evaluation. Source: Innes, 1990:5; Seasons, 2003b
<b>Minimalist approach</b>	A heritage resource management approach which recognizes as heritage only those features which all groups can accept or be persuaded to accept. This is appropriate for addressing apparently irreconcilable group differences. Source: Graham et al., 2000
<b>Qualitative study</b>	An inquiry process of understanding a social or human problem based on building a complex, holistic picture, formed with words, reporting detailed views of informants, and conducted in a natural setting Source: Creswell, 1994
<b>Quantitative study</b>	An inquiry into a social or human problem, based on testing a theory composed of variables, measured with numbers, and analyzed with statistical procedures, in order to determine whether the predictive generalizations of the theory hold true Source: Creswell, 1994
<b>Stakeholders</b>	They are the individuals, groups and organizations with an interest in a common heritage management problem or issue and are directly influenced or affected by the actions or non actions taken by others to resolve the problem or issue Source: Gray, 1989; Hall and McArthur, 1998
<b>Structural dependence</b>	It has two meanings: on one hand, an individual factor cannot function effectively without the whole organizational structure within which it exists and on which it depends; on the other, an organization structure cannot function effectively without a certain individual factor which exists within the structure and on which the structure depends The second meaning is used in this paper. Source: Huang, S., 2004
<b>Synoptic planning</b>	It is the dominant planning model, also referred to as comprehensive/rational planning. It include steps like: 1. defining the problem, 2. establishing goals and objectives, 3. identifying alternative means to achieve the goals and objectives, 4. assessing the options against explicit criteria, 5. choosing a preferred solution and implementing it, and 6. monitoring and evaluation. It does not seem well suited to encourage local involvement and stakeholder collaboration. Source: Mitchell, 2002; Wall, 1996
<b>Triangulation</b>	It emphasizes on combination of methods which means using several kinds of methods or data, quantitative or qualitative. The four basic types of triangulation are: 1. data triangulation; 2. investigator triangulation; 3. theory triangulation, and 4. methodological triangulation. Source: Patton, 2002; Denzin, 1978

## Appendix 2. Relevant information about the operation of World Heritage Convention

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**World heritage convention:** The World Heritage Convention, ratified by 21 member state parties in 1972 in Paris, links together in a single document the concepts of nature conservation and the preservation of cultural properties. It recognizes the way in which people interact with nature, and the fundamental need to preserve the balance between the two. It defines the kind of natural or cultural sites which can be considered for inscription on the “World Heritage List”, and sets out the duties of States Parties in identifying potential sites and their role in protecting and preserving them and reporting regularly to the World Heritage Committee on the state of conservation of their World Heritage properties. It explains how the World Heritage Fund is to be used and managed and under what conditions international financial assistance may be provided.

**States Parties:** are countries which have adhered to the *World Heritage Convention*. They thereby agree to identify and nominate properties on their national territory to be considered for inscription on the World Heritage List. When a State Party nominates a property, it gives details of how a property is protected and provides a management plan for its upkeep. States Parties are also expected to protect the World Heritage values of the properties inscribed and are encouraged to report periodically on their condition. 180 States have signed the Convention as of 07 January 2005

**World Heritage Committee:** The World Heritage Committee meets once a year, and consists of representatives from 21 of the States Parties to the Convention elected by their General Assembly for terms up to six years. The Committee is responsible for the implementation of the World Heritage Convention, defines the use of the World Heritage Fund and allocates financial assistance upon requests from States Parties. It has the final say on whether a property is inscribed on the World Heritage List. It also decides on the inscription or deletion of properties on the List of World Heritage in Danger.

**World Heritage Centre:** Established in 1992, it is the focal point and coordinator within UNESCO for all matters related to World Heritage. Ensuring the day-to-day management of the Convention, the Centre organizes the annual sessions of the World Heritage Committee and its Bureau, provides advice to States Parties in the preparation of site nominations, organizes international assistance from the World Heritage Fund upon request, and coordinates both the reporting on the condition of sites and the emergency action undertaken when a site is threatened. The Centre also organizes technical seminars and workshops, updates the World Heritage List and database, develops teaching materials to raise awareness among young people of the need for heritage preservation, and keeps the public informed of World Heritage issues.

**World Heritage Fund:** The World Heritage Fund provides about US\$4 million annually to support activities requested by States Parties in need of international assistance. It includes compulsory and voluntary contributions from the States Parties, as well as from private donations. The World Heritage Committee allocates funds according to the urgency of requests, priority being given to the most threatened sites. International Assistance from the Fund can support requests falling five categories: preparatory assistance, training assistance, technical cooperation, Emergency assistance, and Promotional and educational assistance.

**World Heritage List:** The list of natural, cultural or mixed heritages designated by UNESCO World Heritage Convention. So far (April, 2005) 788 heritage sites are on the list with 611 cultural site, 154 natural sites and 23 mixed sites

**The World Conservation Union (IUCN):** one of the three international non-governmental or intergovernmental organizations which are named in the Convention. It is an international, non-governmental organization that provides the World Heritage Committee with technical evaluations of natural heritage properties and, through its worldwide network of specialists, reports on the state of conservation of listed properties. With more than 1000 members, IUCN was established in 1948 and is located in Gland, Switzerland.

**The International Council on Monuments and Sites (ICOMOS):** one of the three international non-governmental or intergovernmental organizations which are named in the Convention. It provides the

World Heritage Committee with evaluations of cultural and mixed properties proposed for inscription on the World Heritage List. It is an international, non-governmental organization founded in 1965, with an international secretariat in Paris. ICOMOS is one of the main participants in the World Heritage Information Network (WHIN).

**The International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM):** one of the three international non-governmental or intergovernmental organizations are named in the Convention. It is an intergovernmental body which provides expert advice on how to conserve listed properties, as well as training in restoration techniques. ICCROM was set up in 1956 and is located in Rome. It is an active partner in the World Heritage Information Network.

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**Source: Summarized from UNESCO, 2004**



### Appendix 3. Secondary data collected

Secondary Data	Source
<b>A. Plan and relevant documents</b>	
1. Nomination document for Taishan as a world cultural and natural site, 1987	Taishan Administrative Committee
2. Taishan Conservation Plan, 1987 (still in use)	Taishan Administrative Committee
3. Taishan Conservation Plan, 2007 (incomplete)	
4. Tourism Master Plan of Tai-an City, 2003	Tourism Bureau of Tai-an City
5. Tourism Development Master Plan of Taishan District, Tai-an City, 2006	Tourism Bureau of Taishan District, Tai-an City
6. Tourism Master Plan of Shandong Province	Tourism Bureau of Shandong Province
7. Folk Culture Tourism Plan of Baimashi Village	Baimashi Village Committee
8. Yearbook of Tai-an (1987-2005)	Statistics Bureau of Tai-an City
9. General Record of Taishan (2001)	Taishan District Government, Tai-an City
10. Collection Books of Laws and Regulations Concerning Mt.Tai Conservation(1,2,3) 2001, and 2004	Taishan Administrative Committee
11. Some official documents relating to heritage resource conservation and tourism of Taishan	Taishan Administrative Committee and Tourism Bureau of Tai-an City
12. Work Summary Reports of Tai-an Tourism Burea	Tourism Bureau of Tai-an City
13. Tour Guide Manual for introducing Taishan (Compiled by Tai-an Tourism Bureau)	Tourism Bureau of Tai-an City
14. The 11 <sup>th</sup> “Five Year Plan” of Tourism Development in Tai-an	Tourism Bureau of Tai-an City
15. Investigation report on the Temple Festival in Tai-an, 2006	Tourism Bureau of Tai-an City
16. Market development plans of Tai-an’s tourism	Tourism Bureau of

(2002-2006)	Tai-an City
<b>B. Statistics</b>	
List of travel agencies in Tai-an (2006)	Tourism Bureau of Tai-an City
List of star hotels in Tai-an (1-4-stars ) (2006)	Tourism Bureau of Tai-an City
Tourists' average length of stay and expenditure in Tai-an (1978-2005)	Tourism Bureau of Tai-an City
International tourists received in Tai-an (2000-2004) Composition of international tourists (figures with countries)	Tourism Bureau of Tai-an City
The Statistics of "Gold Week" tourist reception in Tai-an (May, October, and Spring Festival, 2006)	Tourism Bureau of Tai-an City
Statistics of Tai-an's Tourism Employment	Tourism Bureau of Tai-an City
Tai-an's Ranking of domestic tourists reception in Shandong province (2001-2004)	Tourism Bureau of Tai-an City
Statistics of Tai-an's domestic tourists reception (major indicators presented)	Tourism Bureau of Tai-an City
Statistics on Tai-an Farmers' family Cash Income (2003-2005)	Bureau of Finance, Tai-an City
Population statistics of Taishan District, Tai-an city	Bureau of Statistics, Tai-an City
<b>C. Other useful information</b>	
Introduction of Taishan as a world cultural and natural heritage (hard print)	Taishan Visitor Centre
Taishan, the treasure and wonder of the world (DVD)	Taishan Visitor Centre

**Appendix 4. The checklist of the structured interview questions for the villagers including the private business owners.**

1. Are you local by birth?
2. Are you holding a job relating to tourism on and around Taishan?
3. If you are, what is the job like? How is your income?
4. If not, why not? Do you hope to have a job in tourism?
5. Were you consulted or informed as the heritage resource conservation plan and the tourism plan relating to Taishan were made?
6. If yes, when and in what way?
7. If yes, on which aspects of the plans were you consulted and informed?
8. Do you think the government should consult you or at least inform you when making decisions concerning those plans?
9. Are you interested in participating in the decision making of those plans and expressing your own opinions?
10. What issues are of the most important in tourism planning and management on Taishan?
11. What issues do you think are of the most critical brought by resource conservation and tourism on and around Taishan to your life?
12. Do you think these issues could be addressed through proper planning and management or not?
13. Which issues do you think have been addressed? Which have not yet?
14. If some have been addressed, how were they addressed? Did we solve the problems by ourselves or the government solved the problems? If the government did, did the government solve the problems by itself, or did it initiate and encourage the local people to discuss the problems and solve them together?
15. Have you ever received any training relating resource conservation and tourism jobs? Do these training programs free or not? Were you financially supported by the government to participate any one training program?
16. If yes, what kind of trainings they are, and when?
17. If yes, who were responsible for organizing these trainings?
18. In your opinion, are there any cultural and natural elements that are unique to your place and should be recognized and shared, but yet developed and presented to tourists?
19. If yes, what are they?
20. In your opinion, are there any cultural and natural elements that should not be shared by the tourists but actually have been developed as tourist resources?
21. If yes, what are they?
22. Were you ever asked these above questions by people from the government in the past?
23. If yes, when and in what circumstances?
24. Did you get any financial support in any form from the government to sustain your livelihood?
25. If yes, when? How much? Is it/are they related to tourism on and around Taishan?
26. If yes, how did you spend the money? (Buy food, support the kids for education, get training , or whatever?)
27. Do you think this financial help was significant to improve your life or not?
28. How do you think the tourism commodities of Taishan? Do you think they can well reflect the local characteristics of Taishan or not?
29. Do you have any idea or suggestions to provide in improving the quality of tourism commodities of Taishan?
30. Do you have any other ideas or opinions you would like to make concerning Taishan resource conservation and tourism and their relation to your life?

## Appendix 5. Survey Questionnaires for the local villagers

Hello!

We are a research team doing investigation about tourism on Taishan. We would be very thankful if you could take some minutes to help us with this questionnaire survey. The numbers after each statement indicate the degrees of agreement or disagreement: from 1 for “totally disagree”, to 7 for “totally agree”. Please mark the number you choose either by circling it or by ticking it. We hope to get your authentic ideas. This is done just for pure academic purpose, and we will keep your answers strictly confidential. Your help and support is more than appreciated.

Research Team, FES, University of Waterloo

	Totally Disagree.....Totally Agree						
1. I am always friendly towards the tourists at Taishan.	1	2	3	4	5	6	7
2. I'd like to work in tourism industry.	1	2	3	4	5	6	7
3. My daily work is highly relevant to Taishan tourism.	1	2	3	4	5	6	7
4. Tourist activities do not make inconvenience to my life.	1	2	3	4	5	6	7
5. I'd like to offer help to tourists, even for free.	1	2	3	4	5	6	7
6. I can find fun in interacting with tourists.	1	2	3	4	5	6	7
7. I feel my activities are an integrated part of tourist experience.	1	2	3	4	5	6	7
8. I am satisfied with income from tourism.	1	2	3	4	5	6	7
9. A good part of income is from Taishan Administrative Committee.	1	2	3	4	5	6	7
10. Taishan Administrative Committee often provides us with welfare.	1	2	3	4	5	6	7
11. Quite a few facilities of our community are built by TMC.	1	2	3	4	5	6	7
12. I enjoy a reduced fee or free entrance to Taishan.	1	2	3	4	5	6	7
13. My life quality is impacted by tourism more in better ways.	1	2	3	4	5	6	7
14. I can get training on how to interact with tourists.	1	2	3	4	5	6	7
15. I can get training on heritage conservation and tourism.	1	2	3	4	5	6	7
16. I can get training on options of livelihoods.	1	2	3	4	5	6	7
17. The TMC listens to our opinion when developing tourism.	1	2	3	4	5	6	7
18. We have effective ways to express our opinion to TMC.	1	2	3	4	5	6	7
19. I hope to know about tourism development on Taishan and express my opinion.	1	2	3	4	5	6	7
20. I think the passed development of the Taishan Scenic Area has reflected our anticipation and requirements.	1	2	3	4	5	6	7
21. I am clear of the future development direction and goals of the Taishan Scenic Area.	1	2	3	4	5	6	7
22. I think the natural environment around me has been destroyed by tourism development.	1	2	3	4	5	6	7
23. I feel some of my thoughts are changed through interacting with tourists.	1	2	3	4	5	6	7
24. Interacting with tourists make an important							

source for information.

1 2 3 4 5 6 7

25. I have strong awareness to protect the cultural and natural heritage of Taishan.

1 2 3 4 5 6 7

26. Presently the most serious problem existing in tourism development on Taishan that I am concerned about is \_\_\_\_\_

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27. The best way I hope to solve the problem is:\_\_\_\_\_

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Please provide your personal information: You live in \_\_\_\_\_village.

1. gender: a. male b. female

2. age: a.18 and below b.18—30 c.30—46 d.41—50 e.51—60 f.60 and above

3. Career: a. government b. enterprise c. self-employed d. farmer e. student f. others

4. education: a. senior high school and below b. college c. bachelors d. masters and above

5. Family income (RMB yuan/month): a.1500 and less b.1500—3000 c.3000—4500 d.4500 —6000 e.6000 and more

Pleas write on the back of the paper if you have any more concerns or suggestions。 Thank you again for your support.

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## Appendix 6. Survey Questionnaires for the resource management personnel

Dear Madame/Sir,

We are a research team doing an investigation on harmonious relation among resource, tourism and community relating to Taishan. We would be very thankful if you could take some minutes to help us with this questionnaire survey. The numbers after each statement indicate the degrees of agreement or disagreement: from 1 for “totally disagree”, to 7 for “totally agree”. Please write the number you choose after each statement to show how much you agree or disagree to the statement. We hope to get your authentic ideas. This is done just for pure academic purpose, and we will keep your answers strictly confidential. Your help and support is more than appreciated.

Research Team, FES, University of Waterloo

	Perspectives	Degree of agreement	remarks
	<b>The conservation of Taishan heritage resource owes a lot to the following:</b>		
	Successfully enlisted as a world heritage site		
	Well-established conservation law and regulations		
	Sufficient funding support		
	Effectiveness of regulation and control of the government		
	The conservation and management system is reasonable and efficient		
	The management personnel fully recognized the importance of conserving the authenticity of heritage resource		
	Correctly handled the relationship of resource conservation and tourism development		
	Healthy coordination among departments		
	Positive participation of the local residents to resource conservation		
	Set up communication and education centre, and provide signs of environmental protection to guide and reminding visitors		
	Regular training for the management personnel on knowledge and skills about resource conservation and management		
	<b>Presently the most pressing difficulties and problems for Taishan resource conservation and tourism development</b>		
	The conflicts between preservation and development are getting worse		
	The management system is not smooth, lack of interdepartmental coordination and cooperation		
	Lack of Funds for development of tourism infrastructure construction, and lack of start-up funding as well		
	Tourist facilities lags behind, and management staff are lack of knowledge of tourism management, and awareness of service		

more and more disputes between management staff and visitors		
more and more disputes between management staff and local residents		
more and more disputes between local residents and visitors		
<b>In terms of the relation among heritage conservation, tourism development and community well-being, you believe:</b>		
More and more conflicts arising among heritage conservation, tourism development and community benefits		
Heritage conservation and tourism have produced a lot of negative impacts on the locals, and therefore, local people should get more benefits from tourism		
Local participation in resource conservation and tourism development is very necessary, and it is an important aspect of the sustainability of both resource and tourism..		
Presently local participation in tourism benefit is not enough yet		
Presently local participation in the decision-making on resource conservation and tourism development is not enough yet.		
Local participation is limited by their awareness and competence of participation		
Trainings relating to resource conservation and tourism development should be provided for local residents.		
Local culture and custom are also tourism resource, and should be an important aspect of visitor experience.		
An effective mechanism should be set up for local people fully participating in the benefit sharing and decision making of tourism		

Or, you may have further comments and opinions on the above discussed: (you may also write on the back of the paper )

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Thank you very much for your participation and support !

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## Appendix 7. Survey Questionnaires for the tourism management personnel

Dear Madame/Sir,

We are a research team doing an investigation on harmonious relation among resource, tourism and community relating to Taishan. We would be very thankful if you could take some minutes to help us with this questionnaire survey. The numbers after each statement indicate the degrees of agreement or disagreement: from 1 for “totally disagree”, to 7 for “totally agree”. Please write the number you choose after each statement to show how much you agree or disagree to the statement. We hope to get your authentic ideas. This is done just for pure academic purpose, and we will keep your answers strictly confidential. Your help and support is more than appreciated.

Research Team, FES, University of Waterloo

No.	Opinions	Degree of agreement	Remarks
<b>A.</b>	<b>The tourism development of Taishan owes a lot to the following:</b>		
1	Uniqueness and quality of the heritage resource		
2	Successfully enlisted as a world heritage site		
3	Good conservation and management of the resource and its environment		
4	Effectiveness of regulation and control of the government		
5	Effective marketing and media communication		
6	Local participation in tourism		
7	Healthy coordination among departments		
8.	Improvement and update of tourism products		
<b>B.</b>	<b>Presently the most pressing difficulties and problems for Taishan tourism development in including planning and management</b>		
9	The management system is not smooth, lack of interdepartmental coordination and cooperation		
10.	Service quality is not good		
11.	Vicious competition among businesses		
12.	more and more disputes between management staff and visitors		
13.	more and more disputes between management staff and local residents		
14.	more and more disputes between local residents and visitors		
15.	Shorter tourism stay and less tourism expenditure		
16.	The conflicts between preservation and development are getting worse		



C.	<b>In terms of the relation between heritage resource, tourism and community, you believe:</b>		
17.	More and more conflicts arising among heritage conservation, tourism development and community benefits		
18.	Tourism and heritage conservation have produced a lot of negative impacts on the locals, and therefore, local people should get more benefits from tourism		
19.	Local participation in resource conservation and tourism development is very necessary, and it is an important aspect of the sustainability of both resource and tourism.		
20.	Presently local participation in tourism benefit is not enough yet		
21.	Presently local participation in the decision-making on tourism planning and management is not enough yet.		
22.	Local participation is limited by their awareness and competence of participation		
23.	Local culture and custom are also tourism resource, and should be an important aspect of visitor experience.		
24.	An effective mechanism should be set up for local people fully participating in the benefit sharing and decision making of tourism		

Or, you may have further comments and opinions on the above discussed: (you may also write on the back of the paper)

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Thank you very much for your participation and support !

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## Appendix 8 Survey Questionnaires for the tourists

Hello!

We are a research team doing investigation about tourism on Taishan. We would be very thankful if you could take some minutes to help us with this questionnaire survey. The numbers after each statement indicate the degrees of agreement or disagreement: from 1 for “totally disagree”, to 7 for “totally agree”. Please mark the number you choose either by circling it or by ticking it. We hope to get your authentic ideas. This is done just for pure academic purpose, and we will keep your answers strictly confidential. Your help and support is more than appreciated.

Research Team, FES, University of Waterloo

	Totally	Disagree.....	Totally	Agree
1. I visit Taishan mainly for its beautiful natural scene.	1	2	3	4 5 6 7
2. I visit Taishan mainly for its history and culture.	1	2	3	4 5 6 7
3. I think the entrance fee of Taishan is reasonable.	1	2	3	4 5 6 7
4. I am content with the traffic condition at Taishan.	1	2	3	4 5 6 7
5. I am content with the accommodation at Taishan.	1	2	3	4 5 6 7
6. I am content with the food and beverage at Taishan.	1	2	3	4 5 6 7
7. I am content with the sanitary facility at Taishan	1	2	3	4 5 6 7
8. I am content with the service provided by the tourist information centre	1	2	3	4 5 6 7
9. I am content with the tour guiding and interpretation at Taishan	1	2	3	4 5 6 7
10. I think the tourism security work is good at Taishan.	1	2	3	4 5 6 7
11. I think the heritage resource of Taishan is well conserved.	1	2	3	4 5 6 7
12. I think the ropeways provide convenience to tourists while destroy the heritage resource.	1	2	3	4 5 6 7
13. I feel I have experienced the authenticity of natural heritage here in Taishan.	1	2	3	4 5 6 7
14. I feel I have experienced the authenticity of cultural heritage here in Taishan.	1	2	3	4 5 6 7
15. I think the design of the buildings and facilities goes harmonious with the resource environment	1	2	3	4 5 6 7
16. I think the tourist souvenirs can well reflect the characteristics of the local culture.	1	2	3	4 5 6 7
17. I would like to experience the local custom and culture (including the life-style and the food of local villagers)	1	2	3	4 5 6 7
18. I can feel the hospitality of the locals.	1	2	3	4 5 6 7
19. I can get great fun from the participatory activities that the scenic spot has provided for the tourists.	1	2	3	4 5 6 7
20. I hope to participate activities through which I can interact with the local people.	1	2	3	4 5 6 7

21. I think tourism on the heritage site should benefit the local people. 1 2 3 4 5 6 7
22. I think local involvement in tourism is important to both tourism and the local communities. 1 2 3 4 5 6 7
23. Overall I am content with my experience at Taishan. 1 2 3 4 5 6 7
24. If chances are given, I'd like to visit Taishan once more. 1 2 3 4 5 6 7

Please provide your personal data: 1. Gender: a. male b. female

2. age: a. under 18 b. 18—30 c. 30—41 d. 41—50 e. 51—60 f. over 60

3. profession: a. civil servant b. business employee c. freelancer d. farmer e. students f. others

4. education: a. high school and under b. college certificate c. bachelor d. master and above

5. income (USD/month): a. 1500 and less b. 1500—3000 c. 3000—4500 d. 4500 —6000 e. 6000 and more

**Please write here if you have any other suggestions and advices. Again we thank you for your sincere help and support!**

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