

Cultural Heritage Quality Management: Analysis of archaeological heritage managers' perception

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Goal and objectives of the dissertation

The current thesis - designed and conducted at European level, academically recognized through the awarding of the honorary title of *Doctor Europaeus* – has as its main goal to propose, design and accomplish the first doctoral thesis on the topic of Cultural Heritage Quality Management, by applying a complex approach that would frame theoretically the convergence of three main areas towards sustainability: Quality and Tourism, Archaeological Heritage and Culture.

We have thus placed the subject of the application of quality principles to cultural heritage management within the broader debate about the policies of integrated development and the role of cultural heritage in society and within the process of a

sustainable global development. We have defined then four objectives:

- ✓ To understand how the heritage managers perceive Quality Management, particularly when the latter is applied to Cultural Heritage;
- ✓ To understand the impact of the implementation of quality management systems on the level of self-awareness of the local population;
- ✓ To consider the role of cultural heritage in the context of tourism development, as key element within the destination competitiveness. Thus, we aimed to comprehend how (and if) does the implementation of quality management systems for heritage sites play a role to boost the visitors' experience;
- ✓ To understand to what extent operators consider the promotion of the encounter between tourists and local community and the promotion of intercultural dialogue within the

tourist experience among the dimension of cultural heritage quality management.

Methodology

We have designed a research based on the interpretivist paradigm, which led us to adopt a qualitative approach to explain (not to measure) the phenomenon investigated. We have conducted a multiple transdisciplinary, explorative and illustrative case study. We have thus considered appropriate to associate to our method (case study) a series of adjectives in order to better define and place it within the theoretical and sectorial point of view. The adjective *multiple*, refers to the existence of several cases considered in order to create comparisons. In Italy, we involved the manager of the *Museo della Civiltà Romana* (Rome), *Museo dei Mercati di Traiano e Fori Imperiali* (Rome), *Museo del Mare e della Navigazione Antica* (Santa Marinella). In Portugal, we analysed the Synagogue of Tomar, the Castle of Abrantes, the CIAAR of Vila Nova da Barquinha and the *Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo* (Mação). Finally, in Spain, we investigated the four museums of the *Ruta Caesaraugusta* (Zaragoza).

The research was also *transdisciplinary* - as the research aims to achieve a holistic comprehension - and *explorative*, as its aim is to examine the difficulties in implementing new procedures and techniques in an organisation. Finally, we have defined our research *illustrative*, as it aims to illustrate new practices adopted by specific organisations (Collis & Hussey, 2009, p. 82).

We have thus adopted three main techniques for the collection of data:

✓ *Direct observation*

Direct observation was conducted in various phases of the study, maintaining updated a field journal and creating an observation grid. In addition, in order to have a more close contact with the local population in the cities where the study was conducted, we have chosen to optimize the period of our permanence through operational options such as the stay with local families - planned by the use of online platforms such as

couchsurfing.com - instead of hotels or other commercial/tourist accommodation.

✓ *Interview with key agents*

Semi-structured interviews were carried out involving 5 museums directors during the exploratory phase (2011). During the empirical study conducted between 2013 and 2014 we have analysed 8 cultural heritage places (museums and archaeological areas) open to the public and assessed by the HERITY GES. 13 informants were involved. Moreover, unstructured interviews were carried out with museums workers, during the direct observation.

✓ *Document analysis*

We have analysed documents such as: monographic publications; print and digital press archive; institutional documents such as *White Papers* - defined by the Oxford Dictionary as "book of rules, standards or records, especially an official government report, bound in white" - and *Grey Literature* (Debachere, 1995, p. 95), including the HERITY GES assessment reports of each museum analysed.

Results

Among the most significant results of our research, we can mention the observation of a general lack of awareness regarding the principles of management on the part of heritage managers. This situation leads to the "stigmatisation" of the term *manager* itself, or *clients* and even *users*, perceived as belonging to the economic sector, then distant, even antithetical, from the mission and the values of the cultural sector. In this context, the level of the culture of quality among the cases analysed is particularly uneven. In some cases, it is positively perceived by managers and staff while on the other hand, we found cases in which we observed great scepticism with regard to quality. The latter is usually perceived as a useless surplus of work.

The lack of implementation of a culture of quality is generally attributed to the scarcity of economic resources, but the empirical study and the cross-cases analysis have shown different attitudes in this respect. Paradoxically, it was observed that some managers

consider quality and its certification as a vehicle for attracting structural funds. Others use the quality certification and its results as argument to oppose detrimental cultural policies. The main managers' attitude is essential for the spread of a culture of quality. The idea of quality within cultural heritage management thus appears as a concept still "under construction", perceived and interpreted by managers according to three main factors: academic background; personal sensitivity; and personal interests.

We have also noticed the intrinsic role of the quality assessment process in the dissemination, understanding and greater acceptance of the principles of quality among managers and public. The informants have indeed affirmed this process was useful to "construct" the idea of quality within cultural heritage management. We have defined this phenomenon as "Tangibility of the Principles of Quality".

We also found that local community participation is considered among the indicators of quality by the HERITY GES. Still, our research showed a lack of uniformity and unanimity on the part of managers regarding the perception of this matter.

Theoretical conclusions

The process of construction of the theoretical model underlying the empirical study has provided our first theoretical contribution. It is a conceptual, ideal model arisen from a philosophical speculation about the purpose of managing the cultural heritage as a basis for launching intercultural dialogue through tourism. The "Paideia approach to heritage management" – as we call it - would provide a greater involvement of the resident population and, consequently, a greater self-awareness and greater self-esteem. Therefore, the destination would have to be more prepared to an encounter with "the other", namely, the tourist, and provide an intercultural encounter that promotes growth and greater understanding between different cultures.

The consideration of the "Paideia approach to heritage management" among the dimension

of cultural heritage quality management would lead to the dissemination and implementation of our theoretical proposal. While there are those who are working to send tourists into Space, we should work to bring them back to Earth, rediscover our roots, understand and appreciate diversities, and together build a better world.

Regarding the theoretical conclusion referred to the empirical study, we can affirm there is still no unanimity in the perception of the concept (and need) of quality within cultural heritage management, which is seen in some cases as unnecessary surplus of work.

The perception of the concept of quality of heritage management on the part of heritage managers is comparable to the perception of quality that managers and workers of the industrial sector had in 1950s. We have defined 4 Weberian typologies of cultural heritage managers, according to their perception of quality: Conservator/Reactionary; Reticent; Pragmatic; Enthusiastic.

Practical application of the dissertation

The first practical application of our findings is the proposal of integrating - among the dimensions of cultural heritage quality management - the ability to promote intercultural dialogue between tourists and hosting population in cultural heritage places. Including the dimension of "involvement of local communities and intercultural dialogue" would represent the alliance between the Paideia Approach to Heritage Management and the HERITY GES Model.

Another practical implication is the empirical evidence of the necessity of altering the programmatic content of university courses on cultural heritage, which should aim also at the creation of unanimity among future archaeologists, museum professionals of cultural heritage in general.

Finally, our proposal of Weberian types of heritage managers, generated based on the similarities arose among various managers and stakeholders involved and interviewed,

could strongly contribute from a practical point of view, particularly in the future selection of operators and managers at cultural sights open to the public, and/or in order to ascribe functions and responsibilities.

Content of the dissertation

Abstract of chapter one: Archaeology and Archaeological heritage management.

This chapter is devoted to the theme of archaeological heritage management and the role of archaeology within the new paradigms of development. The first part of the chapter will represent the *excursus* which introduce more complex questions, about the role of archaeology, archaeologist and archaeological heritage within regional planning and development, and the opportunity to manage archaeological knowledge and heritage in order to create a social benefit.

Abstract of chapter two: Cultural Heritage and Archaeological Tourism.

The main issue of this chapter is the archaeological tourism, and it is analysed from its main characteristics and exploring its links with new paradigms of planning and development. In the first part of the Chapter, the main concepts are exposed and analysed. The second part analyses the impacts of tourism and the challenges of the new paradigms of development. In particular, the opportunity to use tourism as a vehicle of cultural interchange within the new process of development, based on knowledge and mutual understanding on a global scale.

Abstract of chapter three: Quality Management and Cultural Heritage.

This chapter analyses the process of the introduction of the principles of quality in the field of heritage management. In particular, we show the point of convergence with the practices of cultural heritage management and total quality management (TQM). We thus present the current debate on the necessity and the modality of applying the principles of TQM to cultural heritage.

Abstract of chapter four: Methodology.

The first part of this chapter is dedicated to the presentation of the main philosophical

currents, underlying the scientific approaches. Fundamental topics like the concept of “blind intelligence” and that of the “complex thinking” are approached. Then, the paradigm used for our research has been identified as well as the method adopted the techniques of data. At the moment of our first approach to the issue, we found a substantial debate which arose at the turn of the twentieth and twenty-first century, with authors like Conti (1998) and Natali (2005) or – at the institutional level – the European-Commission (2000). Nevertheless, the scientific literature regarding this phenomenon was still poor at the beginning of our work. Conceptually, this circumstance confirmed the consideration of Thomas Kuhn in his work of 1962, according to which thirty to fifty years are necessary for a new reality to be perceived and finally accepted by the academic community. This reflection, place our research work and has represented the basis for the definition of our methodology.

Abstract of chapter five: Data Analysis and Findings

In this chapter, we present the data and evidence gathered during the empirical phase of our research. The study includes the analysis of eight case studies. Evidences and findings were analysed according to the proposed theoretical model and its seven dimensions shown in the previous chapter.

Abstract of chapter six: Cross-cases analysis and discussion.

This chapter continues the data analysis and proceeds with further discussions. The sections contain the cross-cases analysis, that is, a comparative analysis of the considered case studies. In the second part of the chapter, evidences and findings emerged from the case studies and cross-cases analysis was finally discussed.

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