



Title      A Communicative Model for Stakeholder  
             Consultation: Towards A Framework for Action  
             Inquiry in Tourism I.T.

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A COMMUNICATIVE MODEL FOR STAKEHOLDER  
CONSULTATION: TOWARDS A FRAMEWORK FOR ACTION  
INQUIRY IN TOURISM IT

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## ABSTRACT

This thesis focuses on an under-researched area of tourism – the multi stakeholder, inter organisational business to business Tourism IT domain which exhibits a marked rate of failure. A critical review of B2B case studies reveals that this failure is in large part due to the primacy afforded to technical problem solving approaches over human centred ones. The main purpose of the research is therefore stated as: “how do we ensure that, as technological solutions are implemented within this domain, due consideration is given to human-centred issues?” In order to tackle this research problem an interdisciplinary approach is taken and a communicative model for stakeholder consultation is developed. At the centre of the model lies an innovative method for deconstructing and reconstructing stakeholder discourse. A Co-operative Inquiry research methodology was used and a significant number of stakeholders were engaged in an Open Space event sponsored by two major Tourism IT companies who wanted to investigate the issues and opportunities connected with travel distribution and technology. This was followed up with face to face interviews and live discussions over the internet. In addition stakeholder discourse was captured via the Travelmole tourism discussion site. The discourse between stakeholders was reconstructed and the normative and objective claims analysed in depth. The presentation of these reconstructions in textual, tabular and diagrammatic formats captures the complexity of stakeholder interactions, revealing that although IT is an important tool, what really lies at the core of multi stakeholder projects are the normative positions to which participants subscribe. The model provided a practical means for critiquing stakeholder discourse, helping to identify stakeholders both involved and affected by the issue; juxtaposing the ‘is’ against the ‘ought’; and enabling critical reflection on the coercive use of power. The review of the tourism literature revealed that these issues are as important in general B2B tourism partnerships as in Tourism IT and in this respect the model provides a practical tool for critique and for enabling the formation of a shared normative infrastructure on which multi stakeholder projects can proceed. In addition, while borrowing from Management Science, this thesis also makes a contribution to it, specifically in the area of boundary critique, through the way in which Habermas’ ideal speech criteria are practically implemented.

## **DEDICATION**

To my beautiful and loving wife, Zewen, who has travelled with me on the six-year journey which has been this PhD, never complaining and always supportive. Also for my two sons, Lawrence (born just after I started!) and Harry who have had to put up with the highs and lows of my moods!

# TABLE OF CONTENTS

<b>ABSTRACT</b> .....	<b>II</b>
<b>DEDICATION</b> .....	<b>III</b>
<b>TABLE OF CONTENTS</b> .....	<b>IV</b>
<b>LIST OF FIGURES</b> .....	<b>VIII</b>
<b>LIST OF TABLES</b> .....	<b>IX</b>
<b>LIST OF APPENDICES</b> .....	<b>X</b>
<b>ACKNOWLEDGEMENTS</b> .....	<b>XI</b>
<b>DECLARATION</b> .....	<b>XII</b>
<b>1. INTRODUCTION</b> .....	<b>1</b>
1.1. Business to business Tourism IT.....	1
1.2. The research problem.....	4
1.3. Aim and objectives.....	7
1.4. Methods used in the research .....	8
1.5. Emphasis of the thesis.....	9
1.6. Structure of the thesis.....	11
<b>2. CRITIQUE OF BUSINESS TO BUSINESS TOURISM IT</b> .....	<b>13</b>
2.1. The nature of travel and tourism.....	13
2.2. Tourism partnerships.....	14
2.2.1. Critical reflection on tourism partnerships .....	25
2.3. Inter-organisational multi stakeholder Tourism IT .....	27
2.3.1. English Tourist Network Automation Project .....	28

2.3.2.	EnglandNet .....	29
2.3.3.	Yield Management System Implementation in the Hotel Sector.....	31
2.3.4.	BookTownNet - EC-funded tourism IT project.....	32
2.3.5.	The GTI Project .....	36
2.4.	A social theoretical critique of Tourism IT.....	38
2.4.1.	System of systems methodologies .....	39
2.4.2.	A framework for measuring failure .....	42
2.4.3.	A critique through sociological paradigms .....	44
2.5.	Summary of critique.....	54
2.5.1.	The role played by communication.....	57
<b>3.</b>	<b>A MODEL FOR STAKEHOLDER CONSULTATION .....</b>	<b>59</b>
3.1.	From Critical systems thinking to Critical systems practice.....	59
3.1.1.	Critical systems practice .....	71
3.2.	Operationalising Habermas' theory of communicative action.....	79
3.3.	Validity Claim Reconstruction.....	81
3.4.	Validity claim reconstruction and boundary critique .....	85
3.5.	A communicative model for stakeholder consultation.....	85
<b>4.</b>	<b>RESEARCH METHODS .....</b>	<b>89</b>
4.1.	Research paradigm.....	89
4.2.	Research methodology.....	91
4.3.	Research methods .....	94
4.3.1.	Travelmole.....	95
4.3.2.	Open Space .....	97
4.3.3.	Semi structured in depth interviews.....	101
4.3.4.	Voice over internet group discussion.....	104
4.4.	Trustworthiness of the research .....	105
<b>5.</b>	<b>RECONSTRUCTION OF TRAVELMOLE DISCUSSION.....</b>	<b>107</b>
5.1.	Background to the Travelmole discussion .....	107
5.2.	Reconstruction of Travelmole discussion.....	109
5.3.	Summary of reconstructive analysis .....	126

5.3.1.	Reconstruction in tabular format .....	126
5.3.2.	Reconstruction in a boundary flow diagram.....	129
5.4.	Critical reflections.....	132
5.4.1.	Boundary critique through discourse deconstruction.....	132
5.4.2.	Intersubjectivity .....	133
5.4.3.	The technical versus the human.....	134
5.4.4.	The model as a facilitation tool.....	134
5.4.5.	Trustworthiness.....	136
5.4.6.	The role of Internet forums .....	136
5.5.	Augmentation of model after Travelmole test phase .....	137
<b>6.</b>	<b>TRAVEL DISTRIBUTION &amp; TECHNOLOGY .....</b>	<b>139</b>
6.1.	The real world IT problem scenario.....	139
6.2.	Diagnosing the problem – identifying the boundaries .....	141
6.2.1.	ntl travel.....	141
6.2.2.	Galileo.....	148
6.2.3.	Critical reflection on diagnosis.....	149
6.3.	Action planning.....	151
6.3.1.	Pre Open Space event publicity .....	154
6.3.2.	Critical reflection on action planning .....	159
6.4.	Action taking – Open Space.....	163
6.4.1.	Output from Open Space .....	166
6.4.2.	Creating a virtual forum in Blackboard .....	177
6.4.3.	Critical reflection on Open Space and Co-operative Inquiry.....	181
6.4.4.	Co-operative Inquiry validity criteria .....	190
6.5.	Recruitment of follow up co-operative inquiry group .....	201
6.6.	Scenarios emerging from interviews – a critical view .....	202
6.7.	Analysis of Voice over Internet group discussion .....	208
6.8.	Critique of issues arising from group discussion .....	209
6.8.1.	A critique of the boundaries central to the discussion .....	215
6.9.	Augmentation of model .....	218
<b>7.</b>	<b>CONCLUSION.....</b>	<b>220</b>
7.1.	Meeting the objectives of the study .....	220

7.2. Main findings .....	224
7.3. A critique through System/Life-world.....	228
7.3.1. Tourism IT case study critiqued through system/life-world.....	230
7.3.2. Open Space output critiqued through system/life-world .....	232
7.4. Credibility and transferability .....	234
7.5. Future Research.....	235
<b>REFERENCES.....</b>	<b>307</b>



# LIST OF FIGURES

Figure 1-1: Travel industry supply chain.....	1
Figure 1-2: The research problem.....	5
Figure 1-3: Research emphasis of the thesis.....	10
Figure 2-1: Product creation at Norwegian Coastal Voyages.....	16
Figure 2-2: The EC Work Programme Project Life Cycle.....	33
Figure 2-3: The System of Systems Methodologies.....	39
Figure 2-4: Tourism IT cases mapped onto SOSM.....	40
Figure 2-5: Classification of sociological paradigms.....	44
Figure 2-6: Hotel IT case mapped onto social framework.....	48
Figure 2-7: Summary of critique of IT implementation.....	55
Figure 3-1: The Complementarist Framework.....	64
Figure 3-2: Boundary critique of EnglandNet.....	70
Figure 3-3: The range of coercion in problem contexts.....	76
Figure 3-4: Systemic triangulation.....	77
Figure 3-5: Model for stakeholder consultation.....	86
Figure 4-1: Model of choice in tourism and leisure research.....	89
Figure 4-2: Research process.....	96
Figure 4-3: VIPER.....	104
Figure 5-1: Reconstruction of Travelmole discussion.....	130
Figure 5-2: Augmentation of model for stakeholder consultation (1).....	138
Figure 6-1: Critical diagnosis of ntl travel position.....	150
Figure 6-2: Open Space Blackboard site.....	177
Figure 6-3: Message posted on Blackboard on dynamic packaging.....	178
Figure 6-4: Travel distribution scenarios.....	203
Figure 6-5: Reconstruction of Internet group discussion.....	211
Figure 6-6: Boundary critique of Voice over Internet discussion.....	216
Figure 6-7: Augmentation of communicative model (2).....	219

## LIST OF TABLES

Table 2-1: Failure classification of Tourism IT cases.....	42
Table 2-2: Sociology of regulation – radical change .....	45
Table 2-3: The subjective - objective axis .....	46
Table 2-4: Human-centred elements in Tourism IT cases .....	52
Table 2-5: Conditions for critique present in tourism cases .....	56
Table 3-1: Methods allocated to SOSM.....	62
Table 3-2: The significance of Habermas’ Knowledge Constitutive Interests .....	66
Table 3-3: Twelve critical boundary questions.....	67
Table 4-1: Research methods .....	94
Table 5-1: Stakeholders’ reconstructed claims .....	126
Table 6-1: Methods used during Co-operative Inquiry.....	140

## LIST OF APPENDICES

Appendix 1: Full text of Travelmole article.....	238
Appendix 2: Review of travel distribution conference .....	244
Appendix 3: ntl travel strategy document .....	248
Appendix 4: Pre Open Space publicity .....	257
Appendix 5: Invitation to Open Space .....	260
Appendix 6: Recruiting for Open Space .....	262
Appendix 7: Photographs of Open Space .....	266
Appendix 8: Output from Open Space.....	270
Appendix 9: Post Open Space publicity .....	278
Appendix 10: Messages on Open Space Blackboard site .....	280
Appendix 11: ntl travel report on Open Space.....	287
Appendix 12: Reconstruction of interviews.....	291
Appendix 13: Author’s publications related to thesis .....	305

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## **DECLARATION**

I declare that this thesis is my own unaided work.

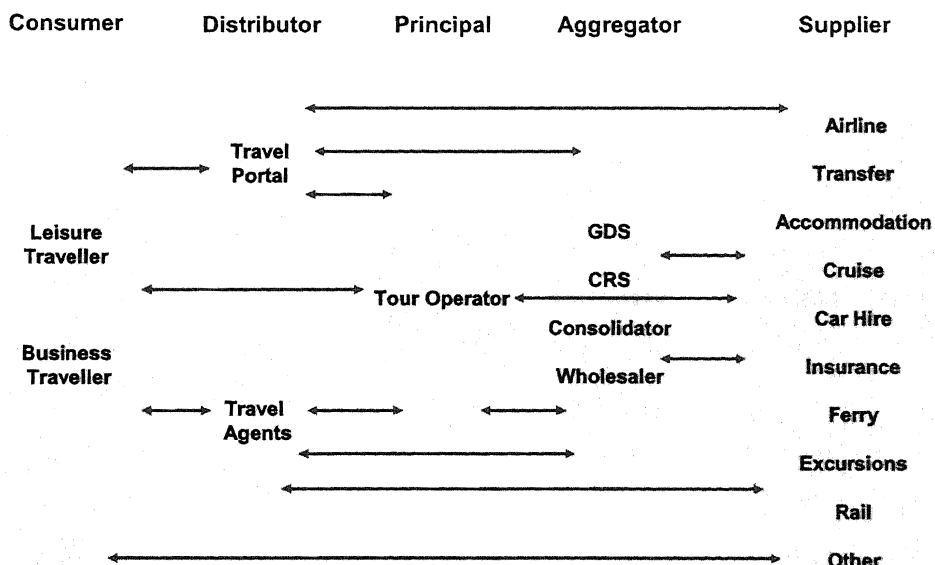
# 1. INTRODUCTION

## 1.1. BUSINESS TO BUSINESS TOURISM IT

This study is based in the business to business (B2B) domain of Tourism IT where multi stakeholder projects are planned and implemented. One of the unique characteristics of tourism as a service industry is the central role which people play and this study will demonstrate that the people element is as important in the planning and production of tourism (B2B domain) as it is in its consumption (business to consumer B2C domain). The success of a B2B Tourism IT project depends heavily on inter-organisational communication and collaboration. B2B tourism is increasingly interconnected involving myriad relationships moving the product from supply to consumer (Figure 1-1).

**Figure 1-1: Travel industry supply chain**

### Travel Industry Supply Chain



(Dombey 2005)

Technology plays a central enabling role in this scenario as the following examples illustrate:

- The Global Distribution Systems (GDS) are technology and distribution companies which aggregate supply and distribute it downstream to travel agents and Internet travel portals. Increasingly they are positioning as technology partners to the airlines and are using their vast information databases to provide content to the online travel portals (Alford 2006).
- Telecommunication companies such as ntl:Telewest have travel divisions which provide the networks and software that connect tour operators and travel agents and help agents sell to their customers.
- In a highly competitive field, a host of technology suppliers offer software products designed to assist tour operators with their supplier relationships, back office systems, brochure production, pricing and travel agency distribution.
- Companies such as Tiscover and Worldnet sell destination management systems to destination marketing organisations which facilitate collaboration with tourism businesses in the destination and promote the marketing of the destination over the Internet (Alford and Karcher Forthcoming).

However while technology plays an important role, there is evidence to suggest a high rate of failure in Tourism IT. Citing David *et al.* (1996) and Brown and Stange (2002), Tang points to the failure of IT implementation in the hospitality industry:

... the significance of ICT investments does not find that related expenditure has had a direct impact on improving industry profitability, either by driving up top line revenue performance, competitive advantage or increasing labour productivity (2004: 490).

This is corroborated by evidence from Piccoli and Wagner who record that the failure rate for IT projects in the hospitality industry in 2000 was 72 per cent. “The average cost overruns were estimated at 45 per cent over budget (down from 189 percent in 1994), and the average time overrun was estimated at 63 per cent” (Piccoli and Wagner 2003: 8). These figures are taken from a panel of chief information officers participating in a HITEC (an association of hospitality, financial and technology professionals) forum in 2001. Despite the improvement over six years, Piccoli and Wagner refer to the failure rate as “staggering” (2003: 8). While no explanations are given specifically for these

figures, Piccoli and Wagner state that “systems are challenged by a lack of end-user acceptance and a limited understanding of their full functionality” (2003: 8).

A growth area within Tourism IT is the increasing number of European Commission-funded projects, which comprise teams made up of stakeholders from the public, private and university sectors. One of the conditions on which funding is granted is the post-funding sustainability of the project. However, research stemming from the 1990s provides an early indicator of problems in the domain of EC-assisted tourism technology projects, reporting that “in all cases projects failed to address post-project sustainability” (Evans and Peacock 1999: 256 citing CEC 1996 report).

Notwithstanding these insights, there is overall relatively little published statistics relating to multi stakeholder B2B Tourism IT and specifically why it might fail. In order to address this limitation, the research undertakes a detailed examination of five B2B Tourism IT case studies. Two of these cases come from the destination management sector and relate to the planning and implementation of destination management systems (DMS) in the UK. One of these cases, English Tourism Network Automation (ETNA), was an attempt in the early 1990s to put in place an IT network to connect the tourism information centres in England and facilitate closer collaboration between the regional tourism boards and local authorities (Mutch 1996). However the project failed, with the system installed in only 17% of the TICs. The main contributory factor was the inability of the steering committee to win support from local authorities who had a different local agenda (and sometimes no agenda) for tourism.

Another case features an EC-funded tourism technology project, BookTownNet, which comprised a number of stakeholder groups across five countries including, the University of Luton (the author was part of the evaluation team), West Norway Research Institute, the European Commission, 75 second-hand and antiquarian book dealers located in rural areas of Europe, and a number of tourism interests. The aim was to form an IT network to improve and disseminate IT skills through the small enterprise network, to test the utility of internet and intranet networks to improve their business functioning and the attraction of visitors to book towns (Seaton and Alford 2001). The project ran for two years and yields interesting insights into multi stakeholder IT implementation in the B2B domain.



## 1.2. THE RESEARCH PROBLEM

The research will show that multi stakeholder B2B Tourism IT projects are dominated by a view which privileges the technology at the expense of considering the interaction with that technology by human actors, and that this view is a contributory factor to a high rate of failure. We therefore have a problem which can be stated as: “how do we ensure that, as technological solutions are implemented within tourism, due consideration is given to human-centred issues?” This question lies at the heart of the so-called hard-soft debate in IT, whereby a common resolution is sought via more interpretive methods. However, more recent research and practice has pursued a solution through an in depth analysis of the foundation of interpretive analysis, namely social theory.

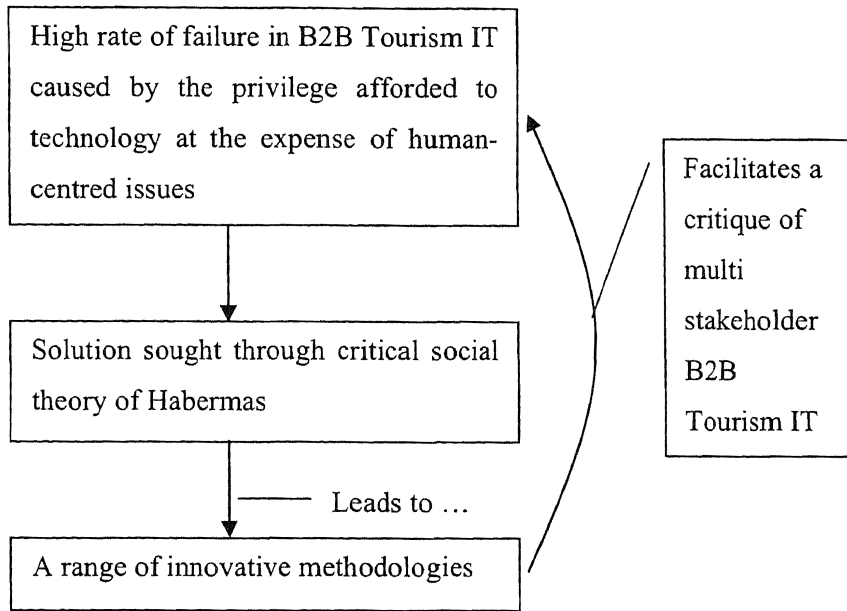
In attempting to find a solution to this problem the study turns, in what might be considered a radical move, to the critical social theory of Habermas (1984), a German philosopher whose ideas underpin much of critical thinking and practice in Management Science and who has been used more “than any other critical social theory school of thought” (Ngwenyama and Lee 1997: 151) in that domain. The rationale for choosing social theory is that technology is not an end in itself, but is of value only to the extent that it provides the enabling mechanism for improvements in human action. The human versus technical issue has been the focus of study in Information Systems (IS) where solutions have been sought through social theory. This study draws on that literature. Habermas in particular is chosen because his theory points to a range of innovative methodologies which enable a critique of B2B Tourism IT and facilitate a practical solution to its problems (Figure 1-2).

The term ‘critique’ is central to this study and warrants some initial reflection at this stage. What does it mean to critique, to be critical or to critically appraise a subject? It does not mean to subjectively criticise or to be dismissive according to the personal point of view of the person undertaking the critique. If critique is to contribute to a solution to the problems facing B2B Tourism IT, it has to be constructive and contain a practical element which enables a more human-centred perspective.

According to Midgley, critical awareness “consists of examining and re-examining taken-for-granted assumptions, together with the conditions which gave rise to them” (cited in Clarke 2001). A common thread running through the critical theory literature is the importance of accessing the normative position – people’s views on what ought to be and

contrasting this with what is. Kemmis and McTaggart view this ought position as the “seed of the critical perspective” (2000: 590).

**Figure 1-2: The research problem**



Source: Author

Although not intended to be a definitive list, there are three important issues/concepts associated with critique, which are all underpinned by Ulrich (1983) – an author of central significance in this thesis. Ulrich in turn is informed by Habermas (1971) and from him back to the philosophy of Kant (1787).

1. *The 'is' versus the 'ought'*: this concept affords primacy to the normative (ought) perspective. Drawing on Kant (1787), Ulrich argues reason to be “.. theoretical if it secures critical understanding of *what is*; (and) practical if it secures critical understanding of *what ought to be* (Ulrich 1983: 220). This may appear on the surface to be contradictory – one might reasonably expect theoretical perspectives to be more associated with how things could be and practical perspectives with how they are. However Ulrich used the term ‘practical’ to mean ‘rational’ in terms of planning: “planning is rational, from the perspective of this study, if the involved planners and the affected citizens make transparent to themselves and to each other this normative content” (Ulrich 1983: 20). In

other words planning is practical or rational only if it takes into account what ought to be. Technological solutions seek what 'is', focusing on the design aspects of a problem. Human problems, seen from a critical perspective, seek what 'ought to be', focusing on the normative debating issues. Incorporated in this concept is seeking alternative perspectives or mind set.

2. *The involved and the affected*: this concept encourages reflection on who is affected by the system under consideration and is related to the previous one in that it asks "who ought to be involved?"
3. *Power*: to what extent is power being used in order to achieve a certain agenda? A theme inherent in Ulrich's later work (Ulrich 1988) is that of emancipation to combat coercive influences. Here he draws on Habermas, who asserts that, in both theoretical and practical reason, decisions are reached by "the peculiarly unforced force of the better argument" (1971: 240) rather than by resort to power or deception. Ulrich (1983: 221) also refers to Kant's moral idea whereby he takes practical to mean that which is possible through freedom. Hence the introduction of emancipation to the debate: "By 'the practical', I mean everything that is possible through freedom" (Kant 1787: 828). Power is perhaps the most difficult issue to address in that it can be both overt and covert. The evidence from the B2B domain and the case studies reviewed in the following chapter indicates that while varying degrees of power will be endemic to every case, stakeholders are both willing and able to engage. This creates the opportunity to apply innovative methodologies for critique and this study will demonstrate how, through the analysis of communication, the norms underpinning the status quo can be challenged.

Critical social theorists point to the normative perspective as a point of differentiation from general social theory, which, although placing people's views at the centre of research, do so in a largely unreflective manner – consultation takes place without any attempt to challenge the normative positions that underpin the status quo. It could be argued however that a people-centred approach undertaken within an Interpretive rather than Critical theoretical framework would succeed in unearthing the normative position over time.

Rather than engaging in the debate from an abstract theoretical level, this study, albeit informed by theory, takes a largely methodological route to critique rather than a theoretical one. Methodology is a key feature of critical systems *practice* and this will be

discussed in more detail later in the thesis. This is where the critical social theory of Habermas has added real value – in leading to a range of innovative methodologies which can facilitate a practical critique of Tourism IT. Habermas developed a theoretical communicative framework, the ideal speech criteria, which offer the potential for identifying the norms and values underpinning stakeholder positions through the analysis of stakeholder discourse. In order to operationalise the framework, this study borrows a methodology tested in social ethnographic research undertaken in schools in the United States (Carspecken 1996). Using Habermas’ ideal speech criteria as a theoretical framework, this methodology involves the deconstruction and reconstruction of validity claims contained in conversations.

### **1.3. AIM AND OBJECTIVES**

The main aim of the research is to design and test a theoretically and empirically informed action inquiry model for critically facilitating stakeholder consultation in an inter-organisational Tourism IT project.

The objectives of the study are as follows:

- a. A critical analysis of the current approaches to Tourism IT implementation as reported in the literature, and through the empirical evidence
- b. Critically review the theoretical constructs available to understand how Tourism IT can be managed
- c. Draw on theory and methodology from outside the tourism domain in order to develop the concept of ‘critique’, which is central to the aim and objectives
- d. Develop a model for stakeholder consultation which actions Habermas’ theory of communicative action
- e. Test the model using an iterative, inductive action research framework in a ‘live’ setting
- f. Produce a revised model, which is both theoretically and empirically informed

The following hypotheses, based on the objectives and the rationale, provide a focus for the various procedures adopted throughout the study:

1. The failure of B2B Tourism IT is largely attributable to human rather than technical factors
2. Functionalist and Interpretive approaches are insufficient for addressing this failure

3. Habermas' critical social theory points to a range of innovative methodologies which facilitate critique
4. The deconstruction of dialogue between participants is a practical means for implementing Habermas' ideal speech criteria
5. This deconstruction methodology, developed in social settings such as education and health, is applicable in B2B Tourism IT

#### **1.4. METHODS USED IN THE RESEARCH**

Before outlining the individual methods that were used in the study, this section begins by reflecting on the overall methodology and its connection to the philosophical underpinning of the thesis. Hollinshead argues that this philosophical awareness is important and that it should not only be a "methods-level" (2004: 64) decision. The philosophy underpinning this thesis is a critical one, stemming from Habermas' theory of communicative action. Taking into account the aim and objectives and the reflections on being critical in the previous section, the methodology had to be capable of engaging participants in communication in a live scenario where the boundaries surrounding the issue could be critiqued.

Co-operative Inquiry (Heron 2005) was chosen as the umbrella methodology for a number of reasons. Firstly, Co-operative Inquiry is highly participative whereby those involved are more appropriately termed 'participants' rather than 'subjects'. Secondly, these participants are encouraged to be "critically subjective" (Reason 1994: 327) by reflecting on the way in which they view an issue and exposing expert and dominant positions. Thirdly, Co-operative Inquiry comprises a range of validity criteria – an extended epistemology which, this study hypothesises, can facilitate a critical inquiry. One of the objectives of this study is to investigate how these validity criteria can augment a model for critical inquiry.

A number of individual methods were chosen to facilitate the Co-operative Inquiry, which adhere to the principles outlined above. Firstly, participants were engaged via a one day Open Space workshop which took place at the University of Luton. To the best of the author's knowledge this is the first time Open Space Technology (Owen 1997) has been used in the travel and tourism sector in the UK, although it is recognised internationally as a highly participatory and unstructured method for investigating an issue (a number of international case examples appear on the Open Space web site – [www.openspaceworld.org](http://www.openspaceworld.org)). Open Space which allows participants to build their own

agenda is an antidote to the traditional travel industry conference format with an invited panel of speakers and a preset agenda. An Internet discussion board was used after the Open Space event for the purposes of capturing dialogue which could then be deconstructed using the validity claim reconstruction method described earlier.

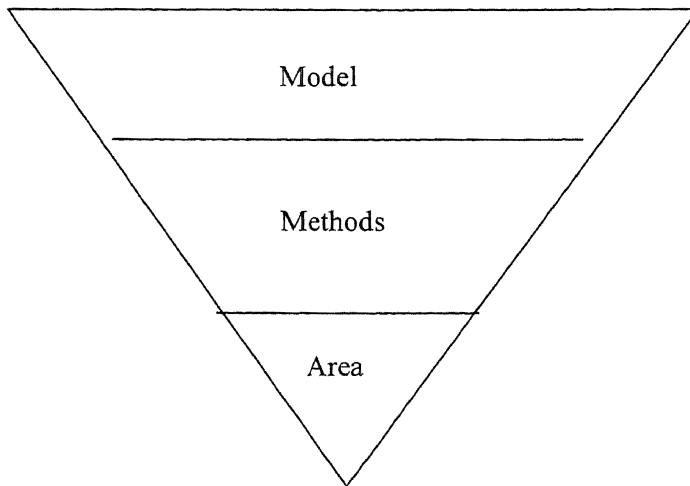
Secondly, the Open Space workshop was followed with a number of in depth face to face interviews with key informants who had attended the workshop. These semi structured interviews allowed the author to probe the participants' normative and objective positions in depth. The transcription and deconstruction/reconstruction of the interviews allowed for a critique of these positions. Thirdly, these positions were subjected to further debate during an online group discussion forum using voice over internet technology. The conversation was recorded and transcribed for later deconstruction. This process provided useful insights into facilitating a discussion online. The use of voice over internet technology is expanding rapidly in the business world as well as for home use and the ability to harness it as part of an action inquiry model is tested in this study.

Two additional methods were undertaken prior to the Co-operative Inquiry. Firstly, a number of B2B Tourism IT case studies were reviewed and critiqued using social theoretical frameworks that have been applied in the IS domain. This critique serves to establish critical social theory as an appropriate lens through which to study Tourism IT and to study in depth the reasons lying behind its failure. Secondly, the conversations between participants which took place on a Travelmole internet discussion board were deconstructed. Travelmole is a popular travel and tourism news site and the discussion forums allow visitors to the site to respond to articles which have been posted. This debate concerned the role of technology in facilitating the distribution of travel and the participants came from different backgrounds including IT supply, travel agency, academia, and a Tourism IT industry association. The debate provided an opportunity to test the theoretical model on discourse related to the commercial area of concern and to identify core themes and stakeholders which would inform the Co-operative Inquiry.

### **1.5. EMPHASIS OF THE THESIS**

Three areas are tested in the action research framework which guides this study: the theoretical model, the methods, and the commercial area of concern. While this study contributes to all three areas, the emphasis lies in the theoretical and methodological areas rather than the commercial area of application (Figure 1-3).

**Figure 1-3: Research emphasis of the thesis**



Source: Author

The rationale behind this emphasis lies in the nature of the problem and the main aim of the study as described earlier. The specific sector chosen in which to test the model is the packaged holiday industry and the issue under investigation is the role which IT plays in facilitating the production, sales and distribution of these holidays. This area was chosen for a number of reasons. Firstly it is a research area in which the author is active (Alford 2000; Alford 2000; Alford 2000; Alford 2001; Alford 2001; Alford and Karcher 2001; Alford 2005; Alford 2006).

Secondly and related to the first, the author has a pool of industry contacts from which cooperation could be secured to facilitate empirical research. The high level of industry collaboration in this study was both an opportunity and a challenge. On the one hand it helped to ensure that the study was grounded in a real world scenario, while on the other it was important to be mindful of the commercial interests at play and how these might run contrary to 'being critical' (as discussed above). This brings into play the power issue which is reflected upon in more detail in Chapters 3 and 4.

Thirdly this subject area is rich in multi participant B2B discussion with forums such as Travelmole ([www.travelmole.com](http://www.travelmole.com)), Travel Technology Initiative ([www.tti.org](http://www.tti.org)), eyefortravel ([www.eyefortravel.com](http://www.eyefortravel.com)), and IFITT ([www.ifitt.org](http://www.ifitt.org)) regularly scheduling conferences and featuring debate related to this topic.

## **1.6. STRUCTURE OF THE THESIS**

Chapter 1 introduces the research problem, why this research is important and how the study proposes to address the problem through the aim, objectives and hypotheses. Critical social theory is introduced as an appropriate theoretical framework for guiding a critical inquiry and Habermas' theory of communicative action as the specific theory to be used. The deconstruction of conversations borrowed from ethnographic research in the US will be used to action the ideal speech criteria contained in Habermas' theory. This chapter contains reflections on what it means to be critical and these reflections will continue throughout the study.

Chapter 2 reviews the relevant literature, examining further the human-centred nature of tourism as a phenomenon, in particular the role which collaboration and partnerships play in the B2B domain. Within this context, the applicability of IT to tourism is discussed. Further examples of IT failure are examined along with the reasons that have been given. A range of social theoretical frameworks are then described and applied in order to critique in detail the tourism cases that were introduced in Chapter 1. This critique establishes critical social theory and Habermas' theory of communicative action as a valid perspective through which to critique Tourism IT. They are explored in more depth, setting the scene for the development of the theoretical framework in Chapter 3.

Chapter 3 builds the model for participant consultation which is applied and tested in Chapters 5 and 6. The chapter commences with a detailed review of critical systems practice – examining its history and the main agendas suggested for its future direction. Habermas' theory of communicative action and the ideal speech criteria are explained in detail. The methodology for deconstructing conversations and the way in which it can facilitate the practical application of Habermas' theory, is explained. Boundary critique is introduced as a means for augmenting a critical approach based on communicative analysis. Finally the resultant model is presented and applied to critique the Tourism IT cases.

Chapter 4 presents the research methods framework, which will be used to test the model. With the human activity focus, participatory methods are investigated and critiqued for their potential contribution to the research. Co-operative Inquiry – a methodology identified by Clarke (2001) as being in tune with the critical approach - is explained in detail.



In Chapter 5 the model for participant consultation undergoes its first cycle of evaluation during which it is tested on a discussion extracted from the Travelmole tourism news site ([www.travelmole.com](http://www.travelmole.com)). An article on Travelmole concerning the role of IT in the tourism industry generated a substantial amount of online debate. The resulting discourse is a simulation of that which might occur during a multi participant Tourism IT project and is analysed using the model.

Chapter 6 contains the results of the different stages of a Co-operative Inquiry during which the model was submitted to additional testing. The intervention was a collaborative venture between the author and two major Tourism IT companies. The aim of the intervention was to provide these companies and their clients with insights into the future direction that technology and distribution might take in the travel and tourism industry. In this regard it provided an ideal scenario in which to test the model and evaluate the results that emerged.

Chapter 7 concludes the thesis, summarising the main findings, the contributions to knowledge and areas for future research.

## **2. CRITIQUE OF BUSINESS TO BUSINESS TOURISM IT**

One of the central objectives of this study is to contribute to the development of critique and this chapter addresses that objective through the critique of tourism partnerships and of B2B Tourism IT cases. In undertaking this process, particular attention will be given to the conditions for critique (the involved and affected, the 'is' and the 'ought', and power) as discussed in Section 1.2 in the previous chapter.

### **2.1. THE NATURE OF TRAVEL AND TOURISM**

The travel and tourism leisure 'product' comprises a number of unique characteristics which best describe it as an 'experience' rather than a 'product'. Firstly, it is intangible - unlike a physical product, a holiday cannot be experienced at the point of sale. This factor intensifies the importance which information plays in reducing the consumer risk when purchasing something lacking tangibility. Tourism therefore can be viewed as an 'information product' consisting of factual information (e.g. flight schedule, hotel rates or the opening times of an attraction) and more descriptive promotional information (e.g. promotion of a destination through text and images).

The information-richness of tourism accounts for the importance which IT, in particular the Internet, plays in the domain. The most obvious example of this is the myriad travel and tourism web sites which support the sales and distribution of travel. The 24/7 nature of the World Wide Web, the depth and breadth of information available, the ease with which information can be updated, and increasing consumer Internet access, all help to explain why researching and buying travel is one of the most popular activities on the Internet.

Secondly, the travel and tourism product is perishable – the consumption of it is time and place-specific. The empty flight seat, cruise cabin or hotel room cannot be stored and sold at a later date. This is one of the biggest challenges facing the travel and tourism industry as airlines, hotels, car hire firms and other suppliers seek to influence demand through pricing, promotion and other marketing techniques in order to limit the amount of unused inventory. Again IT plays a central role here and the consumer-facing examples of that

are the myriad web sites which offer price comparisons and last minute offers, and auction sites where travellers can name their own price.

Behind the scenes in the B2B domain there are many IT suppliers who facilitate the sales process. For example in the hotel industry, property management systems; in the tourist board sector, destination management systems (DMS); in the airline industry, flight reservation and yield management systems; they are all designed to enable the optimisation of supply and demand. The Sabre global distribution system, which allows agents to book flights, hotels and many other travel products on a global scale, processes more than 8,000 transactions per second - six times more than the New York Stock Exchange (Alford 2006).

Thirdly, travel and tourism is a high touch product where the production and consumption occur simultaneously. This is often referred to as the 'inseparability' factor in the marketing literature and refers to different forms of host-guest interaction for example, checking in at a hotel, in-flight service, the holiday representative on a package tour, the customer-travel agent, etc. This factor explains why tourism is essentially a people-business where the quality of service is the key competitive differentiator. At the customer interface IT has a supporting role to play, for example the travel agency desktop booking system, the hotel's front office system, the customer database for recording preferences, and the use of email, online chat and web site FAQs to support customer service. Once again there is an extensive array of IT suppliers and processes existing in the B2B domain which enable this supporting role. For example ntl travel, a collaborator in this study, supplies the communications network which links travel agents and tour operators, enabling the former to search and book operators' holidays using the ntl travel desktop selling tool, Traveleye.

## **2.2. TOURISM PARTNERSHIPS**

Outside of the vertically integrated tour operations of big players such as TUI and First Choice, the tourism industry is not characterised by vertical and horizontal integration but rather a network of partnerships which create the tourism product "assembly process" (Bramwell and Lane 2000: 1). According to Zhou: "Partnerships are important because of the nature of the hospitality and tourism industry, which is an interrelated group of businesses that serve the needs of travellers" (2004: 198). The people focus is normally discussed in the B2C domain in the context of the customer / supplier interaction as described above, however people also play the leading role in the B2B domain where the

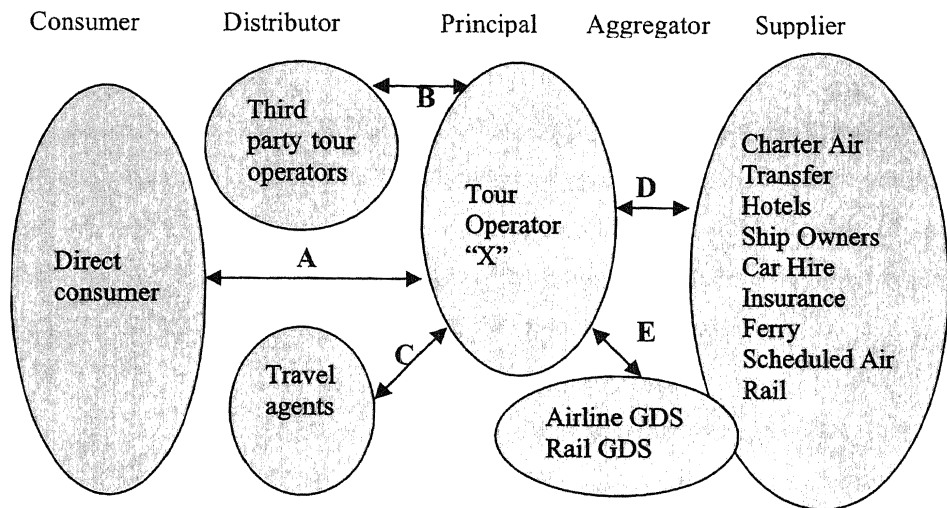
effective packaging and distribution of the tourism product requires collaboration and ‘co-opetition’ – “when organisations collaborate with players that they would normally regard as competitors” (Buhalis 2003: 336).

For example, Lastminute.com was a victim of its own success in that it had not anticipated the level of demand it would generate, finding that it could not meet the fulfilment requirements (ticketing, itineraries, enquiries, complaints, etc) for the holidays which it sold. It therefore partnered with traditional independent travel agents belonging to the Advantage Travel consortium in order to provide the level of customer service required. There is some irony here in that Internet travel providers are often regarded as a threat to the independent agent.

Karcher (2002) also illustrates the co-opetition concept when referring to the future of destination marketing. He discusses how Tiscover, a provider of DMS technology, provides the IT platform which facilitates collaboration between the regional destination marketing organisation (DMO), sub regional partners and the tourism businesses. The Tiscover application service provider (ASP) solution allows DMO, both large and small, to avoid hefty IT set up and brand marketing costs by sharing an Internet platform with other DMO. Nevertheless, while there are clear advantages to the ASP solution, public-private partnership collaborations have always been practically problematic in the destination marketing sector. DMO typically complain that they cannot secure participation by private sector suppliers, while the latter often point to the lack of impact which DMO make and complain about the DMO membership fees they have to pay. These are essentially political issues between two stakeholder groups which highlight the conditions for critique as discussed in Chapter 1. For example, from an ‘is’ and ‘ought’ perspective, the private sector is claiming that DMO *are* ineffective and *ought to be* functioning differently in order to justify the membership fees they charge. Of clear interest here are the normative views underpinning the private sector ‘ought to be’ position. From a power perspective, the status quo and the material conditions which support that position can be critiqued. For instance is the organisational structure of regional tourism an effective one in terms of the respective roles of the public and private sectors? Two of the B2B Tourism IT case studies, Englandnet and English Tourism Network Automation, reviewed later in this chapter illustrate the complexities which exist in this sector.

The importance of partnerships in the travel and tourism industry is revealed when taking a B2B perspective (Figure 2-1) on the supply chain diagram introduced in Chapter 1.

**Figure 2-1: Product creation at Norwegian Coastal Voyages**



KEY: A: Customer feedback; B: Commercial agreements; Net rates; C: Commercial agreements; Commission levels; D: Contracting services; Rates & Allocations; E: Access agreements

Source: (Alford 2005)

This schematic resulted from work carried out in 2004-5 by TOWARD Europe's Business Cost Analysis working group of which the author was a member:

The acronym stands for **T**our **O**perators and **W**holesalers **A**chieving **R**eal-time **D**istribution. The TOWARD Europe web site (<http://www.towardeurope.org/>) includes the following description: 'TOWARD Europe is a member organisation dedicated to improving the profitability of tourism industry companies. Our goal is to create a new and more profitable tourism marketplace by optimising the entire distribution chain - from suppliers to tour operators, and onwards to agents and consumers.' (Alford 2005: 125)

The diagram shows the B2B processes involved in creating the cruise product sold by Norwegian Coastal Voyages. It illustrates the collaborative nature of the product creation process. Process 'B' illustrates the concept of 'co-opetition' whereby the company offers

some elements of its package to another tour operator to package in its product. This 'net rates' agreement is common practice in the travel industry and is a means for ensuring that perishable inventory is not left unsold.

One of the most important partnerships for Norwegian Coastal Voyages is that which exists with hotel suppliers in the destination as illustrated by Process 'D' – contracting services, rates and allocations. This process was identified by the TOWARD Europe group as a candidate for automation through technology as it was seen to contain a high degree of repetitive, manual processes where technology might be able to take out costs. For example instead of renegotiating contracts each year with a large number of small hotels in Norway, an Extranet could be created which would include a common contract template where hoteliers could enter and update their details (Alford 2006).

The IT and Finance Director for the cruise company acknowledged that the more repetitive activities such as updating rates could be automated. However he reminded the group that these suppliers are, in the main, small hotels with sometimes limited access to technology. More importantly they value a high level of human contact as an integral part of the partnership. Therefore to attempt wholesale automation would on the one hand be impractical while on the other potentially very damaging to a network of key partnerships. The accounting, sales, and inventory and fulfilment processes were also examined and also depended on partnerships within the supply chain (Alford 2005).

Partnerships with the airlines are becoming increasingly important for the future direction of the GDS, Amadeus, Galileo, Sabre and Worldspan. These global players which have been providing electronic distribution services to the travel industry for over 30 years are facing a number of threats including new Internet entrants, direct sell by the airlines, deregulation and competing channels of distribution (Alford 2006). These threats are placing downward pressure on the fees that GDS charge the airlines for distributing their products. The fees are under review in the contract renegotiations with the airlines. The GDS realise that their core proposition as a distribution channel is no longer sustainable and are repositioning as IT partners for the airlines. For example, a number of airlines including British Airways, South African Airways and the Oneworld Alliance outsource a range of IT activities to Amadeus including e-ticketing, reservation systems, customer and inventory management solutions (Alford 2006).

The rationale behind this strategy is based on the commonsense assumption that the airline will be less likely to replace an intrinsic partner offering a range of services rather than acting as only a distribution channel. However three factors identified as being fundamental to the success of business alliances indicates that for these partnerships to work effectively, more than good technical solutions will be required (Kanter cited in Werthner and Klein 1999). Firstly partnerships are not static but dynamic and must yield mutual benefits. Secondly, partnerships require the creation of extra synergistic value through collaboration. Thirdly, interpersonal connections rather than formal systems are the key to enhancing learning within the partnership. However in their strategic move, the GDS are demonstrating keen awareness of some of the conditions for critique. Firstly, they have recognised that the *status quo* of travel distribution is under threat and a business model based only on charging fees for distribution is not sustainable. Suppliers now have many different ways to distribute their products. Secondly, this leads to a shift in the *balance of power* whereby the suppliers are more likely to put downward pressure on GDS fees and possibly even completely remove them from the equation.

Away from the commercial travel industry IT field there is a small but growing body of literature on the role of partnerships within tourism planning and sustainable development. The following review of this literature enables a better understanding of the human issues which affect the success of collaborative partnerships. A central publication is the collection of papers edited by Bramwell and Lane (2000). In their definition of partnerships, the editors emphasise the cross-sector component and exclude marketing alliances between businesses. However this author contends that alliances between businesses in the supply chain take place across the supplier, aggregator, principal and distributor sectors as illustrated in Figure 2-1 and therefore qualify as cross-sector partnerships.

In their opening chapter, Bramwell and Lane pose some incisive questions relating to the inclusiveness of partnerships, which echo the conditions of critique as discussed in Chapter 1: “Are all participants in a partnership fully involved in the discussions (*involved and affected*), is there mutual respect and shared learning, and are all participants equally influential in the negotiations and decision-making (*power*)?” (Bramwell and Lane 2000: 3 words in italics added by author). These questions are highly pertinent as points of reflection on the case studies considered later in the chapter.

The editors emphasise that their collection of papers goes beyond demonstrating the theoretical rationale for partnerships to making them more practically effective. In their consideration of theoretical frameworks that might help with this task, a number of questions arise. Firstly, to what extent do partnerships include all those stakeholders and the range of concerns affected by the issue? This question is very close to the concept of the involved and the affected which underpins boundary critique – a field within Management Science which is underpinned by critical social theory. The fourth hypothesis listed in Chapter 1 holds that Habermas' communication theory can make a contribution to this question by facilitating the critical appraisal of boundaries that surround an issue.

Two further questions are related to the power issue - one of the conditions of critique. Is there honest and open dialogue between partners and an atmosphere of trust? And to what extent does power affect the success of partnerships? These are difficult questions to answer as many multi participant scenarios feature hidden agendas and coerciveness. A number of cases contained in Bramwell and Lane feature the power issue prominently, where some voices are louder than others (Jamal and Getz 2000; Mason, Johnston et al. 2000; Medeiros de Araujo and Bramwell 2000). A central hypothesis underpinning this study is that the reconstruction of communication between stakeholders can make more transparent the norms and opinions underlying discussion. Where participants are, in principle, willing to engage, the methods investigated in this study can contribute to the conditions for more open and rational dialogue through increased transparency. The evidence from the tourism partnerships literature indicates that on the whole stakeholders are prepared to engage. Of course there will be potential scenarios where certain stakeholders refuse to come to the table or walk away from it, and while the development of strategies for engaging them would prove an interesting study, it falls outside the aim of this thesis.

Finally, is there an acceptable level of consensus among stakeholders to enable progress? The authors caution that the consensus may only exist on the surface due to "continuing underlying ambiguity" (Bramwell and Lane 2000: 10). One of the hypotheses underpinning this study is that the reconstruction of communicative acts can help to remove these ambiguities and thereby contribute to sounder consensus.

The case study of the Costa Dourada tourism project in Brazil focuses on the first question, the placement of boundaries around an issue, and considers a number of



approaches to stakeholder assessment and optimising stakeholder involvement (Medeiros de Araujo and Bramwell 2000). One of these approaches is designed, through training and education, to raise the skills and knowledge levels of stakeholders in order that they can participate equally in a partnership. This is one way of addressing the power issue, as superior knowledge can be used coercively to exert power over others. A second approach, employed by Medeiros de Araujo and Bramwell, is to directly ask stakeholders to recommend who ought to be included – a form of ‘snowballing’. This concept of the *is* and the *ought* is a central one in critique and the role which Habermas’ communicative theory can play in facilitating critique of who is and ought to be included is a central theme of this study.

In their conclusions, Medeiros de Araujo and Bramwell acknowledge some of the limitations of the case which includes the under representation of the commercial private sector. No specific details are given as to why the private sector did not participate, only to speculate that it might have been related to lack of time and suspicion of public sector initiatives. It could be argued that the private sector through non attendance was exercising indirectly (or possibly directly) its power. It is not clear from the case what impact the non attendance of the private sector will have on the project which is scheduled to run from 1994-2010, however the authors caution that “if legitimate stakeholders are excluded or ignored then the quality and degree of acceptance of the project plans will be questionable” (Medeiros de Araujo and Bramwell 2000: 292).

A third approach involves reflecting on the complex relationships contained in a partnership. The first of these relationships involves the exercise of power and coercion, “through access to material or financial resources, or through normative pressure” (Medeiros de Araujo and Bramwell 2000: 276). The use of the term ‘normative’ is of interest in this study as critique of the normative position underpins the critical perspective. For example, some sections of the private sector appeared to hold the normative position that it *ought not to be* involved in regional public sector projects. The challenge for the project management is how to challenge that normative stance and to examine the claims that lie behind it – this communicative challenge can then directly address the exercise of power as defined by Medeiros de Araujo and Bramwell. The second relationship relates to the legitimacy of stakeholders’ claims and in this regard there is a connection to the first relationship. For example, why would one participant’s normative claim enjoy precedence over another? Or, why does the private sector reject the legitimacy of public sector projects? Citing Lawrence 1997, Medeiros de Araujo and

Bramwell claim that the analysis of communication might provide some insights: “legitimacy is socially produced in the communicative interaction among stakeholders” (2000: 276).

Lawrence’s paper is not concerned with communication or consensus seeking per se but it does discuss “evaluative frameworks” (Lawrence, Wickins et al. 1997) in detail. These frameworks are made up of values and expectations which stakeholders apply to an issue in order to determine its legitimacy. Writing with reference to ecotourism in Canada, Lawrence refers to:

the profit-oriented and conservation-oriented frameworks of the private entrepreneur and the environmental activist. Along with these, however, are the parochial economic and political ideologies of local government, the concerns of local citizens, and the cultural concerns of indigenous peoples (Lawrence, Wickins et al. 1997: 310).

These evaluative frameworks are in effect normative frameworks which shape the way in which stakeholders think an issue *ought to be* addressed. Although Lawrence et al refer to one stakeholder changing another’s perceptions and to “an approach that accommodates the multiple perspectives and evaluative frameworks of stakeholders”, the paper does not elaborate on what this approach might be, other than to stipulate the need for “open communication and unhurried collaboration” (1997: 315). It is these forms of approach that the methodologies under investigation in this study seek to enable.

The Arctic Tourism Project case reports on the collaboration processes designed to produce codes of conduct for tourism in the Arctic region (Mason, Johnston et al. 2000). It features a diverse range of stakeholders, including indigenous groups, local and national planners, tourism and environmental NGOs, academics, tour operators and cruise operators. The overall aim of the consultation exercise was “to achieve a consensus of views” (Mason, Johnston et al. 2000: 108). One of the advantages of the consultative approach claimed by the authors is the degree of ownership and motivation it engenders in participants. However there were issues of conflict which give useful insights into the human dimension within multi stakeholder projects. One area of disagreement surrounded the writing up of a code of conduct for Arctic communities. Some participants argued that there ought to be more input from community groups before the code was compiled. Time and resources militated against such input and the idea of a community

code was abandoned. This highlights the role which normative claims (community groups *ought to be* more closely consulted), and the placement of boundaries (who and what should be included discussions) play in multi participant projects.

The Arctic Tourism case also allows for reflection on the questions posed by Bramwell and Lane in their introduction, relating to the inclusiveness of the process and the opportunity for participants to make equal contributions. It appears as if the terms of reference for the project were established by a core group of participants who attended early meetings and continued to have a dominant say in the direction. Restrictions including funds for travel, computer access and language translation meant that some participants could not make a contribution at all or at best on an ad hoc basis. Although accepting the inevitability of such restrictions, the authors point out the “important implications for the process and the final product” (Mason, Johnston et al. 2000: 110). Clearly those participants who do did not have the opportunity to contribute to the process, to express their normative views or to challenge those of others were going to have less ownership of the final product. There is a power issue at play here inasmuch that those participants who had access to computer technology, funds for travel and for whom English was their first language, had an advantage. The issue of participant accessibility is important and one of the objectives of this study is to investigate the role which Internet technology can play in facilitating participant inclusion and communication.

Some post-case reflections by the principal author of the case provide useful insights (based on an interview with Professor Peter Mason 5<sup>th</sup> July 2006). There was a good spirit of cooperation within the group which broadly identified with the overall aims of the project. This included cruise operators which were identified as being one of the most important stakeholders, due to the popularity of cruise tourism in the Arctic region. The cruise operators were well informed about the sensitivities of Arctic tourism and could see the commercial benefits of being associated with an initiative which promoted sustainable tourism. A code of conduct already existed for operators in Antarctica and an Antarctica expert was brought in from Cambridge University to assist in the transfer of knowledge. In his reflections Mason commented on the exchange of values between stakeholder groups. For example the cruise operators were primarily interested in issues relating to safety as this was of primary commercial concern. One of these issues related to the need for small group sizes when viewing wildlife on the land mass. Therefore there was

common ground between commercial and sustainable tourism interests as smaller groups would serve both interests.

A final reflection relates to the practicalities of sustaining a partnership whereby stakeholders would often compromise in order to get a result. Under time pressure and the requirement to generate results by the World Wildlife Fund (the sponsors of the project) stakeholders would push through output rather than see a process collapse. Mason et al claim that there was a negotiated consensus with some participants foregoing their positions in the interests of keeping project momentum. However to repeat the earlier caution by Bramwell, to what extent did underlying ambiguities remain? It would be useful to have a clearer analysis of points of difference and detail on how they were sacrificed and to know the background to the positioning of the boundaries that surround an issue. It is hypothesised in this thesis that the detailed recording and reconstruction of dialogue between participants can provide important detail on stakeholder positions.

The case contributed by Jamal and Getz (2000) relates to the growth of tourism in the Canmore mountain area of Canada where local residents were opposed to resort development. A consensus-based approach was undertaken in order to try and resolve the issues. However from the outset only those stakeholders who were willing to compromise were admitted. For example, those with a “no-growth mandate” chose not to participate because the no-growth position was not allowed on the table. The authors question this stance claiming that, “A key purpose of interest-based processes is to enable exploration of the interests behind the positions voiced by parties” (Jamal and Getz 2000: 165). There was a missed opportunity to explore the normative claims that lie behind the no-growth position. By excluding this group the facilitators were also running the risk of jeopardising the relevance and effectiveness of the final output. In effect the Growth Management Committee had rejected the legitimacy of the no-growth position and imposed prerequisites which clearly some parties did not adhere to. On the other hand those that belonged to recognised community interest groups such as the Chambers of Commerce were afforded de facto legitimacy. This is an example of the subtle use of power and one of the objectives of this thesis is to examine how different methodologies can facilitate a critique of the status quo position and the conditions that give rise to it.

Accessibility by less powerful stakeholders is an issue in many multi stakeholder projects and in the Canmore case one way in which power was determined was the extent to which residents were well connected in the area – “through active volunteer work, professional

reputation, or other connections developed through long residency in the community, etc” (Jamal and Getz 2000: 169). These connections afforded participants the right to sit at the table and to voice the concerns of established groups. However these criteria excluded low-income and new residents who did not have this network of contacts. Participant involvement was affected by a number of factors including their ability to bargain, the force of their personality, their ability to sustain levels of energy, access to timely information, and the ability to handle vast amounts of data. It is hypothesised that the concept of the involved and the affected – one of the conditions of critique – is a powerful concept for identifying those that ought to be involved in a project.

Jamal and Getz refer to the “shotgun rule” – an all or nothing approach to consensus building, where the onus was on individuals to make sure the processes worked. If they walked away from a process because they did not agree with it they were made to feel personally responsible for letting down the whole group. While this has the advantage of ensuring an end product it may also result in participants arriving at a consensus under duress. For example the authors refer to participants who, feeling very tired and overloaded with information, made decisions on the basis that they had had enough and wanted to get some closure. This was a factor echoed by Mason in his post case reflections during an interview with the author.

Although it could be argued that these time and resource limitations are inevitable in a multi stakeholder project there are implications to imposing rules in an instrumental manner. Jamal and Getz observe that “a ‘consensus’ process is no guarantee that the voices and words of a participant will necessarily be heard or incorporated into the decision-making” (Jamal and Getz 2000: 174).

Jamal and Getz’s conclusions contain a number of useful reflections on collaborative processes:

- The role of convenors as project champions is crucial in identifying, recruiting and bringing together stakeholders.
- Diagrams are useful for visualising the scope of an issue particularly at the earlier stages. The Canmore case featured a land use map which showed the trade-offs which different interests might have to make. This diagramming technique is deployed within the field of boundary critique and will be used later in the thesis.

- This map also facilitated the creation of a joint purpose statement early in the process which provides an opportunity for legitimising participants' positions.
- Labelling groups is not appropriate as their interests will vary and overlap. It represents an attempt to impose a status quo which might be detrimental to the dynamic and fluid nature of partnerships.
- Process rules can be instantiated in an instrumental manner leading to false consensus.
- The use of exercises by facilitators which create joint dialogue and the role of facilitators in imparting conflict resolution skills to participants.
- Conflict can be constructive as stakeholders learn to accommodate other viewpoints. This was an outcome which Mason referred to in his reflections with the author on the Arctic tourism case where for example he, as an academic, gained new insights into operator priorities.

### **2.2.1. Critical reflection on tourism partnerships**

The partnership literature further cements the viewpoint that the successful planning and production of tourism in the B2B arena depends predominantly on the interaction between human beings. The following are some critical reflections following a review of the partnership literature. They relate to the contribution which critical social theory and communicative action could make and also the extent to which the conditions for critique as outlined in Chapter 1 were met. In a number of cases these points support and reiterate the hypotheses contained in Section 1.3 in Chapter 1.

- In the Costa Dourada case study it could be argued that some sections of the private sector exercised power through non participation. Therefore the challenge lies not just in identifying stakeholders but devising a strategy for bringing them to the table. While this direct challenge falls outside the remit of this study there are an increasing number of forums in the B2B Tourism IT arena where stakeholder positions can be identified and where appropriate challenged: the Tourism Technology Initiative ([www.tti.org](http://www.tti.org)) organises two annual conferences and also has a newsletter; eyefortravel ([www.eyefortravel.com](http://www.eyefortravel.com)) organises several conferences around the world on the subject of IT and marketing; the Travelmole news site ([www.travelmole.com](http://www.travelmole.com)) has online discussion forums and a section dedicated to the IT area; IFITT (International Federation of IT in Tourism) holds the annual ENTER conference which features both applied and theoretical tracks. These forums present an opportunity for capturing the discourse of industry and

academics (the slides are often available online and in some cases the full presentation has been recorded and can be downloaded) and submitting it to validity claim reconstruction, thereby providing an initial insight into the position of different players. While this may not lead to direct engagement, it increases the chance of dialogue through the incisive identification with the stakeholder's position.

- Accessing and subjecting to debate the normative frameworks which stakeholders use to evaluate issues is critical and can be facilitated through communicative action. The objective is to understand the criteria by which stakeholders afford legitimacy to different positions and this thesis hypothesises that the reconstruction of normative validity claims facilitates access to these criteria.
- Providing a visual map of the issue and plotting the stakeholder positions on that map is a useful means for creating a positioning document which acts as a start point for debate. This thesis will explore the contribution that boundary critique in conjunction with validity claim reconstruction can make by showing clearly the boundaries that surround an issue and the elements which different stakeholders differ upon. It enables a visualisation of the involved and affected.
- Time and resource limitations can hinder a project and marginalise stakeholder positions. The challenge is how to allow access by stakeholders at critical touch points in a project. In this regard Internet technologies can be explored as a cost effective and accessible vehicle to facilitate stakeholder access on a continuous basis.
- An instrumental, rule based approach can bring results but may also lead to a false consensus achieved through subtle coercion as stakeholders feel duty bound to sacrifice their position to prevent the process from collapsing. Therefore it is imperative to create the positioning document (see above) as quickly as possible and create the opportunity for ongoing dialogue which can be deconstructed and reconstructed on an ongoing basis.
- The de facto ruling-out of certain positions should be avoided as it misses the opportunity to explore the interests behind that position and thereby potentially an important piece in the overall jigsaw. From a critical perspective it is important to debate and if necessary challenge the underlying conditions which give rise to the status quo.
- Finally, what is meant by consensus? How will that be defined by the group? How valid or legitimate is the end product of a consensus-seeking process? An

underlying hypothesis of this thesis is that the reconstruction of both objective and normative validity claims enables a consensus which is free of distortion.

### **2.3. INTER-ORGANISATIONAL MULTI STAKEHOLDER TOURISM IT**

Other than affirming the importance of B2B partnerships, Tourism IT texts provide little insight into the success or failure of multi stakeholder IT projects (Poon 1993; Inkpen 1998; Buhalis 2003; O'Connor 2004; Zhou 2004). In order to address this limitation, five multi stakeholder Tourism IT cases are reviewed in this section. A number of different sources were used when compiling these cases, including refereed tourism journals, the author's involvement in a multi stakeholder EU project, key informants from industry, and the travel industry trade press. Before reviewing these cases, the following empirical evidence provides some general insight into the reasons lying behind the failure of multi stakeholder B2B Tourism IT.

In an interview posted on the HITEC web site, Connolly provides some insights into why IT projects might be under performing in the hospitality sector, "the hospitality industry is steeped in tradition and often resists change" (HITEC 2003). He advocates that hotels be more proactive with regard to IT, particularly at the attitudinal level. "Clearly, the industry needs to be challenged to think outside the box, continuously innovate, operate under new paradigms and eliminate obsolete tasks". Connolly advocates that a better understanding of business processes be a prerequisite to IT investment and that investment should not be a one-off but an ongoing dynamic process.

The destination marketing sector relies heavily on the use of DMS, described by the World Tourism Organisation as the "IT infrastructure" (WTO 1999: 70) for a DMO. However Professor Andy Frew refers to the failure rate of DMS in an email to the TRINET online tourism discussion group in March 2005:

Contrary to the high levels of performance of travel eMediaries, DMS (with the exception of a handful of cases) have experienced high failure rates as they seem to be unable to attract the support and commitment required from both the private and public sectors (Frew 2005).

Buhalis and Deimezi highlight the barriers to developing a DMS in Greece:



The low level of cooperation between SMTEs [small medium tourism enterprises], however, and the serious doubts about the ability of the National Tourism Organisation to coordinate the destination makes the prospect of a DMS development in Greece doubtful (2004: 103).

These two examples point to human issues - the lack of collaboration between the public and private sectors as the root cause of the problem - rather than technical issues related to the DMS. However they do not elaborate on the reasons lying behind this failure. DMO arguably face stiffer challenges than pure private sector players in that they are expected to act in an umbrella role, uniting the diverse range of both private and public sector tourism interests. While theoretically the DMS should be a tool to assist in this task, the evidence above indicates that this is not the case because they cannot secure the required levels of cooperation at the outset.

The problems of public / private sector collaboration in the destination marketing sector are the subject of two of the five case studies reviewed below. The case studies provide more insights into the failure of B2B Tourism IT implementation involving inter organisational cooperation and they will be critically reflected upon later in the study.

### **2.3.1. English Tourist Network Automation Project**

The English Tourist Network Automation (ETNA) project was an attempt to develop a DMS for England. Launched in 1990, ETNA was abandoned in 1993 with systems installed in only 17% of the targeted tourist information centres (Mutch 1996). It aimed to be an inter-organizational system linking together a number of organizations that included the English Tourist Board, the regional tourist boards, and local authorities. In theory, the virtual nature of tourism facilitates the movement of information and the development of business processes across organizational boundaries. However, the political borders of the local government authorities and of the regional tourist boards proved very real and were central to the failure of ETNA. The tourism information centre manager was not close to the centre of decision-making power and, although the local authorities had a tourism remit, it came near the bottom of the list of priorities. The chief aim in many authorities was to standardize data and communication within and across the authority, which was at odds with the outward facing priority of ETNA. Those authorities with a more open and devolved approach depended on the presence of an informed and politically astute champion at the local level. In reality, ETNA was marginal to the computing strategies of the local authorities. A review of the annual reports of the tourist boards revealed little

emphasis on IT, concentrating instead on their contractual agreements with the English Tourist Board (since replaced by VisitEngland).

The failure of ETNA demonstrates above all else the need to address issues of power and conflict in a multi-stakeholder setting. Mutch refers to a “rich and complex picture of implementation of IT at local levels” (1996: 606) and to the “danger in separating strategy formulation from its resource consequences” (1996: 607). It is evident that similar factors to those which caused the failure of ETNA have also been at play in a similar DMS case, the current EnglandNet project, which is reviewed in the next section.

### **2.3.2. EnglandNet**

The objective of this nationwide project, funded by the UK government and spearheaded by the national tourist office, VisitBritain, was to join up the different tourism information systems operating in England and Wales. EnglandNet was also to include tourism booking facilities, in effect creating “a national distribution system for tourism product and information” (Williamson 2004: 4). The backdrop was the UK government’s earlier ‘Go for IT’ Tourism IT campaign, which was oriented towards establishing an online tourism network, EnglandNet. The campaign was “set up by the English Tourism Council with £3.6m of government money” (Taylor 2002: 8). This was part of an overall government initiative to encourage tourism businesses to make better use of technology and the Internet.

EnglandNet was set up primarily as a content provider that “allows agencies, distributors and consumers to find, book and pay for England holidays in one place” (Travel Trade Gazette 2004: 9). In March 2004, the government announced a further grant of £1m, bringing the total expenditure to £6m. However, despite the government claiming that it was an opportunity “to cement the relationships which had formed between the private and public sector” (Travel Trade Gazette 2004: 9) one section of the tourism industry, self-catering accommodation, was already beginning to question the viability of the project, claiming that similar initiatives in other parts of the UK had failed.

The initial questioning grew into further confusion over the issue of whether tourism businesses would have to pay commission to EnglandNet if their products were distributed through its channels. There was concern that EnglandNet would become a profit-making organisation, actually competing with private sector agencies that represented individual tourism businesses. A further point of conflict lay in the possibility

that tourism businesses would have to pay two lots of commission – one to EnglandNet and another to the individual DMS through which the regional tourist boards gather content for EnglandNet (Williamson 2004: 4).

From a series of articles published in *Travel Weekly*, one of the UK's leading travel trade magazines, it is clear that these issues were not addressed and that the tension increased: "Tourism businesses in England are up in arms about VisitBritain's plans for new call centres that will make bookings on their behalf and take up to 10% commission" (Williamson 2004: 20).

The call centres were proposed, in a consultation document, as a complement to EnglandNet; however judging from the reaction the consultation process was failing. The owner of a self catering accommodation agency called the consultation document a "disgrace", which "illustrates how little the authors understand our business" (Williamson 2004: 20). The tourism trade wanted the system to allow tourism businesses, not the national tourist board, to profit from the bookings. They perceived the tourist board as stepping outside its remit to support the tourism industry, and to actually operating as a business in its own right. Tourism businesses were also concerned that their existing customers would transfer to booking online at a cost of 10% rather than booking direct. VisitBritain's claim that the system would produce incremental business for tourism providers rather than cannibalise existing direct sales, appeared to be falling on deaf ears.

The row with the self-catering section of the UK tourism industry escalated, with representatives taking their complaint to the European Commission, claiming that the government was in effect using public funds to support a commercial organisation which would result in "unfair competition" (Williamson 2004: 6). Again it appears that communication had broken down between the government and VisitBritain on the one hand, and the self-catering agencies on the other. The UK National Audit Office, which audits all Government departments' accounts, appeared to validate the complaint, criticising VisitBritain "for acting like a commercial organisation" with "parts of the industry sometimes perceiving VisitBritain as a publicly funded rival" (Williamson 2004: 6).

At the end of 2004, *Travel Weekly* reported that EnglandNet had completed a u-turn: "Englandnet's owners Networksfortourism, a joint venture between regional tourist boards and VisitBritain, has been scrapped with the project coming under the sole control

of VisitBritain” (Travel Weekly 2004: 68). Although VisitBritain claim that the abandonment of Networksfortourism was not linked to the conflict with self-catering businesses, it is clear that the inability of VisitBritain to win over the support of the private sector was instrumental in its failure to become a commercial entity.

The first article revealing the government and VisitBritain’s plans to launch EnglandNet was published in July 2002 (Taylor 2002). In March 2004, an article claimed that “operators are still in the dark about how the service will operate” (Williamson 2004: 4), indicating that the consultation process initiated by VisitBritain had failed. This failure to establish channels of communication between the public and private sector resulted in an inability to resolve differences of opinion as to where the boundaries of EnglandNet should lie. Although EnglandNet is still operating from within VisitBritain to collate content for distribution and therefore cannot be considered an outright failure, there are parallels with ETNA from more than 10 years ago. Both projects were unable to resolve issues of power and conflict over what ought to have been the specifications of the projects.

### **2.3.3. Yield Management System Implementation in the Hotel Sector**

Three UK hotel chains were chosen by Peng and Litteljohn (2001) to study the role of organizational communication in the process of strategy implementation within multi-unit organizations. Each chain was in the process of implementing a yield management system. Such a system assists in the following aim, “to sell the right room at the right price to the right customer” (Sigala, Lockwood et al. 2001: 364). The effective communication of information is critical for multi-unit hotel chains seeking to maximize the revenue from their perishable room stock.

In the Peng and Litteljohn study, the chain that relied most heavily on the implementation of a computerized yield management system was the one that was the least effective. It implemented the project almost entirely from head office with insufficient training and little consultation at the individual unit level. The result was a slow uptake of the yield management strategy and total neglect of the computerized system in some units. The hotel chain which was successful in its implementation of yield management grounded its initiative at the unit level, working with the general managers of each hotel in identifying suitable candidates to fulfil the role of room revenue managers. The network of room revenue managers across the chain was instrumental in the successful implementation of yield management. The result was a strategic chain-wide strategy with buy-in from

individual units and high levels of both vertical and horizontal communication within the chain. The focus in this chain was not on the technology but on the people and processes involved.

In their concluding remarks, Peng and Litteljohn place the emphasis on the importance of effective communication as a pre determinant of effective strategy implementation. They refer to the importance of communication networks within organisations, which have the potential to tap the “distributed organisational resource” (2001: 362). Such is the importance they attach to communication that they advocate it “as a useful lens for studying strategy implementation” (2001: 362).

#### **2.3.4. BookTownNet - EC-funded tourism IT project**

BookTownNet was an EC-funded tourism technology project involving a five-nation, 75-strong small to medium sized enterprise user group of second-hand and antiquarian book dealers located in rural areas of Europe. The aim was to form an IT network to improve and disseminate IT skills through the SME network, to test the utility of internet and intranet networks to improve their business functioning and the attraction of visitors to book towns (Seaton and Alford 2001).

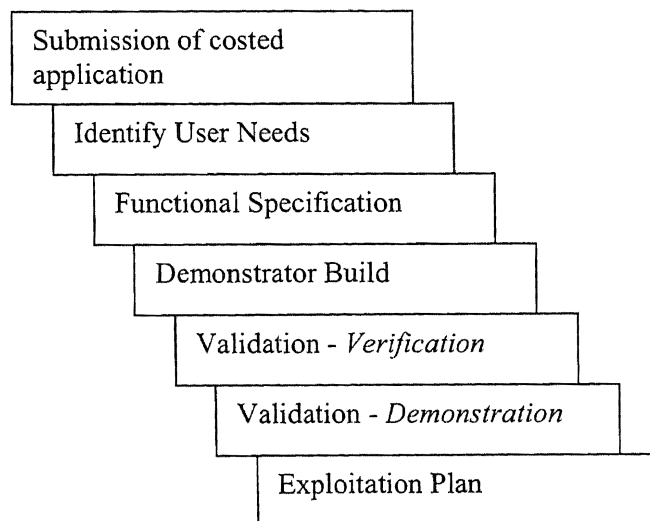
The author was a member of the evaluation team and the analysis contains personal reflections as well as those of the project manager, Ingjerd Skogseid of the West Norway Research Institute. The European Commission DG XIII Telematics Application Programme funded the project from July 1998 to September 2000. Prior to that date the project team submitted an application, with costs attached, to the Commission. The team comprised three key stakeholder groups each with its own priorities and agenda:

- *The book town group*: a number of influential book dealers who wanted to create an international book town network.
- *West Norway Research Institute*: managed and co-ordinated the project and also undertook all the technical development. Its brief was to deliver a technical system, which conformed to the EC’s technical criteria.
- *The University of Luton*: responsible for the evaluation of the project and holding a specific interest in the concept of a tourism trail around international book towns.

In addition to these three groups, there was the EC, which sought to demonstrate that Telematics can solve problems in rural areas and to extend, fund and deploy the results to further regions. The terms of reference for funding applications mentioned three specific stakeholder groups, SME, citizens and tourism interests that the project was intended to benefit. However none of these groups participated fully in the initial submission which had effectively mapped out the project's boundaries. Although the book town group comprised SME, some with a limited tourism interest, it was a small sample of the wider SME population. Arguably the fuller participation of these stakeholders at the outset would have resulted in the placement of different system boundaries.

The project was run according to the strict guidelines, set out by the EC Work Programme Project Life Cycle (Figure 2-2).

**Figure 2-2: The EC Work Programme Project Life Cycle**



Source: Author

This is the standard implementation framework provided by the EC to structure projects and to which successful applicants must adhere. The User Needs Analysis is designed to give a voice to the intended beneficiaries and take their needs into account. However two observations can be made in relation to the user needs phase. Firstly, it was carried out as a stepping-stone to the first deliverable, which, as stated in the technical annex provided by the EC, was the functional requirements specification. Secondly, the questionnaire used to illicit user requirements in the five book towns was pre designed around four areas: organisational profiles of SME; tourism effects of book towns; IT usage in book

town SME; individual levels of IT knowledge among book dealers. These areas, helping to form the boundaries of the system of inquiry, were pre determined by the project team as part of the application process.

The functional requirements as set out by the EC were achieved by the project, through iterative cycles of prototyping, testing and evaluation involving the technical development and specification teams and a pilot user group. However fulfilling the technical requirements of the EC is not the full story and the following reflections, first from the project manager and then from the author (in his capacity as a member of the project evaluation team), cast light on the challenges and limiting factors involved.

- *Free versus restricted discussion*: one issue from a project management perspective was the degree to which they could allow free discussion and to which extent the discussion needed to be couched. The project manager used the term “web-like side-stepping” (personal email communication with Ingjerd Skogseid on 9<sup>th</sup> March 2003) to describe the way in which one issue could prompt project team discussions to veer off at a tangent. Often it was not until considerable time had been exhausted that the group realized the tangent was irrelevant. Although the project management learned how to bring the discussion back on track, these sidetracks often “emptied the air out of the balloon” (personal email communication with Ingjerd Skogseid on 9<sup>th</sup> March 2003). This is an example of a situation where extensive user participation can be viewed as counter productive and underlines the need for communication and participation to be effectively facilitated.
- *Continuity*: when some members of the team were absent from a previous meeting, the project team had to spend time bringing them up to speed with developments. In certain instances those who had been absent suggested technical changes, which were no longer possible due to developments that had already taken place. The project team described these repetitious discussions as “useless”. One member of the team exacerbated the problem in particular by changing representatives seven times, with the transition between them often not smooth.
- *Different culture*: the partners of the project came from five different countries and represented 4-5 different languages and business cultures. Additional differences were between the larger and smaller booksellers, between associations

and booksellers, and between the three different cultures of applied research (West Norway Research Institute), university and bookselling.

- *Responsibility*: the emphasis of the project management lay in fulfilling the EC contract, however the project management felt that the other partners in the project could have contributed more and in so doing could have got more out of the project. This issue relates, in part, to ownership of the project. The point of reflection here is the extent to which ongoing participation and communication and boundary setting can instil a greater sense of ownership among diverse stakeholder groups.
- *The end product*: at the close of the project some partners will have felt that their needs had been met while others will not. The project manager does not elaborate on this point however it is possible that not all the partners had their needs fully articulated. It could also be partly attributable to the point above relating to ownership of the project.
- *Limiting factors*: the project manager identified a number of factors, in addition to those above, which placed limitations on the management team in particular and the project overall. Firstly the issue of the contract and not having a sufficient budget and time to fulfil it. The EC require that results be demonstrated at different stages and this was not always easy to deliver. Secondly, the lack of IT skills among the group. This raises a power issue in that those who possessed the IT skills were arguably in a more powerful position than those who did not. Thirdly, the geographic spread of partners made it difficult to meet and discuss the project.

The project manager did make it clear in her reflections that it is easy to be wise with the gift of hindsight. While acknowledging this caveat, the author, drawing on his knowledge and experience of the project as a member of the evaluation team, has two reflections to complement those above. Firstly, the issue of ownership of the project is a significant one and there was a sense that the management team from the West Norway Research Institute was driving the project with sometimes less than full buy-in from other stakeholders. The fact that the management team were also responsible for the technical development lent a technical emphasis to the project which, while meeting the requirements of the contract, did not always reflect the needs and concerns of the booksellers or tourism interests.

Secondly, and related to the first point, the booksellers in the five towns who constituted the wider user group possessed relatively little knowledge about the project. This was



despite the fact that each town was represented on the project team. This indicates a lack of communication across the town network, and also a lack of real consultation at the beginning of the project.

In conclusion, the case highlights a discrepancy between the project framework imposed by the EC and the needs of different stakeholders which are often difficult to articulate and do not fit easily into such a relatively inflexible framework. It further highlights the inability of the instrumental EC framework to allow for effective participation, communication and reflection. In what can be seen as an attempt to be accountable, the EC insists on a strict set of deliverables but these are sometimes out of tune with the real needs of the stakeholders and user interests.

### **2.3.5. The GTI Project**

This case stems from tour operating and package holiday distribution which, as with other sectors of the tourism industry, is heavily reliant on technology - in particular to facilitate the sales and distribution process. The case has not been published in the literature and the author has drawn his findings based on personal communications with key informants who were involved in the project.

The GTI project, “was an attempt to produce a standard distribution method for tour operators using a new front-end – a replacement for Viewdata” (personal email communication on 9<sup>th</sup> June 2003 with Di Lavers - a technology consultant to the travel industry). The acronym ‘GTI’ refers to the initiators of the project – Galileo (UK), Thomson, and Istel. Galileo is one of four GDS referred to earlier in this chapter; Thomson (now part of the TUI group) is the largest UK tour operator; and Istel (now ntl travel) is one of the two leading Viewdata network providers (Inkpen 1998) which connects tour operators and travel agents: “Viewdata (the British version of Videotext) has been the principal technology for electronic package holiday distribution in Britain and Ireland for almost two decades and remains so today” (Alford and Karcher 2001). However Viewdata has a number of weaknesses for both agents and operators including, from an agency perspective, slow searching of multiple tour operator reservation systems, and from an operator perspective, difficulty in developing more flexible holiday packages.

However despite a sound rationale for the project, the problems with GTI began at the outset with the secretive way in which the project was developed:

For reasons, which I never really understood, it was all very secretive. And that was part of the problem. The technical side of it (business scenario design, data definitions and message specification was the part I was involved with) was progressing reasonably well. Commercially and politically it was not so easy, as it needed a critical mass of the tour operator community to be viable. The assumption within the project was, I believe, that once the prototype product had been produced, other players would see its value and join in. But of course it didn't work like that (personal email communication with Di Lavers 9<sup>th</sup> June 2003).

Other tour operators were suspicious of the motives behind the project and of the competitive advantage it would afford its initiators. Such suspicion and secrecy was not a sound foundation on which to build a community of interest. Another key informant involved in the business, rather than the technical, aspects of holiday distribution, also testified to the “top secret” (personal communication 24<sup>th</sup> July 2003 with Pete Newton, First Choice Holidays and Flights) nature of the project. He referred to 20-30 people, representing the “top electronic data interchange brains in the travel industry”, being “squirreled away” in a secret location. Even though two other leading tour operators, First Choice and Airtours, were persuaded by Thomson to join the project at a later stage, the seeds of suspicion had already been sown during the initial planning stages. There was also a problem with the basic objective of the project – the development of a standard distribution method:

Even if the suspicions about the secretiveness could have been calmed, the tour operators were still in competition with each other. Standardization of the front-end was seen to mean common selling methods and even common look-and-feel. Although the argument was that market edge was in the business offering, not in how it was presented, it wasn't and still isn't as simple as that. And despite long discussions, the tour operators didn't go for it. The project folded and that was that (personal email communication with Di Lavers 9<sup>th</sup> June 2003).

Di Lavers alludes to the complexity of multi stakeholder projects, in particular where stakeholders are in direct competition with each other. This makes it especially difficult to establish common ground on which to move forward. For example, tour operators were “obsessed” (personal communication with Pete Newton 24<sup>th</sup> July 2003) with brand differentiation as an essential part of their competitive strategies. The GTI project, by

creating what Di Lavers refers to as a “common look-and-feel”, would have reduced considerably the extent to which they could have imposed their branding on travel agency Viewdata computer screens (what Di Lavers refers to as a the “front-end”).

These are examples of those contested areas, referred to earlier, that lie within the boundaries of a project and which must be debated fully before progress can be made. However achieving resolution is not an easy task and cannot be done by trying to impose one point of view. For example, the position of the GTI management committee that competitive differentiation rested more with the actual product than with the sales channel did not resonate with other key stakeholders.

The cost of the project ran into millions of pounds with nothing to show for it in the end as different groups employed by GTI members took their work away with them. There was a perception of the project as “too theoretical and philosophical” – an, “academic exercise” (personal communication with Pete Newton 24<sup>th</sup> July 2003), and the tour operator bosses withdrew their support. A concluding remark by Di Lavers encapsulates the essence of the problem: “with hindsight, it was never going to work. The message of the whole project is not really about the use of technology in travel, but about commercial and political issues” (personal email communication with Di Lavers 9<sup>th</sup> June 2003).

This case study highlights the difficulties in securing initial support for a multi stakeholder project and then maintaining that support. The predominantly technical approach adopted during this project, similar to that adopted in the failed computerised hotel yield management system implementation, was unable to account for the political and commercial issues involved. Both are examples of attempting to use technology to lead a project rather than supporting it. The lack of communication at the beginning of the project sowed the seeds of failure – once the element of trust was lost, future cooperation was very difficult to secure.

#### **2.4. A SOCIAL THEORETICAL CRITIQUE OF TOURISM IT**

The concept of critique and being critical is central to this study. The following theoretical frameworks taken from social theory and systems thinking are designed to facilitate a ‘thinking outside the box’ approach, looking at the cases through different paradigms, considering issues of power, the suitability of approaches taken, the *is* versus *the ought*, and the placement of boundaries around the issue.

### 2.4.1. System of systems methodologies

The System of Systems Methodologies (SOSM) (Figure 2-3) was an attempt by Jackson and Keys (1984) to categorise problem settings and to identify those systems methodologies that are best suited to managing them. They define a problem context according to the level of agreement among participants, ranging from unitary through pluralist to coercive, and the complexity of the problem context, from simple through to complex. Unitary is where there is unanimous agreement; pluralist where there is some disagreement but this can be addressed through debate; and coercive where the exercise of power prevents conflict being resolved through debate. An increased number of human-centred issues and interactions between different participant groups results in greater complexity. Methodologies are then mapped onto the grid, according to their suitability to different types of problem context.

**Figure 2-3: The System of Systems Methodologies**

	<b>Unitary</b>	<b>Pluralist</b>	<b>Coercive</b>
<b>Simple</b>			
<b>Complex</b>			

(Jackson and Keys 1984)

IT implementation has varying levels of human interaction and there are problem contexts that map to the top left hand box (simple-unitary). An example of a computerized stock control system is provided by Clarke (2001). The successful implementation of a system for sharing information among staff at easyJet is another example (Alford 2000). These are problem contexts where a technology-led approach is likely to enjoy the greatest chance of success. However the five cases reviewed in the previous section demonstrate that multi stakeholder Tourism IT projects reside in either the complex-pluralist or complex-coercive boxes (Figure 2-4).

**Figure 2-4: Tourism IT cases mapped onto SOSM**

	<b>Unitary</b>	<b>Pluralist</b>	<b>Coercive</b>
<b>Simple</b>			
<b>Complex</b>		BTN Hotel YM EnglandNet	GTI ETNA

Source: Author

BookTownNet was characterised by multiple interactions between stakeholders in five different countries that came from the bookselling, tourism, IT and higher education sectors. This resulted in a complex scenario. BookTownNet resides in the complex-pluralist box as there is no evidence of coercive forces at work or the overt exercise of power, and most issues were capable of being resolved through debate. However in practice a number of the booksellers did not feel any ownership of the project and viewed it as something remote from their day to day concerns. There were a number of different and sometimes challenging personalities involved in the project along with the political baggage that accompanies them. In certain instances they had a limited understanding of technology and in others could be considered to be almost hostile to technology.

EnglandNet was largely a complex-pluralist problem context; however, as discussed earlier, there were elements of irreconcilable conflict evidenced by a breakdown in discussions between a group of self catering businesses and the national tourist board that was steering the project.

Peng and Litteljohn's study of three hotel chains that were implementing a yield management strategy reveals a complex-pluralist scenario, with interactions between head office, room revenue managers, general manager, and other hotel staff. Peng and Litteljohn refer to the importance of informal channels of communication, underlining the significance of human-centred behaviour. The hotel chain which relied heavily on a computerised system was the least effective in implementing the strategy. By contrast the

chain that took a participative approach and a hands-on consultation process was the most successful.

The GTI and ETNA cases are examples of predominantly complex-coercive problem contexts. The comments by a key informant, Di Lavers, closely involved in the GTI case, reveals a project that was initiated behind closed doors by powerful industry players with no opportunity for input or debate by other tour operators. The result being that at a later date when the project team attempted to roll the project out across the industry there was little interest and the project folded with nothing to show for the millions spent on it. One of the core problems apart from the climate of suspicion was the fact that the technology was perceived as reducing the opportunity for tour operators to differentiate their brand from the competition – the travel agency screens on which the tour operator’s product was presented allowed little scope for describing product differentiation. Whether or not this perception was a true account of reality is not the point - tour operators believed it to be the case and the technical, non participative approach adopted by the project initiators meant that this important business perspective was overlooked.

The author of the ETNA case refers to a “rich and complex picture of implementation of IT at local levels” (Mutch 1996: 606). The consultation process proved inadequate in handling this scenario and the project steering group failed to realise that Tourism IT was far down the list of priorities of most local authorities. This was a powerful stakeholder group and the failure to fully engage it contributed to the failure of the project. In identifying the variables that helped to account for the failure of ETNA, Mutch included the “balance of forces between the various organizations involved” and the “relative power of the parties” (1996: 607).

What marks out each of the cases, are the levels of misunderstanding and conflict between stakeholders, lending credence to McGrath’s (2003) observation that power-political considerations, in particular, contribute to IT failure. In his conclusion to the ETNA case study, Mutch acknowledges the advantages of Internet technology but cautions that relationship building will need to accompany the proliferation of inter-organisational systems in order to help manage the increased political dimension, which characterises them.

### 2.4.2. A framework for measuring failure

Within the IS domain, Lyytinen and Hirschheim (1987) developed a framework which facilitates a critical perspective on the criteria by which the success of the Tourism IT cases were measured. The framework contains four different measures of information systems failure:

- Correspondence failure: the failure of an information system to meet requirements stated in advance
- Process failure: where a system cannot be produced within given budget or time constraints
- Interaction failure: the system is not used or is underused by its intended target population
- Expectation failure: the failure of the information system to meet the expectations of the users

The cases have been mapped onto the framework (Table 2-1) and the reflections set out below.

**Table 2-1: Failure classification of Tourism IT cases**

	Correspondence	Process	Interaction	Expectation
YM in hotels			✓	
BookTownNet		✓		✓
GTI				✓
ETNA	✓			
EnglandNet	✓		✓	✓

Source: Author

The failure of EnglandNet to realise its goal of earning revenue and adhering to a transactional business model is a clear example of the problems associated with correspondence failure. The conflict with the group of self catering businesses, discussed above, arose in large part because that section of the industry was strongly opposed to the national tourist board pursuing a transactional model. The legitimacy of the national tourist board position had never been open to debate and was a position which sections of the tourist industry deeply opposed.

The hotel chain that attempted to implement its yield management via a computerised system failed and the system was largely ignored by the individual hotels. Managers and staff found that the system inhibited rather than supported their work and they relied more on their own informal channels of communication. This supports the pattern emerging from the overall critique, namely that computer based information systems are systems of human activity rather than technical systems.

BookTownNet, although not classed as a failure per se, does contain elements which were problematic, as the project manager and author's reflections reveal. Process failure is checked in Table 2-1 because it was very difficult to meet the project's aims within the budgetary and time constraints. This was a similar issue besetting the tourism partnership cases reviewed earlier and underlines the importance of stipulating attainable goals in advance. The setting of unattainable goals resulting in process failure also runs the risk of agendas being pushed through simply to meet preset objectives regardless of the level of consensus reached by stakeholders.

Expectation failure is an attempt by Hirschheim and Klein to address the shortcomings of the other criteria and to adopt a more people-centred yardstick. It encourages reflection from the perspective of those involved in and affected by the project and on the manner in which the terms of reference for projects are initially designed. In BookTownNet a number of intended beneficiary groups, including tourism businesses and a number of book sellers, were not party to stipulating the requirements for the project and did not participate fully in the consultation phase. The resulting feelings of lack of ownership led to under use of the final system. The EC may have been satisfied that the project delivered what it had aimed to do, but these aims were never fully debated with the range of stakeholders that it purported to benefit.

This also casts a critical light on the appropriateness of correspondence failure as a measurement tool. If the stated aims of a project are not arrived at through a process of participation and communication among all stakeholders, then they are invalid from the outset and correspondence failure as a yardstick is flawed. The gap therefore between correspondence and expectation failure is significant.

GTI is an example of a project where a key stakeholder group, tour operators, were not given the opportunity to articulate their requirements and expectations. The project failed



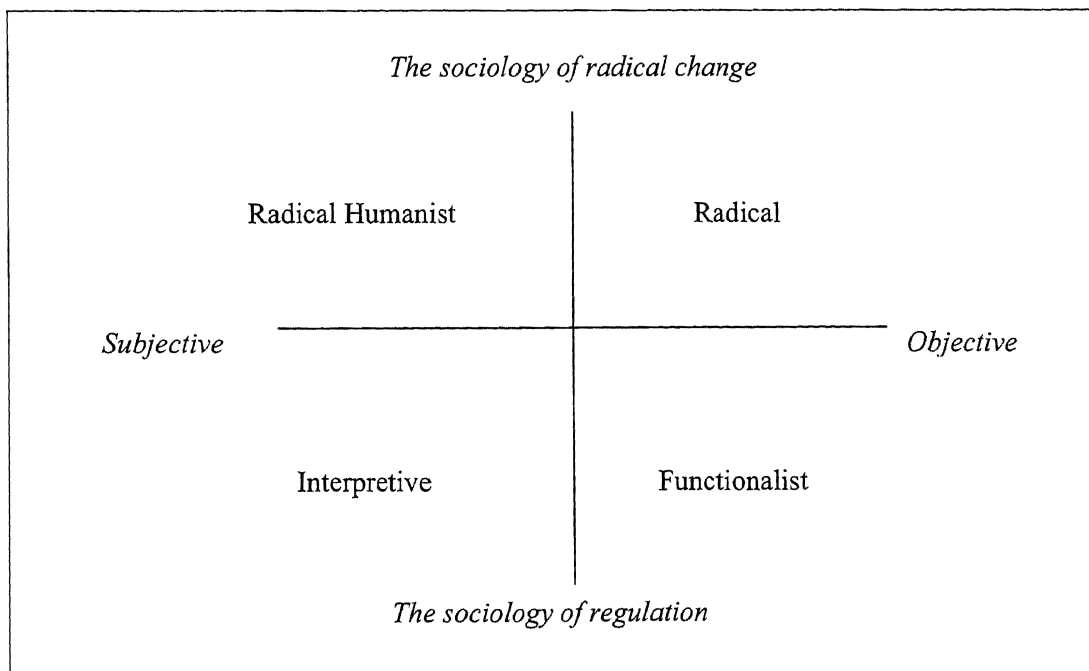
to build consensus among the tour operating community. This was largely due to the secrecy and the lack of communication that characterised the early stages of the project, but also due to the inability to resolve fundamental differences relating to commercial practice.

There are different classifications of IT failure but they all hold one thing in common – they endorse why Lyytinen and Hirschheim’s framework is grounded in social theory. The reasons for failure revolve around human rather than technical factors as evidenced by Mutch’s observation in his conclusion to the ETNA case: “Information systems are complex social systems and as such their success or failure is going to be contingent on a large number of variables” (1996: 606). Di Lavers confirmed that commercial and political issues, not technical ones, accounted for the failure of GTI. The GTI and computerised hotel yield management system failures reveal what happens when technical factors prevail over human and organisational ones.

**2.4.3. A critique through sociological paradigms**

The final section in this systems critique of the Tourism IT cases turns to the classification of social theories by Burrell and Morgan (1979) (Figure 2-5).

**Figure 2-5: Classification of sociological paradigms**



Source: Burrell and Morgan 1979

Given the human-centred issues that have arisen from the previous sections it is appropriate to view IT implementation through a social theory lens. Although more than 25 years old this framework is widely cited in the IS literature and has helped to inform that domain (Checkland 1981; Jackson 2000; Clarke 2001). For example, Jackson’s classification of systems approaches to management includes an early chapter entitled “Relevant Social Theory”. One of his goals for devoting an entire chapter to this topic is clear: “learning more about the adequacy of particular social theories and improving systems approaches as a consequence” (Jackson 2000: 21).

The framework positions four sociological paradigms in four different quadrants according to where they sit on two axes: subjective-objective and sociology of radical change-regulation. Understanding the different paradigms and the contribution they can make to a critique of IT implementation requires an analysis of the two axes on which the framework sits.

**Regulation versus radical change**

The vertical axis ranges from the sociology of regulation to the sociology of radical change (Table 2-2).

**Table 2-2: Sociology of regulation – radical change**

<b>The sociology of regulation is concerned with:</b>	<b>The sociology of radical change is concerned with:</b>
The status quo	Radical change
Social order	Structural conflict
Consensus	Modes of domination
Social integration and cohesion	Contradiction
Solidarity	Emancipation
Need satisfaction	Deprivation
Actuality	Potentiality

(Burrell and Morgan, 1979)

Those theories, which are accepting of the status quo and emphasise the need for social order and consensus, are cast in the sociology of regulation. Those theories, which reject the status quo and concern themselves with issues of emancipation and structural conflict, are cast in the sociology of radical change. They emphasise people’s potentiality and the need to instigate change in order to realise it.

**Objective versus subjective approaches**

The objective-subjective axis brings into sharp relief the differences between the sociological paradigms (Table 2-3).

**Table 2-3: The subjective - objective axis**

<b>The subjectivist approach to social science</b>	←	Ontology	→	<b>The objectivist approach to social science</b>
Nominalism	←	Ontology	→	Realism
Anti-Positivism	←	Epistemology	→	Positivism
Voluntarism	←	Human nature	→	Determinism
Ideographic	←	Methodology	→	Nomothetic

(Burrell and Morgan 1979)

The objective approach adopts realist ontology where reality is considered to exist independent of the individual. By contrast, nominalist ontology holds “that reality is a product of individual consciousness” (Clarke 2001: 46). In the context of IT, planners have the choice of seeing an objective reality as an IT system, existing over and above participating stakeholders, or a reality that exists in the subjective perceptions of those participants. “Epistemology is concerned with ... how the world might be understood” (Clarke 2001: 47). The subjective approach subscribes to an anti-positivist epistemology. Reality can only be understood through the eyes of those who participate in it. It is a participatory process, as opposed to a positivist epistemology, which does not rely on the same levels of participation, believing as it does that “knowledge is hard, real and capable of being transmitted in a tangible form” (Clarke 2001: 47).

From the subjective perspective, human beings are voluntaristic and have the free will to create and define their own reality. Again this is a very participative scenario where, in an IT context, stakeholders would, through communication and participation, create an IT-enabled system to which they could subscribe. The objective perspective holds that human behaviour is determined by external circumstances (Jackson 2000). In an IT context this paints a non-participatory scenario where participants' behaviour is controlled via a technical system.

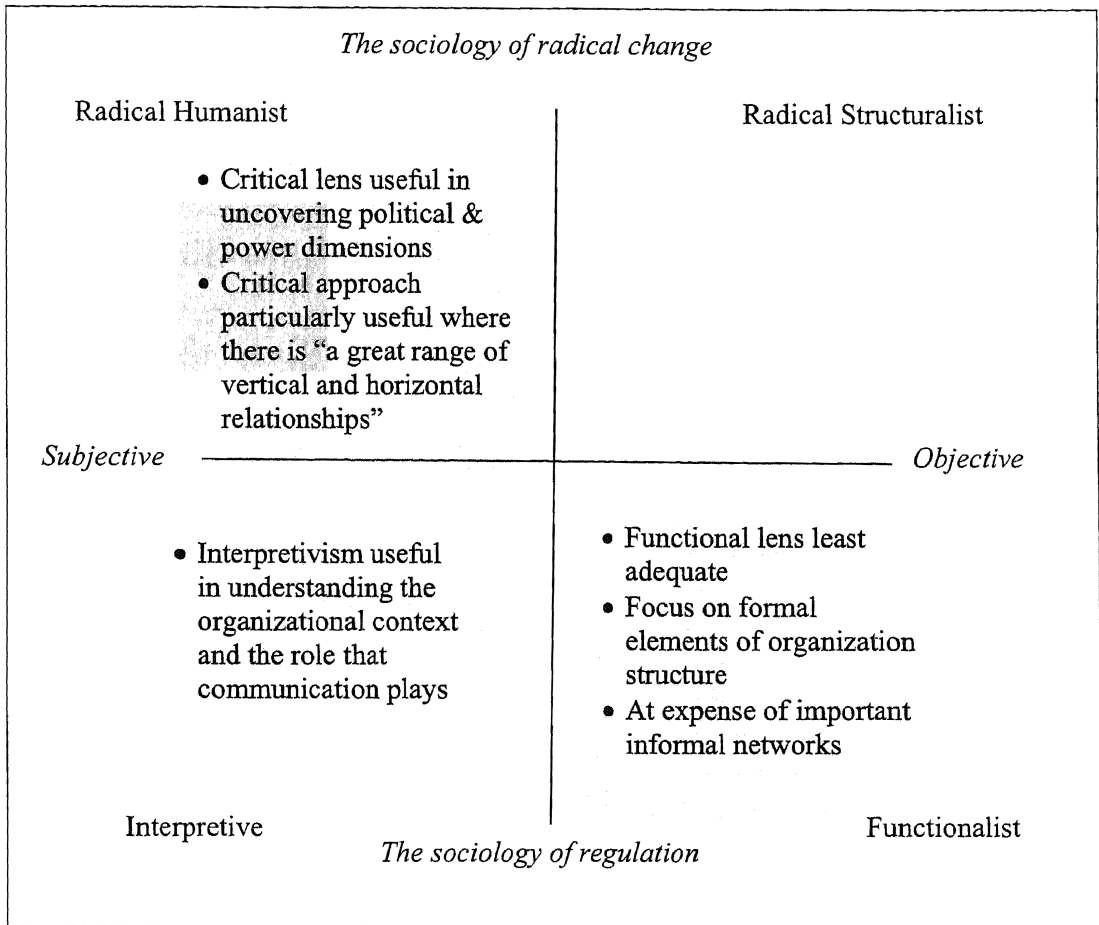
From a methodological perspective, the objective approach to social science will favour scientific and quantitative methods for knowledge gathering. For example, in an IT context, planners may consult stakeholders via a questionnaire and subject this to quantitative analysis. On the other hand the subjective approach favours in depth qualitative methods that allow the researcher to get as close as possible to the participant. For example, consultation is more likely to employ methods such as in depth interviews, discussion groups and participant observation.

The Burrell and Morgan framework enables different social paradigms to be applied to tourism cases in order to critically evaluate their underlying assumptions and any potential strengths and weaknesses. The framework also enables a 'stepping outside' of the study domain – a 'thinking outside the box' approach. Connolly (HITEC 2003) attributes a lot of the problems in the Hospitality IT area to a fixed mindset. He refers to the inability of the hospitality industry to think outside traditional approaches and the need for it to adopt new paradigms.

### **Hotel IT case viewed through different paradigms**

The reflections by Peng and Litteljohn are mapped onto the Burrell and Morgan framework (Figure 2-6), revealing the contribution that a social theoretical framework makes to critiquing a multi stakeholder IT case study. Peng and Litteljohn found the Functional lens was the least adequate, with its focus on the formal and visible elements of organization structure at the expense of the informal networks which Peng and Litteljohn found to be of such importance. The hard, functional approach failed to take into account the importance of horizontal and vertical communication, which was so important in the organisation. This supports Clarke's view that an information system "is not necessarily a technological one, but may take many forms" (Clarke 2001: 115). There was already an effective human information system in place and instead of enabling that system, the technology in the failed case inhibited it.

**Figure 2-6: Hotel IT case mapped onto social framework**



Source: Burrell and Morgan (adapted by author)

Peng and Litteljohn found Interpretivism useful in understanding the organizational context and the role that communication plays. This supports the earlier critique through SOSM whereby Interpretivism is well suited to complex-pluralist scenarios where the conditions for free and open debate are present.

Finally Peng and Litteljohn found the Critical lens useful in uncovering the political and power dimensions which are exercised through different communication channels and which influence strategy implementation. They considered the critical approach particularly useful where there is “a great range of vertical and horizontal relationships” (Peng and Litteljohn 2001: 363). This lens is useful in complex-coercive scenarios where the conditions for open participation are not always present.

## **A critique through Functionalism**

The empirical evidence suggests that the examples of failed IT implementation were governed by assumptions belonging to the Functionalist paradigm. For example, the GTI project was governed by an overly objective approach – an ontology where reality was considered to exist independent of the individual. This metaphysical stance prevailed in the failed GTI project, whose founding members believed, erroneously as it happened, that a replacement for Viewdata could be developed independently of, and involving no consultation with, other tour operators.

The domination of GTI by technical experts reveals its positivist epistemology – the search for hard, tangible data. The assumption underpinning GTI that “other players would see its value and join in” (personal communication with Di Lavers, key informant involved in GTI case) exposes a deterministic view of human nature – the assumption was that ultimately other tour operators would fall in line behind a technically superior IT system. These viewpoints resulted in the choice of nomothetic methodologies, “hard, technology-based methods” (Clarke 2001: 47) including “business scenario design, data definitions and message specification” (personal communication with Di Lavers), which could model the reality as observed by the GTI team. The decision to develop GTI was an attempt by the founding companies to preserve the status quo and satisfy their own needs uppermost, through a lack of participation and consultation. They were not interested in hearing the views of other operators on what a new system of distribution ought to be like. Actuality, not potentiality, was their main concern.

This analysis reveals that those steering the GTI project implicitly subscribed to the tenets of Functionalism. Peacock’s observation that, “most managers within the tourism and hospitality industries perceive technological innovation as an external, autonomous process” (1999: 310) underlines the significance of the theory-practice link. Evans and Peacock refer to the:

...Technological determinism (“optimism”) and domination of ICT (information communication technology) and online reservation systems by major travel and tour operators and integrated chains (e.g. hotels, car hire, tour operators, travel agents and transport carriers) and the problems of accessing such systems by SMEs (small medium enterprises) (1999: 248).

The foregoing is an example of IT reinforcing existing power structures and restricting the potentiality of smaller players. There was evidence of such power plays surrounding the GTI project. The Tour Operator Group was started at the same time as GTI by a number of operators including First Choice, Airtours, Cosmos and Best Travel. This group was also interested in developing electronic messaging but on a smaller more tactical scale than GTI. Thomson, one of the initiators of GTI, refused to join the Tour Operator Group and later succeeded in recruiting First Choice and Airtours to GTI. Without the participation of Thomson, the market leader, the Tour Operator Group would enjoy limited success. The GTI project was an attempt to find a replacement for Viewdata, the system used for the electronic distribution of packaged holidays. The search for a replacement has continued and is still dominated by the existing power structure:

Therefore, it can be seen that the innovation decision on whether to replace Viewdata is a top down authoritative decision where the adoption of an innovation is decided by a small number of individuals possessing power, status and technical expertise (Yeates 2002: 58).

### **A critique through Interpretivism**

Peacock counters the objective view, which he sees dominating Tourism IT with the opinion that “technology interacts with the subjectivity of those who develop or use it” (1999: 310 citing Scarborough and Corbett 1992). This is an Interpretivist position located at the subjective end of the subjective-objective axis. Had this position been adopted by the initiators of the GTI project, there would have been a greater likelihood that the views of other tour operators would have been consulted at the outset. For example, tour operators had specific objectives, such as brand differentiation, which they expected technology to enhance and support. However the GTI proposition actually had the effect of reducing the potential for differentiation by imposing a common look and feel on travel agents’ computer screens. The idea that an external group could impose a technical solution proved untenable in the case of GTI. An Interpretivist, as opposed to Functionalist, position would have facilitated the choice of more human-centred, ideographic methods.

Interpretivists take the view that reality is socially constructed and, rather than trying to reduce its complexity, they are concerned with interpreting the meanings and relationships which lie behind its construction. The importance of this perspective is highlighted in the

hotel yield management case study where the chain that was successful worked closely with local unit managers to first of all understand the reality of operations in each hotel.

In the Interpretive paradigm, a 'system' is viewed more as an ongoing process of inquiry and making sense, rather than as an end product (Checkland 1999). In the IS domain there is a growing trend toward the use of Interpretivism in order to counter Functionalism's inability to make sense of the human-centred issues which lie behind information systems. A 1991 survey found that between 1983 and 1987, 97% of information systems articles used a Positivist research framework (Orlikowski and Baroudi 1991; cited in Mingers 2001). A literature survey in 1997 found that 16% of papers employed an Interpretivist methodology (Nandhakumar and Jones 1997; cited in Mingers 2001).

However Interpretivism, while achieving a more human-centred perspective, still remains cast within the Sociology of Regulation:

It neglects questions about the origins, causes and results of actors adopting certain interpretations of their actions and social life, and neglects the crucial problems of social conflict and social change (Carr and Kemmis 1986: 95).

Reflecting back on the SOSM critique, Interpretivism is not well-suited to complex-coercive scenarios where conflict must be addressed and the status quo is an inadequate frame of reference. The ETNA and GTI projects demonstrate the limitations of the Interpretivist paradigm in Tourism IT. The IT strategies of two powerful stakeholders - local authorities and regional tourist boards - ran contrary to the objectives of ETNA. A more radical approach to the design and implementation of ETNA would have provided a better understanding of this fundamental conflict. However the positions that these stakeholders occupied, and potentially the structure of English tourism itself, would have to be opened up ultimately to critique and debate. They were stifling the free flow of information and the potential for regions to share information with each other, to their mutual benefit. ETNA failed, in large part, because of the inability of the project team to discover the normative values driving the strategies of powerful stakeholders.



## Radical Humanism - a way forward for Tourism IT

This section examines how the Radical Humanist position enables an effective critique of the inter-organisational multi stakeholder Tourism IT case studies. It starts with a look at the human complexity present in each of the cases (Table 2-4).

**Table 2-4: Human-centred elements in Tourism IT cases**

Case	Human-centred and communication dimensions
YM in hotels	Complex network of vertical and horizontal channels of communication; attempt to impose technical solution from head office failed;
BookTownNet	Diverse and sometimes conflicting range of cultures and attitudes; communication challenges inherent in a project spread over five countries;
GTI	Attempt by small group of powerful operators to impose a technical solution on other operators; lack of communication and consultation between stakeholders;
ETNA	Solution based on status quo of the structure of English tourism; politics of local authorities and regional tourist boards ignored; need for a project champion to be present at local level;
EnglandNet	Complex range of relationships between private and public sector stakeholders; lack of communication between public sector initiators of the project and private sector interests, resulting in confusion and ultimately hostility; national tourist board viewed by some private sector players as overstepping their boundaries;

Source: Author

Viewed from a Radical Humanist perspective, these five projects are revealed as complex systems of human activity involving multiple relationships. The critique reveals how communication plays a central role in determining the success or failure of the projects. It is not the case that the projects failed to initiate any inter-stakeholder communication. For example, face-to-face group meetings and conference calls were part of the BookTownNet consultation process. The UK Government's 'Go for IT' campaign formed the backdrop to EnglandNet whereby the benefits of getting online were explained to tourism

organisations. However it is the starting point and framework for that communication that is of most significance.

In all cases the boundaries of the project had already been set; establishing a status quo and an overwhelmingly technical remit within which the consultation process was framed. For example the boundaries of BookTownNet were effectively set by the contract with the European Commission which funded the project and VisitBritain and the Government established the boundaries of EnglandNet. In both cases there were a number of key stakeholders who were not party to the boundary-setting process. Despite later attempts to build consensus, this boundary setting process by those holding positions of power reveals itself, when viewed through Radical Humanism, to be a mode of domination (a concern of the sociology of radical change – see Table 2-2). It was an attempt, particularly in the cases of ETNA and EnglandNet, to impose social order (a concern of the sociology of regulation).

If on the other hand the project team had embraced structural conflict (a concern of the sociology of radical change) they might have been prepared to reflect on whether the existing structure of English tourism was appropriate and in so doing be better able to engage stakeholders in effective communication. From a Radical Humanist perspective, 'effective' communication is communication that contains dialectic, enabling stakeholders to challenge the status quo, recognise their full potential and make the implicit assumptions in which much communication is framed, explicit.

Having viewed the cases through different sociological paradigms it would be tempting to dismiss Functionalism and Interpretivism outright in favour of Radical Humanism. However that is misleading and ignores the contributions that both hard and soft methodologies can make. For example, the technical expertise of the project management team in the BookTownNet project was essential in building a robust web site and providing stakeholders with the tools that could add value for their organisations. In EnglandNet, the idea of using internet technology in order to aggregate tourism content in England for online distribution represents advanced thinking in the sector of national tourism marketing. Similarly the softer methodologies offer promise in terms of facilitating a more in depth understanding of stakeholder organisations. For example, BookTownNet and EnglandNet were characterised by a willingness to engage stakeholders.

## 2.5. SUMMARY OF CRITIQUE

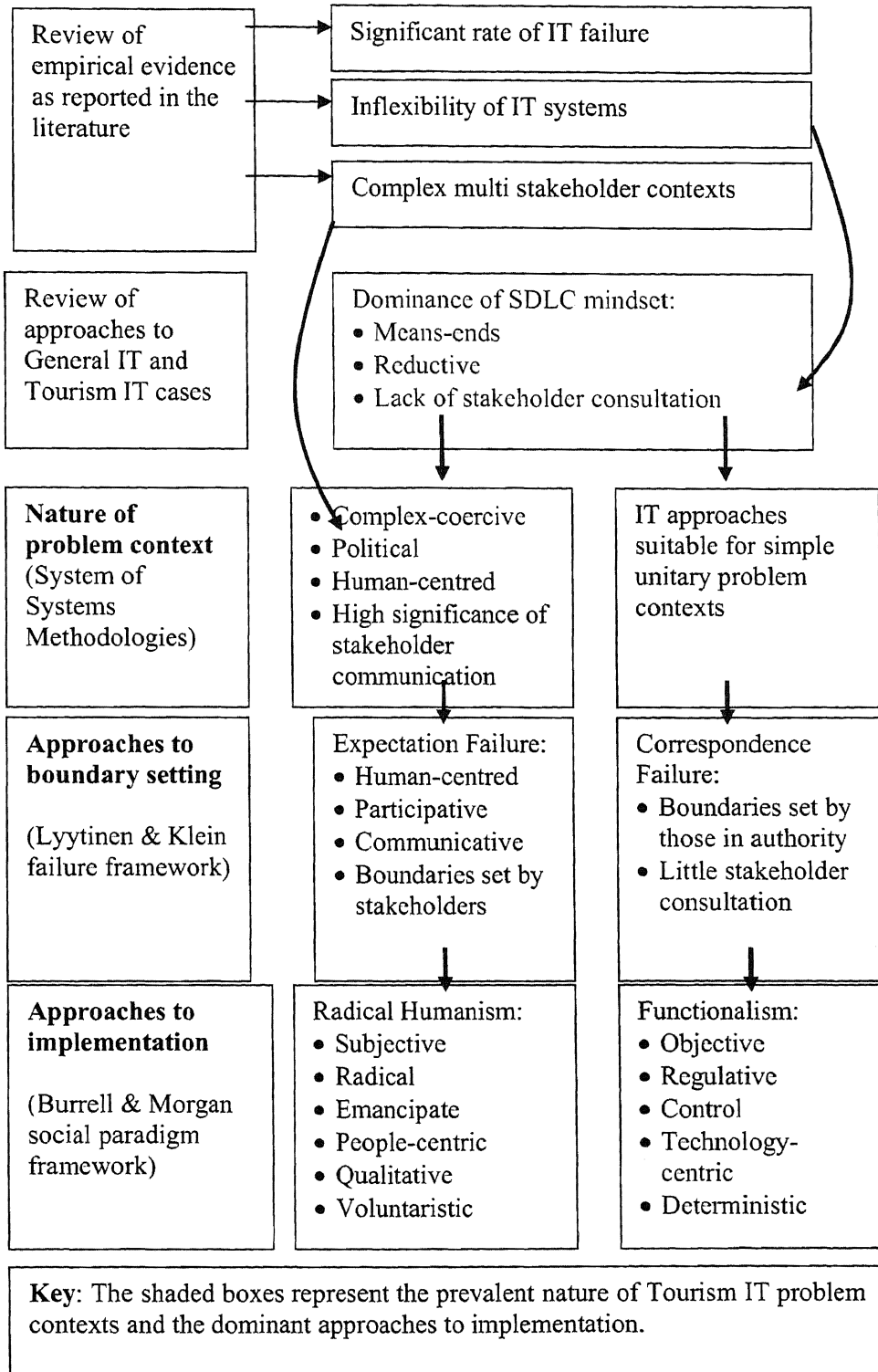
When the evidence from the literature is subjected to a systems critique, what emerges is the extent of the mismatch between the approaches to IT implementation and the nature of the problem context (Figure 2-7).

The shaded boxes indicate the contribution of the critique in highlighting the fact that the majority of problem contexts are complex-coercive, where human-centred issues play the main role in determining the success or failure of an IT project; yet the critique through Lyytinen and Klein and Burrell and Morgan reveal the approaches to implementation as ill equipped to handle these contexts. In light of the critique it is more appropriate to think of the scenarios in which IT is implemented as systems of human activity rather than technical activity (Clarke 2001).

While the theoretical critique is useful in investigating the reasons lying behind IT failure, it is important to reiterate that the primary route to critique in this study is methodological. In order to adopt a more pragmatic perspective, the following is a critical analysis of the cases from the perspective of the conditions of critique (Table 2-5).

The three conditions for critique – is/ought, involved/affected, and power – facilitate a stepping outside of the largely Functionalist mindset that dominates the cases. The ‘is/ought’ column is not intended to be exhaustive and there are many more is/ought perspectives that can be taken. Some of these are examined later in the study when Ulrich’s (1983) Critical Systems Heuristics methodology is introduced. However at this stage the ‘is/ought’ dichotomy allows useful reflection on some of the underlying problems. This is particularly evident in the two destination marketing case studies, ETNA and EnglandNet where it could be argued the model of national tourism ought to have been open for debate. In the failed hotel yield management case, the system largely ignored the rich channels of communication which if it had supported would likely have had a higher chance of success. The ‘involved/affected’ dichotomy is related to the ‘is/ought’ and by incorporating the affected as well as the involved it in turn takes a wider view of what the system ought to be like. For example, consultation with local authorities in the case of ETNA would have revealed the mixed picture of tourism at local level and thereby cast doubt on the logic of imposing a target metric for implementing a network of information centres.

**Figure 2-7: Summary of critique of IT implementation**



Source: Author

**Table 2-5: Conditions for critique present in tourism cases**

<b>Cases</b>	<b>The 'is' versus 'ought'</b>	<b>The involved and the affected</b>	<b>Power</b>
ETNA	Difference in emphasis on the level of importance attributed to tourism by local authorities	<i>Involved:</i> National level steering group; <i>Affected:</i> local authorities and regional tourist boards	Select management committee determined boundaries of the project
England Net	Conflict between private sector and National Tourist Office on what an NTO model ought to be	<i>Involved:</i> NTO steering group; <i>Affected:</i> Self catering businesses felt that their business would be adversely affected by NTO objective to take bookings	Lack of trust between NTO and self catering businesses; was there adequate consultation re. NTO objective to follow a commercial model?
<i>Failed</i> Hotel YM case	What is the purpose of the system – to support existing organizational structure or ought it to support informal channels of communication?	<i>Involved:</i> Head Office driven initiative; <i>Affected:</i> Rich horizontal and vertical 'informal' channels of communication affected by the system	Top-down initiative with relatively little consultation at unit level
Book Town Net	The consultation process never took into account the 'ought' position of book dealers	<i>Involved:</i> EU, WNRI, University, book dealer representatives from each town; <i>Affected:</i> Small book dealers for whom the project was intended to deliver key benefits not sure how the project would benefit them	Terms of reference for project determined by core group of powerful stakeholders – EU, WNRI, and University of Luton.
GTI	No debate on the viability of the current model for travel distribution and what	<i>Involved:</i> Core group (Galileo, Thomson, Istel); <i>Affected:</i> Tour operators'	Development took place behind closed doors creating

	that ought to be	ability to differentiate their brand at the travel agency point of sale would be adversely affected by GTI	climate of mistrust; Thomson Holidays used its muscle to sideline the TOG project; GTI attempt to preserve status quo of travel distribution
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Source: Author

With respect to power, the cases with the exception of GTI, demonstrate a general willingness to engage albeit within limited remits as discussed above. The position is taken within this study that through innovative critical methods underpinned by communication the two concepts of the is/ought and involved/affected can be operationalised and in so doing address some of the issues contained in the power column. The critique has revealed overall the importance played by communication and the following section discusses the opportunity this presents in addressing a prime cause of failure.

### 2.5.1. The role played by communication

The scenarios in which IT is implemented are characterised by rich channels of communication, which is a common thread, running through the five Tourism IT cases and also the sustainable planning partnerships. However the Functionalist approach, which has been seen to dominate IT implementation is unable to tap into these channels and use them to effectively engage with stakeholders.

The critique through Lytinen and Klein has highlighted how the boundaries of a system are pre determined by those in positions of authority and, where communication does take place, it does so within the framework of the status quo. This status quo is, in turn, a Functionalist one which is technology centric and means-ends dominated. Its non-participative stance and deterministic view of human beings are barriers to effective stakeholder engagement.

The critique through expectation failure reveals how a communicatively mediated process offers the promise of implementing a system which is stakeholder-centric. In this process,

stakeholders would have a valid say in determining the boundaries of the system. However in order to achieve this a more radical view is required – one that is prepared to challenge the status quo and give all stakeholders a more involved role in the communication process. The very nature of the communication must be changed so that it embraces debate. It is communication that looks at reality through the eyes of different stakeholders – this is what lies at the heart of expectation failure.

Radical Humanism offers the promise of encouraging researchers and practitioners to “move beyond a debate located firmly in the sociology of regulation to a critically reflective, radical position” (Clarke 2001: 51). Most significantly it points to a series of innovative methods which practically enable critique by embedding the conditions for critique. The development of a model which incorporates these methodologies is the objective of the following chapter.

### **3. A MODEL FOR STAKEHOLDER CONSULTATION**

The objective of this chapter is to develop a model for stakeholder consultation which is underpinned by critical social theory and communicative action and which can address the weaknesses associated with Tourism IT. When the model has been developed it will be used in the conclusion to the chapter to reflect critically on the Tourism IT case studies. This reflection will be based around the following questions: to what extent can the model facilitate:

- The articulation and clarification of stakeholder requirements as stipulated under expectation failure in the Lytinen and Hirschheim framework?
- The capture of rich communicative interactions that were shown to exist in complex-coercive problem contexts?
- A critique of boundaries which surround an issue?
- A consensus which is free from underlying ambiguities?
- The identification of the normative frameworks which stakeholders use to evaluate issues?
- A visual map which can be used as a positioning document for partnerships?

#### **3.1. FROM CRITICAL SYSTEMS THINKING TO CRITICAL SYSTEMS PRACTICE**

In developing a model for stakeholder consultation, this study draws heavily on Critical Systems Practice (CSP). As discussed in Chapter 1, the thesis seeks a largely methodological route to critique and, in reviewing the literature on CSP, the emphasis lies on the word ‘practice’ and the choice of appropriate methodologies. However, this emphasis notwithstanding, it is important to clarify the theoretical start point in the form of Critical Systems Thinking (CST) and how CST evolved into CSP. In charting this evolution, the initial part of this section draws heavily on Jackson (2000; 2003). This is followed by different perspectives on CST from other contributors and finally their visions for the future of CSP.

Jackson uses the following structure for his discussion of the origins of CST:

the growth of “critical awareness” in systems thinking; the “system of systems methodologies”; the engagement with emancipatory



thinking; the developing argument for pluralism; and the preliminary operationalising of critical systems ideas in the meta-methodology called “Total Systems Intervention” (TSI) (2000: 355).

Inherent in this structure are the three commitments of CST: “‘critical awareness’, ‘improvement’ and ‘pluralism’” (Jackson 2003: 303). Jackson places special emphasis on the role of the social sciences as an enabler of “critical awareness” (2000: 356) referring in particular to Burrell and Morgan’s framework (discussed in the previous chapter – see Figure 2-5) which facilitated a “critique of the assumptions different systems approaches make about social science” (2000: 356). Critical awareness was also facilitated by Habermas’ early work on Knowledge Constitutive Interests (1971).

Habermas was a later member of the Frankfurt School of Critical Theorists who included Horkheimer, Adorno, Fromm and Marcuse. They wanted to distance themselves from the Positivism of traditional social theory (Ngwenyama and Lee 1997); however unlike other, older members of the School, Habermas, a more recent exponent, has for some time underpinned CST. His work was first applied by Mingers (1980) and Jackson (1982) in order “to ask questions about the social theory on which soft systems thinking was based” (Jackson 2000: 356). Habermas identified two main interests - technical and practical - that affect attempts to acquire knowledge. The technical interest emphasises ‘predict and control’ in order to achieve goals. It requires empirical analytic knowledge from which hypotheses derive, measuring and predicting the system of study. The practical interest relates to interaction with other people to achieve a mutual understanding. It requires historical hermeneutic knowledge to facilitate mutual understanding among human beings.

Habermas sees the technical interest dominating a society controlled by experts. Practical issues become redefined as technical ones and discussion is prevented. This was evident in the GTI case where the technical development failed to take into account the business issues related to competitive differentiation. Habermas also argues that historical hermeneutic knowledge is insufficient on its own in that it assumes a consensus which may not in reality exist. It has not taken into account the power relationships at work, which will influence how humans act and perceive the world.

Therefore, Habermas proposes a third emancipatory interest designed to facilitate free and open discussion on which the success of the other two interests depend. Habermas acknowledges the need for instrumental and strategic action but argues that society also

needs communicative action. Communication free from domination is important in order to be able to consider what we should or might do and to question the norms on which we base interaction. The technical and practical interests should, Habermas argues, be complemented by critical theory, which seeks to generate knowledge about the values and attitudes, which ultimately determine people's behaviour. This process should be emancipatory, freeing individuals from forces of which they were previously unaware and allowing unfettered access to debate. By increasing their levels of conscious awareness, they can regain control over greater areas of their lives. Their explanations carry more of a ring of truth and individuals have a more acute perception of events. This move toward communicative action is a theme which is applied later in this research.

Habermas' Knowledge Constitutive Interests paved the way for the next phase of CST – the System of Systems Methodologies (SOSM) (Jackson and Keys 1984) which was introduced and explained in Chapter 2 in the critique of Tourism IT (Figures 2-3 and 2-4). It is clear to see how Habermas' technical, practical and emancipatory interests underpin the unitary, pluralist and coercive problem contexts respectively. The SOSM encouraged reflection on the allocation of methodologies to different problem contexts, evidenced by the way in which Torlak has adapted the framework (Table 3-1).

Hard problem solving methods can be readily applied in a simple-unitary context where consensus exists between people and where there are few interactions involved; complex-coercive scenarios on the other hand involve many complex interactions and there is conflict between stakeholders and power issues at play.

The SOSM and its Habermasian underpinning also heralded the next phase of CST - the engagement with emancipatory thinking. Here Jackson acknowledges the role of Ulrich's Critical Systems Heuristics (1983) which he refers to as "an independently developed strand of critical systems thinking (really emancipatory systems thinking), deriving from Kantian idealism and Chuchman's reflections on systems design" (Jackson 2000: 363). His re-classification of Critical Systems Heuristics as emancipatory systems thinking is based on Jackson's contention that the methodology is limited to coercive contexts and therefore "narrower than critical systems thinking" (2000: 363). This contention is later challenged by Ulrich (2003), as discussed later in this section.

**Table 3-1: Methods allocated to SOSM**

	<b>Unitary</b>	<b>Pluralist</b>	<b>Coercive</b>
<b>Simple</b>	*Operational Research *Systems Engineering *Systems Analysis *System Dynamics	*Social Systems Design *Strategic Assumption Surfacing and Testing	*Critical Systems Heuristics
<b>Complex</b>	*Viable System Diagnosis *General System Theory *Sociotechnical System Theory *Contingency Theory	*Interactive Planning *Soft Systems Methodology	*No methodology available

Source: (Adapted from Torlak 2001)

In addition to facilitating critical reflection on methodological choice, the SOSM also helped to establish “pluralism as a central tenet of CST” (Jackson 2000: 360) and brought different systems approaches together under one umbrella. He defines pluralism as “the use of different methodologies, methods, models and techniques in combination” (Jackson 2000: 377). The significance of pluralism is underlined by Jackson’s reference to the “intimacy of the relationship between pluralism and critical systems thinking” (Jackson 2000: 364) and he devotes considerable space to its discussion. Among other advantages, Jackson suggests that pluralism is practically needed as one methodology is no longer sufficient in problem contexts. The alternatives – isolationism, imperialism and pragmatism – are not tenable according to Jackson.

For example, the mixing and matching of methodologies, with little regard to the theoretical underpinning, leads in Jackson’s view, to unreflective practice and an inevitable lapse into pragmatism or imperialism. He cites the combinations of methods practiced by Ormerod in his work with Sainsbury’s (1995) which are all done under the

umbrella of the interpretive paradigm resulting, according to Jackson, in a situation where paradigm diversity is not ensured. Citing Brocklesby and Mingers (1997) Jackson refers to this approach as essentially “single paradigm multi-methodology” which is good for practitioners but has a number of faults. These include its imperialism - meaning different rationales are not considered, and also subsequent sacrifice of the emancipatory commitment.

In order to achieve what Jackson refers to as “coherent pluralism” (2000: 387), the detachment of methods, models and techniques from their methodology must be done with a critical awareness of the generic methodology and the theoretical rationale that the combination is serving. Citing Gregory’s (1996) work on “discordant pluralism” (Jackson 2000: 386), Jackson suggests that within pluralism paradigm diversity should be celebrated – using multiple methodologies in the same intervention but with a self conscious awareness of how each paradigm is contributing. However he cautions that this requires a precise awareness of the theoretical underpinning of each methodology.

One example of an attempt to meet this requirement was the development of the Complementarist Framework (Flood 1995), which helped to underpin the reconstitution of Total Systems Intervention (TSI) - the final phase in Jackson’s account of the origins of CST. TSI is labelled as a meta-methodology, “capable of guiding practitioners in their pluralist practice” (Jackson 2000: 368), and this quote points to its role in acting as a bridge between CST and CSP. It comprises three phases – creativity, choice and implementation. The original version of TSI (Flood and Jackson 1991) was based on the SOSM and while the contribution of the SOSM is undisputed, it did not allow for methods to be mixed across the different paradigms – Functionalist, Interpretive and Critical. The reconstituted version of TSI (Flood 1995) replaces the SOSM with the Complementarist Framework (Figure 3-1), with a view to facilitating more critical awareness in the mixing of methods across paradigms in a complementary style.

In the reconstituted TSI, after surfacing the issues, five metaphors (machine, organic, neuro-cybernetic, socio-cultural, and socio-political) are used to converge on them, which in turn leads to choice of purpose (designing, debating, disimprisoning - which map to the unitary, pluralist, coercive of SOSM, and the technical, practical, emancipatory of Knowledge Constitutive Interests).

**Figure 3-1: The Complementarist Framework**

Designing	Debating	Disimprisoning
Machine	Socio-Cultural	Socio-Political
Organic		
Neuro-Cybernetic		

(Flood 1995)

The first purpose poses the question, ‘*How should we do it?*’ and assumes that there is consensus among stakeholders. The emphasis is on designing effective processes and the purpose maps to the technical interest and Functionalism. The review of Tourism IT in Chapter 1 indicates the dominance of this purpose, with the misplaced assumption that consensus exists, or at least if it does not then stakeholders will fall in line behind a technical system. The choice of hard methods in the GTI case illustrates this position, where experts in electronic data interchange worked on the design of a technical system.

The second purpose poses the question, ‘*What should we do?*’ and acknowledges that there is some disagreement but that this is non-coercive and can be addressed within the prevailing status quo. This purpose maps to the practical interest and Interpretivism. Both ETNA and EnglandNet exhibit this purpose and, as been discussed previously, their adherence to the status quo and inability to manage the conflict were instrumental in their failure.

Habermas argues that practical interests often become redefined as technical ones and discussion ends. There is empirical evidence from Tourism IT to suggest that such redefinition occurs and that power is exercised through technical systems in order to control other actors in the organisation:

Managers who define success in terms of the perception of their superiors were overwhelmingly male, but these were also managers who worked in places with both highly autocratic styles and information systems, which reduced the discretion and autonomy of the individual manager. In these more ‘masculine’ workplaces the

strategy behind the development of information systems was the control of subordinates. Computer systems are a means of achieving predictability from subordinates (Peacock 1999: 313).

The third purpose, disimprisoning, poses the question, ‘*Who will benefit if this is done, or, why should it be done?*’ and recognises that coercion exists, whereby powerful stakeholders will use their position to achieve their ends. This purpose maps to the emancipatory interest and Radical Humanism. In setting out areas for future research in tourism partnerships, Bramwell and Lane point to the lack of research into the modes of reasoning behind stakeholder discourse and point to Habermas’ Knowledge Constitutive Interests as a framework for addressing this gap. They cite Habermas’ contention that “technical reasoning often dominates public discourse, despite the importance of moral and emotional concerns for society” (Bramwell and Lane 2000: 338). The “moral” concern refers to the disimprisoning purpose and the emancipatory interest.

Each purpose has a common set of principles associated with it and these are used to cross check that the metaphor was appropriate given the nature of the problem context. For example the disimprisoning purpose has the following principles:

- Identifying whose interests are served
- Identifying experts and their position in the power structure
- Identifying sources of motivation, control, expertise and legitimation (Flood 1995: 184)

The next step in the TSI process is to look for a match between purpose and methodology, based on the principles associated with both. For example, if the issues in the creativity phase indicate a socio-political structure then this will lead toward the choice of methods which are linked to disimprisoning. Flood refers to the use of the Complementarist Framework as “an extremely important step forward for choice of methods” (1995: 183). Although described in a step by step fashion for simplicity sake, TSI is an iterative, cyclical and recursive process rather than a linear one.

There is a clear link between the different frameworks deployed within CST and Habermas’ Knowledge Constitutive Interests which have played a central underpinning role through the 1980s and 1990s (Table 3-2).

**Table 3-2: The significance of Habermas’ Knowledge Constitutive Interests**

Habermas’ Knowledge Constitutive Interests	Technical	Practical	Emancipatory
System of Systems Methodologies	Unitary	Pluralist	Coercive
Complementarist Framework	Designing	Debating	Disimprisoning
Paradigm	Functionalist	Interpretivist	Radical Humanist

Source: Author

Continuing the “theme” of CST moving to CSP, the following considers the contribution of Critical Systems Heuristics (Ulrich 1983), Creative Design of Methods (Midgley 1997), and Multimethodology (Mingers and Gill 1997).

In parallel with the work at the University of Hull, Ulrich (1983; 1988; 1996; 1998) developed his approach to CST based on critical boundary judgements, encapsulated in Critical Systems Heuristics (Ulrich 1983). Ulrich’s work is discussed separately here because although Jackson refers to it in his phase “the engagement with emancipatory thinking”, in reality it was developed in parallel to Jackson’s work at the University of Hull. The methodology emerged from Ulrich’s work in attempting to establish a philosophical and epistemological basis for socially rational planning:

...in the context of applied social inquiry and planning, being critical therefore means to make transparent to oneself and to others the value assumptions underlying practical judgments, rather than concealing them behind a veil of objectivity (Ulrich 1983: 20).

In defining ‘system’ Ulrich takes an explicitly Kantian perspective in that, due to *a priori* judgements, our view of a system is naturally selective and we need to be aware of this selection process and the elements being omitted. This is where the heuristics play a role – in a constant process of critical reflection on judgements and validity claims. In order to facilitate that reflection, Ulrich designed 12 critical boundary questions which cover four key areas of concern: motivation, control, expertise, and legitimacy, and which contrast the ‘is’ with the ‘ought’ encouraging critical reflection on the boundaries surrounding an issue (Table 3-3).

**Table 3-3: Twelve critical boundary questions**

<b>Question</b>	<b>“Is” Mode</b>	<b>“Ought” Mode</b>
1	Who is the client? Whose purposes are served by the system?	Who ought to be the client?
2	What is the purpose?	What ought to be the purpose?
3	What is the measure of success?	What ought to be the measure?
4	Who is the decision taker?	Who ought to be the decision taker?
5	What conditions are actually controlled by the decision taker?	What components of the systems ought to be controlled by the decision taker?
6	What conditions does the decision taker not control?	What resources and conditions ought to be part of the system’s environment?
7	Who is the system’s designer?	Who ought to be the system’s designer?
8	Who is involved as an expert, what is the nature of the expertise, and what role does the expert play?	What kind of expertise ought to be involved, who should exercise it, and what should his/her role be?
9	Where is the guarantee of success? With experts, political support etc?	Where ought the guarantee of success to be?
10	Who represents the concerns of the affected (but not involved)?	Who ought to represent these concerns? Who among the affected ought to become involved?
11	Are the affected given the opportunity to emancipate themselves?	To what extent ought the affected to be given such an opportunity?
12	What worldview underlies the system of concern?	On what worldview ought the design of the system to be based?

(Ulrich 1983)

The 12 questions give a voice to the cognitive perceptions of stakeholders and challenge the status quo view. For example, Question 3 challenges the “Functional terms in which the success-oriented operations of systems are described” (Kemmis 1998: 284) and encourages reflection on the different measures of system failure introduced in the previous chapter. Within the context of the critique undertaken in Chapter 2, Ulrich’s questions encourage reflection on the appropriateness of the criteria linked to correspondence failure. The success of ETNA was measured according to the number of tourism information centres which were networked – a quantitative measurement typical of Functionalist approaches. This was the benchmark devised by the project’s steering



group, however as the case analysis in Chapter 2 reveals, this was not a rational goal, as it was not based on full consultation and understanding of different stakeholder positions.

When applying Ulrich's normative stance, it could be argued that one of the measures of success of the ETNA project ought to have been how it engaged tourism organisations in debate regarding the use of technology to facilitate better models of destination marketing. In the case of EnglandNet, while VisitBritain stated that one of the aims of the project was to sell direct to consumers and to charge commission on the sale, sections of the private sector believed that the aim ought to have been confined to collecting and distributing content, leaving the sales process to the tourism businesses. Ulrich's critical boundary questions are useful for placing issues and ideas on the agenda that otherwise might be ignored or suppressed. This parallels one of the advantages observed by Gregory and Romm in utilising Habermas' ideal speech criteria within the NHS consultation, namely that it was useful in bringing issues to the surface (Gregory and Romm 2001).

Ulrich's framework also encourages the planner to consider both the involved and the affected in any decision-making process. This is a powerful concept, which contains a central emancipatory tenet in that it encourages consideration not only of those directly involved, but also those affected by it. For example in documenting the ETNA case, Mutch (1996) lists the English Tourist Board, regional tourist boards, tourist information centres and local authorities as major players, but the project would also have affected tourism businesses and the visitors themselves.

In GTI the major tour operators were involved in designing the technology but it would have affected other operators, as well as other players in the supply chain, including travel agents and hotels. None of these were given a voice in the project planning. Question 10 confronts the issue of the involved and affected most directly but the concept is inherent in many of the other questions and is particularly relevant in a multi stakeholder project. Considering who will be affected by IT immediately encourages a more human-centred and participative view of planning and throws into discussion the boundaries on which the IT project is based.

Ulrich's ideas have spawned a body of work under the label of 'boundary critique'. A proponent of this work is Midgley and one of his oft-cited case studies makes extensive use of Ulrich's 12 critical boundary questions (Midgley, Munlo et al. 1998). The case, on

the planning of a housing service for older people, has a strong practical edge in addition to theoretical rigour and reports on a consensus-seeking process involving a number of stakeholders, including local authority housing officers and older people. Central to this process is the identification of primary and secondary boundaries surrounding the housing issue and the marginalised elements that lie in between.

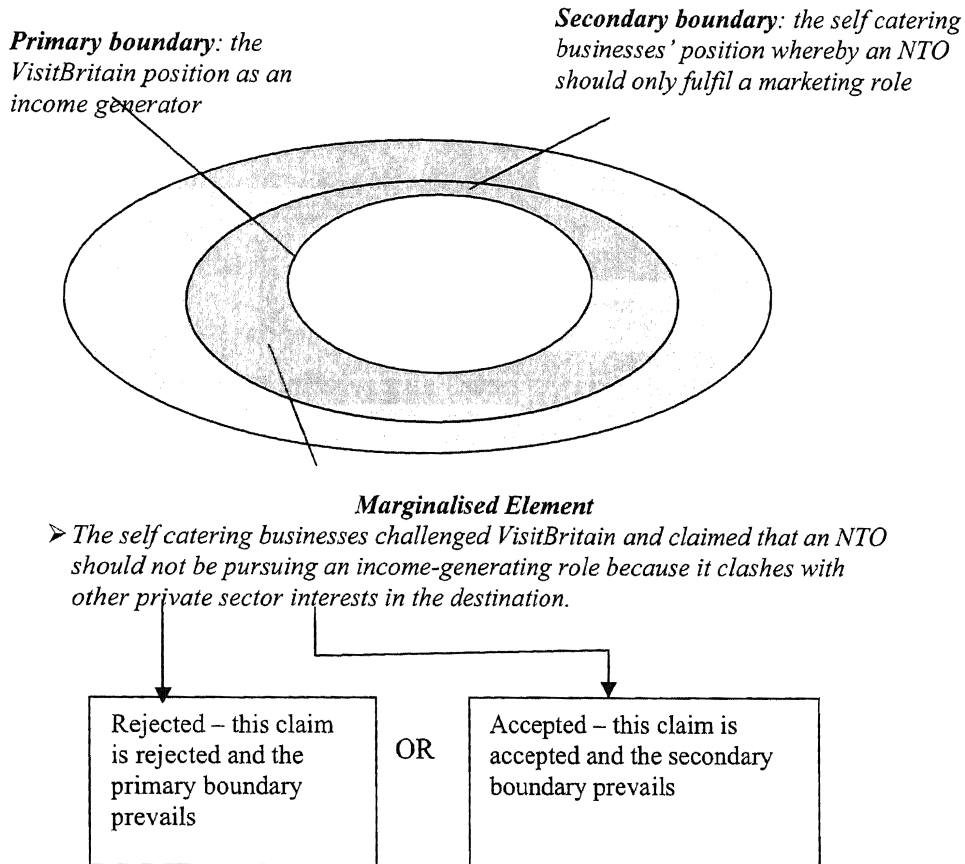
Midgley focuses on the conflict that arises when groups make different boundary judgements on the same issue. He uses the concept of primary and secondary boundaries and the contested marginal area in between, as part of this focus. When one group makes a narrow boundary judgement (primary boundary) and another makes a wider judgement (secondary boundary), the contested area of difference between them lies in the marginal area. This area contains marginalised elements which effectively represent points of dispute between different stakeholders.

The marginalised elements provide an agenda for ongoing debate designed to either accept or reject them. The rejection of a marginalised element would mean that the narrower primary boundary prevails and becomes the “reference for decision making” (Midgley, Munlo et al. 1998: 469). When the element is accepted, the wider boundary becomes the preferred reference point. When applied to the EnglandNet case study this boundary mapping process makes transparent the normative differences between two stakeholders (Figure 3-2).

In this case the main marginalised element between VisitBritain and the group of self catering businesses concerned the role of a national tourism office. Should that role be purely marketing and information dissemination, a view to which the self catering businesses subscribed, or one that fulfils more of a commercial role, as VisitBritain was perceived to be following? The visualisation of this normative difference is a useful means for making the boundaries transparent to stakeholders and was identified as an important step in the partnership literature reviewed in the previous chapter (Jamal and Getz 2000).

Habermas’ Knowledge Constitutive Interests have been criticised as being too inflexible (Midgley 1995; Jackson 2000; Clarke 2001). As a framework, it has been argued, the three interests perpetuate the concept of paradigm incommensurability, mediating against the mixing of approaches from different paradigms during an intervention.

**Figure 3-2: Boundary critique of EnglandNet**



Source: Author

Jackson's criticism of the first version of TSI (Flood and Jackson 1991) is based in part on its uncritical adherence to Habermas' Knowledge Constitutive Interests which he sees as constricting the mixing of methods across different paradigms and operating "at a metalevel to the paradigms" (Jackson 2003: 304).

Critical systems thinkers have now largely accepted that it is untenable to believe, in the manner of TSI, that paradigm incommensurability can be resolved by reference to a metatheory (Jackson 2003: 304)

Partly in response to the perceived limitations of Habermas' Knowledge Constitutive Interests framework and the SOSM framework, two additional approaches to CST/CSP emerged in the late 1990s. Firstly, Midgely's promotion of the creative design of methods (1997) and secondly, multimethodology (Mingers and Gill 1997), both which involve an "orientation toward a pragmatic decomposition and recombination of *parts* of

methodologies from different paradigms” (Ulrich 2003: 339). Jackson acknowledges the advantages of these approaches in terms of their flexibility and value to practitioners but again injects a cautionary “caveat” that they do not fall prey to “unreflective imperialism or pragmatism” (2003: 305). Interestingly both approaches turn from Habermas’ Knowledge Constitutive Interests to his theory of communicative action for their underpinning.

### **3.1.1. Critical systems practice**

Having discussed the evolution of CST, the visions of different authors for the future of CSP will now be outlined, starting with Jackson’s agenda which is synonymous with TSI (a landmark which he sees as the stepping stone from CST to CSP):

Employs a metamethodology to take advantage of the benefits to be gained from using methodologies premised upon alternative paradigms together, and also encourages the combined use of diverse methods, models, tools and techniques, in a theoretically informed way, to ensure maximum flexibility in an intervention (Jackson 1999: 20).

While he contends that TSI has “stood the test of time”, Jackson finds it is no longer tenable to rely on Habermas (cited in Clarke 2001) for the reasons outlined above and he sets out nine “constitutive rules” (Jackson 2000: 93) to accompany his metamethodological vision for the future of CSP. In this same text he also assigned different methodologies to the four paradigmatic approaches (2000), for example including Strategic Assumption Surfacing and Testing (Mason and Mitroff 1981), Interactive Planning (Ackoff 1981), and Soft Systems Methodology (Checkland 1981) under the umbrella of Interpretive systems approaches. Three years later, Jackson built on this by developing general principles and theoretical rationale for four generic systems methodologies –functionalist, interpretive, emancipatory, and postmodern (Jackson 2003). For example, the “constitutive rules for a generic emancipatory systems methodology include the following guidelines:

- An assumption is made that the real world can be systemic in a manner alienating to individuals and/or oppressive to particular social groups;
- Analysis of the problem situation must take into account who is disadvantaged by current systemic arrangements;” (Jackson 2003: 310)

Jackson views the establishment of these generic methodologies “as one of the great achievements of CSP” (Jackson 2003: 307), not least from the viewpoint that they allow methods and techniques to be detached from their parent methodology and used appropriately while at the same time enabling adherence to firm principles associated with the dominant methodology and its paradigm.

In his most recent paper to date, Jackson sees the role of CSP to “protect paradigm diversity and to encourage critique between paradigms” (2006: 877). Of interest in this paper is Jackson’s discussion of critique which “has always sought, at the very least, to reveal the hidden assumptions behind claims to knowledge or claims to be taking legitimate action” (Jackson 2006: 872). He asks how we can get at the assumptions which lie behind problem structuring methods and views SOSM as the main vehicle for achieving this, as well as the two approaches of paradigm and metaphor analysis (in effect a combination of the SOSM and Complementarist Framework). Curiously he does not refer to his generic systems methodologies, discussed above, which would also provide a useful template.

When Jackson set out his nine rules for CSP, Clarke commented that Jackson was calling “for an improved version of TSI, but it is as yet unclear how these ideas are to be applied” (2001: 8). In his latest work, Jackson (2006) distinguishes between methods, models and techniques and advocates disconnecting them from the methodologies with which they are traditionally associated. He also advocates using multiple theories and methodologies, and not just methods, in an intervention. However in the opinion of this author, Clarke’s observation still applies, inasmuch that there is no practical means offered for achieving these ideas.

Mingers continues his “multiparadigm multimethodology” (Kotiadis and Mingers 2006: 856) agenda, the rationale for which he originally set out in a paper with Brockelsby (Mingers and Brocklesby 1997):

- The world is complex and using different paradigms facilitates different perspectives
- More than one problem is needed to tackle a problem as it goes through different phases
- Multiparadigm multimethodology is commonplace in practice

- Different methodologies allows for triangulation and enhanced confidence in results (cited in Kotiadis and Mingers 2006: 857)

Mingers' original multiparadigm multimethodology framework consisted of a grid, based on the dimensions of the problem situation (social, personal and material) and the phases of a project (appreciation, analysis, assessment and action). The framework is based on Habermas' three worlds – objective, social and subjective (Clarke 2001: 9 citing Mingers and Gill) - and aimed to provide “some guidance as to which methods may be appropriate at particular points in a project” (Mingers 2003: 560). However Mingers acknowledges the weaknesses of the grid relating to the ad hoc and subjective way in which methodologies are mapped onto it and the lack of detailed information about how different elements of methodologies can be used at different points in a project.

More recently Mingers has developed a seven-category classification of management science methods and methodologies based on what “the methods model (ontology), how they model (epistemology), and why they model (axiology)” (2003: 559).

“The point of this is to assist users in understanding both the implicit or explicit assumptions underlying methods, and their principal aims and purposes, in order to be able to make more informed and critically aware choices when designing particular combinations in practice” (Mingers 2003: 561).

The classification is used to augment and enhance his earlier framework and while Mingers acknowledges the similarities to SOSM and TSI he claims it provides a “much richer picture” and “does not try to pigeonhole methods into specific, narrow, categories” (Mingers 2003: 561). This tacit criticism of TSI notwithstanding, the two approaches have a marked similarity in that they both try to classify methodologies according to their principles, purposes and assumptions.

Midgley's (2000) future agenda for CSP is embodied in ‘systemic intervention’ which he describes as “purposeful action by an agent to create change *in relation to reflection upon boundaries*” (Midgley 2006: 467 italics contained in original). For Midgley, boundary critique represents “the crux of what it means to be systemic” (2006: 467) and his approach to the placement of primary and secondary boundaries and the marginal elements that lie between was described earlier in detail. In this recent paper he also sets

out his vision for methodological pluralism which he interprets as methodologies learning from one another and “drawing upon and mixing methods from other methodologies” (Midgley 2006: 468). Midgley emphasizes the synergy between boundary critique and methodological pluralism with the former deployed up front to prevent “superficial diagnoses” (Midgley 2006: 468) and the latter providing a pragmatic element in order to affect change.

In concluding his summary of the current status of CSP, Clarke views Habermas’ theory of communicative action as “the most promising arena in which to ground development of the domain” (Clarke 2001: 11). He challenges the concept of paradigm incommensurability, arguing that “all human endeavour becomes mediated through subjective understanding, and the paradigms as impenetrable barriers disappear” (Clarke 2001: 11). The attraction to Clarke of Habermas’ work on communicative action is that the three core validity claims of truth, rightness and sincerity are communicatively mediated and therefore cross the paradigms. His vision for the future is one “grounded in communication, explicitly based on participation and critically informed” (Clarke 2001: 12).

Finally, this examination of the future agendas for CSP considers in some depth that of Ulrich. He has a radically different perspective than that of Jackson and, to a lesser extent, Mingers, as summed up by the following statement:

“Critique is more – much more - than informed methodology choice”  
(Ulrich 2003: 336).

Ulrich dismisses the emphasis in the UK on methodology choice and sees the future in “critically systemic discourse” (Ulrich 2003). Boundary critique, he argues, is the essence of critical practice and should not be “subordinated to methodology choice” (Ulrich 2003: 325) as happens in SOSM and TSI. In these frameworks, critical systems heuristics is seen as fit for purpose only when the context is deemed coercive. Moreover Jackson (2000) has criticised critical systems heuristics on the grounds that it is predicated on the ideal conditions for speech which, due to the closure of debate which characterises coercive contexts, can never exist.

Ulrich takes issue with his critics on this last point and on a number of others. Firstly, he states that:

A coercive context is defined by structural conditions that create an asymmetry of discursive chances, for instance regarding the distribution of influence and decision power, of access to information, of argumentation skills, and so on (2003: 329).

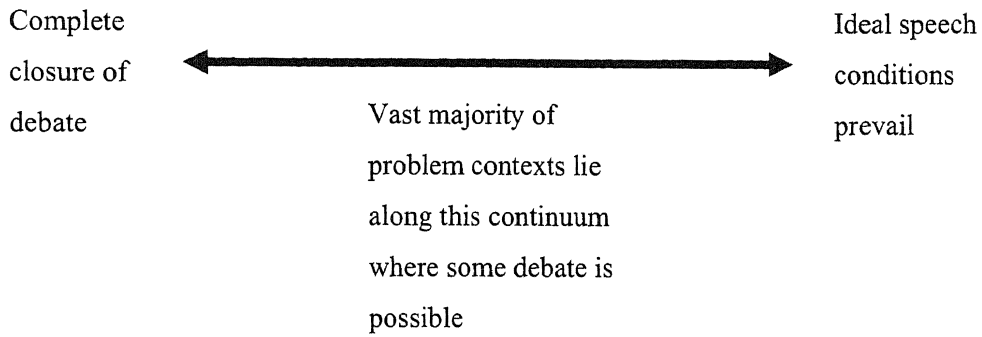
Ulrich claims “that in real world discourses” these conditions “are the rule rather than the exception” (Ulrich 2003: 329) and therefore boundary critique is relevant in all situations. He is concerned that as a result of the SOSM and TSI schema, practitioners will be encouraged to classify problem contexts as unitary (designing purpose) or pluralistic (debating purpose), thereby missing the distortion which occurs in all problem contexts. Indeed Ulrich goes as far as to liken the use of ‘purposes’ (discussed earlier) in TSI and SOSM to the instrumental means-end schema of Positivism whereby the choice of purpose is used to justify the means.

Secondly, Ulrich counters the definition of coercive contexts as those characterised exclusively by the closure of debate. He places this scenario at one end of the spectrum of possible problem contexts with the ideal conditions of speech at the other, but contends that the majority of cases lie in between, where the opportunities for debate are present in varying degrees (Figure 3-3). Along this spectrum, Ulrich prefers the term ‘selective’ to ‘coercive’ with the former carrying less strident overtones. He urges readers to return to the original terminology used in Critical Systems Heuristics - the “sources of selectivity that inevitably flow into systems maps or designs” (Ulrich 2003: 330). He acknowledges that there are “non-argumentative forces (power, deception, unchallenged interests behind asserted facts and norms, tacit assumptions, dogmatic and cynical use of boundary judgements, etc)” (Ulrich 2003: 339) which can result in the selective positioning of boundaries, but that these do not constitute closure of debate.

The review of multi stakeholder tourism partnerships and Tourism IT cases in Chapter 2 would tend to support Ulrich’s stance. Only GTI is characterised by closure of debate due to the exercise of power by the project’s initiators. They made the mistaken assertion that a technical solution based on Electronic Data Interchange was needed by the packaged travel industry and refused to enter into any meaningful debate with the tour operator community; a situation which led to mistrust and ultimately project failure. The other cases are characterised by varying degrees of willingness on the part of participants to engage in dialogue, thereby placing them at different points along the spectrum in Figure 3-3.



**Figure 3-3: The range of coercion in problem contexts**



Source: Author

For example, in BookTownNet the European Commission imposed a time limit of two years and stipulated the ‘work packages’ that the project team had to adhere to. Although as previously discussed this was not ideal, in that a number of stakeholders were not party to the initial project specifications, there was nevertheless scope within the confines of the project framework for dialogue which could influence the outcome of the project. As previously stated, a number of channels of communication were available to stakeholders (workshops, telephone conference calls, individual interviews, formal project meetings, Intranet and email) and the management team demonstrated a genuine willingness to engage in dialogue. A rich range of communicative discourse was generated over these channels and harnessing this addresses one of the limitations identified in the partnership literature, namely the difficulty that stakeholders have in attending all project meetings.

Ulrich is also optimistic regarding the opportunities for debate which exist *outside* the confines “of a singular discourse situation” (2003: 330) and argues that even if outright coercion exists and the debate is closed, there are other spheres available in which debate can continue. An example of this is EnglandNet where the self catering businesses took their case to the European court; or the hotel yield management case where informal channels of communication existed. In the tourism arena, travel news sites such as Travelmole.com, industry association (e.g. Toward Europe, International Federation for IT and Travel & Tourism) seminars and annual conferences (e.g. Eyefortravel) are all opportunities for debates to be aired. A debate on Travelmole is analysed in depth in Chapter 5 of the thesis. Additionally Internet weblogs (‘blogs’) and peer to peer web sites are growing exponentially in number and provide an opportunity for interactive debate which can attract a large and diverse audience.

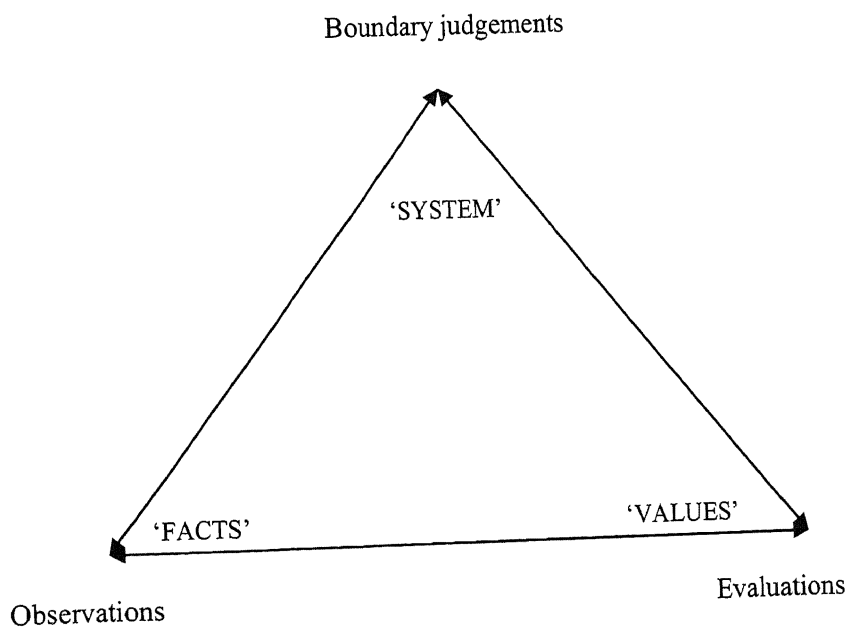
Not only does Ulrich argue that additional opportunities for discourse exist but that they should be actively sought because a single local discourse is inadequate for fully defining the problem, insomuch that it is unlikely to consider the full range of stakeholders and issues both involved in and affected by the problem.

Ulrich sets out his vision for ‘deep complementarism’ which from his perspective is not about the complementary use of methodologies, but rather about the complementarity of “the theoretical-instrumental and the practical-ethical dimensions of rationality” (Ulrich 2003: 335).

It is the very inseparability of empirical and normative assertions, which is at the heart of the approach (Ulrich 2003: 335).

Or put differently, “The concept of boundary judgements helps us to understand how exactly assertions of facts and norms depend on one another” (Ulrich 2003: 338). Ulrich uses a triangle to illustrate the complementary nature of facts and values and the role of boundary judgements (Figure 3-4).

**Figure 3-4: Systemic triangulation**



(Ulrich 2003: 334)

He poses a number of questions which lead to critical reflection on systemic discourse: “how do our valuations look if we consider new facts that refer to a modified reference system?”(Ulrich 2003: 334) and “does the reference system still look appropriate if we consider additional empirical evidence or value considerations?” (Ulrich 2003: 335). This constant process of boundary testing (Ulrich emphasises that boundary *testing* rather than boundary *setting* is the goal of boundary critique) lies at the heart of boundary critique and is a process which needs to take place in any setting and with any methodology regardless of how the problem is perceived. Only then can the emancipatory interest be retained and the selectivity of reference systems critiqued.

While Ulrich sets out strong theoretical arguments for his version of CSP as critically systemic discourse, he does not advance any practical arguments as to how this might be operationalised other than to refer back to Critical Systems Heuristics as the most appropriate methodology. Curiously he does not, in his review of the UK branch of CSP, acknowledge the work of Midgley on primary and secondary boundaries and marginalised elements. Midgley’s work is supported with pragmatic case examples and represents a useful application and development of Ulrich’s work on boundary judgements.

What is clear from the five basic principles (discourse, the role of civil society, emancipatory orientation, systemic boundary critique, and deep complementarism) Ulrich (2003) sets out for critically systemic discourse is that his approach is predicated on Habermas’ theory of communicative action, in particular the ideal speech criteria of truth and rightness.

Of the different agendas for the future of CSP, this author finds Clarke and Ulrich, and Midgley’s work on boundary critique, the most attractive. They are strongly predicated on the theory of communicative action which, given the central role played by communication in the cases reviewed in Chapter 2, indicates that critique through communicative action is a relevant approach to adopt. If, as the case study review in Chapter 2 indicates, the success of a multi stakeholder IT project depends on all stakeholders ‘singing from the same hymn sheet’, then it is important that all are given the opportunity to understand and subscribe to the assertions that underpin the project. In other words all participants should have a say in choosing the hymns!

This author finds the arguments set out in Ulrich's vision for critically systemic discourse as the most compelling:

Boundary judgements are constitutive of any systems map or design, regardless of whether the situation at hand is judged to be of a unitary, pluralistic, or coercive nature. How then can we understand the merits and the validity of a proposal without appreciating the selectivity of asserted facts and norms in terms of underpinning reference systems? (Ulrich 2003: 337)

An assertion by Morgan eloquently captures the simplicity of this argument: "We will not be able to reach consensus with others if they have no reason to believe what we say to them and if we morally violate their dialogical status as conversational partners" (2002: 286).

The task which the remainder of this chapter now sets out to address is to propose a framework for operationalising Habermas' ideal speech criteria, thereby contributing a practical element to critically systemic discourse and to CSP. In addressing this task, the discussion will also draw on Midgley's work on boundary critique (Midgley, Munlo et al. 1998; Midgley 2000; Boyd, Brown et al. 2004; Midgley 2006) and will explore the synergies between questioning facts and norms, which are seen to exist in Figure 3-4, and the testing of primary and secondary boundaries.

### **3.2. OPERATIONALISING HABERMAS' THEORY OF COMMUNICATIVE ACTION**

At the heart of Habermas' theory of communicative action is his critique of instrumental reason, which he sees as being afforded primacy over practical reason (Morgan 2002). This imbalance has resulted in a situation where:

...whole realms of social life are co-ordinated in terms of purposive-rational action and functional reason, with the requirement for mutual understanding and consensus being more or less suspended (Kemmis 2001: 96).

In order to redress this imbalance, Habermas conceived of the "ideal speech situation", "where all assertions are equally open to critical scrutiny" (Kemmis 2001: 93) and truth

can emerge. He devised four criteria for assessing the extent to which communicative action measures up to this ideal:

These are that the utterance is intelligible; that its propositional content is true; that the speaker is justified, in terms of certain social norms, in saying what is said; and that he is sincere in uttering it (Jackson 2000: 34).

While these provide a powerful theoretical framework, the challenge remains: How can they be used to facilitate critique in problem interventions? The author could find only one example in the critical systems literature where the ideal speech criteria had been used in action (Gregory and Romm 2001: 460). The case is set in the UK National Health Service during which the authors of the case facilitated a group of stakeholders and attempted to “utilise Habermas’ ideas in a practical context” (Gregory and Romm 2001: 460). They used “a pragmatized version of Habermas’ concentration on different types of validity claims that may be invoked in speech situations” (2001: 453). It was pragmatized partly from the point of view that Gregory and Romm, as facilitators, did not insist that all communicative action be aimed at consensus, which is Habermas’ theoretical ideal. Rather they “aimed at testing understanding by all parties and extending understanding at the same time” (2001: 457). This is close to Ulrich’s idea of boundary-testing which takes place within the confines that consensus is an ideal and one that may never be reached in practice.

Gregory and Romm regarded the “process of gaining communicative competence as being an educative one” (2001: 458) and did not adopt ‘an all or nothing’ stance toward consensus. On the contrary, one of the main aims of the process was to highlight the differences between participants as a means of illuminating key areas for future debate. Another, related, goal was to challenge assumptions that one group of participants might hold about another. This pragmatic approach is one that is endorsed in the partnership literature reviewed in Chapter 2 where an ideal consensus appears largely unattainable, replaced instead by a working solution to which stakeholders can subscribe even if that means making sacrifices along the way.

Gregory and Romm framed Habermas’ four criteria for communicative validity in the following questions:

- Do you understand what is being said? (comprehension)

- Is the speaker being sincere? (sincerity)
- Is the speaker's point acceptable to you? (rightness)
- Do you agree with the speaker's use of information and/or experiences? (truth)

Gregory and Romm, as facilitators, used the questions to intervene, where appropriate, in discussions between participant stakeholders. They were phrased in everyday language in order to make them easier to use in a practical context. The third question is of particular interest to the critical researcher as it seeks to identify the normative framework which the stakeholder uses to evaluate discourse. In their summary, Gregory and Romm conclude that the major advantage of using Habermas' framework was "to raise issues for discussion that might otherwise not have been put on the agenda" (2001: 464). The questions served an emancipatory purpose in that they empowered participants to ask questions and to challenge claims.

While this case provides a practical dimension it lacks depth of detail in terms of how the empirical assertions and normative assumptions contained in the discourse were analysed, as a prerequisite to challenging them. Indeed it is impossible, if they were used during conversation, that they were analysed at all and therefore a lot of depth of meaning was lost. In order to examine how the validity claims inherent in discourse and debate might be analysed in more depth, the chapter now turns to the field of critical qualitative research (Carspecken and Apple 1992; Forester 1992; Carspecken 1996) which, it will be argued, provides a critical epistemology that can be applied in Tourism IT and which can assist in the practical application of Habermas' ideal speech criteria.

### **3.3. VALIDITY CLAIM RECONSTRUCTION**

The author discovered Carspecken's work (1996) on validity claim reconstruction in a paper by Kincheloe and McClaren in which they refer to Carspecken's "brilliantly articulated approaches" and his impressive "exposition and analysis of communicative acts" (1994: 300). This takes place during his field research in an inner-city school in Houston in the US. Borrowing from reconstructive analysis, common to critical ethnographic studies, Carspecken uses a model for reconstructing the validity claims raised during communicative action. This reconstruction takes place on two dimensions – horizontal and vertical.

Claims raised in the horizontal dimension are categorised in three ontological realms – objective, subjective, and normative-evaluative. Validity claims raised in the objective

realm are concerned with defining reality. All organisational actors have access to this objective world, which lends itself more readily to empirical study. It can be described as 'the' world and, in Habermasian terms, brings into question the 'truth' validity criterion.

From a critical perspective, truth, in its purest sense, can only be arrived at through unforced consensus. There can be no objective definition of truth imposed from one group's perspective on another, which in Habermasian terms would constitute distorted communication. However it is probable that different participants will interpret reality in different ways and using different terms. Ulrich (1998) argues that it is impossible to establish a true relationship between statements of facts and reality because the latter is only accessible through the researcher's statements, which are subjective, personal constructs of reality.

In order to avoid distorted communication, objective truth claims should be challenged and opened to full debate. For example in the case of GTI, a number of points may have been put forward, articulating the limitations of Viewdata, the system which GTI sought to replace. This articulation of objective claims is an important step because it helps to establish the rationale for developing a new system. However, while considered by some as the basic truth, these points would nevertheless require debate in order to ensure that there was full dialogue surrounding the arguments for replacing the old technology.

Very often in debate surrounding truth claims, participants will draw on their experience to try and validate their claim (Gregory and Romm 2001). In this respect expertise, often used by those in positions of power to maintain their position, is of less utility, inasmuch that all participants, regardless of status, are in a position where they can debate truth claims based on experiential knowledge. Ulrich (1998) argues that, when it comes to boundary setting, the expert is in no more of a position of authority than anyone else involved in the discussion, a position he reiterates in a more recent paper (2003). Each stakeholder has an equally valid contribution to make – no single view of reality should be allowed to take automatic precedence over another. The current Functionalist approach to IT implementation places the technician in the role of expert, thereby inhibiting the ideal speech situation from the outset.

Claims raised in the subjective realm are accessible only by the person making the claim or by those who have been granted privileged access by that individual. It can be regarded as 'my' world in which other actors debate the 'sincerity' claims made by a

participant. Carspecken (1996) suggests ways in which the researcher can gauge this sincerity:

- Checking recorded interviews for discrepancies and asking the interviewee to explain them
- Comparing what respondents say with what they do – again if there is conflict aim for clarification
- Showing individuals a summary of the investigator’s reconstruction and ask them to comment on its accuracy

The more engaging challenge for essaying communicative action free of distortion is to make subjective claims communicative by position-taking with the persons making the utterance – to try and infer meaning from what they say (Carspecken 1996). This strategy involves trying to understand other perspectives and requires the listener to be open and prepared to be challenged by what is heard. This preparedness requires a temporary suspension of the status quo and traditional mindset. It derives from Habermas’ concept of communicative rationality involving an “intersubjective relation that speaking and acting subjects take up when they come to an understanding with one another about something” (Habermas cited in Gregory and Romm 2001: 459). If the communicant refuses to co-operate and falls back on a position of expertise and power, then distorted communication occurs.

The normative-evaluative realm contains norms, which “legitimise the action” (Forester 1992: 49) that people take. Normative-evaluative claims are claims to universality – the assumption is that this is the way ‘our’ world should be and corresponds to Habermas’ ‘rightness’ criterion. From a critical perspective the normative-evaluative realm is the most significant of the three as it contains the ‘ought’ positions of actors and the ability to identify these positions is the “seed of the critical perspective” (Kemmis and McTaggart 2000: 590). As with the subjective realm, inter-subjective position taking is also required to recognize the validity claims that are raised in the normative-evaluative realm. According to Carspecken, “such recognition is intersubjective because it is a process of framing the normative-evaluative claim from the positions of others” (1996: 144).

Along the vertical dimension, reconstructed validity claims can be placed in either the background or the foreground. Often deep-seated values and norms, taken as ‘givens’, will exist in the background and, from a critical perspective, it is these values and norms



that need to be identified and, if possible, brought to the fore. The vertical dimension provides a framework for analysing the way in which different types of validity claims move in the background-foreground dimension over time, as discourse progresses. These movements are known as “setting shifts” (Carspecken 1996: 116). “An interactive setting is a sort of normative infrastructure” (Carspecken 1996: 116), which dictates the rhythm of discourse. It sets the parameters for the discourse and the assumptions on which it is based.

By bringing validity claims from the background to the fore and challenging them, participants and facilitators can alter the setting. Challenging these backgrounded claims, particularly those in the normative-evaluative realm, is an essential part of the critical approach, as they often determine the assumptions on which discourse is based.

One of the weaknesses of Functionalism and Interpretivism, as discussed in Chapter 2, is that neither is primarily concerned with challenging the assumptions, which often underpin the status quo. As a result the normative infrastructure is often left undisturbed. This situation may suit powerful participants who are content to leave certain norms, which protect their interests, in the background. In a multi stakeholder Tourism IT context the result is a discussion where “selectivity” (Ulrich 2003: 1226) is allowed to prevail. The vertical dimension represents “a flexible and powerful interpretative framework” (Carspecken 1996: 119) for extending inter-subjective understanding of other stakeholders’ positions over time. It also enables those positions to be challenged and setting shifts to be instigated. This will help to bring existing boundaries into question and stimulate further communicative and discursive action.

Carspecken used the technique to analyse the behaviour and discourse of ‘special needs’ students who exhibited learning difficulties and disruptive behaviour in the classroom. In addition to recording the dialogue, he also recorded the behaviour and body language of the students and teacher. This provided him with thick descriptions of the social setting and allowed him to undertake a detailed reconstructive analysis. It suggests that validity claim reconstruction provides a framework for undertaking a detailed reconstruction of validity claims *after* the discourse has taken place. This could potentially complement the way in which Gregory and Romm (2001) deployed the ideal speech criteria *during* discourse and could provide the facilitator with a dynamic and powerful tool for facilitating ongoing rounds of discussion. For example, by identifying backgrounded

claims, the facilitator could ‘flush out’ potentially entrenched positions held by powerful stakeholders and present them for future debate.

### **3.4. VALIDITY CLAIM RECONSTRUCTION AND BOUNDARY CRITIQUE**

The attraction of augmenting the practical application of Habermas’ ideal speech criteria with boundary critique and validity claim reconstruction lies in the natural way in which they complement each other. Validity claim reconstruction provides a framework for identifying and bringing to the fore hidden assumptions that often determine the boundaries of a project. The concept of charting normative setting shifts is a means for assessing the way in which the boundaries of a discussion are changing over time.

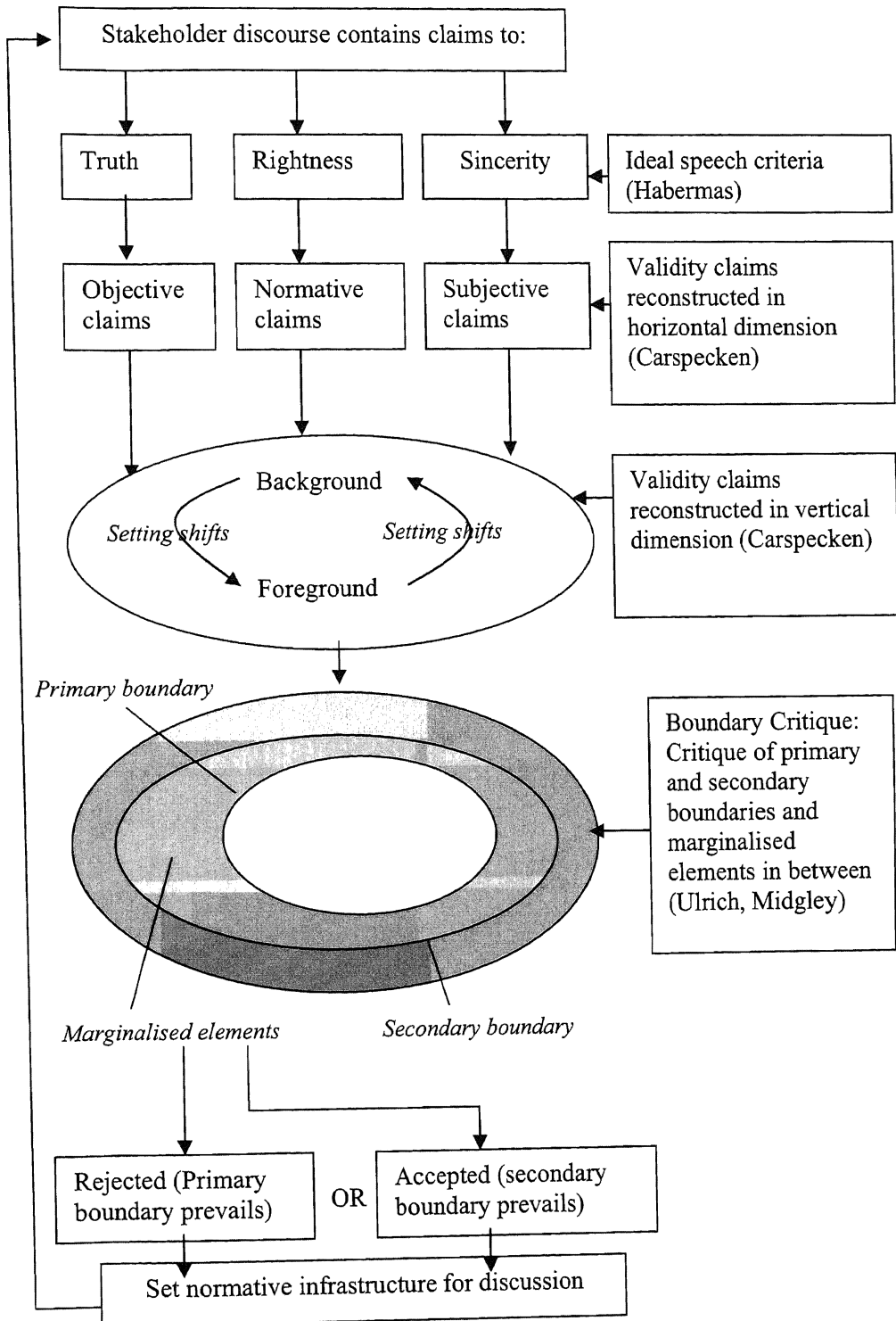
Reconstructing validity claims provides a useful methodology for debating the marginalized elements that lie between primary and secondary boundaries. Yolles (2001) observes that, rather than weakening a system, allowing for and indeed embracing different stakeholder viewpoints can enhance its viability. This view is endorsed by the concept of “constructive conflict” identified by Jamal and Getz (2000: 168) in their case study. It also mirrors the findings of Gregory and Romm (2001) from their NHS case study whereby ongoing debate and differences of opinion between participants were considered to be strengths rather than weaknesses.

The complementary nature of validity claim reconstruction and boundary critique is illustrated in the following model for stakeholder consultation which brings different theoretical perspectives together.

### **3.5. A COMMUNICATIVE MODEL FOR STAKEHOLDER CONSULTATION**

The proposed interdisciplinary model for stakeholder consultation (Figure 3-5) incorporates the main theoretical components that form the basis of this chapter – Habermas’ ideal speech criteria, Ulrich’s concept of systemic discourse and boundary judgements, Midgley’s approach to boundary critique, and Carspecken’s model for reconstructing claims raised during discourse. Rather than try to explain the model in an abstract or purely theoretical way, it will now be applied to critique the Tourism IT cases reviewed in the previous chapter.

**Figure 3-5: Model for stakeholder consultation**



One of the prime causes of failure in the IT cases is the inability for stakeholders to reach a shared normative infrastructure which shapes how the future ought to be. Each stakeholder has their own framework for evaluating an issue and, despite the opportunities for dialogue, there appears to be little mechanism for understanding and, where appropriate, challenging these. The discourse is dominated by technical reasoning and formal structures which prioritises the 'is' over the 'ought'. For example, in BookTownNet the EU structure; in ETNA the existing geographical and political boundaries of English tourism; in GTI the chain of travel distribution dominated by the large vertically integrated tour operators; and in the yield management case the organisational structure of the hotel chain.

However despite these limitations, the cases reviewed in Chapter 2 are all characterised by rich channels of communication – both face to face and non face to face and formal and informal. Using the model presented in Figure 3-5, there is an opportunity to harness this communication and deconstruct it in order to make the boundaries around the issue, transparent, and to engage stakeholders in the 'ought' rather than the 'is'. For example how differently would GTI have turned out if the project had been driven by the sales and distribution priorities of operators rather than the technical terms of reference determined by the project steering group?

The deconstruction of the discourse facilitates the drawing-up of a visual representation of the interests lying behind different stakeholder positions as shown in Figure 3-2 for the EnglandNet case. In the case of ETNA such a map would show the inward looking position of the local authorities which was in sharp contrast to the outward facing concept of networking the tourism information centres.

Exploring the interests behind this position through the deconstruction of discourse with local authorities would increase the likelihood of resolving the marginalised element in such a way that would be acceptable to all parties. This does not necessarily mean absolute consensus, but rather an ongoing process, involving what Jamal and Getz termed as "constructive conflict" (Jamal and Getz 2000: 168). This is a learning process and in critical terms one of intersubjectivity – of trying to identify with another stakeholder's normative frame of reference. Such a process in ETNA may well have resulted in a different set of objectives, perhaps not even relating to the networking of the information centres.

The literature has revealed the importance of engaging with stakeholders over a sustained period of time – a longitudinal rather than cross sectional snapshot of stakeholder requirements. Stakeholder perceptions and normative frameworks will change shape over time due to a number of possible factors: more information becomes available; new stakeholders join the process; interests are sacrificed; resource constraints; etc. The concept of the vertical dimension in validity claim reconstruction instils a critical awareness in the facilitator of this dynamic process.

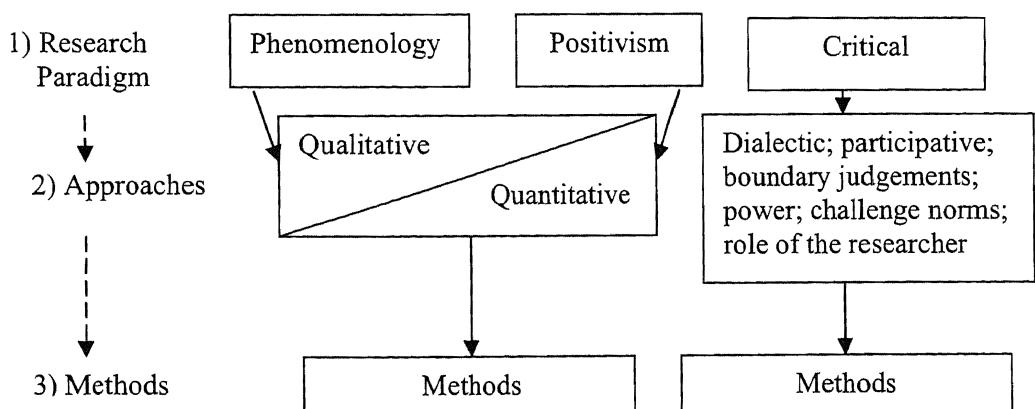
## 4. RESEARCH METHODS

This chapter describes and critiques the methodology (Co-operative Inquiry) and individual methods (Open Space, semi structured interviews, Idealised Design, voice over internet discussion), which were chosen to test the model for stakeholder consultation developed and presented in the previous chapter (Figure 3-5). The methods were critiqued from the perspective of the ‘being critical’ criteria outlined in Chapter 1 (the involved and affected, the ‘is’ and the ‘ought’, and the use of power). Each of the methods is discussed in relation to how it links with different phases of the model in Figure 3-5. However before this, the initial sections will consider paradigm and methodology and how these helped to inform choice of methods.

### 4.1. RESEARCH PARADIGM

Henderson tells us that “The choice of specific research methods is based on assumptions about one’s world view and epistemological approaches” (Henderson 1990: 173) with a Positivist paradigm leading to the choice of quantitative methods, and Phenomenology, qualitative methods (Figure 4-1).

**Figure 4-1: Model of choice in tourism and leisure research**



(Adapted from Finn, Elliott-White et al. 2000)

The Positivist position is characterised by a deterministic view of human behaviour, the search for cause and effect, a value-free researcher, and the confirmation of truth through

empirical evidence (Finn, Elliott-White et al. 2000). These are all descriptors which are at odds with the critically systemic view that Ulrich sets out in his recent paper (2003). Positivism favours the use of quantitative research methods, which Walle (1997) identified as dominating tourism research. He refers to the constraints imposed by its “scientifically acceptable definitions” (1997: 525), which involve ‘trade-offs’ and which include the “sacrifice of possible important data” (1997: 531). While surveys can be an effective research tool in certain contexts, in this thesis they are ill equipped to capture the complexity of communicative discourse and the validity claims which stakeholders make. They lack the dialectical element which is crucial to the critical facilitation approach. This was one of the limitations of the BookTownNet project where the terms of reference for the project were informed in part by a survey of users.

Phenomenology sees reality as multiple and divergent and determined by the actor’s own perspective and behaviour (Henderson 1990 cited in Finn, Elliott-White et al. 2000). It leads to a participant-centred epistemology and the choice of qualitative methods (Figure 4-1). While the methods deployed in this thesis can be broadly described as qualitative, an extra dimension is required in order to fulfil the requirements for being critical as set out in Chapter 1 of this thesis. This requirement has led the author to add the critical paradigm to Finn’s model (Figure 4-1) and reflect on the extent to which methods facilitate the inclusion of the involved and the affected; the capture and reconstruction of dialectic; the subsequent challenging of norms and boundary judgements. It also includes critical reflection on the role of the researcher.

While the acid test for the interpretivist is: “Does this research make the world more understandable?” (Mobily cited in Henderson 1990), critical research has a more emancipatory agenda: “Inquiry that aspires to the name *critical* must be connected to an attempt to confront the injustice of a particular society or public sphere within the society” (Kincheloe and McClaren 1994: 291). While this language might be appropriate for the sustainable tourism partnerships reviewed in Chapter 2 or the education and health sectors where critical approaches have been tested, it does not fit the business world as easily. This is a world which portrays an image of profit-making, power and efficiency.

However Clarke reminds us that:

In business organisations we may not seem to be dealing with the impoverished and oppressed, but many groups are clearly

impoverished in relation to their access to information, and oppressed in so far as they feel unable to express true opinions owing to power exercised within the organisation (1997: 612).

The lack of access to information was clearly a feature of the GTI case where tour operators were not privy to the development process initiated by Galileo, Thomson and Istel. In the EnglandNet project the self catering businesses complained about the unwillingness of the national tourism office to heed their concerns. In this regard these stakeholders can be said to be impoverished. There is therefore a direct link between emancipation and commercial success – stakeholders who freely subscribe to and participate in the aims of a project are more likely to play a central role in its successful delivery.

Summarising Kincheloe and McClaren (1994), Carspecken reminds us, “that critical epistemology will include an understanding of the relationship between power and thought and power and truth claims”, and will also “provide a precise understanding of what values are, what facts are, and how they are interconnected” (1996: 10). From a personal perspective, the process of validity claim reconstruction, borrowed from Carspecken, facilitated a level of understanding, enabling the author to view the process with a critical detachment while at the same time working closely with industry participants. Therefore there is a fine line to tread between being intersubjective - position-taking, and obscuring a critical view through getting too close. This has important implications for using validity claim reconstruction as a facilitation tool whereby it is important for the facilitator to be able to bring fresh perspectives to bear on an issue.

#### **4.2. RESEARCH METHODOLOGY**

Co-operative Inquiry was chosen as the methodology for the inquiry for two core reasons. Firstly, it is “a qualitative approach to research which is inherently participatory and critical, and promotes organisational learning” (Clarke and Lehaney 1997: 611) – this statement is examined below. Secondly, it comes with a set of validity criteria which complement the process of reconstructing Habermas’ ideal speech criteria.

Co-operative Inquiry is iterative and emergent and involves four phases:



1. A group comes together to investigate an area of human activity. A set of propositions is agreed on to guide the investigation, followed by a set of procedures for generating action and recording the data.
2. The group, now in the role of co-subjects engage in the agreed action and record their experiences, comparing them against the propositions in Phase 1.
3. Phase 3 is in many ways a deepening of the process undertaken in Phase 2, with the co-subjects becoming immersed in the action, potentially generating new insights and directions.
4. In the fourth and final phase, the group reassembles to reflect on their original ideas and to plan their next cycle of action.

There are three elements to this process which fit well with the criteria for critique outlined in Chapter 1. Firstly, the membership of a Co-operative Inquiry group is fluid, which allows for the incorporation of the involved and the affected. As new stakeholders are identified, they can be admitted to the process. The second and third elements are supported by the validity criteria that support Co-operative Inquiry (discussed in detail below). Secondly, the process is underpinned by communication and allows for the generation of a dialectic which is central to capturing and reconstructing discourse and identifying the 'is' and 'ought' positions of participants. According to Reason, Co-operative Inquiry enables participants (which includes the researcher) "to *critically see through* their subjectivity" (Reason 1994: 333 emphasizes appears in original). The role of the validity criteria that accompany the process facilitates this transparency. The third and final element relates to the power issue which is central to critique. Co-operative Inquiry affords equal legitimacy to all members of the group and the process of generating dialectic and reconstructing the resulting claims helps to highlight incidences where selectivity on the part of participants threatens to challenge that equality.

The comprehensive range of validity criteria that Heron (1988) developed as part of Co-operative Inquiry gives a critical edge to the methodology. These criteria are based on four worlds and three types of knowledge and provide an additional lens through which to critique the interaction between stakeholders:

- **Posited world** – subjects' knowledge about the world – attitudes and beliefs. It contains **propositional knowledge**
- **Researched world** – this is a formalised statement of the knowledge contained in the posited world. Contains **propositional knowledge**

- **Presented world** – this is the real world, where life is actually played out. It is the experiential touchstone against which the posited and researched worlds can be grounded
- **World of action** – this is the touchstone for the presented world – it gives meaning and helps to create the presented world. It contains **practical knowledge**.
- **Experiential knowledge** - interplay between the posited and presented worlds

The overall validity of a co-operative study lies in the level of coherence between the inquirers' experience and action. This coherence is confirmed in a three-way relationship between research statements, and propositional and presentational knowledge. Coherence does not mean that there has to be unanimous agreement – on the contrary different perspectives and overlapping views on issues increase the validity of the findings. This is similar to the concept of “constructive conflict” which Jamal and Getz identified in their case on community roundtable tourism planning (2000). It provides an interesting perspective from which to reflect on one of the potential challenges associated with a model based on communicative action and open debate: what happens if that debate results in irreconcilable differences?

It is also similar to Ulrich's position that reaching a critical solution does not provide a definitive answer but helps to prevent participants from deluding themselves (1983). The suggestion is that closer and critical examination of differences may reveal them not to be irreconcilable, but may actually result in a heightened state of awareness. This casts power in a different light and takes Ulrich's (2003) stance that coercion is more likely to manifest itself in forms of selective reasoning rather than walking away from the process completely.

Closer examination of the Co-operative Inquiry validity criteria reveals how they can augment a critical facilitation model based on communicative validity claims. For example, in testing Habermas' communicative criteria in an action setting, Gregory and Romm (2001) observed how participants often drew on their personal experience to support truth claims. Therefore in facilitating stakeholder consultation, the evidence presented by participants in support of any claims made would be examined. The potential for the model's augmentation through Co-operative Inquiry is explored more fully in Chapter 6, when reflection takes place on the testing of the model during and after the Open Space workshop.

### 4.3. RESEARCH METHODS

Four distinct methods (Table 4-1) were used to test the model for stakeholder consultation which is contained in the previous chapter in Figure 3-5.

**Table 4-1: Research methods**

Description of method	Rationale / critique of method
<p>(1) Analysis of multi participant debate which took place on the Travemole web site discussion forum on the issue of the Viewdata travel system. The participant discourse (Appendix 1) was deconstructed and reconstructed in different formats – textual, tabular and diagrammatic.</p>	<ul style="list-style-type: none"> <li>➤ To what extent can reconstruction of the discourse on an asynchronous forum enable the preliminary critique of stakeholder positions and interests? This was identified at the end of Chapter 3 as a possible technique for becoming more informed about an issue and for optimising the buy-in from different stakeholders.</li> <li>➤ Illustrates the use of another “sphere” where debate can continue (Ulrich 2003)</li> <li>➤ Helps to identify the involved and affected.</li> </ul>
<p>(2) A one-day seminar facilitated by the Open Space method, involving stakeholders from different positions in the travel supply chain.</p>	<ul style="list-style-type: none"> <li>➤ How effective is Open Space as a critical method for engaging stakeholders?</li> <li>➤ How can this method, previously untested in the tourism domain, be developed?</li> </ul>
<p>(3) In depth face to face interviews with stakeholders who had attended the Open Space event. The interview was semi structured around the Ideal Design method (Ackoff 1981).</p>	<ul style="list-style-type: none"> <li>➤ How can Ideal Design be used to identify stakeholders’ normative positions?</li> <li>➤ Provide a more in depth treatment of the issue with those both involved and affected.</li> </ul>
<p>(4) Group discussion using Voice over Internet Protocol VoIP technology. The group discussion comprised the interviewees from the previous stage.</p>	<ul style="list-style-type: none"> <li>➤ How can a consensus seeking approach be facilitated virtually using synchronous communication?</li> <li>➤ To what extent can VoIP address the issue of non participant attendance identified through the tourism partnership literature?</li> <li>➤ How can the vertical dimension in validity claim reconstruction chart the dynamic shift in the normative infrastructure?</li> </ul>

Source: Author

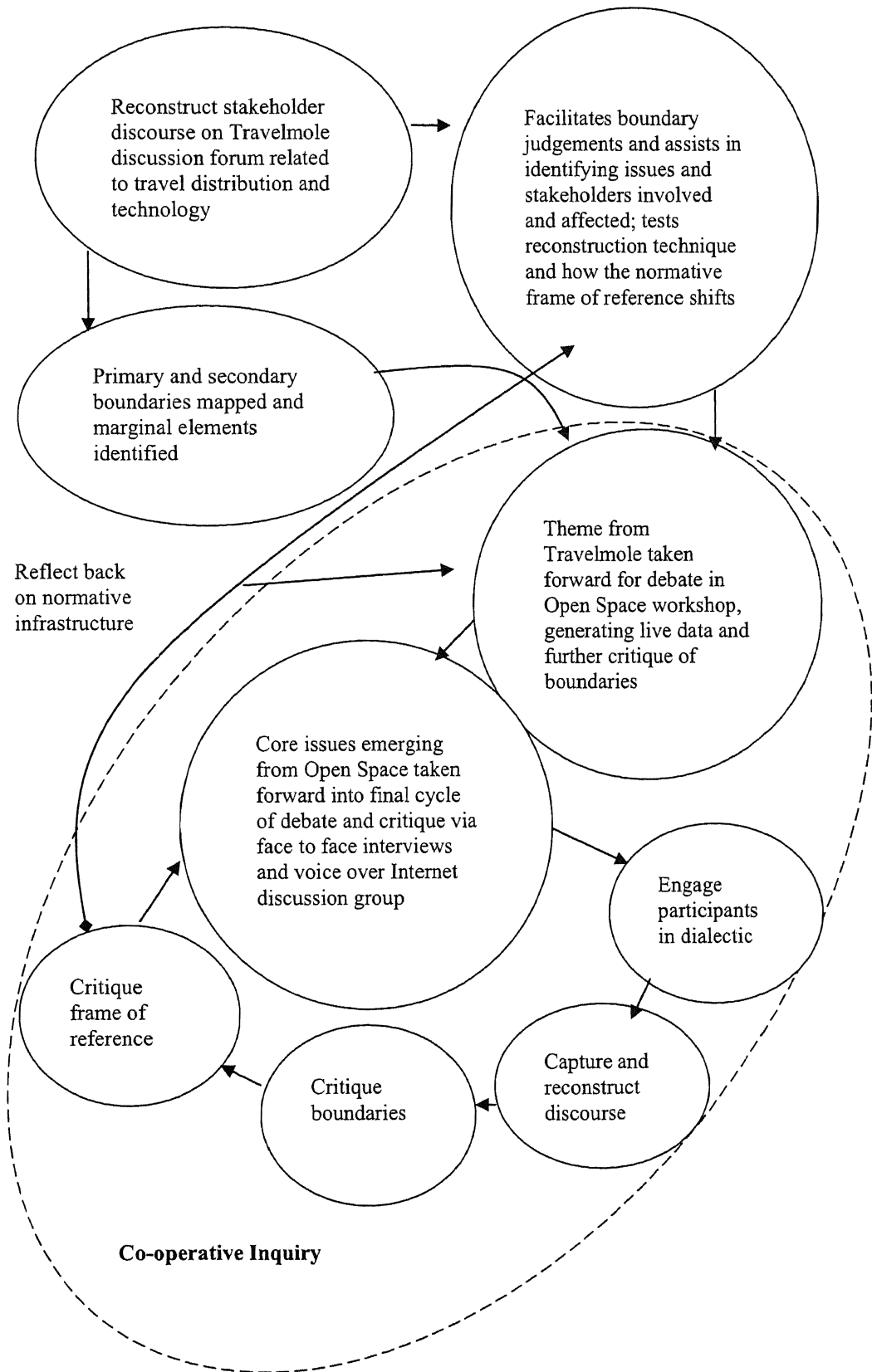
The way in which the methods meet the criteria for critique is contained in the second column of the table and also discussed further below. In addition to describing the methods in tabular style they are also presented in diagrammatic format (Figure 4-2). This format illustrates the way in which the methods link with the theoretical model and also indicate the way in which the methods interrelate. The part of the diagram sectioned off by the broken line represents the co-operative inquiry which comprised several iterative steps.

#### **4.3.1. Travelmole**

The first method involved reconstructing the discourse which took place on a discussion forum on the travel industry news site, Travelmole ([www.travelmole.com](http://www.travelmole.com)). The site features articles on wide ranging travel and tourism issues, and readers have the opportunity to post messages in response to the content and opinions expressed in any forum. Often this prompts responses from other readers and a form of interactive virtual discourse ensues. The Travelmole forum offers a number of advantages in the context of facilitating a critical study:

- It creates a discourse opportunity beyond the confines and limitations of a local discourse situation (Ulrich 2003).
- The discussion provided insights into the boundaries surrounding the issue of travel distribution and technology which was to be the focus of the Co-operative Inquiry in the following phase of the study. This also facilitated the identification of types of stakeholders, and in one instance a specific individual, to invite to the Open Space event.
- It provides a voice to those involved and affected by the issue, with participants allowed to start their own discussion threads in addition to responding to existing posts.
- It enabled experimentation with the way in which the results of the validity claim reconstruction could be presented in a practical and accessible way.
- The relative anonymity of a Travelmole forum allows participants to post messages free from the restrictions that might apply in a face to face setting, where less powerful or knowledgeable participants may be reluctant to contribute.

**Figure 4-2: Research process**



- Travelmole forums are widely accessible and do not create barriers based on size of organisation, background, status or expertise. For example in the discussion chosen for this study, there were contributions from experts in the IT field and from a small travel agent who admitted to not being technologically savvy. In this respect it is a good example of the Internet ‘levelling the playing field’. However the limitation of an electronic post box should be acknowledged in that it may be open in terms of access but this does not mean that each participant’s contributions will produce equal influence.
- The accessibility of the Internet allows participants from anywhere in the world to access and contribute to the discussion which can be a useful means of obtaining a different perspective on an issue. The Travelmole discussion features a message from someone based in the Asia Pacific region, offering a valuable ‘outside’, non-UK perspective. From the point of view of facilitating stakeholder discussion which can challenge the status quo, this is a valuable asset.
- In a similar vein to the previous point, the discussion forums are not necessarily restricted to those working in the travel and tourism sector. A perspective from someone who can share experience of for example, IT implementation in another sector would again be a valuable means of thinking outside the travel paradigm. Similarly the forums are available to both the involved and the affected – a central theme running through critical stakeholder facilitation.
- From a facilitator’s perspective, the discourse is easily captured for later reconstruction. There is no need for a recording device or transcription.

However there was one downside in that it was not possible to test the reconstruction on participants in the discussion. This was due to the fact that the discussion had already taken place and there was not another suitable live IT-related discussion during the timeframe in which the research was being carried out.

#### **4.3.2. Open Space**

Open Space Technology (hereafter referred to as Open Space) is based on a study of myth, ritual and culture in U.S.A. and Africa and aims to “combine the level of synergy and excitement present in a good coffee break with the substantive activity and results characteristic of a good meeting” (Owen 1997: 3). Open Space has been used extensively around the world by organisations, consultants and academics for the facilitation of group processes and meetings including, change management, community projects,

organisational (re) design, and strategy development. A detailed analysis of the method and case studies of its use reported on the Open Space community website (<http://www.openspaceworld.org>), pointed to its ability to facilitate a critical inquiry. Its critical credentials are discussed below after a description of the method.

- *The headline issue*: “An Open Space event usually takes the form of a theme or a question which the participants accept responsibility for tackling in collaboration with each other” (White 2002: 153). The theme for this investigation was “Travel Distribution & Technology: the issues and opportunities”.
- *Opening the event*: The participants are arranged in a large circle in the main meeting room with quarter flip chart paper, marker pens and masking tape in the centre. The circle is significant as it is a means by which equality is encouraged – there is no table or raised area for panellists at the front of the room. One wall of the room is kept completely free of any obstructions. The facilitator makes the introductions, states the theme and provides instructions for what will happen during the day. Then participants volunteer themselves to come into the centre, write down the issue that they want to debate, announce this to the rest of the group and then tape their issue to the wall (referred to by Owen as the “village market place”). They also post the time slot and location for their discussion on the board. By the time this process is finished the group has moved from a blank wall and a meeting with no agenda to a wall covered in issues and an agenda, time slots and breakout sessions, created by the participants themselves.
- *The village market place*: The market place is now open for participants to sign up for the issue / debate in which they are interested. The person who initially suggested the issue is responsible for facilitating the discussion but the way in which this gets done is down to the group itself.
- *The “law of two feet”*: As the discussion sessions convene, there is no rule that each session has to take the time allotted to it or that participants have to stay for the whole session. If they feel they have no more to contribute or to learn, they can move to another parallel session. However there should be a person (s) in the group responsible for submitting a written record / summary of the session. This summary should include a set of action points, designed to work towards proposed solutions to the issue. At the end of the session the summary is printed off and posted on to the “bulletin board” – blank walls around the venue, where participants can read it and add to it if they wish. The law of two feet allows

those delegates who may find themselves stifled in one session, to leave and join another.

- *Catering:* There is no official lunch period or coffee times as in a traditional conference. Participants can take lunch, in the form of a buffet, when it suits them and not when it is convenient for the conference organisers. The principle behind this is to ensure that refreshments do not inhibit the stream of creativity and energy.
- *Concluding and prioritising issues:* The participants reassemble in the main room in a circle and are given an opportunity to vote for those issues, which they consider to be priority. This can be achieved manually or electronically and is designed to facilitate action for the future; countering any potential criticism that Open Space may be “just a talking shop”.

### **Critique of Open Space**

There are a number of elements to Open Space which fit the criteria for critique:

1. The seating in a circle helps to engender a spirit of equality and collaboration and is an antidote to the traditional classroom style layout with its inherent expert-non expert relationship.
2. The invitation to all delegates to come into the centre of the circle and write the issue which is of importance to them respects the contribution that each delegate has to make. This along with the absence of a speakers’ table counters the notion of expertise and is in keeping with Ulrich’s viewpoint that when it comes to the discursive approach to critique, expertise is not a requirement (Ulrich 2003: 326).
3. The concept of the involved and the affected is central to the critical approach and the opportunity for delegates to effectively construct their own agenda for the day enables those affected by an issue to have their voice heard, regardless of their status. There is one caveat here in terms of the event organised during this thesis – namely that it was an invitation-only event with invitations drawn up by the two sponsoring companies. This presented challenges to the author as a critical researcher and required active intervention in order to ensure that small independent travel agents were adequately represented at the Open Space seminar.
4. As participants sign up for issues at the marketplace, a lot of discussion takes place and on occasion some issues are merged because of their similarity and some are abandoned because of lack of interest. Whatever the reason, it relies on



collaboration and communication between participants and involves reaching consensus. It also empowers delegates and gives them ownership of the process – a factor that was absent from some of the Tourism IT case studies reviewed in Chapter 2. It is a process that encourages “emergence and self-organisation” (White 2002: 153).

5. As with the third point, the law of two feet gives an opportunity to those affected by an issue to have their voice heard in different forums even if they are running simultaneously.
6. The display of output in the main hall encourages transparency and again an opportunity for delegates to add a contribution if they wish. It also encourages the cross-fertilisation of ideas. The output must include recommended next steps which facilitates a call to action.
7. The voting process at the close of the workshop facilitates the consensus-seeking approach – participants are put in a position where they have to prioritise the issues.
8. Open Space has four guiding principles which empower participants to take control of the event:
  - a) Whoever comes are the right people
  - b) Whatever happens is the only thing that could have - this second principle, “is a reminder that real learning and real progress will only take place when we all move beyond our original agendas and convention-bound expectations” (Owen 1997: 96).
  - c) Whenever it starts is the right time
  - d) When it is over, it is over
9. A number of measures were used to evaluate the event. Firstly, a simple grid was drawn up on a whiteboard and delegates were invited to rate the Open Space event according to whether they thought it was well organised and if it contributed to their learning objectives. Secondly, the author sought informal feedback from delegates both during and after the event. This was enabled through the participation by the author as a delegate in the event, as opposed to an official facilitator/researcher. It allowed the author to post an issue and facilitate one of the discussions. Thirdly, subsequent press coverage was reviewed in order to gauge reaction to the event in the industry.

### **Creation of Blackboard discussion site**

A discussion site was created on Blackboard, the University of Luton's e-learning platform, to accompany the Open Space event. This was an attempt to capture discourse after the event was finished and the alternative views of stakeholders. It was agreed early in the planning phase that any attempt to tape or video record the discussions as they took place would at best inhibit creativity and at worst endanger the viability of the whole event. There is also the likelihood that the participants would have objected on the basis of commercial sensitivity and the fact that there was a journalist from the Travel Trade Gazette present. There is always the concern among industry executives that they will be misquoted or the wrong impression will appear in press. This underlines further the importance which communication plays in articulating a position.

While Open Space calls for each breakout group to record their findings on a flip chart, this is summarised in bullet point form, which does not encourage the type of natural discourse where validity claims can be raised and debated. Therefore the author created a forum for discussion and delegates were invited at the end of the event to post comments on the site. Email reminders followed this invitation. As an incentive the overall Open Space results were posted on the site within 48 hours, rather than sent out by email, thereby encouraging delegates to visit the site.

Setting up the site was relatively straightforward, enabled by the university's recent investment in Blackboard, an Internet based teaching, learning and communication tool. The email addresses of delegates were supplied to the university's Blackboard administrator who was then able to create accounts for them. Ten discussion forums were set up, structured around the 10 issues raised at the Open Space event. Blackboard presented a number of advantages. Firstly it was relatively easy to create a site as the author had already attended a number of training sessions organised by the university and had set up a number of sites to support the delivery of undergraduate and postgraduate modules. Secondly, Blackboard is stable and secure, supported by the university's servers, helping to guarantee a reliable level of service and access. Thirdly, it is equipped with an interactive discussion board, where users can start and respond to discussion threads.

#### **4.3.3. Semi structured in depth interviews**

Having tested the model in Open Space, the Co-operative Inquiry investigation continued with a series of interviews to investigate the themes that had emerged from Open Space.

The conclusion of Open Space brought a change in the group membership. While one member of the original group stayed in the second round, those who had been involved in the detailed planning of the event no longer felt they had a role to play. As a result additional participants were recruited, according to the following criteria. Firstly, they had attended the Open Space event, thereby providing continuity to the investigation of the issues emerging from it. Secondly, those participants with whom the author had built up a good working relationship were prioritised. This was important as engaging in a Co-operative Inquiry study required a time commitment from busy individuals that was difficult to secure. Thirdly, each participant was able to represent the views of certain groups within the travel industry supply chain – tour operators, travel agents, technology suppliers and companies which fulfil the service of aggregating content for distribution through various channel (both ntl travel and Galileo are examples of such aggregators). This was an attempt on the part of the author to ensure that those involved and affected by the issue were given a voice.

The face-to-face semi structured interview format presented a number of advantages:

- Most importantly, it enabled the author to build up a relationship and rapport with the interviewees and to ‘get a foot in the door’ of their respective organisations. The element of trust is essential particularly when discussing the commercial sensitivities of technology systems (Karcher 1997: 89).
- It allowed a range of non-verbal language to be studied.
- Visual aids were used during the interview, which were essential in helping to understand the problem. In a number of cases powerpoint presentations were obtained which the interviewees had presented either externally at conferences or within their own organisations.
- I was able to view IT systems and additional data that otherwise would have been difficult to access.
- An unanticipated benefit in one case was the opportunity to meet the interviewee’s colleagues who would later become key informants– an example of a snowballing process. These are benefits that accrue from arranging the interviews in-situ on the interviewee’s company’s premises.

The main objective of the interviews was to ascertain the position of each participant through generating discourse, which could then be transcribed and the various claims, reconstructed. The semi structured rather than unstructured format because it allowed the

interviewer to adhere to a basic framework while at the same time giving latitude, during which issues could be investigated in further depth. Idealised Design, part of the Interactive Planning method (Ackoff 1981), was used to broadly structure the interview and each participant was asked by the author to describe his or her ideal system of travel distribution. It represents a system that, “its designers would like to have right now, not at some future date” (Ackoff 1981: 105) and reverses the traditional goals-objectives-ideals structure. Existing constraints (e.g. cost, personnel, and technology) are not taken into account when articulating ideals. Idealised Design was chosen for a number of reasons, related to the way in which it could enable a critical inquiry. These reasons are explained below.

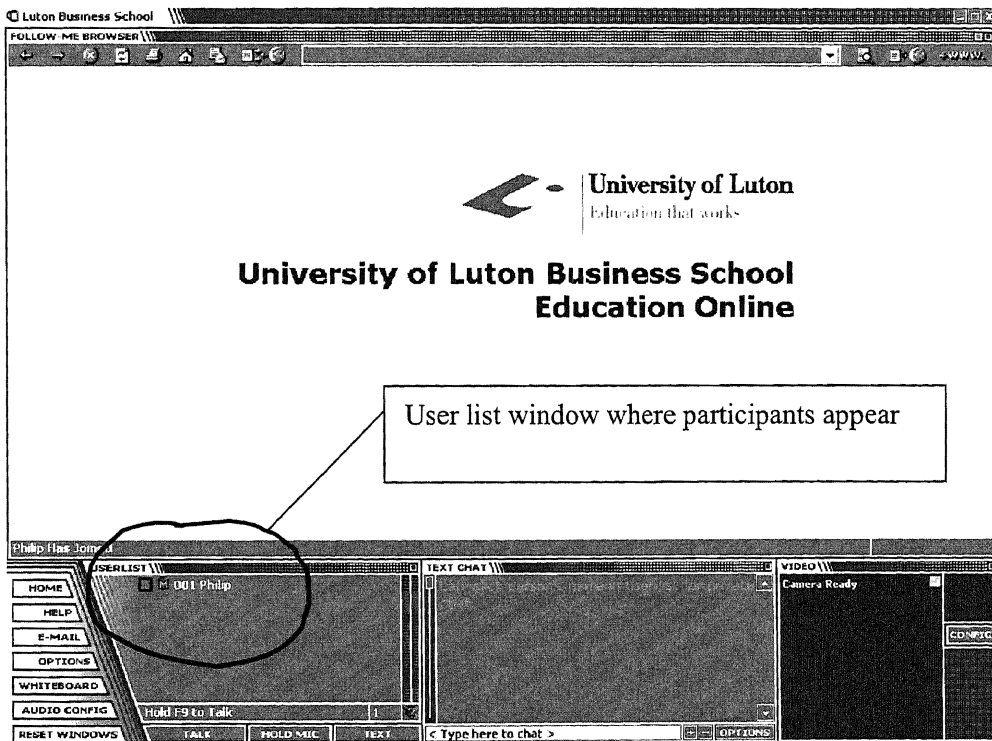
### **Critique of Idealised Design**

- Idealised Design has been identified in critical systems practice as a methodology which complements critical boundary judgements (Ulrich 2003). It was used by Midgley in his facilitation of stakeholders that were involved in and affected by the planning of housing services for the elderly (1998). He used it to generate a checklist of the desired properties of a housing system and it proved a useful method for identifying the normative positions of stakeholders through the expression of their ideals. In the context of this study, participants’ normative positions would be identified through the reconstruction of normative validity claims made as they articulated their ideal system of travel distribution.
- The method also facilitates the articulation of objective claims which can be reconstructed. Participants must demonstrate that their vision is achievable, for example by stating that the technology or business processes exist to make their vision a reality. In this way they are put in a position where they have to support their normative positions with objective claims.
- Both the normative and objective positions of each participant can then be fed into the next step in the cycle of testing, the Voice over Internet group discussion.
- Idealised Design allows each participant to express their ideal regardless of status: “when it comes to considering what a system *ought to be*, no one is an expert at preparing an Idealised Design of it” (Ackoff 1981: 116). Expertise can potentially be used as a barrier to participation and could therefore be associated with the exercise of power by certain stakeholders.

#### 4.3.4. Voice over internet group discussion

Having reconstructed the normative and objective claims of each group participant, the next step involved creating a space in which the whole group could come together and engage in communicative action surrounding the themes that emerged from Open Space and the individual interviews. This was considered an important method in order to create dialectic and a forum where views could be exchanged and claims either accepted or challenged. However the senior profile of each participant, their busy diaries, and their geographic location, presented a major challenge in arranging a mutually convenient time and place. In order to address this, the author convened a discussion group using VIPER (Voice over Internet Protocol Extended Reach), a learning and communication system pioneered at the University of Luton (Figure 4-4).

Figure 4-3: VIPER



Source: Author

VIPER enables participants to engage in real time discussion over the Internet while also having access to text chat and a browser. It is a low cost and convenient method for bringing participants together and generating discourse. During the preceding face-to-face interviews, each participant was given a headset and instructions as to how to download and install the VIPER software.

After participants have logged on to a VIPER session their names appear in the ‘user list’ window. They then press F9 on the keyboard or click on ‘talk’ to speak - VIPER only allows one participant to talk at any given time. When someone else is ‘holding’ the microphone, another participant can signal their wish to speak by right clicking on their name and choosing the ‘question mark’ symbol to signal that they want to ask a question or the ‘exclamation mark’ symbol if they want to make a statement. They can also choose a ‘thumbs up’ or ‘thumbs down’ symbol to indicate their agreement or disagreement with something that the speaker is saying.

#### **4.4. TRUSTWORTHINESS OF THE RESEARCH**

Before commencing this section on the validity or “trustworthiness” (Decrop 2004: 158) of the research, it is important to reflect on the relative (lack of) power of research methods to reveal the ‘truth’: “It is an illusion to believe that research methods and techniques provide secure paths to truth and certainty” (Kemmis and McTaggart 2000: 580). From within the domain of critical theory, Ulrich (1998) holds a similar viewpoint, claiming that we can never justify our findings by referring to our methodology - our findings are selective and that selectivity is in part down to the chosen methodology.

Instead Ulrich sees validity in the extent to which the research illuminates an area of inquiry. This illumination takes place not through absolute consensus among participants in the research but, on the contrary, through overlapping and sometimes contradictory viewpoints. This is an important perspective for critical reflection and one that was considered earlier on Co-operative Inquiry validity criteria. This point of view suggests that the process is every bit as important, if not more so, than the actual findings, insomuch that it instils a culture of communication and debate, thereby helping to lift any veils of secrecy behind which instrumental and coercive approaches might be hiding.

Decrop claims that the issue of trustworthiness is not relevant to critical approaches to qualitative inquiry (2004: 158). He cites the research by Ryan and Martin (2000) into strippers in Darwin as an example of research that is not concerned with trustworthiness but with “possible (radical) changes in the participants’ lives” (Decrop 2004: 158). Here he gives the researcher’s role as an agent for change precedence over the reliability of the research. From this example he reaches the conclusion “that criteria for assessing qualitative inquiry are relative and depend on the paradigmatic stance each researcher takes” (Decrop 2004: 158).

Notwithstanding these observations, this study has deployed the triangulation of theories, investigators, data and methods in an attempt to defend the legitimacy and transparency of the research.

- Data triangulation (use of a variety of data sources);
- Investigator triangulation (several different researchers);
- Theory triangulation (multiple perspectives on a single set of data);
- Methodological triangulation (multiple methods to study a single problem).

The review of empirical evidence, the analysis of IT implementation case studies in tourism, the use of an Internet live discussion forum, and a major action research intervention, provide the core of data triangulation for this study.

The use of Open Space and Co-operative Inquiry both facilitate investigator triangulation. Open Space empowers delegates to effectively conduct their own investigation albeit within a given context. During a Co-operative Inquiry, the “researcher’s voice is one among many” (Phillimore and Goodson 2004: 9), with each member of the group having ownership of the process.

Theory triangulation is illustrated in Chapter 2 whereby the tourism case studies are viewed through different paradigmatic lenses, thereby providing multiple perspectives on the same data. The analysis of the interviews and group discussions in Chapter 6 is conducted through validity claim reconstruction. This form of inductive analysis led to a gradual unfolding of insights and resulted in the generation of new perspectives ‘on the fly’. The ongoing cycles of action and reflection allows for the development of the communicative model while at the same time providing a sound underpinning for the inquiry.

## **5. RECONSTRUCTION OF TRAVELMOLE DISCUSSION**

In this chapter the content of the discourse resulting from an online discussion on the Travelmole web site is reconstructed. The virtual discussion features several participants who debate the future of technology related to the sales and distribution of packaged holidays in the UK - a theme that runs through the empirical study. The reader is referred to Figure 4-2 in order to place the chapter in context of the overall research process.

The chapter has a number of objectives:

- Test the contribution which validity claim reconstruction can make in critiquing the boundaries to which stakeholders subscribe
- Map the primary and secondary boundaries surrounding the issue of travel distribution and technology and identify some of the marginal elements, in advance of the Co-operative Inquiry study
- Identify stakeholders and issues which are involved in and affected by the topic
- Examine the way in which the normative frame of reference / infrastructure changes over the duration of the discourse

On a practical level there are two additional objectives:

- To what extent can the deconstruction of discourse in an asynchronous forum facilitate the critique of the boundaries surrounding an issue?
- How can this analysis be presented in a digestible way that is of use to a facilitator in a live setting?

### **5.1. BACKGROUND TO THE TRAVELMOLE DISCUSSION**

Travelmole describes itself in the 'About' section of its web site as a:

News and Resource Centre for the Travel Industry with over 300,000 registered travel and tourism professionals worldwide (35k in UK, 30k Europe, 210k North America, and 25k in other countries) (www.travelmole.com accessed 23<sup>rd</sup> October 2005).



Travelmole offers its readers the opportunity to post messages in response to articles, which appear on its site. The discussion forums attract lively debate; the one chosen for this study was posted in April 2002, entitled 'Viewdata to stay, say industry heavyweights' (for full text see Appendix 1). Viewdata has been "the industry's communication standard between tour operators and agents for the booking of holidays over the last two decades" (Yeates 2002: 2). However it is considered to be legacy technology incompatible with the Internet and is the subject of constant debate within the travel industry. It is also part of a tour operator-centric model which itself is being questioned. Tour operators package at least two elements of the holiday – flight and accommodation – and sell them, via travel agents, to the consumer. However, as the supply chain model (Figure 1-1) illustrates, this is only one channel to market. There is ongoing discussion in the travel industry centred on finding a replacement for Viewdata and the dialogue taken from Travelmole is part of that. However, as the reconstruction of the validity claims raised during the online debate, demonstrates, it is not a simple technical question of replacing one type of system with another and there are many additional issues and viewpoints which surface during the debate.

The article was read 1676 times, demonstrating the interest in the topic. The debate that was generated by the article featured 15 separate postings from eight contributors and generated a stream of discourse from a range of different stakeholders including travel agent, IT supplier, IT consultant, a travel technology association, and a Tourism IT academic. As such it represented a valid forum in which to test the contribution that validity claim reconstruction can make in providing a critique of discussions surrounding Tourism IT.

The Travelmole debate offered a number of advantages for testing the communicative model. Firstly, it enabled the identification at an early stage of the primary and secondary boundaries that surround the topic, the marginalised elements that lie in between, and the positions of those involved and affected by the issue. The topic of the discussion was related to the IT-enablement of a new system for package holiday sales and distribution – the same topic that would dominate the Open Space event, the face to face interviews and the Voice over Internet group discussion. Secondly, it was a participant-centred process with no researcher involvement, thereby constituting a more trustworthy replication of an industry discussion. Thirdly, the desk-based analysis of discourse on the Internet also has the practical advantage of allowing validity claim reconstruction and boundary critique to be undertaken with little time and cost commitment.

The following section contains a detailed message-by-message reconstruction of the Travelmole discussion. It contains the whole reconstruction, as it was felt that removing part of it to the appendices would inhibit the free flow of discussion and reconstruction. The detailed reconstruction is summarised in section 5-3 further in the chapter.

## **5.2. RECONSTRUCTION OF TRAVELMOLE DISCUSSION**

The reader should note that, when referring to the full text in Appendix 1, the main article is featured at the front, but the chronological order in which opinions were posted start at the back, with David Jones, then Mike Cogan, and so on. The format for the section is as follows:

- The title of the posted message, the time of the posting and the name and affiliation (where available of the contributor).
- Reconstruction of claims in the horizontal dimension – normative, objective and subjective realms and in the vertical dimension - existing in the foreground or the background.
- A summary of the reconstruction, containing critique on the boundaries of the system under discussion and, where appropriate, identifying any marginalised elements.

### **Viewdata to stay, say industry heavyweights**

Time: 18 April 2002

From: Travel Technology Initiative working group (this is the main article and reports on the group's working paper examining technical standards in the UK travel industry)

#### ***Possible normative evaluative claims***

*Foregrounded, Immediate*

“XML ought to be the focus of any debated solution,”

*Less Foregrounded, Less Immediate*

“The TTI ought to be at the forefront of any travel initiatives relating to distribution,”

*Backgrounded, Remote*

“Any development ought to take place within the existing system of travel distribution whereby content is distributed via tour operators, over established networks, through travel agents, to the consumer,” “The discussion ought to focus on the software, which enables packaged holiday distribution,” “The future of holiday distribution is primarily a technical issue,” “The post-Viewdata world is another technical world,” “Viewdata

has served the industry well for many years and is satisfactory at present until something better is adopted,”

***Possible subjective claims***

*Foregrounded, Immediate*

“As a respected industry-wide body we carry out independent research,”

*Less Foregrounded, Less Immediate*

“We understand travel agents’ needs,” “Our research is representative of the wider travel agent community,”

*Backgrounded, Remote*

“We represent the interests of the wider travel industry,” “We possess the technical expertise to speak authoritatively on the subject of Viewdata replacement,”

***Possible objective claims***

*Foregrounded, Immediate*

“The TTI XML initiative offers the best solution to the travel industry’s distribution problems,” “Distributing Viewdata across network providers’ IP networks provides the same benefits as distributing in pure IP format,” “It is not necessary to replace Viewdata to achieve distribution cost savings,” “The ability to carry out multi searching will improve travel agency productivity,”

*Less Foregrounded, Less Immediate*

“Tour operators provide the lead in terms of whether Viewdata will remain or be superseded,” “Travel agents are dependent on the decisions made by tour operators,”

*Backgrounded, Remote*

“The consumer will continue to buy packaged holidays,” “Content will be distributed in the future through packaged deals,”

The normative infrastructure underpinning the TTI position is based on the existing supply chain and the future application of XML. Therefore it is a technical system, which is viewed as the solution to distribution problems. The subjective claim to understand travel agents’ needs could be called into question by the fact that travel agents were not represented in the group of 12. The reference to a ‘post-Viewdata world’ indicates the functionalist position that reality is represented by a technical system.

**Is the TTI wrong?**

Time: 18 April 2002 @ 15:16 PM

From: David Jones, Travelink Systems Limited

***Possible normative evaluative claims***

*Foregrounded, Immediate*

“The focus of the discussion ought to be legacy systems, not Viewdata,”

*Less Foregrounded, Less Immediate*

“The travel industry ought to look to other sectors for examples of new technology use,”

*Backgrounded*

“The solution to the Viewdata problem lies in another technical system,”

***Possible subjective claims***

*Foregrounded, Immediate*

“The continued discussion on Viewdata is damaging the industry as it is not discussing the issues which really matter,”

*Backgrounded*

“I find it difficult to trust TTI research,” “The TTI and the travel industry are too inward looking,” “The travel industry is wasting time as new technology development continues,”

*Backgrounded, Remote*

“I believe technology can solve the industry’s problems,” “The entrenched technology position adopted by tour operators is holding back progress,” “I can quote information about the industry which demonstrates superior knowledge to TTI,”

***Possible objective claims***

*Foregrounded, Immediate*

“The TTI position regarding Viewdata is outdated,” “Legacy systems are inflexible,”

“A new technology distribution system could not operate over legacy systems,”

*Backgrounded*

“While the travel industry deliberates over Viewdata, the technology moves on and the traditional system of distribution could find itself bypassed,” “The existing travel supply chain is outmoded,”

David Jones starts his comment with reference to “raising more questions than answers”. This sets the scene for ongoing communicative and discursive action in which validity claims are raised, challenged and debated. This begins with the negotiation of a setting shift by David Jones as he brings into the foreground the TTI’s backgrounded normative claim that the discussion should be focussed on Viewdata and XML. David Jones places legacy systems on the normative agenda in place of Viewdata, arguing that they ought to

be the focus of the discussion. Legacy systems refer to the reservation systems of the large vertically integrated tour operators (MyTravel, First Choice, TUI and Airtours) who represent a powerful force in the travel distribution system and are influential in the TTI committee. By backgrounding the assumption that the discussion should centre on Viewdata, it could be argued that these tour operators are deflecting attention away from a problem, namely their outdated reservation systems, which they would be responsible for addressing and which would cost millions of pounds. The assumption that packaged holidays can continue to be distributed using Viewdata is a status quo position which suits the tour operators' current position. However David Jones is challenging the boundaries of the discussion and arguing that the inflexibility of the tour operators' reservation systems lays at the heart of the problem, with Viewdata a symptom rather than a cause.

He supports this setting shift with a number of additional validity claims. Firstly, he raises the "truth" claim that legacy systems are too inflexible to support new technology. Secondly, he negotiates a subtler setting shift by bringing the TTI backgrounded subjective claim of credibility and expertise into the foreground, with the comment, "What was it that they got so wrong over the past few years?" Thirdly, his position is supported by the backgrounded objective claim that the current status quo of travel distribution is being outstripped by new technology and as a result travel companies are losing competitive advantage.

### **Wasn't Viewdata's days numbered last June**

Time: 18 April 2002 @ 15:34 PM

From: Mike Cogan, Equinus

#### ***Possible normative evaluative claims***

##### *Foregrounded, Immediate*

"The debate over Viewdata ought to be opened up to a wider audience," "The debate ought to move beyond XML and focus on the industry's lack of investment in technology," "The debate ought to encompass the wider issues of changing public expectations being met by the low cost airlines and direct from travel suppliers,"

##### *Less Foregrounded, Less Immediate*

#### ***Possible objective claims***

##### *Foregrounded, Immediate*

“Lawrence Hunt is inconsistent in his opinion on the future of Viewdata,” “The public’s expectations are changing,” “The traditional tour operators are not investing in the technology required for a Viewdata replacement,” “Viewdata results in expensive selling processes,”

*Less Foregrounded, Less Immediate*

“The traditional tour operators are not keeping pace with changing public trends,” “The existing system of distribution may be bypassed by suppliers, low cost airlines and the public who are buying and selling travel outside it,” “The traditional tour operators will have to compete with the low cost airlines if they want to meet the public’s changing expectations,”

*Backgrounded*

“The tour operators and Viewdata network providers have a vested interest in maintaining the status quo,”

### **Possible subjective claims**

*Foregrounded, Immediate*

“I am in touch with current developments in the travel industry,”

*Less Foregrounded, Less Immediate*

“I don’t trust Lawrence Hunt’s statements regarding Viewdata – his position depends on his vested interests,”

Mike Cogan is supporting Mike Jones’ setting shift and negotiating two of his own. He supports the view that lack of investment in technology is the reason why the industry has an outdated distribution system. In the first of two setting shift negotiations, he brings into the foreground the TTI backgrounded normative claim that the boundaries of the discussion be drawn up around the existing system of distribution, which involves selling holidays packaged by tour operators and sold to the public via travel agents. Mike Cogan implies that the discussion ought to be framed within changing public expectations and the distribution practices of the low cost airlines and “the vast majority of travel suppliers”, all of which throw the validity of the supply chain into question. This widens the boundaries to include additional stakeholders, for example the public (customers), low cost airlines and end suppliers.

In the second negotiation, although he does not elaborate, he brings into the foreground the assumptions, backgrounded by both TTI and David Jones, that the problems associated with travel distribution can be solved by technology. These assumptions are based on a functionalist position whereby a technical language represents post-Viewdata

reality. It is a position based on technical expertise, which could feasibly act as a barrier to “ideal” communication, as many stakeholders in the travel industry will not understand the technical details of XML or legacy systems and therefore feel ill equipped to contribute to the debate. Mike Cogan’s setting shift questions the technical boundaries of discussion so far.

### **Common platform**

Time: 19 April 2002 @ 01:02 AM

From: Sam, Travel Agent (surname and name of organisation not provided in posting)

### ***Possible normative evaluative claims***

*Foregrounded, Immediate*

“There ought to be technology available which can support multi fare searching on the web,” “

*Less Foregrounded, Less Immediate*

“The interests of small players in the travel industry should be better represented,”

“Technology solutions should satisfy the immediate business needs of travel organisations and improve their productivity,”

*Backgrounded, Remote*

“Technology should be a tool to help me undertake my business more effectively,”

“The discussion ought to focus on web distribution, not Viewdata,”

### ***Possible objective claims***

*Less Foregrounded, Less Immediate*

“The discussions surrounding Viewdata and technology are mainly for technology experts and big operators,”

*Backgrounded, Remote*

“There is no technology available, which can support multi fare searching,”

### ***Possible subjective claims***

*Foregrounded, Immediate*

“I don’t feel confident entering this discussion,”

*Backgrounded, Remote*

“I am a little suspicious of technology and the people who sell it and advise on it,” As a small agent I have just as much right to have technical solutions which address my needs,” “I am keen to understand technology and to make a contribution to the discussion,” “I have a role to play as I am in the front line with the customer,”

Sam's posting to the discussion illustrates clearly the concept of the involved and the affected, for as a small travel agent he will be affected by decisions reached by TTI, for example in terms of his ability to search for fares and availability more easily. He represents a group of stakeholders (small travel agents), which hitherto have not been represented within the boundaries of the discussion. There is evidence of distorted communication as he clearly feels at a disadvantage to those who are in a more powerful position, by virtue either of their technical expertise ("technology gurus") or their commercial size ("the big boys"). In order to create the ideal speech conditions free of distortion, Sam's concerns over occupying a less powerful position would have to be addressed and his contributions acknowledged. For example, he supports the earlier setting shift that the discussion ought to focus more on web distribution as opposed to Viewdata distribution. Sam's knowledge of customer needs would make a potentially valuable contribution to the development of technology, which will effectively support an improved system of distribution.

**Sam – look at Dolphin Dynamics and Travelfusion**

Time: 19 April 2002 @ 08:44 AM

From: Mike Cogan, Equinus

***Possible normative evaluative claims***

*Foregrounded, Immediate*

"There ought to be greater awareness and discussion surrounding web based search applications,"

*Backgrounded, Remote*

"Web based search applications represent the future for the travel industry,"

***Possible objective claims***

*Foregrounded, Immediate*

"There will be a greater increase in web based search applications than in Viewdata based ones," "Systems exist today which can enable multi fare searching,"

*Backgrounded, Remote*

"Web based search applications will provide an increasingly better solution for travel agents when compared to Viewdata search applications,"

***Possible subjective claims***

*Foregrounded, Immediate*



“I am keen to help agents with my knowledge of technology,”

*Backgrounded, Remote*

“Travel agents have a valid contribution to make and should be involved in the discussion,”

In this fairly brief posting, Mike Cogan is supporting his earlier setting negotiation by reaffirming his claim that web based technology will outstrip Viewdata and therefore the discussion centred on the latter is increasingly irrelevant. By recommending two systems to Sam, he is adding strength to his backgrounded claims that web-based applications are the best future solution for the travel industry.

### **Viewdata will be here ... what about the Travel Agencies?**

Time: 19 April 2002 @ 16:10 PM

From: Dimitrios Buhalis, University of Surrey

#### ***Possible normative evaluative claims***

*Foregrounded, Immediate*

“The discussion ought to focus on the strategic issues surrounding the intermediaries of the future,”

*Less Foregrounded, Less Immediate*

“Travel suppliers and intermediaries ought to focus on Internet technology,”

*Backgrounded, Remote*

“The discussion is overly focussed on technology at the expense of longer term strategic issues,” “Suppliers and intermediaries, both traditional and emerging, are key stakeholders in the discussion,”

#### ***Possible objective claims***

*Foregrounded, Immediate*

“Viewdata fulfils distribution needs for the present,”

*Less Foregrounded, Less Immediate*

“There are new intermediaries emerging, which will threaten existing ones, in particular travel agencies,”

#### ***Possible subjective claims***

*Foregrounded, Immediate*

“I am able to step outside the immediate discussion and take a longer term perspective,”

“This perspective is partly enabled by my academic standing,”

*Backgrounded, Remote*

“Academics have a contribution to make, through their research and insight, in terms of taking a longer term analytical view,” “I think the present discussion, focussed on technology is short sighted,”

Dimitrios is taking a longer-term academic perspective and in this regard is negotiating a setting shift from a technology-focussed operational discussion to one concerning competitive advantage and future winners and losers. He supports inclusion of the supplier and intermediary stakeholder groups, but also flags up the relevance of emerging intermediaries, and this can also be regarded as an additional setting shift. These intermediaries include online travel companies such as Lastminute.com and Expedia.com that are challenging the traditional “bricks and mortar” businesses.

### **The industry needs.....**

Time: 22 April 2002 @ 11:57 AM

From: Lawrence Hunt, Rapid Travel Solutions (and spokesperson for TTI working group)

#### ***Possible normative evaluative claims***

##### *Foregrounded, Immediate*

“The development of new technology ought to focus on the search function,” The TTI initiative ought to be supported,”

##### *Less Foregrounded, Less Immediate*

“Finding a replacement for Viewdata ought to be a gradual process, not a ‘big bang’ approach,”

##### *Backgrounded, Remote*

“The solutions ought to be aimed at tour operators,” “The best solution remains cast in the ability for travel agents and customers to have improved means for searching tour operator reservation systems,” “The existing supply chain is the framework within which the discussion ought to take place,”

#### ***Possible objective claims***

##### *Foregrounded, Immediate*

“Viewdata is a good order taking tool but not effective technology for searching,” “The TTI initiative can help to reduce distribution costs and improve the customer experience,” “TTI has the interests of the wider industry at heart,”

##### *Less Foregrounded, Less Immediate*

“The TTI initiative is not receiving the support it deserves,”

##### *Backgrounded, Remote*

“Tour operators are the central players in the distribution chain,”

***Possible subjective claims***

*Foregrounded, Immediate*

“We are at the cutting edge of the industry, obtaining feedback from stakeholders at different stages in the distribution chain,” “We have a track record and therefore credibility in this area,”

*Less Foregrounded, Less Immediate*

“I am aware of the advantages and am an advocate of new technology,”

Lawrence Hunt is reaffirming his support for TTI and backing this up with anecdotal reference to the cost savings that can be achieved by developing new search tools based on the TTI standard. By referring to feedback from different stakeholders and to past contracts with tour operators, Lawrence Hunt is making a subjective play for credibility, which had been challenged in previous postings by David Jones and Mike Cogan. While acknowledging the need for new technology to replace Viewdata he has not responded to earlier setting shifts by David Jones relating to tour operator reservation systems and by Dimitrios Buhalis relating to the need to consider new intermediaries. Lawrence Hunt is continuing to confine his discussion to the established supply chain of tour operators, travel agents and consumers. He also does not respond to Mike Cogan’s setting negotiation that the discussion ought not to focus purely on XML, but fairly vaguely refers to the implied savings that can be made by supporting the TTI initiative. Overall this is a relatively defensive reply from Lawrence Hunt, maintaining a status quo position, and refusing to acknowledge any of the setting shifts. It is clear from Lawrence Hunt’s references that tour operators are core to his company’s business. Therefore one has to question his subjective position and his vested interest in supporting the tour operator position.

**The transition from Viewdata continues ..**

Time: 24 April 2002 @ 12:01 AM

From: Edward Spiers, Anite Travel Systems

***Possible normative evaluative claims***

*Foregrounded, Immediate*

“There ought to be a more scientific way of measuring the demise of Viewdata,”

*Backgrounded, Remote*

“There ought to be benchmarks for measuring the ROI on Viewdata replacement,”

“The discussion should be framed within the traditional supply chain,”

***Possible objective claims***

*Foregrounded, Immediate*

“Agents are moving away from Viewdata to search for holidays,” “The network companies are moving to a sale-based, rather than time-based, charging model,” “Tour operator reservation systems are moving from Viewdata to XML,” “Viewdata runs through the core of the package holiday distribution system,” “The technology exists to replace Viewdata,” “Viewdata replacement will be a gradual process,” “Viewdata is not a current constraint on the travel industry,”

***Possible subjective claims***

*Foregrounded, Immediate*

“I am taking an objective and analytic approach to the analysis of Viewdata,”

*Backgrounded, Remote*

“I am an authority on the use of Viewdata in the package holiday industry,”

Ed Spiers makes a useful contribution to the discussion through the anecdotal evidence contained in his objective claims that travel agents and tour operators are gradually moving away from Viewdata. His posting represents a subtle setting shift in that he is introducing the need for more objective measurement of the decline of Viewdata through the questions that he poses. Of course these questions, which represent benchmarks for measuring the transition from Viewdata, are “truth” claims and therefore open to debate. However inasmuch that they are variables for measurement they provide a useful debating point. They can also be verified through information. For example, how many agents now use Viewdata terminals? However it is interesting that his variables are exclusively technical in nature and do not refer to the fact that Viewdata is an integral part of the “culture” of selling package holidays. This is somewhat paradoxical considering his later incisive point that Viewdata is more than just a technical system but represents part of the status quo of package holiday distribution. Therefore it could be argued that changing attitudes on the part of travel agents and tour operators are an equally valid benchmark. Ed Spier’s contribution is framed within the status quo of package holiday distribution and, similar to Lawrence Hunt, Ed does not acknowledge earlier setting shifts that new intermediaries and new technology are bypassing the traditional supply chain or that the tour operator reservation systems are part of the problem. It could be argued, in a ‘devil’s advocate’ role, that Ed is suffering tunnel vision and that his views are embedded in the existing supply chain.

**Ask sales staff what they think**

Time: 24 April 2002 @ 17:16 PM

From: Mike Cogan, Equinus

***Possible normative evaluative claims***

*Foregrounded, Immediate*

“Travel sales staff ought to be central to the discussion,” “The discussion ought to focus on the central problem of outdated tour operator reservation systems,”

*Less Foregrounded, Less Immediate*

“The tour operators ought to replace their legacy systems,” “The TTI focus on XML is detracting from the core issue – the replacement of tour operator legacy systems,”

***Possible objective claims***

*Foregrounded, Immediate*

“Viewdata constrains the industry through time and money costs,” “The large tour operators are struggling to implement new technology to meet customer needs,”

*Backgrounded, Remote*

“XML is only a small part of the solution to reducing selling costs,”

Mike Cogan accepts the majority of Ed’s truth claims, but challenges the claim that Viewdata is not a constraint on the industry. He supports this challenge with reference to the need for add-on technology providers and the inability of Viewdata to support on-line brochure content. Mike negotiates a further setting shift by advocating a widening of the boundaries to include sales staff who work in travel agencies and call centres. Here he is making a case not for those involved in the discussion regarding the replacement of Viewdata but rather for those affected by it. Arguably he is asking that those who do not yet have an input to the debate should be given a voice. This setting shift underlines the interconnected nature of the bottom and top half of the proposed framework whereby the raising and challenging of validity claims will lead to the shifting of project boundaries. Mike Cogan also reiterates his earlier opinion that XML is only a small part of the solution and reinforces his backgrounded assumption that the TTI position is too heavily based on the development of XML. He upholds the earlier setting shift that legacy systems are principally to blame and interprets Ed as having the same opinion. This is a mischievous interpretation, as Ed did not make this claim and indeed challenges this claim in a later posting.

**Lay off Anite please!**

Time: 30 April 2002 @ 19:26 PM

From: David Jones, Travelink Systems Limited

***Possible normative evaluative claims***

*Foregrounded, Immediate*

“There ought to be a replacement for Viewdata,”

***Possible objective claims***

*Foregrounded, Immediate*

“There are problems with legacy systems as evidenced by their widespread criticism,”

“The Anite product “@COM” is a potential replacement for Viewdata,”

*Backgrounded, Remote*

“Viewdata can only be replaced when legacy systems are replaced,”

This brief posting by David Jones pursues his previous setting shift that legacy systems and the replacement of Viewdata are inextricably linked. It appears likely that David Jones is looking to provoke a response from a member of the discussion group, as he is singling out Ed Spiers’ company, Anite, as leading the way in finding a replacement for Viewdata. He has altered the pace of the discussion by posing a direct question to a member of the group.

**Viewdata and Legacy Systems: Anite’s product strategy**

Time: 2 May 2002 @ 11:47 AM

From: Edward Spiers, Anite Travel Systems

***Possible normative evaluative claims***

*Less Foregrounded, Less Immediate*

“The best solution at the moment is an integration of old and new technology,”

*Backgrounded, Remote*

“It is not right that the big tour operators control the pace of Viewdata replacement,”

“The big bang replacement approach is not feasible,”

***Possible objective claims***

*Foregrounded immediate*

“Viewdata and legacy systems are not a constraint,” “New technology and legacy systems can exist side by side,” “Legacy systems are capable of delivering high volume bookings,” “The transition from Viewdata to new technology is happening,”

*Less Foregrounded, Less Immediate*

“Tour operators control the pace of Viewdata replacement,”

*Backgrounded, Remote*

“The perception of others in the discussion that Viewdata is not being replaced is wrong,” “Other members of the discussion are advocating a big bang replacement approach,”

***Possible subjective claims***

*Foregrounded, Immediate*

“Our company is committed to new technology,” “We are proactive and forward-thinking, while at the same time committed to practical solutions,”

Ed is negotiating a setting shift of his own and bringing into the foreground the backgrounded assumption that legacy systems represent the main barrier. His counter claim is that legacy systems and new technology can sit comfortably side by side and uses the MyTravel example as evidence to support this. Explaining that the @COM suite of products are designed to sit alongside legacy technology provides further support. In offering this explanation he is also correcting David Jones’ previous objective claims.

**One last question**

Time: 2 May 2002 @ 12:30 AM

From: David Jones, Travelink Systems Limited

***Possible normative evaluative claims***

*Foregrounded, Immediate*

“We ought to hear from other tour operators on the debate,”

***Possible objective claims***

*Foregrounded, Immediate*

“The migration path for some tour operators will not be as painless as Ed Spiers implied,”

***Possible subjective claims***

*Foregrounded, Immediate*

“I am keen to establish the truth behind objective claims,”

David Jones is seeking clarification on Ed Spiers’ objective truth claims and in doing so he is seeking to widen the boundaries of the discussion to include tour operators that are FSS or Travellog clients. His use of the term “forced” implies coercive behaviour on the

part of Anite as does his implication that FSS or Travellog clients would not be able to express their views in public.

**New economy reservation system already available**

Time: 2 May 2002 @ 17:02 PM

From: Arvinder Virdee (Worldnet)

***Possible normative evaluative claims***

*Foregrounded, Immediate*

“The travel industry in the UK ought to look outside the traditional supply chain to new suppliers,”

*Backgrounded, Remote*

“The discussion ought to be taking a more global perspective,” “UK tour operators ought to take a more radical approach and adopt new technology systems,”

***Possible objective claims***

*Foregrounded, Immediate*

“Despite reference to a ‘new’ reservation system, Anite is trailing other technology suppliers,” “The new technology system from TWN can meet the needs of UK tour operators,”

*Backgrounded, Remote*

“The discussion is too inward looking on the UK supply chain,” “Those UK companies which take a slow migratory path will lose competitive advantage to operators which are prepared to adopt new technology outright,”

***Possible subjective claims***

*Foregrounded, Immediate*

“I am providing an international perspective on what was formerly a UK-based discussion,”

A new entrant to the discussion, Arvinder, is challenging the status quo of the discussion based on UK only operators. This in effect represents a setting shift, which suggests a widening of the boundaries to include technology suppliers and operators from outside the UK. He is challenging the Anite view that tour operators should develop new technology alongside their existing technology and suggesting that they take a more radical approach and adopt new technology outright.



## **The Mould is Being Broken**

Time: 2 May 2002 @ 19:22 PM

From: Mike Cogan, Equinus

### ***Possible normative evaluative claims***

*Foregrounded, Immediate*

“New entrants such as TWN ought to be embraced and have a contribution to make to the debate,”

*Less Foregrounded, Less Immediate*

“The UK travel industry needs new perspectives and new ideas to shake the status quo,”

### ***Possible objective claims***

*Foregrounded, Immediate*

“Viewdata and legacy systems cannot present product content alongside price and availability in the same way that new technology can,” “XML is only masking the real problem – outdated reservation systems,”

*Backgrounded, Remote*

“The tendency of the established UK travel industry is to dismiss new entrants and maintain the status quo,” “The solution to the problem lies deeper than developing a technical specification that can facilitate business to business trading – what is needed is a fundamental strategic shift involving organisational and cultural change,”

### ***Possible subjective claims***

*Foregrounded, Immediate*

“I welcome change and new perspectives,”

Mike, as before with travel sales staff, is suggesting that new perspectives are healthy for the debate and as such is advocating a widening of the boundaries to admit additional stakeholders. The previous posting by Arvinder also adds weight to his truth claim that old and new technology does not sit comfortably alongside each other. However he does not offer any concrete example to illustrate this objective claim. His choice of words: “XML is ‘only’ a structured data exchange” carries a dismissive tone and points to his now backgrounded assumption that the TTI focus on XML is masking the true problem – legacy systems.

## **Legacy Systems Strategy ...**

Time: 3 May 2002 @ 18:20 PM

From: Edward Spiers, Anite Travel Systems

***Possible normative evaluative claims***

*Foregrounded, Immediate*

“Tour operators should be adopting a migratory path to new technology implementation,”

***Possible objective claims***

*Foregrounded, Immediate*

“New technology solutions can sit alongside existing systems,” “Anite products are designed to achieve such integration,” “The tour operators using FSS and Travellog have accepted this,” “Legacy systems are flexible enough to work with new technology,” “MyTravel, Superbreak and Virgin are examples of new technology working successfully with legacy systems,” “New technology systems cannot match legacy systems for scalability and functionality,” “The legacy systems will move to both new technology and scalability and functionality before new systems companies move to full scalability and functionality,”

*Backgrounded, Remote*

“Advocates of the big bang approach to replacement are irresponsible and misrepresenting the facts,”

***Possible subjective claims***

*Foregrounded, Immediate*

“I am a cautious person who does not believe in throwing the baby out with the bath water,”

This posting by Ed Spiers contains a large number of objective truth claims and on the subject of the integration of old and new technology, he and Mike Cogan have reached a stalemate. This is an essential point to resolve, as it is central to determining which way the industry should evolve. From a critical perspective this resolution must be achieved through open debate free of distortion as opposed to arbitrary decisions reached by a closed group in positions of power. Distortion can take different forms and includes reference to information by certain stakeholders, which other stakeholders are not privy to. Arriving at the truth regarding the integration of old and new technology will require further debate and clarification, in particular where specific terms are used. For example, what does Ed mean by “new distribution model” and “full scalability and functionality”? Can he demonstrate how the tour operators, MyTravel, Superbreak and Virgin achieve the integration of old and new technology? Is there evidence, publicly available, which

demonstrates that the revenues and operational scale of new system operators do not match those of the established tour operators using legacy systems? Are these two indicators relevant to the discussion?

### 5.3. SUMMARY OF RECONSTRUCTIVE ANALYSIS

The detailed reconstructive analysis has produced a dense amount of ethnographic-style reportage and the author is conscious that, in order for this approach to work in practice, the results would have to be condensed into a more accessible format. To this end the analysis has been summarised in both tabular and diagrammatic form.

#### 5.3.1. Reconstruction in tabular format

The first step in summarising was to clarify the normative and objective claims which each participant raised during the discourse. This summary is first presented in tabular format (Table 5-1). The reasons for not reconstructing the subjective claims are discussed below.

**Table 5-1: Stakeholders' reconstructed claims**

Stakeholder	Claims	
	<i>Normative</i>	<i>Objective</i>
TTI (Trade body)	(1) The discussion ought to be framed within the existing system of travel distribution. (2) The discussion ought to focus on the software (Viewdata and XML), which enables packaged holiday distribution (3) The travel industry ought to move from a Viewdata world to an XML world.	(1) Customers will continue to buy travel through the existing supply chain. (2) Tour operators will continue to dominate the supply chain. (3) Viewdata is not a barrier to package holiday distribution. (4) XML offers an effective solution to the distribution problems facing the industry.
David Jones (IT supplier)	(1) The focus of the discussion ought to be the hardware (legacy systems), not the software (Viewdata). (2) Tour operators are central to the problem and the solution in deciding whether or not to replace their reservation systems. (3) Additional tour operators should be brought into the discussion.	(1) Legacy systems are not flexible enough to support a new technology distribution system. (2) The existing supply chain will be bypassed. (3) There is widespread criticism of legacy systems. (4) The Anite product "@COM" is a potential replacement for Viewdata.
Mike Cogan (IT supplier)	(1) The discussion ought to be framed within changing public	(1) Viewdata adds cost to the selling and distribution

	<p>expectations and the distribution practices of the low cost airlines and ‘the vast majority of travel suppliers’.</p> <p>(2) The tour operators ought to play a major role in initiating a Viewdata replacement by changing their core reservation systems.</p> <p>(3) Travel sales staff ought to be central to the discussion.</p> <p>(4) New entrants ought to be brought into the debate.</p> <p>(5) There ought to be a major structural rethink of the supply chain.</p>	<p>processes.</p> <p>(2) The tour operators and Viewdata network providers have a vested interest in maintaining the status quo.</p> <p>(3) The tour operators’ lack of investment in technology is the primary reason for an inefficient distribution system.</p> <p>(4) Viewdata constrains the industry through time and money costs.</p> <p>(5) Web-based technology will outstrip older technology.</p> <p>(6) Viewdata and legacy systems cannot present product content alongside price and availability in the same way that new technology can.</p>
Sam (Travel agent)	<p>(1) The discussion ought to focus on web distribution, not Viewdata.</p> <p>(2) Technology should be a tool to help small businesses run their operation more effectively.</p>	<p>(1) There is no technology available, which can support multi fare searching.</p>
Dimitrios Buhalis (Academic)	<p>(1) The discussion is overly focussed on technology and should instead be seen in the context of a changing supply chain where new intermediaries are emerging.</p>	<p>(1) Viewdata fulfils distribution needs for the present.</p> <p>(2) New intermediaries threaten travel agents.</p>
Lawrence Hunt (TTI)	<p>(1) The solution should enable agents and customers to more effectively search tour operator reservation systems.</p> <p>(2) It is right that tour operators are placed centrally in the supply chain.</p> <p>(3) The discussion ought to be framed within the existing supply chain.</p>	<p>(1) Viewdata is a good order taking tool but not effective technology for searching.</p>
Edward Spiers (IT supplier)	<p>(1) The discussion ought to be framed within the existing supply chain.</p> <p>(2) The present solution ought to be based on an integration of old and new technology with a gradual phasing out of the former.</p>	<p>(1) The transition away from Viewdata is taking place.</p> <p>(2) This transition is taking place in such a way that it does not place a constraint on package holiday sales and distribution.</p> <p>(3) New technology and legacy systems can exist side by side.</p> <p>(4) MyTravel, Superbreak and Virgin are examples of new</p>

		<p>technology working successfully with legacy systems</p> <p>(5) Other members of the discussion carry the perception that Viewdata is not being replaced and this is wrong.</p> <p>(6) Tour operators control the pace of Viewdata replacement.</p> <p>(7) New technology systems cannot match legacy systems for scalability and functionality</p>
Arvinder Virdee (unknown)	<p>(1) The discussion ought to be taking a more global perspective.</p> <p>(2) The travel industry in the UK ought to look outside the traditional supply chain to new suppliers both within and outside the UK.</p>	<p>(1) The new technology system from TWN can meet the needs of UK tour operators.</p> <p>(2) Those UK companies, which take a slow migratory path, will lose competitive advantage to operators, which are prepared to adopt new technology outright.</p>

Source: Author

The table does not include a column for subjective claims. While the author attempted to reconstruct the subjective claims of each participant, in reality this was a difficult exercise and, in the author’s opinion, one of limited use. Subjective claims are personal claims of truthfulness and sincerity and are only accessible by the person making that claim. They undoubtedly have their use in certain settings, for example, Carspecken (1996) makes considerable use of subjective claim reconstruction in his observation of school classroom behaviour. However they were the most difficult to reconstruct, particularly in a virtual environment where the researcher/facilitator is unable to observe physical cues such as body language, tone of voice and physical interaction with other participants, which give insights into the subjective state of the person making the claim.

It is the initial opinion of the author that subjective claims would be more significant during communicative action over a longer period of time when there are high levels of face-to-face contact and where the subjective positions of stakeholders would have the opportunity to emerge. In that context the consistency of participant behaviour over time could be used as an effective way to measure sincerity.

Presenting the reconstruction in tabular format has a number of advantages. Firstly, it enables the researcher/facilitator to present an at-a-glance summary of the normative-

evaluative and objective validity claims made by each participant. Secondly, by placing the normative-evaluative and objective claims side by side, it allows the mutually supportive nature of the two to be observed. For example the normative position of the TTI that, “The travel industry ought to move from a Viewdata world to an XML world” is supported by the objective claims that, “XML offers an effective solution to the distribution problems facing the industry”.

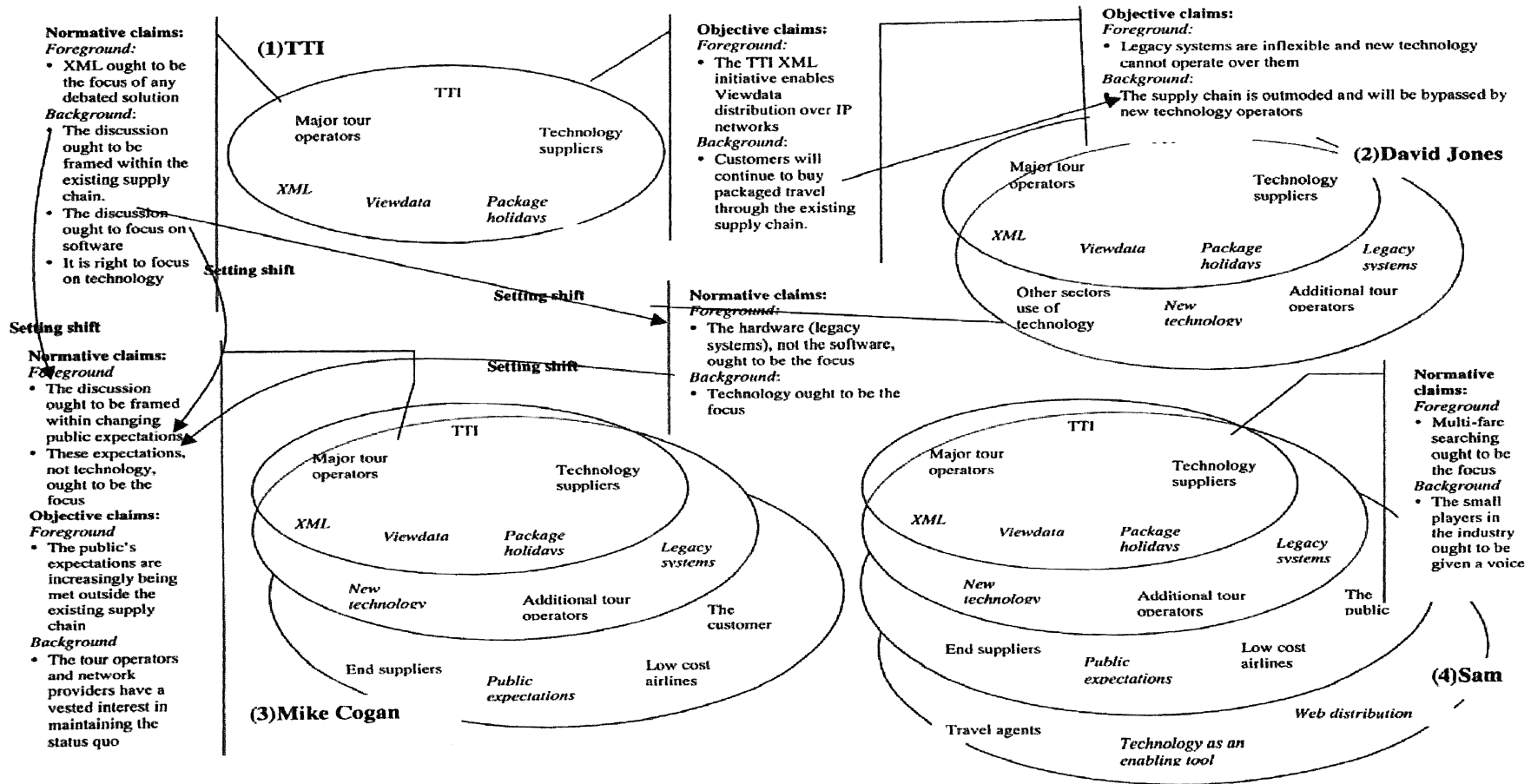
Thirdly, it shows where participants differ on their interpretation of the truth. From a critical perspective, objective truth claims are only one person’s perception of the truth, as revealed in the following opinion by Carr: “Facts are always facts as interpreted by prior assumptions and beliefs” (1986: 74). Therefore objective claims are subject to debate in the same way as normative ones. For example the debate between Ed Spiers and Mike Cogan reveals that the ability of legacy systems to support new technology is a marginalised element, requiring further information and debate.

On the downside, presenting the findings in a linear-style tabular format fails to capture the dynamic way in which claims move along the vertical dimension from the background to the foreground and how setting shifts are negotiated. Secondly, it does not represent the ways in which the boundaries of the discussion change in terms of whom and what should be included in the discussion. Boundary critique was identified in Chapter 3 as a useful theoretical construct to strengthen the communicative framework and therefore it is important that any analysis reveals the way in which boundaries move during discourse. The ability as a researcher/facilitator/moderator to identify and, where necessary, negotiate setting shifts is a main strength of validity reconstruction and of the framework. For example a critical facilitator might want to challenge the normative position of a participant who occupies a more powerful position than other participants. Alternatively he might want to change the setting and pose a new normative position that challenges what those in positions of power are trying to establish as the status quo.

### **5.3.2. Reconstruction in a boundary flow diagram**

In order to address the limitations associated with presenting the findings in tabular format, the reconstruction of claims made by the first four participants in the discussion is presented in a flow diagram (Figure 5-1). This captures the way in which the boundaries of the project shift as normative-evaluative claims are moved from the background into the foreground and challenged.

Figure 5-1: Reconstruction of Travelmole discussion



The diagram reveals how a major setting shift is negotiated in the short space of the first two postings. David Jones brings into the foreground the TTI backgrounded normative claim that the discussion ought to revolve around software (XML), claiming that hardware issues (legacy systems) are central instead. He supports this challenge with the objective claim that legacy reservation systems are incapable of supporting new technology – in other words this issue needs to be discussed prior to other technological development. In the course of negotiating this setting shift, David Jones has widened the boundaries of the discussion in terms of whom and what should be included. It puts the issue, ‘new technology versus legacy systems’ on the discussion agenda. Although they did not participate in this discussion it is likely that the tour operator members of TTI may wish to challenge David Jones’ objective claim regarding their reservation systems. Indeed Ed Spiers, whose company delivers tour operator solutions does refute David Jones’ claim, later in the discussion.

David Jones, in an attempt to support his objective claims, makes reference to other industry sectors. Therefore it would be informative for a facilitator to invite an organisation representing one of these sectors to join the debate and discuss the ways in which they implement new technology. For example, was it essential for them to replace their core systems in order to implement more effective new technology solutions? What lessons, if any, can the travel industry learn from their approach? Within the travel industry itself, David Jones suggests that there are tour operators who are not encumbered with legacy systems and again it would be informative for them to submit their evidence.

In his response, Mike Cogan negotiates two setting shifts, challenging both TTI and David Jones. Firstly, he brings into the foreground the TTI claim that the discussion ought to be framed within the existing supply chain, arguing instead that customers’ needs are being met outside this framework and that changing customer expectations ought to be the terms of reference for the discussion. Mike challenges the backgrounded claims of David Jones and TTI that the discussion ought to be technology centric. Mike Cogan’s setting shifts have widened the boundaries of the project, placing the customer and his changing expectations within the frame. His posting also flags up end suppliers and low cost airlines as potential contributors to the debate. It is arguable that the backgrounded claim relating to vested interests should be categorised as subjective instead of objective in that it relates to the sincerity of participants. Unlike objective truth



claims, these subjective claims are accessible only by those making them and their validity is much more difficult to assert.

The posting by Sam brings an additional dimension to the discussion in that he/she does not hail from a technology background like the other three participants featured in the discussion and adopts a business perspective. As a travel agent, Sam is interested in how technology can work for his/her business. Sam's involvement in the discussion widens the boundaries still further to include travel agents as potential stakeholders, and sales and distribution over the web as a subject for debate. This illustrates how the boundaries can be widened not only by new stakeholders but also by new topics for discussion.

Figure 5-1 reveals how the horizontal and vertical dimensions of validity reconstruction provide "a flexible and powerful interpretative framework" (Carspecken 1996: 119) for identifying and debating who and what should be involved in the stakeholder facilitation process. In this respect validity reconstruction encourages critical reflection on the positioning of the boundaries, which surround discussion and decision-making. Over the course of this virtual Internet discussion the boundaries have been rolled out considerably. By the end of the fourth posting by Sam there are considerably more potential issues and stakeholders involved than at the end of the first which focused on tour operators and the software they can use to distribute packaged holidays.

#### **5.4. CRITICAL REFLECTIONS**

The problems identified in Chapters 1 and 2 related to how Tourism IT implementation lacked an effective mechanism for critically understanding stakeholders' positions. Specifically it failed to critique the normative boundaries surrounding an issue to which involved and affected stakeholders subscribed. The following sections reflect on how the process of deconstructing the Travelmole discourse can help to address these problems. The reflections are guided by the hypotheses in Chapter 1 and also by the questions posed at the beginning of this chapter.

##### **5.4.1. Boundary critique through discourse deconstruction**

The reconstruction of the claims raised by different participants in the Travelmole forum has demonstrated the potential of a critical approach based on communicative action. Deconstructing the discourse and presenting it in different formats - textual, tabular and diagrammatic – is a means for making transparent participants' objective and normative positions. The latter is referred to as the "seed of the critical perspective" (Kemmis and

McTaggart 2000: 590) and the process undertaken in this chapter has shown how participants' ought positions are contained in discourse. Using Midgley's concept of primary and secondary boundaries, the normative positions of different stakeholders can be mapped and the marginal elements between them, highlighted. For example, two questions which require further debate:

- Is legacy technology a barrier to developing new customer solutions?
- Is the traditional travel distribution model still valid given changing consumer demands?

The cases reviewed in Chapter 2 revealed the importance of having a transparent normative frame of reference to which stakeholders can subscribe and debate where necessary. The alternative is a Tourism IT implementation process which is determined by those in positions of power, irrespective of other stakeholders. However Figure 5-1 reveals the fluidity of that frame of reference or normative infrastructure. Claims move from the background to the foreground over time and setting shifts are negotiated and have to be debated in order to establish their legitimacy. The approach therefore introduces a dynamic which can accommodate the complexity of the stakeholder consultation process.

#### 5.4.2. Intersubjectivity

Carspecken argues that a process of intersubjective recognition is required in order to reconstruct normative-evaluative claims:

... a process of framing the normative-evaluative claim from the position of others ... of 'seeing' something clearly that one has already known in an unclear or implicit way (1996: 144).

Intersubjectivity differs from a subjective interpretation of one person's statement by another in that it is a process during which participants **attempt** to view things from the perspective of others in the debate. The emphasis is on the word 'attempt' inasmuch that recognising another person's normative position does not mean accepting it. It is an ongoing learning process during which one's own perceptions must be put to one side in order to be able to see clearly those belonging to others. If intersubjective awareness among participants was increased, this in itself would increase the success rate of Tourism IT. The cases reviewed in Chapter 2 reveal how the inability of different stakeholders to identify with each others' positions contributed to overall failure.

### **5.4.3. The technical versus the human**

A close examination of the discourse reveals the interplay between technical and human issues. It was hypothesised in Chapter 1 that the latter is of primary importance in Tourism IT. There are two aspects of the discussion which support this hypothesis. Firstly, the deconstruction and reconstruction of the Travelmole debate reveals the level of objective disagreement about technology. For example can legacy technology support new technology solutions? This is a complex issue which cannot be resolved by imposing one viewpoint upon another. It requires additional debate, new evidence, and additional stakeholders in order to come to a consensus. Therefore the route to the required technical solution is through communicative action and stakeholder participation rather than expert opinion, although the latter will have a role to play in the process.

Secondly, the discussion goes beyond technical issues, revealing that it is the normative positions and objective view of reality held by participants that are of crucial importance. For example, Mike Cogan questions the validity of the tour operator-centric packaged holiday model and instigates a setting shift with his normative position that it is the consumer's buying preferences which should be under discussion and not the technology. The implication is that it is pointless to debate technology which supports an outdated model.

### **5.4.4. The model as a facilitation tool**

The practical use of Habermas' communicative theory was put to the test by Gregory and Romm in their NHS case study, where the ideal speech criteria were deployed during discussions in order to try and identify different participant positions. Based on the Travelmole debate, there are several ways in which the ideal speech criteria, enabled via validity claim reconstruction, can be used after discourse has taken place to facilitate a consensus-seeking process.

Firstly, the reconstruction has shown the way in which participants support their normative positions with objective truth claims. In some cases participants present evidence or draw on personal experience to support these truth claims. It is likely therefore that the objective reality to which those in positions of power subscribe supports the normative infrastructure which they have established as the status quo. By challenging the objective validity claims that form this reality, a critical facilitator can begin the process of challenging the normative infrastructure, in order to present

alternative boundaries held by other stakeholders. From a critical perspective truth claims are equally open to debate in order to establish their validity among the whole group.

Secondly, the process of deconstructing and reconstructing validity claims facilitates the identification of additional stakeholders and topics for debate. For example, in order to determine the extent to which legacy technology is a barrier to sales and distribution in the Internet era, it would be instructive to hear evidence from tour operators who claim to marry the two effectively. In her posting, Sam highlights the business issue rather than the technology – in other words she is interested in technology as an enabling tool rather than as an end in itself. The reconstruction allows the facilitator to identify additional stakeholders which may be able to contribute to the effective debate of marginal elements and disputed boundaries.

Thirdly, the facilitator can present the boundaries surrounding an issue to stakeholders in different formats – textual, diagrammatic and tabular. This allows participants to visualise the issues at stake and provides a catalyst for further debate. It provides what Jamal and Getz recommended – a positioning map which enables the consensus-seeking process.

Fourthly, the vertical dimension of validity claim reconstruction involving the background and foreground allows the facilitator to move backgrounded claims to the foreground where they can be debated by all participants. Often these deep seated norms determine stakeholder positions and challenging them is an important part of the critical process.

It is nevertheless important to emphasise that from a critical perspective consensus is an ideal, which may never be fully reached. The process of communicative action is aiming for an *acceptable* rather than *absolute* level of consensus – a normative infrastructure which can provide the basis for ongoing discussion. The emphasis is upon using validity claim reconstruction as a catalyst for further debate.

Despite the potential power of intersubjectivity, it may not succeed practically if participants in a Tourism IT project do not enter another participant's normative frame of reference. This may be because they have been for too long 'stuck in their own rut', blinkered by long periods of subscribing to certain norms, so that they 'can't see the wood for the trees'. On the other hand they may **not want** to consider other ways in

which things ought, or even could, be done, possibly because it threatens their own position.

#### **5.4.5. Trustworthiness**

Carspecken stipulates that intersubjectivity requires framing claims from others' perspectives. However how valid is this process and what problems are associated with replicating it? This is arguably a highly subjective approach and a different researcher may reach a totally different interpretation of the discourse. These are common concerns stemming from a Positivist position but they fail to capture the essence of a critical approach. The purpose of the reconstruction is, through an intersubjective process, to stimulate debate and to challenge accepted norms of behaviour. It is not intended to be a precise or 'true' interpretation of what the participant has claimed – truth in the critical sense is only achieved through a consensus-seeking process.

From a personal perspective as a researcher attempting to reconstruct the meaning lying behind participant discourse, this was an interesting phase of self-learning where the very act of reconstructing claims enabled me to view the subject matter from different perspectives. The presentation of the reconstruction in different formats enhanced clarity of understanding and allowed me to appreciate the diversity of the issue and its complexity.

The main limitation of the process was the inability to feed back the reconstruction to participants in order to test my interpretation on them. This limitation is addressed in the following phase of the research when stakeholders are engaged in dialectic during the Voice over Internet discussion forum.

#### **5.4.6. The role of Internet forums**

The Travelmole discussion demonstrates the potential for virtual forums in giving a voice to the involved and affected. It also, arguably, helps to address the power issue inasmuch that it provides a level playing field in which all participants can make a contribution regardless of status and expertise. The initial article represented the views of the TTI (Travel Technology Initiative) working group, which is closely involved in finding a replacement for Viewdata. TTI is a powerful stakeholder in Tourism IT and its vision for the future is technology-centric. One might argue that this is natural given the TTI remit; however the Travelmole reconstruction highlights the complexity of the issues that are

involved. For example, participants challenge the status quo of travel distribution and question the ability of large tour operators to meet changing consumer demand.

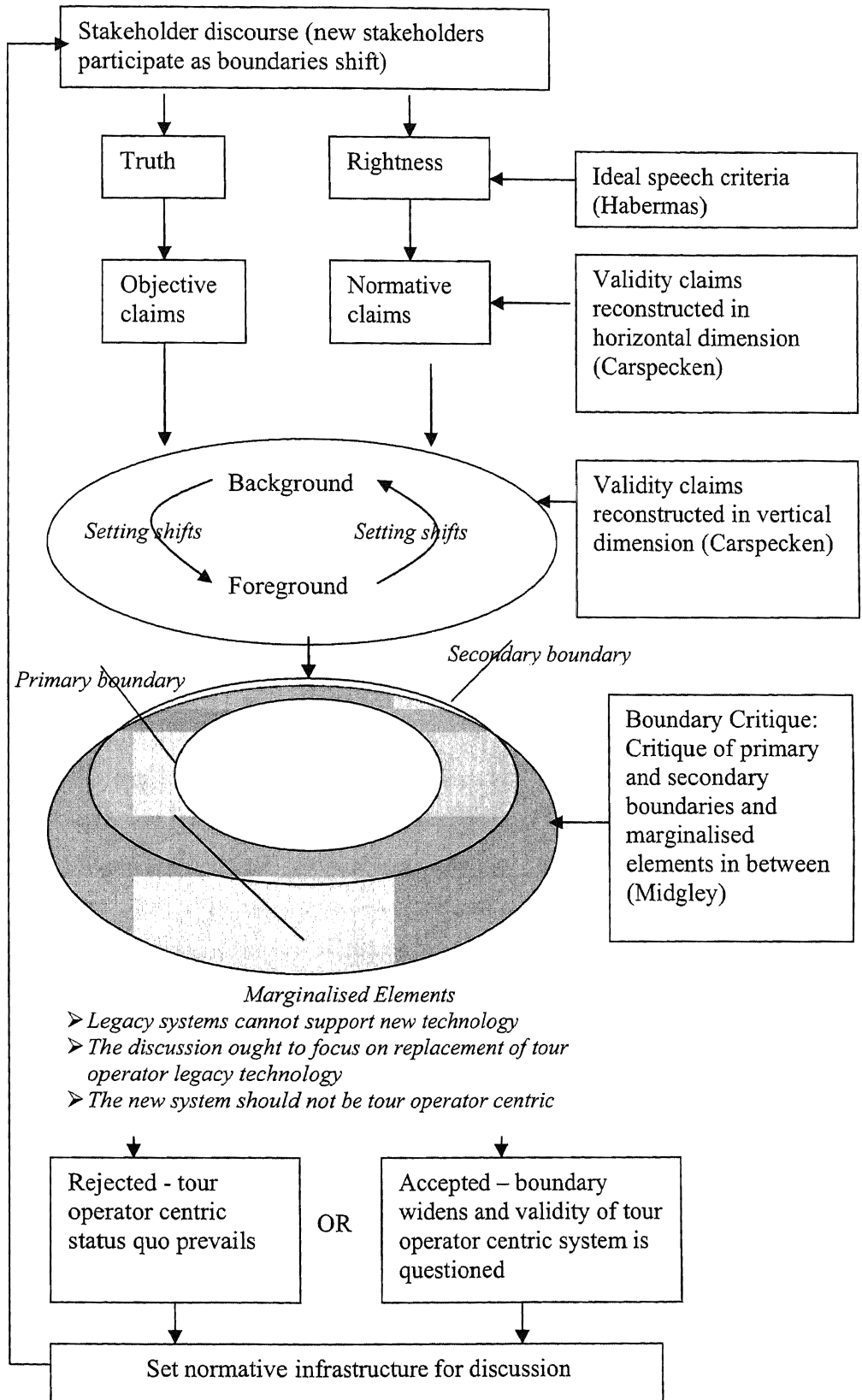
As the review in Chapter 2 revealed, this level of complexity cannot be managed by a technical solution alone. The TTI position appears to be one that supports the status quo; however the interactive nature of the Travelmole web site gives other parties a voice with which to challenge the normative position of TTI. The most vociferous of these – David Jones, Mike Cogan and Ed Spiers – have a technical background and expertise, although Mike does attempt to steer the discussion away from technical issues to human centred ones connected with the nature of customer demand. Sam represents the views of small independent travel agents, which, although not involved in finding a replacement for Viewdata, will certainly be affected by any decisions reached. The contribution by Sam was a catalyst for securing the invitation to the Open Space event of delegates who could give a voice to the concerns of smaller travel agents.

Nevertheless despite the apparent openness of the Internet, it does not mean that each participant's contribution is given equal weight. It is possible that the claims of an influential participant will be afforded more value or indeed he may decide not to participate – a decision which in itself carries overtones of the exercise of power.

##### **5.5. AUGMENTATION OF MODEL AFTER TRAVELMOLE TEST PHASE**

At the close of each phase of empirical testing, the model undergoes a process of augmentation. The model has undergone two adaptations following the testing on the Travelmole discussion (Figure 5-2). Firstly, the 'sincerity' speech criterion and 'subjective' validity claim have been removed, given the limited scope and difficulty for using these in virtual contexts. Secondly, the process of debating marginalised elements, in order to place the system boundary, may require the admission of new participants in order to fully debate the claims in question. For example to fully debate the marginalised element, 'legacy systems cannot support new technology', it would be necessary to invite other tour operators to participate and to present more evidence in support of normative and objective claims. Therefore the first box in the model now allows for the admission and participation of new stakeholders.

Figure 5-2: Augmentation of model for stakeholder consultation (1)



## **6. TRAVEL DISTRIBUTION & TECHNOLOGY**

This chapter reports on the application of methods 2-4 (Table 4-1) which form the Co-operative Inquiry study (Figure 4-2). A detailed explanation of the methods is provided below (Table 6-1). It continues to test how a discourse-based approach to critique can help to identify the involved and affected, the 'is' and 'ought' positions, and address the power issue through highlighting the selectivity of participants; but it does so in a live setting and thereby addresses a number of additional objectives:

- To test the usefulness of validity claim reconstruction in a live setting
- To test Co-operative Inquiry as a methodology for enabling a critical inquiry
- To test different methods (Open Space, Ideal Design, Voice over Internet group discussion) for their ability to engage stakeholders and facilitate boundary critique

The write-up of all the phases of the research will make extensive use of “thick descriptions” (Decrop 2004: 161). This is an inductive technique frequently used in qualitative research and is useful for capturing the context in which the intervention took place and for identifying the emergence of key variables. These thick descriptions are interspersed with critical reflections and validity claim reconstructions. The following section introduces the problem context which the researcher entered.

### **6.1. THE REAL WORLD IT PROBLEM SCENARIO**

The context for this intervention involves an attempt by ntl business: travel division (hereafter referred to as ntl travel) and Galileo International to better understand the issues surrounding distribution and technology, which their clients face. Galileo and ntl travel play a key role in the travel supply chain, aggregating content for distribution. Galileo can be described as a supplier aggregator – aggregating the content of key suppliers including airlines, hotels, cruise ships, car hire and other transport operators. ntl travel can be described as a distribution aggregator – aggregating tour operator content for sale, principally through travel agents. Unlike countries such as France and Germany, the UK holiday market is highly automated with over 90 per cent of holidays distributed



via technology. Galileo and ntl travel are major players in this market and technology is a major component of the solutions which they offer to their clients.

**Table 6-1: Methods used during Co-operative Inquiry**

<b>Methodological approach</b>	<b>Methods</b>	<b>Objectives related to testing model</b>
Co-operative Inquiry (Stage 1)	Face-to-face unstructured interviews	<ul style="list-style-type: none"> <li>• Identify boundaries of real world problem situation with research ‘sponsors’</li> <li>• Test validity claim reconstruction and boundary critique as diagnostic tools</li> </ul>
	Brainstorming	<ul style="list-style-type: none"> <li>• Identify boundaries of real world problem situation</li> <li>• Identify those involved and affected in system</li> </ul>
	Group discussion	<ul style="list-style-type: none"> <li>• Plan Open Space forum for generating participant discourse</li> </ul>
	Open Space Technology	<ul style="list-style-type: none"> <li>• Facilitate stakeholder participation</li> <li>• Identify boundaries surrounding real world problem</li> <li>• Debate marginalised elements</li> </ul>
	Creation of Blackboard Internet discussion site	<ul style="list-style-type: none"> <li>• Test asynchronous communication forum as a stakeholder consultation tool</li> <li>• Clarify boundaries of discussion post-Open Space</li> </ul>
Co-operative Inquiry (Stage 2)	Face-to-face semi-structured interviews	<ul style="list-style-type: none"> <li>• Generate detailed discourse with each participant</li> <li>• Reconstruct this discourse to identify participant claims</li> </ul>
	Idealised Design	<ul style="list-style-type: none"> <li>• A catalyst to help identify stakeholders’ normative and objective claims</li> </ul>
	Voice-over-Internet group discussion	<ul style="list-style-type: none"> <li>• Test synchronous communication forum as a stakeholder consultation tool</li> <li>• Identify primary and secondary boundaries</li> <li>• Identify setting shifts</li> <li>• Debate marginalised elements</li> </ul>

Source: Author

Galileo is one of four GDS, which have been described as the “backbone of the modern travel distribution system” (Ader, LaFleur et al. 2000: 14). They have existed for around 30 years and have built up extensive databases of travel and tourism content. However the GDS face major challenges in the shape of new technology and changing customer demands and they have to constantly reappraise their role (Buhalis and Licata 2002; Alford 2006).

ntl travel occupies the space between travel agents and tour operators, providing the network, which enables travel agents to search and book tour operator content for their customers. The organisation therefore acts as a major channel of distribution for a large number of UK tour operators ranging from the large vertically integrated ones to the smaller independents. At the time of the research, the company, previously trading under the name X-Tant, was undergoing a transition following its acquisition by ntl, the telecommunications company.

## **6.2. DIAGNOSING THE PROBLEM – IDENTIFYING THE BOUNDARIES**

The diagnosis stage is important in any investigation, be it in the social or natural sciences. A misdiagnosis can result in costly and damaging mistakes. The review in Chapter 2 and the initial phase of testing in Chapter 5 highlighted the futility of adopting a deterministic stance to problem diagnosis. The complexity of multi stakeholder problem contexts requires a more participative approach and in this section the methods that were used to recruit the Co-operative Inquiry group and diagnose the problems facing ntl travel and Galileo, are described.

The recruitment of the Co-operative Inquiry group and the securing of sponsorship for the research were largely achieved by networking at travel industry events. Although few academics attend these industry events, they provide excellent networking opportunities particularly for researchers engaging in action research. It allowed the author to begin the intersubjective process of understanding the issues facing commercial tourism companies and the normative positions held by different industry groups – travel agents, tour operators, network providers, etc. This understanding proved crucial in pitching the research proposal and linking it to current issues facing the business. In a live Tourism IT project the author would also argue that this preliminary process of critically appraising stakeholder positions is an essential prerequisite to preparing a positioning document for the partnership as discussed in the previous chapter.

### **6.2.1. ntl travel**

The author made initial contact with the Sales Director of ntl travel, Gary Stimson, at a conference in Nice, France, which was entitled, ‘Distribution Strategies for the Travel Industry - Survival of the Fittest?’ Gary was a conference delegate and the author had been invited by Travel & Tourism Intelligence to make a keynote presentation on the first day of the conference and to chair the second day (Alford 2001). Travel & Tourism Intelligence (now Mintel International) is a market intelligence organisation specialising

in industry-focussed reports for the travel and tourism sector. Access Conferences – the conference organisers - asked Travel & Tourism Intelligence to provide a keynote speaker who could give some context to the conference by providing an overall market analysis of the European travel industry and the challenges it was facing. I had written several reports for Travel & Tourism Intelligence and was asked by them if I would make the presentation. On the second day, as Chairman, I was affiliated with Genesys Information Limited, a provider of insights and commentary to the travel industry, with whom I had worked on a number of projects.

My presentation gave a European-wide perspective on emerging trends affecting the travel industry and acted as a scene-setter for the conference. From the outset my position as a keynote presenter and conference chair, and affiliations with Travel & Tourism Intelligence and Genesys, helped to establish credibility as a researcher and ‘industry-insider’ and proved essential in securing the trust and cooperation of fellow research participants. Undertaking an effective diagnosis of a real world problem situation requires the researcher to bridge the gap between the academic and commercial worlds. As a critical researcher this identity enabled a higher degree of intersubjectivity.

According to Decrop the “credibility of the researcher also affects the way findings are received” (2004: 160) and ultimately enhances their trustworthiness. Citing Marshall and Rossman (1995) Decrop reminds us that, “Issues of training, experience, perspective, status and presentation of self in the research project need to be addressed” (2004: 161). Action research generally places more demands on the research participants, particularly in terms of time, when compared to quantitative approaches where the researcher is distanced from the research subject. Consequently, fellow participants have to be convinced that there is merit in the research and that it, and the researcher, is capable of adding value for their organisations.

Aside from the networking and credibility factors, the subject matter of the conference provided invaluable context to the challenges facing intermediaries such as ntl travel – hence the reason for Gary Stimson’s decision to register for the conference. For instance the panel debate, ‘Predicting the Future Development of Distribution Strategies’ at the close of the second and final day, carried a similar theme and title to the one decided for Open Space. The extended panel session on the first day debated the question, “Is There Still a Role for High Street Shops?” This session debated the future of traditional high street travel agents. This too was subject matter closely related to the Open Space event

in which the role of travel agents featured prominently. Genesys Information Limited, under whose auspices I was chairing the second day, also asked me to write a review of the conference (Appendix 2). This activity was further useful preparation for entering the real world problem situation facing ntl travel and Galileo.

Following this initial contact with Gary, a number of methods were deployed to undertake a diagnosis of the problem faced by ntl travel:

- Two follow-up in-depth, unstructured, face-to-face interviews with Gary
- A presentation by Gary to the author's MSc Tourism students followed by a group discussion – this was a useful exercise in bringing different perspectives to bear on the issue
- A group discussion with Gary and two of his colleagues, including his immediate line manager

The first unstructured face to face interview took place on 1<sup>st</sup> August 2001 at the University of Luton's Putteridge Bury campus. The venue for the interview was significant, as it would host the Open Space event which the diagnosis and planning would lead to. In addition to being the centre for postgraduate teaching, this campus is the university's management and conference centre and is located within a very attractive country house-style setting. It was obvious during the interview that Gary welcomed the opportunity to step out of the day-to-day business operation and take some time to think through the issues, which ntl travel were facing. The first interview centred on where ntl travel had come from, where it was, and the services which it offered to its customers. The interview lasted for almost two hours during which time Gary spent most of the time talking, with the author interjecting mainly for clarification on particular issues.

In this respect the term 'discussion' is more relevant than 'interview' as, rather than a researcher-research subject or interviewer-interviewee relationship, this was participatory in nature. Although no formal plan was yet in place there was the sense that this was very much part of a diagnostic process that would lead to a course of action, which would ultimately add some commercial benefit for ntl travel. During the meeting Gary made extensive use of the flip chart, communicating a number of his ideas and explanations via diagrams. Communicative action is both visual and verbal and diagrams were used extensively during the interviews to identify the boundaries surrounding the issues and those involved and affected by the issue.

What emerges is a system, where technology plays a pivotal role, but which, ultimately, is a system of human activity with a number of inter- and intra-organisational relationships. ntl travel earns the majority of its revenue from tour operators, which pay according to the amount of time travel agents spend searching tour operator reservation systems, via the ntl travel network. Many tour operators regard the time-based system of payment as unfair and would prefer to see a model which is transaction-based instead. Tour operators consider the amount of bookings taken over the network as a truer means of measuring return on investment. They argue that an agent could spend hours searching for a holiday but not actually make a booking. In this instance the tour operator would be charged for activity which did not result in any revenue.

It is in part due to this dissatisfaction with the rising cost of sale that tour operators are increasingly exploring the option of selling direct to the consumer, effectively bypassing the network and the agent. This has the advantage of cutting out the network fee and the commission to the travel agent, but, according to Gary, there are associated costs that the tour operators have not properly taken into account:

- Call centre and free phone telephone number
- Development and maintenance of the web site
- Advertising the web site and building consumer awareness year on year
- Technical support to keep the site operational on a, 24 hours a day, 7 days a week basis

The claim, underlying Gary's viewpoint, is that distribution of tour operator product over the ntl travel network represents a more efficient and cost-effective solution than direct-sell. Gary referred to the ntl network as a "scaleable solution" which means that tour operators can afford to transact higher volumes of business while continuing to offer a high level of service to the customer without incurring substantially higher costs. The direct sell tour operator strategy on the other hand requires more system capacity, technical support and call centre support as sales increase, with the consequence that fixed as well as variable costs increase. To support these points, Gary referred to a team of 30 people which ntl travel had to support their network, and to a tour operator that incurred costs of £800,000 for £300,000 worth of bookings.

This is a further example of how normative claims (tour operators *ought to* distribute through network providers) are supported with objective claims (it costs more for a tour operator to bypass network providers and sell direct) and how these claims are supported

with evidence (the figures quoted above). And of course this is a biased viewpoint as Gary, as a sales director, is trained to promote his business. In conclusion to the discussion, Gary presented a number of future scenarios which incorporate different business models and contain a number of advantages and disadvantages for different stakeholders.

Using Airtours and Inghams to provide examples of a tour operator perspective, two types of customer are identified – end consumers and travel agents - with each accessing the tour operator reservation system through a dedicated front end. In one scenario, distribution to the end consumer takes place over the public Internet via a high bandwidth line to accommodate the volume of enquiries and bookings. However Gary depicts this as a “chaos” scenario because it is an unmanaged network, vulnerable to failure and lacking the reliability and security, which a business operation requires.

Distribution to travel agents takes place either over the Internet or through Traveleye, which is the ntl travel tool that enables travel agents to interface with tour operator systems over ntl travel’s managed network. From a travel agency perspective, the former option is significantly cheaper, costing approximately £30 per month to have a fast Internet connection through an Internet Service Provider. The Traveleye connection on the other hand costs £150 per month. However as with the first scenario, Gary stressed the importance of having a managed network, which he regards as essential for “business-critical” operations. He concluded the discussion with the view that ntl travel ought to move closer to tour operators using ntl services to develop a stronger strategic relationship with them.

The second discussion took place on 18<sup>th</sup> September 2001 and focussed on the following two questions: Where does ntl travel want to be? How is it going to get there? This was a natural progression from the first discussion, which had as its focus: Where did ntl travel come from? Where is it now? The second discussion adopted a similar structure to the first – unstructured, participant-led, and action oriented. Gary reiterated a number of points at the start of the meeting, partly as a refresher and also to underline their importance:

- The company is at a strategic repositioning stage following its acquisition by ntl and the re-branding in early 2002 represents an opportunity to bring a fresh portfolio of products to the market
- Strategically moving closer to tour operators

- Strategic partnerships need to be streamlined in line with the overall vision for the company

The repositioning exercise had gathered momentum in the company since the first discussion and a small team had been appointed to oversee the reappraisal. From the point of view of this study it was good timing as it lent the research an extra measure of relevance. Gary continued the discussion with a summary of what he considered to be the future issues facing the company:

- How to identify strategic partners moving forward?
- How to measure return on investment on existing partnerships?
- What services to be sacrificed?
- How to realise a clearer vision through the web of partnerships?

These questions were in recognition that ntl travel had a large number of partnerships, some of which were a considerable drain on resources, without offering an adequate return on investment. Gary provided a couple of examples to illustrate this issue. ntl travel hosted a client's web site on its server for £6,000 per annum. This was insufficient to cover ntl travel costs involving 60 man-hours for marketing, product, sales, engineer and project management people required to scope and prepare the project. Similarly ntl travel provided a travel agency chain with a Wide Area Network (WAN) covering its 17 branches, for £70,000 per annum. The WAN included: back office and front office automation; Viewdata software for tour operator searching and booking; and ongoing maintenance of the network. Gary aired his personal frustration that the managing director of the chain could not see the value of the WAN despite this level of service.

This second example illustrates the importance of the human relationship and communicative issues. Gary believed the added value of the ntl service warranted the annual fee, but the MD of the travel agency chain did not. This is primarily a communicative rather than a technical issue.

The choice of language during the discussion was interesting as Gary referred to the need to "qualify out" certain customers, to be more "abrasive" in dealing with them, the creation of an "emotional situation" in terms of having to tell loyal customers that it is not feasible to do what they are asking at the price, and reference to "the fat thinning all the time". This language captures the challenges and the potential conflict, which the company faced and enabled the author to clarify the problem situation facing the

company more clearly. This is part of the position-taking process (Carspecken 1996), central to a critical investigation, whereby claims and values are mediated communicatively.

ntl travel was also facing a number of additional threats. Firstly, Energis, a competing network provider and a recent entrant, was competing aggressively on price, obtaining cash from the capital markets and looking for what Gary referred to as “quick wins”. One of the big tour operators had awarded its contract to Energis, partly, in Gary’s opinion, on the basis that it was keen to break the duopoly enjoyed by ntl travel and Telewest Imminus. This illustrates the power struggle between the tour operators and the network providers and is an example of a major tour operator using its bargaining power in an attempt to weaken the position of the two leading network providers.

The second threat came from the large tour operators who were acquiring a number of smaller operators. Network providers such as ntl travel charge tour operators on the basis of the amount of time travel agents spend on the network searching the tour operator reservation systems. If a big operator acquires 10 mid-sized operators then that extra business put over the network is at the lower charge negotiated by the big operator rather than at the higher charge paid formerly by the mid-sized players. The third threat is one affecting any intermediary in the travel supply chain, namely direct-sell by operators and suppliers to the customer.

In November 2001, Gary presented his ideas and analysis to the author’s MSc students who were completing a module on information technology in tourism. From the point of view of the author’s research, this was largely a synthesis of the previous two discussions. Two points were emphasised during this presentation and discussion. Firstly, that there is value in the ntl travel model, whereby tour operator content is aggregated and distributed reliably, at speed, and at relatively low cost. Gary stressed the importance of managing the end-to-end process. Secondly, the ntl travel network would be upgraded to provide Internet Protocol communications end-to-end, gradually phasing out older technology.

It was clear from the three discussions with Gary that ntl travel was taking a far reaching strategic reappraisal of its positioning and was keen not to be constrained by the way in which it had operated in the past. This is reflected in a presentation (Appendix 3), prepared for internal discussion. The presentation, confidential at the time, was emailed to the author in recognition of its potential usefulness to the research task. This is



evidence of the trust and level of cooperation existing between the author and ntl travel and the degree to which the author was recognised as someone working with the ntl strategy team. The presentation's author, Jill Cox (Head of Marketing Travel and Leisure), was Gary's line manager and had prepared the presentation as a means of contributing to a new vision for the company. Analysis of this presentation and its contribution to the diagnosis is included in the critical reflection on the problem diagnosis in Section 6.2.3.

### **6.2.2. Galileo**

Initial contact with Galileo International was made at a Chartered Institute of Marketing Travel Industry Group (CIMTIG) seminar in September 2001, entitled "B2B (Business to Business) Portals, Extranets and ASPs (Application Service Providers) - The Future of High Street Travel Retailing". During the seminar one of the speakers, Elizabeth Harraway (Marketing Manager, Europe Middle East Africa with Galileo International), issued the following invitation:

Galileo want to pull together a cross section of CIMTIG members with a passion for understanding the issues, threats, opportunities and benefits surrounding emerging technologies in the travel industry. The Internet Marketing Advisory Board site <http://cimtig.imab.co.uk> is now the starting point for this initiative (Beaver 2001).

The emphasis of the Galileo initiative was placed on understanding, dialogue and participation and fitted very closely with the author's research. It provided an opportunity to bring a major intermediary player on board as part of the Co-operative Inquiry group recruitment process. A brief conversation with Elizabeth Harraway led to expressions of interest and, as often proved the case, led to another contact person within the organization. There was a lengthy incubation period during which the author established a relationship with Galileo and tried to establish what its needs were. However it was not possible to gain the same insights into the organization and its objectives, as it was with ntl travel and a face-to-face meeting did not take place until February 2002.

The discussion web site, which had been promoted at the CIMTIG seminar had failed to generate any interest and it was decided that a face-to-face event was needed to kick start the Galileo initiative. This underlines the challenges in creating a new communicative

forum in the travel industry and it may be more feasible to use an existing forum such as Travelmole as discussed in the previous chapter.

### **6.2.3. Critical reflection on diagnosis**

The diagnosis of the problem deployed a highly participative approach involving individual and group face to face meetings along with extensive networking. The first stage of empirical testing reveals how communicative action can be an effective means for critically diagnosing a problem. For example, the meetings with ntl travel revealed the centrality of normative and objective claims regarding the relationship between ntl travel and the tour operator community.

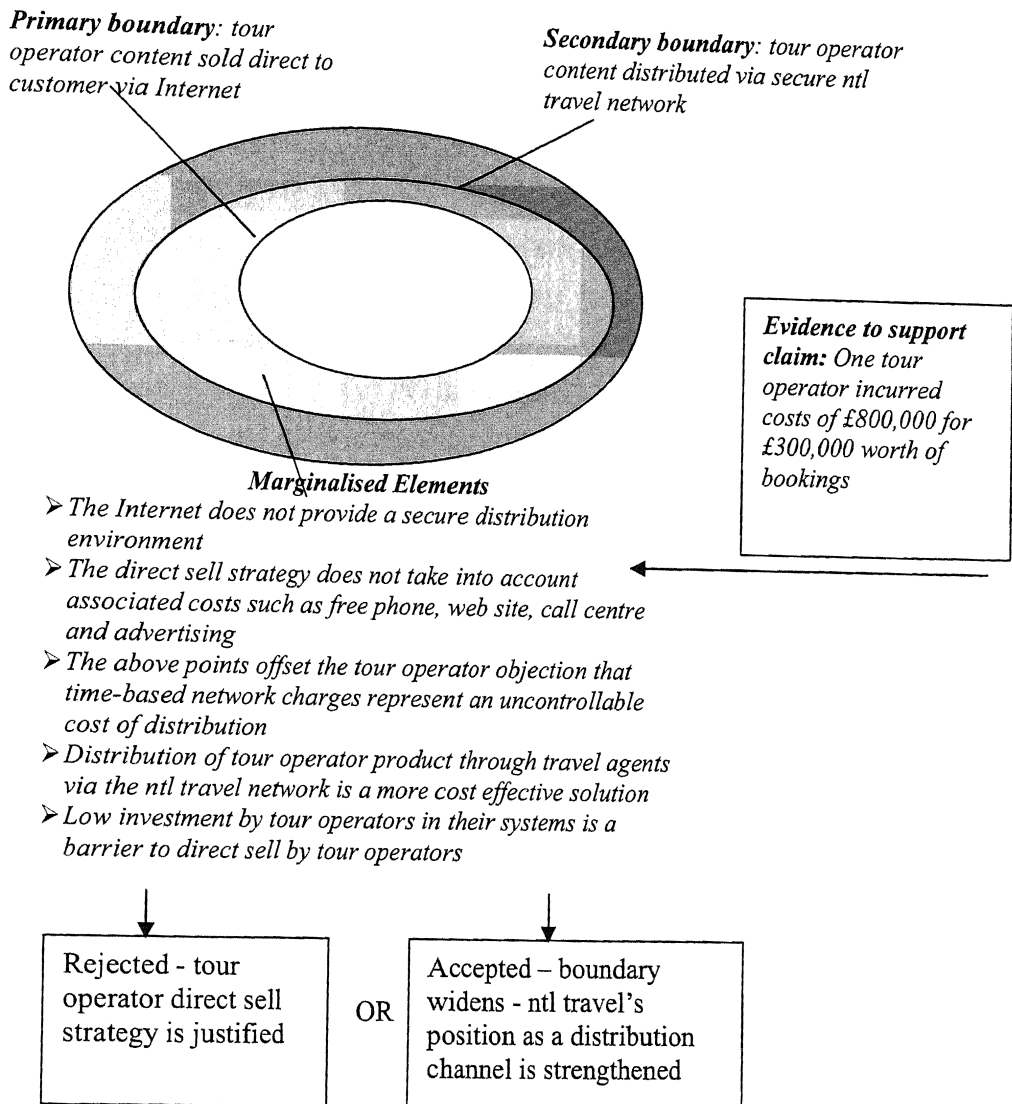
In her strategy presentation, Jill Cox clearly identifies the direct sell strategy pursued by some tour operators as a key issue (Slide 7 Appendix 3), referring to “disintermediation” and “bypass”. During discussions, Gary expressed the normative position that tour operators ought to distribute content through the ntl travel network and made some objective claims in support of that. However it is clear that some tour operators do not see it that way and are keen to sell direct. This conflict scenario is illustrated in Figure 6-1, with the secondary boundary representing the ntl travel position and the primary boundary, the tour operator direct sell position. The marginalised elements represent some of the key issues that could form the agenda for debate between ntl travel and the tour operating community.

The reference by Jill Cox to “Legacy systems / Legacy technology / low investment” is interesting in that it tallies to some extent with the setting shift negotiated by David Jones in the analysis of the Travelmole discussion in the previous chapter, whereby he brings into the foreground the normative claim that tour operator legacy systems ought to be the focus of debate rather than Viewdata. David Jones backed up this normative position with the objective claim that it is not possible to implement new technology solutions over legacy systems.

This overlapping of normative claims is an example of data triangulation, identified by Denzin (1978) as one of four types of triangulation, which helps to validate qualitative research findings (Decrop 2004: 162). It throws into sharp focus the following research hypothesis (and also highlights the way in which validity claim analysis can generate research hypotheses for further investigation):

H1: Tour operator legacy systems are a barrier to new technology solutions

Figure 6-1: Critical diagnosis of ntl travel position



Source: Author

The objective of diagnosing a real world problem context from a critical communicative perspective is to identify those marginalised elements that could be tabled for further discursive action. It also encourages the presentation of any evidence that supports or refutes certain claims – in this case Gary's evidence regarding the poor return of investment secured by one tour operator pursuing a direct sell strategy. This critical diagnosis underlines the communicative nature of the issues that surround IT implementation and the primacy of normative boundaries over technical issues. Gary

confirms that ntl travel want to move strategically closer to tour operators. If this is going to be successful then ongoing boundary analysis and conflict resolution through communicative action is essential.

The centrality of communicative action and shared normative infrastructure is also highlighted through a critical analysis of the strategy presentation by Jill Cox. According to her, ntl travel *ought to be* “playing” in the wider travel community, rather than in its current niche (Slides 6 and 9 Appendix 3). The use of the term “interlinked community” on Slide 12 further emphasises the human dimension and communicative nature of the problem context. Although technology underpins the services and products, which ntl travel offer, from a critical standpoint any technological initiative will have to be based on an understanding of the values of other players in that community. Reference to the way in which the travel community is interconnected illustrates the importance of ongoing communicative action as a basis for moving forward.

### **6.3. ACTION PLANNING**

The action planning stage comprised a series of face-to-face meetings, conference calls and emails. Although no formal facilitation techniques were used during this planning step, ideas and concepts were actively brainstormed. Brainstorming has been defined as, “a formal *setting* for the use of lateral thinking” (de Bono 1977: 131) and formal meetings were arranged either on university or participating company premises in order to provide such a setting. Participants at the group sessions included representatives from each of the participating organisations and this mix helped to ensure the creative development of ideas. Conference calls were also scheduled in order to maintain a high level of participation and to help provide the momentum necessary to plan the event.

During the initial February 2002 meeting with Galileo, the author floated the concept of Open Space as a possible format for the face-to-face event designed to help Galileo engage the industry in dialogue. The idea was met with enthusiasm by the two Galileo representatives as it fitted with their desire to “do something different” and to “take a radical approach” as part of the finding out process. They talked of creating a “think tank” and of “value chain analysis” and an event that was “radical and free thinking”. The consensus was that if the event was not different enough it would not succeed and in this regard the desire to be different was as much driven by commercial priorities as commitment to be participative. There was also an inherent flexibility to the planning expressed by a willingness to try new approaches and, if they were found not to work, to

try something different. There was opposition to the notion of a “grand plan” in preference for trying different “vehicles” by which the industry could be engaged in dialogue. During one of the planning meetings, Galileo expressed the desire to be perceived as a “thinking organisation”, providing an innovative lead to the rest of the industry.

The planning team displayed additional awareness of the power issue in the way in which they decided on the list of invitees. There was a perceived need to invite delegates from business travel as well as leisure travel in order to prevent ‘shadow-boxing’ – a term used by one of the Galileo members to describe the hidden agendas and commercial rivalry within the leisure travel industry. It was felt that unless the debate could be widened by inviting a more diverse range of delegates, the day’s discussions could focus around narrow agendas instead of a more creative blue skies approach to the issue, which the sponsors were keen to facilitate. It is another example of countering the status quo and thinking outside the traditional mindset.

It was agreed during the planning stage that the event should differ significantly from the ‘traditional’ travel industry conference format, which involves a panel of speakers (experts), with each presentation followed by a question and answer session. There is a parallel here between the different formats available for running an event and the paradigms available for guiding research. The traditional format contains an inherent power imbalance with the conference organisers setting the agenda for the conference, and the panel of speakers adopting the role of experts, presenting their view of reality. Although there is the opportunity for delegates to challenge the speakers during the Q&A, this is in reality a fairly limited opportunity, with conference organisers often more concerned with not letting the conference overrun on time.

This scenario is akin to the Positivist researcher, in the role of expert, setting the research agenda and treating others in the research process as subjects. The Open Space format takes a different approach, allowing delegates the opportunity to drive the agenda for the event, based on their own needs. This is more akin to the interpretive and critical paradigms that give a voice to the multiple agendas, which stakeholders have. It does not take an external objective view of the research / problem context but rather an internal, subjective one.

While the Galileo representatives liked the idea of participants actually doing something, as opposed to being passive receivers of information from a panel of speakers, they were nevertheless concerned about participants, as they expressed it, “shadow-boxing”, not sharing ideas because of competitors in the same room. This highlights the commercial sensitivities involved and the difficulties in creating a communicative space free from distortion. One idea proposed by Galileo to counter this shadow boxing was to invite delegates from the business travel sector in order to give the event strength through diversity and also to prevent it from becoming a forum for sales pitches. This is an example of widening the boundaries of the system under consideration and, in so doing, gaining new perspectives. The widening of boundaries was also driven by commercial imperatives. For example, Galileo was keen to have suppliers such as British Airways represented, whom they described as a “playmaker” and also customers, for example e-procurement managers from large corporations, who could be useful future contacts for the procurement of travel.

The author as critical researcher was aware at this stage that two big players, ntl travel and Galileo would want to secure the best PR value from the event and also to use it as a means for generating sales leads. This is inevitable in the business world with most conferences valued as much if not more so for the networking as for the content of the presentations. However both companies were taking a risk with the Open Space format and were genuinely interested in getting new perspectives on the boundaries surrounding the travel distribution and technology issue. In this regard it can be argued that there was an inherent critical element to the process without the undue application of power by the sponsoring organisations. They could have for example insisted that their senior executives be given the opportunity to make corporate presentations, but this did not happen. Apart from some ntl and Galileo banners at the event there was no overt evidence of corporate publicity.

The scene was now set to formally plan a face-to-face event in which ntl travel and Galileo would engage travel companies in dialogue. Galileo was keen to try something different, and ntl travel, in light of its strategic reappraisal, was keen to create a forum in which it could better understand the needs of both existing and potential clients. A meeting was agreed for May 2002 when the author would make a formal presentation on the benefits of using Open Space Technology to facilitate the event. Prior to that meeting, two new representatives from Galileo and one from ntl travel were appointed to liaise on the project. This was due to internal priorities at Galileo whereby the Europe,

Middle East and Africa (EMEA) division was undertaking a strategic reappraisal, examining its product portfolio. The two new contact people, Christy Tyler and Tracy Glenister, were part of the EMEA team and responsible for exploring ways in which the Open Space event could contribute to EMEA objectives. At ntl travel, Jean Quaipe had just been appointed as Business Development Manager and was part of the strategic reappraisal team. This changing of personnel underlines the “fluidity” (Kemmis 2001: 100) of action research projects; however the face-to-face planning meeting achieved a sense of teamwork and a tightly knit group.

At the meeting both companies agreed that the open ended and participative style of Open Space suited their aim of engaging the industry in discussion and debate. They also liked the idea of the event being organised by the University, as it would create what they termed a “think-tank environment” as opposed to a sales one. They were keen to take delegates out of their day-to-day working environment and provide them with an opportunity to reflect on the technology issues they were facing. This underlines the positive role that universities can play in creating communicative spaces in which industry players can engage with each other. The non-commercial climate offered by universities enables them to provide environments conducive to dialogue.

Both companies agreed to sponsor a one-day Open Space event in November 2002 hosted at the University of Luton’s Putteridge Bury Conference Centre. A total budget of around £8,000 was agreed to cover the hire of the venue, catering, the design and printing of an invitation to publicise the event, the printing of Open Space materials to be used during the event, and the fee for the university’s Knowledge Hub to coordinate the event. The Knowledge Hub created additional pages on its web site, providing information about the event and the opportunity for delegates to register online.

### **6.3.1. Pre Open Space event publicity**

The planning of the Open Space event involved a substantial amount of publicity in order to secure the best attendance possible. This included a personal selling by the ntl travel sales account team, articles in the Travel Trade Gazette, a photo shoot in London, a face to face group meeting with ntl travel and Galileo’s advertising agencies, and a printed invitation with the copy created by Galileo’s advertising agency and approved by the collective Co-operative Inquiry group. This publicity drive is described below along with commentaries on the way in which the publicity conveyed the highly participative and communicative nature of the event.

It was agreed to headline the event with the following theme: ‘Travel Distribution and Technology: The Issues and Opportunities’. Both companies were keen to place the word ‘Distribution’ before ‘Technology’ in the title in order not to give delegates the impression that this was a technology conference. There was a clear perception that this could be a potential deterrent, whereby it might be perceived as an event for ‘techies’ – a term often used in industry to describe IT personnel. Again there was the perception in the planning team that technology was an external force or entity to be managed, understood and controlled. This demonstrates a critical awareness of the potential limitations of imposing a technical agenda. The use of the phrase “issues and opportunities” was borrowed from the original call by Galileo at the CIMTIG seminar and was considered to be suitably open-ended to stimulate discussion.

Drawing on their respective client and contact databases, Galileo and ntl compiled a list of 230 invitees. Both companies favoured an invitation-only approach in order to give the event an air of exclusivity, which it was hoped would encourage a high rate of attendance. It was also in recognition of the need to fill a limited number of spaces with delegates, who were going to be of most commercial benefit to the sponsoring organisations. A meeting was held between the two companies and their respective public relations agencies to prepare a publicity campaign for the event. This resulted in extensive pre-event coverage in the travel trade press. The small piece in the Stop Press section of the Travel Trade Gazette 7<sup>th</sup> October 2002 is entitled “Technology firms to host workshop in Luton” (Appendix 4).

The event is described as “a one-day interactive workshop on travel distribution and technology” - referring to its participative format. Reference to Galileo and ntl travel in the TTG piece as “technology firms” further underlines the radical step taken by both companies in relegating technology to second place behind the business issues facing travel organisations.

The larger full page spread in the Travel Trade Gazette 18<sup>th</sup> November 2002 entitled “Open House” is a play on the term Open Space and is intended to convey the concept of a free and open discussion with no preset agendas (Appendix 4). The picture depicts from left, Dave Osbourne, Managing Director of ntl travel, the author, University of Luton, and Gordon Wilson, Vice-President (EMEA) Galileo (the caption underneath the picture has placed the names in the wrong order). The decision to stage a press conference at a prestigious venue in central London is testimony to the priority, which



both organisations attached to the event. The emphasis in this article is on listening, sharing, brainstorming and discussing key issues. It is a very qualitative and grounded approach to finding out.

Gordon Wilson indicates one of Galileo's objectives in the "Open House" article, "to brainstorm with people who would not normally get together to discuss these issues". This makes it clear that the concept of creating an open communicative space is a foreign one in the travel industry. He was also conveying the point that the event was targeting a broad spectrum of people, not just technology experts and that, for non-technology managers, discussing technology-related issues is not common practice within the travel industry. There is a perception that technology discussions are best left to the 'techies', an attitude which can only perpetuate the gulf between the IT department and the rest of the organisation.

Galileo employed its marketing agency to assist with the wording of the invitation (Appendix 5), which not only captures the essence of Open Space, but is also indicative of the professional and committed way in which the companies embraced it:

A departure from the normal seminar format, this Open Space session is for industry 'doers' only. We want the people who, on a daily basis, tackle these issues head on. By creating a sales-free, non-competitive, experience-driven environment, we will be putting the core business needs front and centre. There is no agenda as such. We believe that by assembling the industry's most senior people, we can create our own agenda, an active agenda that will be relevant and real.  
(Extract from Open Space invitation Appendix 5)

Although clearly not expressed in academic language, the terms 'sales-free' and 'non-competitive' place an emphasis on creating an event free from coercion that would act as a barrier to free and open debate. This paragraph in the invitation embodies the nature of action research, namely that participants drive the agenda and determine the relevance and validity of the findings. This is highlighted by reference to an, "experience-driven environment". In other words the event would be enriched by the shared experiences of participants and would use the lessons from that experience to identify and clarify key business issues. The invitation is designed to emphasise the unique nature of an Open Space event and the way in which it differs from traditional travel industry conferences.

Technology is clearly central to the event as displayed in the title; however inside the front cover, the invitation refers to “a unique opportunity for you to be heard and for you to influence the way our industry relates and reacts to technology” (Appendix 5). The intimation here is that through communicative action delegates can influence the ways in which the travel industry deploys technology. The use of the word “unique” also indicates that such communicative forums are rare in the travel industry. Technology is cast as an outside force and a form of external system that needs to be related and reacted to.

The invitation included the following description of Open Space, anticipating the levels of conflict and complexity inherent in the discussion topic:

Open Space is recognised internationally as an innovative approach to more productive meetings. Groups from 5 to 1500 have regularly demonstrated the capacity to create effective meeting agendas and deal with highly conflicted and complex issues. Remarkably, the meeting once created, is completely self-managed by the group. The role of the facilitator is so minimal as to be invisible.

The ntl travel sales team, which on a daily basis manage key accounts, were instrumental in the couple of weeks preceding the event in converting expressions of interest by invitees into firm commitments to attend. Jean Quaife and I worked on a briefing document that was sent to all the sales team to help them in their sales effort. The way in which this co-operation took place illustrates the iterative fashion in which the Co-operative Inquiry process evolved. Firstly, a list of key points were prepared, which would be useful in trying to convince people to attend the event, and sent to Jean. These points focussed heavily on the unique aspects of Open Space, for example the fact that participants would be building the agenda themselves and that it provided an opportunity to discuss real issues in real depth. Jean then prepared the final document (Appendix 6), which was sent to the ntl travel sales team.

Although she undoubtedly took some of my points on board, her final summary of the key selling points is much sharper in its understanding of what is likely to convince busy managers to take a day out of their schedule to attend a workshop. This reveals her insights into the day-to-day challenges facing senior managers in the travel industry. Her

interpretation of the key advantages of attendance at the Open Space event is also revealing as the following detailed analysis of the language used in the document reveals

Having acknowledged in Section 2 of her sales brief that the industry faces complex issues relating to technology, Jean alludes, in Section 5.1 of the document, to the possibility that, collectively, participants might “even reach consensus on some long standing issues”. From a critical standpoint, the use of “consensus” is of interest in that the critical definition of ‘truth’ is that point where unforced consensus is reached through communicative action by the involved and affected. The trustworthiness of the action research process is not to be found in the scientific criteria of validity and reliability but rather in what Jean refers to as “the opportunity to influence the direction of the industry”. If this takes place then the research has ‘made a difference’. This could be in the shape of new ideas or, as Jean intimates, moving towards agreement on “long standing issues”. The careful planning of this sales document and of the optimism it contains is testimony to the pragmatic value of communicative action in a live setting.

Again the fact that these issues have not been resolved for a long period of time indicates the dearth of opportunities for the industry to engage in meaningful communication about them. However Jean did not make any attempt to include specific issues in her document, as to do so would have jeopardised one of the underlying principles of Open Space, namely to let the participants build the agenda themselves. Equally, there was no attempt (of which the author was aware) by the sales team to suggest issues to invitees. This would be tantamount to ‘putting words into their mouths’ and compromising the spirit of Open Space. Once again the participative approach took a voluntaristic rather than deterministic view of participants.

Jean refers in her brief to the sales team to strategic thinking as “a critical business activity” and refers to the difficulty in putting time aside for doing it. The picture presented here is of managers’ activity largely governed by the ‘how to’ of day-to-day operations as opposed to the more reflective question, ‘what ought we to be doing?’ The primacy of technical and instrumental reasoning over practical reasoning offers little opportunity for creative thinking and communicative action. Jean emphasises the importance of “setting aside time in the right environment” offering participants the opportunity to step off the operational treadmill and engage in strategic thinking. However this should not be confused with strategic action where people, “often try to exploit and manipulate organisational processes, resources, and ‘the rules of the game’ to

their advantage” (Ngwenyama and Lee 1997: 155). This paints a coercive picture whereas the Open Space event was designed to be a refreshing break from this.

The way in which Jean and the ntl sales team took ownership of this part of the process indicates that, in an action research context, the researcher can only ever be a catalyst for ideas. Ultimately he has to step back and let the participants determine the relevancy and validity of the process.

### **6.3.2. Critical reflection on action planning**

The action planning stage reflected the diagnosis that the complex challenges facing the distribution of travel cannot be met by a top-down technical solution but rather by trying something more radical and taking a bottom-up approach that relies on genuine participation and experience-driven dialogue. This is clearly revealed in the discourse which took place throughout the action planning stage.

The action-planning phase effectively started in May 2002 approximately six months in advance of the event and from that date on, both ntl travel and Galileo took full ownership of the project with the author acting in a facilitative capacity. This ownership is evidenced by the fact that both organisations employed their respective PR agencies to coordinate the publicity for the event. In addition ntl travel, in the couple of weeks prior to the event, employed their sales force to canvass the clients whom they had invited.

Both organisations were open to suggestions from the author and proved to be receptive to new ideas. For example, they took a risk in adopting the Open Space format, which had not previously been used in the travel industry and was an unknown quantity to all those involved. This risk was intensified due to media presence and the decision by the sponsoring organisations to enter into an exclusive contract with the Travel Trade Gazette in order to maximise the amount of publicity. The Travel Trade Gazette is one of two major weekly travel trade papers with a wide readership throughout the UK and Ireland.

However this willingness to experiment was always framed within commercial priorities, in particular due to the sponsorship being offered. The planning team referred constantly to the need to demonstrate return on investment. For example, the opportunity to secure publicity was one of the main drivers, which secured the involvement of both organisations. Both ntl travel and Galileo were keen to be perceived as innovative organisations, willing to try fresh approaches.

### **Identifying the involved and the affected**

The Open Space event was perceived as an opportunity to gain fresh perspectives on an issue which is frequently debated in the travel industry. It was also an opportunity for the sponsors to build on relationships with existing clients and to network with potential new customers. All invitees were either senior manager or board-level within their organisations. This was considered essential by the planning team, as this level of delegate would possess the knowledge and authority to provide strategic-level input. In this respect boundaries had already been drawn around the event in terms of it being restricted to a definitive list of people and organisations. It could be argued that this was creating an elitist image and giving a voice to those who already occupy powerful positions and this argument is debated in the following paragraphs.

From a critical, emancipatory perspective the ideal of an “open house” where all those, involved and affected, had an equal opportunity to attend, had been compromised. For example, there would have undoubtedly been a wide range of potential participants outside of the client lists who could have made a very valuable contribution to the discussion. Similarly, within those organisations that were targeted it is certain that staff at different levels within the organisation would have had as equally useful and valid contributions to make as the senior delegates. Indeed from a critical standpoint, the author was aware of the weakness of inviting only senior level personnel. Firstly, it engenders and perpetrates a continuous power imbalance as knowledge is created and continues to reside at senior levels within the organisation. Knowledge is power and this cycle runs contrary to the emancipatory principles underpinning the research. Arguably it is incumbent upon the emancipatory action researcher to break that cycle and empower people throughout different tiers of the organisation. Secondly, junior employees at the ‘sharp-end’ who, on a daily basis, interact with the customer possess a unique insight into the strengths and weaknesses of IT implementation and effectiveness. Those insights are lost if they are not invited to participate.

Nevertheless the author in his capacity as a critical facilitator drew on Ulrich’s critical boundary questions (Table 3-3) in order to critique the boundaries for the event. Of particular relevance was question 10: Who represents the concerns of the affected (but not involved)? Who ought to represent these concerns? Who among the affected ought to become involved? The author was aware that the commercial imperatives of Galileo and ntl travel were driving the answer to the first part of this question. To act as a counter balance, I sought to influence the composition of the ‘guest list’ and suggested two

participants who ought to be involved in the event: Steve Pattenden, the owner of a small local chain of independent travel agents in Luton, with whom I had had prior contact; and Colin O'Neill the marketing director of a consortium, which represents independent travel agencies. I had met Colin at the conference in Nice and heard him speak at previous travel industry conferences and I was confident that both he and Steve would give a voice to small independent travel agents. This is a voice that otherwise might have become lost amidst the discussions of participants from ntl travel, Galileo, technology suppliers and others with a strong technical knowledge.

This underlines the tensions that exist in action research, where the researcher is dependent upon sponsoring organisations in order to gather worthwhile data. It had been decided by the planning team that a focussed approach was necessary in order to secure the level of attendance required to make the event viable. Even with the marketing and publicity muscle offered by two large organisations, it did not prove easy to attract delegates to the event and without an intensive effort by the ntl sales team the level of attendance would have been considerably lower. In this respect it proved necessary for the author to make a 'trade off' between critical ideals and the commercial priorities of the sponsoring organisations. Nevertheless, through his industry knowledge and contacts, the author, as researcher and facilitator was able to suggest additional stakeholders that could give additional perspectives.

Furthermore I was satisfied that the method, Open Space, chosen to facilitate the event, was in tune with the methodological principles underpinning the research and that it would provide an effective forum in which to test the framework proposed in the previous chapter. Firstly, neither organisation was adopting a technical, problem solving approach, in their planning of the event. According to Kemmis, this approach is associated with much action research and

...such action research does not necessarily question the goals themselves, nor how the situation in which it is conducted has been discursively, socially and historically constructed (2001: 92).

Both organisations appeared genuine in their convictions that it was essential to do something different and create an open space for real dialogue. Firstly, it would have been tempting for either Galileo or ntl travel, particularly in light of the fact that they were sponsoring the event, to have planned it with a predetermined set of goals in sight.

For example they could have treated it more as a market research exercise to obtain feedback, say, on a planned new software launch, or in the specific case of ntl travel, to have obtained feedback on the new range of ntl products and services. However there was never any indication within the planning meetings that this was considered a real possibility and indeed there was a genuine sense that this problem-solving approach would fail to attract senior-level delegates.

Secondly, both organisations could have opted to have a line-up of guest speakers, which would cast them in a favourable light. This form of “chest-beating” (personal communication with Anna Pollock, Chief Executive Officer, Desticorp, [www.desticorp.com](http://www.desticorp.com)) is common at major travel industry conferences and is essentially a PR opportunity for the speaker to extol the virtues of his or her organisation. Members of the planning team also held this view. The comments by Gordon Wilson in the “Open House” article in the Travel Trade Gazette (Appendix 4) emphasises the opportunity for Galileo to use the event to listen to participants in order to find out what the issues are as opposed to telling them what they are.

Thirdly, ntl travel and Galileo could have designed an overtly technological agenda for the event. The Travel Trade Gazette refers to both companies as “technology firms” (Appendix 4) and therefore it would not have been considered unusual for them to take that route. However their decision was not guided by some commitment to critical ideals. Rather it was by recognition that, commercially, this would have been unwise and would almost certainly have dissuaded large sections of the target group from attending. Despite their label as “technology firms”, none of the members of the planning team had an overtly technical background and they made a clear distinction between ‘technical people’ and ‘marketing/business people’. The author had the impression during the meetings, telephone calls and emails that accompanied the planning stage that not only did the planning team not have a detailed technical knowledge, but that they were more than content to keep technology at arm’s length. There was a clear sense that the business of selling and building customer relationships was the priority with technology existing in the background. Again, the impression that technology was an external entity to be managed and controlled was prevalent.

In contrast to action research, with a technical, problem solving remit, emancipatory action research recognises

...that our goals (as defined by particular individuals or as defined by a particular organisation) may be limited or inappropriate given a wider view of the situation in which we live or work (Kemmis 2001: 92).

Through the diagnosis interviews with Gary, and Jill Cox's strategic overview, it was clear that ntl travel was conscious of the limitations of its position and its current organisational goals. The acquisition of the travel company by ntl, and the opportunity to leverage its telecommunication services, had galvanised the travel team into looking at the wider travel sector and additional areas where they could "play" (Slide 9 Appendix 3). Inviting their clients to convene a meeting in Open Space was an attempt by ntl travel and Galileo to obtain the wider view of the situation that Kemmis refers to.

#### **6.4. ACTION TAKING – OPEN SPACE**

Representatives from 35 travel companies in the UK attended the event on the 26<sup>th</sup> November 2002. The first surprise for delegates was the room layout with all chairs arranged in concentric circles (Appendix 7 – Photo 1). It was clear from the curious expressions on people's faces that this was unexpected and did not conform to the traditional theatre-style seating, which usually accompanies travel industry conferences. The use of the circle in Open Space achieves a number of objectives.

Firstly, it does not respect the seniority of the delegate – in theatre-style Gordon Wilson, vice-president EMEA Galileo and Dave Osbourne, managing director ntl travel, would have been expected to sit at the front or would have been placed on the stage alongside a nominated panel of 'experts'. However with a circular layout there is no 'front' as such and no stage. This immediately levels the playing field and downplays power imbalances that go with corporate position and perceived status. Secondly, it engenders more of a participative culture with delegates facing each other, making it easier for delegates to engage in introductory conversations before the event formally commences. Thirdly, it focuses attention on the centre of the circle where delegates will find the flip chart paper, on which they write the issues, which they wish to nominate for discussion. Fourthly, a sense of expectation is created which in and of itself creates a certain level of energy.

When everyone was seated they were introduced to the principles of Open Space and given a brief overview of how the day would unfold. Delegates were then invited to nominate issues related to the theme for the day, which they considered to be important



and relevant to their business. They did this by leaving their chair and using the flip chart paper and marker pens in the centre of the circle. It was clear that some delegates were more comfortable doing this than others, with some staying back as they reflected on the issues at hand. However overall there was an almost immediate surge of activity with some delegates, in formal business suits, on their knees writing issues on the paper (Appendix 7 – Photo 2). Instantaneously, delegates were empowered to do something and to ‘have a say’ in creating the agenda. There is, inherently, an emancipatory element to this initial process, with delegates given the freedom to physically move around and propose ideas. In some cases delegates tackled this task individually and in other cases, collectively with someone else. This is in marked contrast to a traditional conference where delegates sit, theatre-style, waiting to hear from the ‘experts’. Delegates then posted their piece of paper, which contained their name and their issue, on one wall of the room (termed the “Marketplace” by Owen).

Again there is a sense of empowerment as the delegate takes responsibility and ownership for the issue, which she nominates. She is responsible for coordinating the group of people who sign up for the issue and for arranging a space in which the discussion can take place. She is also responsible for the way in which the group decides to record the output of its discussion and present its findings back to the overall conference. She may, if she chooses, nominate others within the group to take on different roles, for example leader, note taker, etc.

When all the issues were posted, the delegates gathered at the marketplace (Appendix 7 – Photo 3) to sign up for the discussions they were interested in joining. There was a high level of enthusiasm and interest, with delegates discussing the merits of one issue over another. Out of the 19 issues, a total of 10 discussion groups were convened. In one instance, several issues overlapped significantly: “Future of Viewdata”, “Future Replacement of Viewdata”, and “How long will Viewdata be used in travel”. In this case delegates collectively made the decision to group them together under one issue and discussion group. Again the ability for Open Space to empower was evident, with delegates making the decision, collectively, as to when significant overlap existed. The issues, which were more generic and conceptual failed to attract interest and were abandoned. This included the issue, raised by one delegate, of whether the travel industry suffered from myopia in not recognising that it was part of a wider tourism activity. The groups, which attracted interest, were those concerning major current issues, of

immediate commercial concern to delegates. These included the future of Viewdata, the aggregation and distribution of supplier content, and customer relationship management.

The groups then gathered to discuss their particular issue, with each discussion group allotted one hour. However, given the Open Space principle, “When it’s over, it’s over”, there was no stipulation upon groups to rigidly observe this time limit and in some cases groups overran, although none finished early. Another principle, “Law of Two Feet”, allowed participants to leave a group early and join another one if they felt they had nothing more to contribute, or were not learning anything new from the discussion. However the author was not aware of anyone actually doing this, possibly because the group discussions took place in separate rooms, rather than open plan spaces, and it would have appeared impolite to get up and leave. In addition senior business executives in the UK are, collectively, a fairly conservative group and it would not have come naturally to leave a discussion early or join another late. Therefore the pressure to conform to the unwritten social ‘rules’ is strong and in this respect there was, possibly, a missed opportunity for participants to cross-fertilise ideas.

When a group had completed its discussion, the summary, written on flip chart paper, was posted around the walls of the main conference room (Appendix 7 – Photo 5). This enabled all delegates to view the output of the event on an evolving basis and to prepare to vote at the end of the event on those issues they considered to be most important. A simple manual system was used to facilitate the voting, whereby each delegate was given 5 stickers to allocate to the issues on the wall that they considered to be the most significant. A maximum of one sticker could be allocated per issue with the exception of the most important issue where they were allowed to use two stickers.

This low-tech approach had a number of advantages. Firstly, it was low-cost and easy to administer. Secondly, it enabled delegates to spend time refreshing their knowledge of the group output. Thirdly, it enabled them to discuss with one another the relative merits of the output and thereby contributed to the process of consensus reaching, which was one of the objectives of the exercise. Fourthly, it enabled a quick “at-a-glance” summary of those issues, which had been voted the most important, thus enabling quick feedback to the group.

#### 6.4.1. Output from Open Space

The Open Space voting procedure is designed to enable the group to reach a certain level of agreement on those issues that should be prioritised for future action. In this regard, Open Space is not just a discussion forum but also a process, which is designed to facilitate further action. The 10 issues are as follows, with the number of votes in brackets (see Appendix 8 for the detailed output of each group):

- I know technology can be a great enabler - but how do I figure out what to do/invest in first? (26)
- Tour Operators: Access to and aggregation of suppliers' content & product (dynamic packaging) (25)
- Future of Viewdata (24)
- Customer focussed approach (18)
- Distribution through multiple websites - are we re-inventing multi-access? (18)
- Trade Associations and Infrastructure Development (14)
- The industry needs travel agents more than ever today (13)
- What are the barriers to the implementation of distribution technology projects in the travel industry? (13)
- Online procurement (9)
- GDS (9)

The issue, “I know technology can be a great enabler - but how do I figure out what to do/invest in first?” secured the highest number of votes as being the most significant issue arising from the event. This is despite the fact that it attracted 8 delegates, whereas the second issue, “Tour Operators: Access to and aggregation of suppliers' content & product (dynamic packaging)” attracted 20 delegates. It is interesting that the issue which attracted the most votes was not primarily a technical one but rather one which focussed on how smaller travel agents, in particular, can choose the most appropriate technology for their business. This supports one of the hypotheses underpinning this study, namely that while technology has an important role to play, it is ultimately a system of human and organisational activity that it supports. The following section contains a critique of the output of this group, which the author also attended in his role as a participant.

#### **How should travel agents choose a technical system?**

The points below is the original output from the group as set out on their flip chart paper in bullet point format and there has been no attempt to edit or summarise. There is also an account of the group's discussion by Linda Fox, Technology Editor with the TTG in

an article entitled “Agents need systems help” (Appendix 9). Linda Fox attended the Open Space event and reported on the findings of different groups. Linda is an experienced journalist reporting on the travel industry and both her pre-event and post-event reportage contributes a form of investigator triangulation; she is adding her own interpretation and understanding of events.

The following is a list of the delegates which participated in this group, along with their affiliations:

- Colin O’Neill, Advantage Travel Centres (independent travel agents consortium)
- John Lawrence, Worldchoice UK Limited (independent travel agents consortium)
- Pete Newton, First Choice Holidays & Flights (one of the ‘big 4’ vertically integrated tour operators)
- Tracy Glenister, Galileo (global distribution system)
- Nick Bamford, Travelscene (tour operator)
- Melvyn Talyor, West Midlands Co-op (chain of travel agents)
- Steve Pattenden, Double S Travel (independent travel agency)
- Philip Alford, University of Luton

Worldchoice and Advantage are the two largest travel agency consortia in the UK, and Colin (Sales and Marketing Director) and John (Technology Director) collectively gave a voice to the majority of UK independent travel agents. Double S Travel is an independent travel agency with four shops and is also a Worldchoice member. First Choice is one of the ‘big four’ vertically integrated tour operators. Travelscene is a medium sized tour operator with whom Nick Bamford was formerly marketing director, but who is now a freelance consultant to the travel industry, advising on marketing and IT strategy. The West Midlands Co-op is a regional chain of travel agents. The group therefore represented travel agency and tour operator viewpoints, from both technology and marketing perspectives.

The output from this group, chaired by Nick Bamford, was as follows:

**Areas of discussion:**

- a) Technical issue can be intimidating and confusing - risk of management inertia  
/'do nothing'
- b) Process of adaptation/improvement is continuous

- c) Individuals need to become more techno-aware
- d) Challenge is greatest for small and medium companies - primary need is to get brand in front of customers
- e) Delivered solution can fall short of customer expectations: Have requirements been properly stated? How much must customer compromise? Was choice made on basis of lesser of two or more evils?
- f) Customer must articulate business requirement - no need to be a victim
- g) Customer rarely gives suppliers enough time/information to understand their needs

**Conclusions:**

- a) Talk to other companies in a similar position
- b) But take responsibilities for decision
- c) Take time to reach correct decision
- d) Don't compromise on requirement
- e) Educate yourself on technology
- f) Clearly articulate business needs
- g) Understand benefits/costs/timeframes - be realistic
- h) Consult users

It should be stressed that the conclusions do not represent consensus on issues but represent points made by individuals and recorded on the flip chart.

Before a fuller analysis, the following list summarises the way in which the group's output supports the arguments arising from the critique in Chapters 2 and 3 and the rationale for adopting a critical, communicative approach to Tourism IT:

- Area (a) reinforces the uneasy relationship between people and technology and the inappropriateness of a Functionalist, techno-centric approach. The use of the word "intimidating" also points to coercion and power as relevant issues. It was revealed that travel agents felt at a disadvantage when negotiating with IT suppliers because of their relative lack of technical skills. A suggestion was made that case studies be developed and published of best practice IT use in the travel agency community, thereby providing a useful resource and a means of addressing the power imbalance through knowledge transfer. This technique was identified by Medeiros de Araujo and Bramwell for involving stakeholders in a project (2000).

- Area (b) points to the need for any approach to stakeholder consultation being longitudinal as opposed to ‘one-off’ exercise. This contrasts with the SDLC waterfall approach where typically the ‘user needs analysis’ is a snapshot of needs at one moment.
- Area (d) indicates the main driver is business and not technology. Reference to “getting the brand in front of the customer” parallels the objection that many tour operators had to GTI where the perception was that the technical system being proposed would reduce brand differentiation.
- The choice of language (talk, articulate, understand, consult, educate) in the conclusions underlines the relevance of communicative action to IT implementation.

The title of the issue and the discussion areas, together with the TTG article, depict an uneasy relationship between small travel agents and technology suppliers where, rather than proactively using technology, agents must try not to become a “victim” of it. Although a technical system is recognised as an essential business tool, it is nonetheless one that causes anxiety and problems for smaller travel agents.

In her account of the group’s output (Appendix 9), Linda Fox quotes Nick Bamford as referring to the technology market as a “minefield” and to the confusion and intimidation, which agents suffer. In the same article she quotes John Lawrence, “The small guys have nowhere to turn to for the basic knowledge”. In the group discussion Steve Pattenden based his choice of technology system on “the lesser of two evils” – hardly an informed decision. He refers to the failure of technology to meet expectations. Steve’s contribution reaffirms the importance of critically reflecting on the boundaries of the involved and the affected and who ought to attend such events.

Much critical research is applied in social contexts, for example, the education of disadvantaged young people (Carspecken 1996) or the education of ethnic minorities (Kemmis 2001) where there are clear issues surrounding the theme of emancipation. There is relatively little application in the business world, where disempowerment is less obvious and less amenable to address. However in the Open Space discussion forum there is a clear example of a group of businesses (small travel agents) which are at a disadvantage. There is the sense from the group’s output that travel agents (“small guys”) are in a considerably weaker position to technology suppliers. Agents constantly receive the message, through communication channels such as the travel trade press and industry

conferences, that technology is a vital business tool. However they lack the skills, time, resources, expertise and knowledge to make informed decisions about it. This is revealed by Steve Pattenden's acknowledgement, quoted in the TTG, that he bought a technology system "based on negative feedback he had received about rival technology" (Appendix 9) rather than being able to make a more fully informed decision based on what was right for his business and his staff.

This power imbalance in the relationship between agents and technology suppliers, results in distorted communication. Such distortion could occur if technology suppliers took advantage of the "confusion" and "intimidation", which Nick Bamford refers to in the TTG article (Appendix 9). Where distortion occurs, the truth, in a critical sense, cannot be reached. This in turn results in a continuing spiral of problems. For example, without a clear view of why they ought to be investing in a technology system and what systems they ought to be considering, agents are likely to buy technology with unrealistic expectations, which, regardless of the merits of the system, will lead to an unsatisfactory outcome. The alternative scenario, equally unsatisfactory, is that the technology is unable to deliver all the benefits promised by the supplier. In both cases the agent fails to realise the full benefits of technology and the supplier suffers poor word of mouth referral among agents.

How much did Open Space contribute to the resolution of this complex problem? As mentioned earlier, Open Space is not just about discussion but also about the action that should be taken in order to address the issues which have been raised. The group did, as requested by the Open Space facilitator, produce a list of conclusions and recommendations. However an important point to note is that some points on this list represent the suggestions made by individuals and not necessarily a point of consensus reached by all members of the group. In some instances an individual's recommendation would be noted without further discussion of it, while in other cases there was more debate before articulating the conclusion. Therefore a clear distinction can be made between brainstorming and discussion aimed at consensus reaching. For example, in terms of who is responsible for clearing the confusion circling technology, there was unresolved opinion on whether the onus should rest on the travel agent or on the supplier of technology.

This lack of a resolution is revealed in two points of view expressed in Linda Fox's article (Appendix 9). From a travel agency perspective, Steve Pattenden criticises

technology suppliers for not allowing agents to trial technology systems before making a decision whether to purchase them or not. Similarly, John Lawrence asserts that small agents lack the basic knowledge on which to base informed decisions. From a technology perspective, Steve Dobson, technology director with Anite Systems, a major supplier of technology to the travel industry, puts the onus on users “to raise issues with their technology suppliers”. Similarly, Alister Beveridge, IT director with Cosmos, a large tour operator, expresses the viewpoint in Linda Fox’s article that it is the responsibility of all agents to become “techno-aware”. However this latter perspective ignores the point raised earlier regarding the power issues at stake. It is probable in many cases that small agents lack the ability to raise issues with technology suppliers and either do not have the time or do not know how to become more techno-aware. The latter perspective, not surprisingly given the perspective of its proponents, adopts a technology-centric stance, which does not necessarily stop to ask, ‘What system ought we to be building’, where *system* is defined as a system of human activity.

This is clearly an issue where consensus needs to be built and the group started this process by reaching agreement on the need for improved levels of communication between agent and supplier. This is revealed in terms used by the group in its recommendations, such as, “*talk* to other companies, *consult* users, *articulate* needs, and *raise issues* with their technology suppliers”. The consensus of opinion was that through improved dialogue a healthier relationship could be developed between agents and technology suppliers. The first recommendation, to talk to other travel agents, is a useful starting point and one where the conditions for communicative action can be created. A useful contribution in this area came from Colin O’Neill who, as sales and marketing director for the Advantage consortium of travel agents, suggested that case studies of best practice in IT implementation could be developed and shared among his membership, perhaps via the organisation’s web site.

The recommended use of such a community-based approach is in keeping with a solution based on communicative action where the conditions for ideal speech could be created. Dialogue could take place within a secure site and among like-minded players who are all affected by technology to some extent. These conditions would facilitate communication free from distortion and the cooperation among small independent agents would strengthen their position relative to the technology suppliers. Agents would be able to debate validity claims with suppliers from an informed position. For example, there are potentially unresolved objective validity claims, with the technology supplier claiming



the technology can achieve certain benefits and the travel agent lacking the time and knowledge to determine if this is 'true'.

However viewed through a critical lens the truth cannot be established through attempts by one party (technology suppliers) to impose its reality on another party (travel agents). Where, for example, technology suppliers lay claim to certain benefits accruing from a system, travel agents must be empowered to debate that claim from a position of equal strength. The use of case studies of best practice among travel agents would enable this by contributing evidence to assist in the debate of those claims. For example, one of the primary objectives of travel agents is "to put their brand in front of their customers" (Appendix 8: Issue 8) and the ability of technology to enable this could be ascertained through detailed case study analysis and discussion. In this way the distortion is eased, as travel agents are in less of a powerless position and now possess some knowledge, from a trusted source, which they can use in their deliberations. It empowers them to raise issues with their technology suppliers from a position of strength instead of being a "victim". From an emancipation viewpoint, the information has freed them from previous constraints and both agents and suppliers can work towards rational IT implementation.

It could be argued that other methodologies, for example focus groups and case study, would generate case material. However the Habermas paradigm is unique in capturing the validity claims raised during communicative action and therefore uniquely positioned to produce case material with a critical edge and transparency.

It is difficult to see how approaches informed either by a Positivist or Interpretive worldview could, on their own, resolve this problem. The former, adopting an instrumental view, would fail to grasp the intricate contexts in which technology is implemented. Its emphasis on technical solutions and quantitative assessments of the problem would not appreciate the intimidated and confused attitudes that many travel agents have toward technology. Participation and dialogue are not facilitated by a Positivist paradigm and therefore the reality as perceived by the technology suppliers would prevail.

The Interpretive paradigm, while enabling a more user-centric view of the problem, would fail to acknowledge the fact that the technology-centric status quo, where the technology supplier enjoys supremacy over the travel agent, is a failed basis on which to implement any solution for it contributes to a distorted reality which in turn prevents

rationality in IT planning. What is required is a fundamental change with agents empowered to the extent that their communication with suppliers is no longer distorted, coercion is tackled and the playing field is levelled.

### **How to develop a better travel distribution system?**

There are three issues within the top five, which relate to the specific need for the development of a more effective information and marketing distribution system for the UK packaged travel industry (Appendix 8). This is a theme, which is very similar in nature to the Travelmole discussion and represents an example of triangulation of results. These parallels are discussed below.

Of the three issues which centred on the theme of a new distribution system, the one that secured the most votes from Open Space delegates was entitled: “Tour Operators: Access to and aggregation of suppliers' content & product (dynamic packaging)”. The term “suppliers” refers to airlines, hotels, etc., which actually own a physical product, as opposed to intermediaries such as tour operators which traditionally package and sell the product but do not carry the same risk as, say, a hotel that has to fill its beds. The term “content” refers to all information about the supplier’s product, for example prices, schedules, descriptive content in text and image format, and availability. The term “dynamic packaging” is relatively new within the travel industry and is one, which is open to different interpretations. In this respect, the Open Space forum was an opportunity to start a debate on what dynamic packaging is; why it is beneficial; for whom; and how it can be achieved.

The areas which the group discussed and the conclusions they reached are listed and discussed below.

#### **Areas of discussion:**

- a) Who owns content? Who is responsible for accuracy?
- b) How to aggregate content?
- c) Growth in Dynamic Packaging
- d) Suppliers not represented today (at Luton)
- e) Small operators can't afford technology? Don't like to pay commission
- f) Cendant as distributor AND supplier
- g) Large tour operators already investing in Dynamic Packaging

- h) Industry is moving towards aggregation, but question of timescales and critical mass
- i) Technology is not the problem but barriers imposed by commercial conditions
- j) How to get links to ALL suppliers?

**Conclusions:**

- a) Speak with suppliers directly?
- b) Electronic standards for suppliers?
- c) Standards (for all)
- d) Local tourist boards are responsible for and own local content

From the title, it is clear that Ed Spiers, who nominated this issue, holds the normative position that dynamic packaging ought to be a tour operator-centric phenomenon and links it with the ability of tour operators to secure improved access to and aggregation of supplier content. The assumption underpinning this position is that, armed with better access and aggregation, tour operators will be able to respond more effectively to increasing consumer demand for more flexible holiday packages.

A number of objective validity claims are made in the output of this group. Firstly, large tour operators are already investing in dynamic packaging. Secondly, the industry as a whole is moving in the direction of increasing aggregation. Thirdly, it is commercial conditions rather than technology that represent a barrier to this trend, with the implication that the technology already exists to enable increased aggregation and dynamic packaging. From a critical perspective these objective truth claims require further debate to establish their validity.

A similar debate had taken place in the Travelmole discussion. One of the setting shifts negotiated during that discussion brought into the foreground the claim that tour operators' legacy reservation systems are in fact a barrier to the implementation of new technology and therefore to dynamic packaging which requires new technology. As tour operators are one of the principal aggregators of content in the travel supply chain, this is an essential claim to debate. Ed Spiers, who nominated this discussion issue, was a contributor to the Travelmole discussion and referred to the MyTravel case as an example of a tour operator that was already, through its legacy system, implementing more dynamic packaging. However other Travelmole contributors contested this claim and,

although the Open Space group chose not to debate it, it would have been interesting to explore this issue in more depth.

Of even more significance to the critical position is the opportunity to debate normative validity claims. There are a number of normative claims underpinning this group's output:

- a) There ought to be increasing aggregation
- b) It is right that this is a tour operator-centric concept
- c) There ought to be dynamic packaging
- d) The way to achieve this is to create better technical links with suppliers
- e) In order to facilitate this, a set of technical standards should be developed to which suppliers ought to adhere

However at no point does it appear that the group debated these claims, nor attempt to define what dynamic packaging means. A large number of delegates attended this group and it is likely that there was not enough time for a full discussion of these issues. However based on the evidence of the output it appears as if the group largely framed the discussion within the status quo of the travel supply chain.

The purpose of the model being tested in this study is to question these norms. For example it was claimed in the Travelmole discussion that the status quo of travel distribution may no longer be adequate given changing consumer demands. For example, if consumers are increasingly packaging elements of their holiday themselves, is it right to assume that there is a role for increasing aggregation by intermediaries? A counter claim might suggest that travel agents are in an ideal position, taking advantage of their relationships with customers, to package elements direct from suppliers, without the need for aggregation by tour operators. This was an outcome envisioned by Poon (1993) whereby she forecast that travel agents, rather than tour operators, would be the winners in the new technology age.

From a critical standpoint a number of questions arise. Firstly, does the travel industry require emancipation from a system, which no longer responds to consumer demand? Secondly, is the claimed move to increasing aggregation the best way to respond, or ought there to be another way? Thirdly, is it right to take a tour operator-centric view? Fourthly, how does the dynamic packaging argument look when viewed from consumer,

supplier or travel agent perspectives? This last question encourages a rolling out of the boundaries to encompass other stakeholders in the discussion.

The issue of dynamic packaging and a new travel distribution system is very complex and encompasses a mix of involved and affected players, including tour operators, end suppliers, technology companies, travel agents and consumers. The group which debated this issue noted in their output that there were no suppliers present and this was an obvious constraint on the discussion. The sponsors had attempted, in vain, to secure the attendance of airlines and hotel companies, both of which would have had a valuable contribution to make to the dynamic packaging and content aggregation debate. For communicative action to be effective it illustrates the importance but also the difficulty in securing the cooperation of the full range of involved and affected stakeholders.

It was noted earlier that the list of invitees was restricted to senior managers which was potentially at odds with the principle of the involved and affected. Similarly, consumers were not included in the frame and yet are arguably the most important stakeholder in the overall scenario. The sponsors took the position that the delegates would possess more than adequate insights into emerging consumer trends and furthermore that each delegate was him or herself effectively a travel consumer. They were clearly focused on a business-to-business study. They took the view that a sample of consumers, in whatever format, would have rendered the day too unwieldy. However from the paradigm underpinning this study, this is an area for critical self reflection and in any follow up on the future direction of the new travel system, it would be beneficial to bring consumers groups more formally within the boundaries of the discussion as an important stakeholder group.

These types of questions counteract complacency and a tendency to look to technology as a means to achieve a predetermined end, without questioning the end itself or the status quo within which the solution is framed. This form of critical question-asking requires full and open debate in a forum to which all have open and equal access.

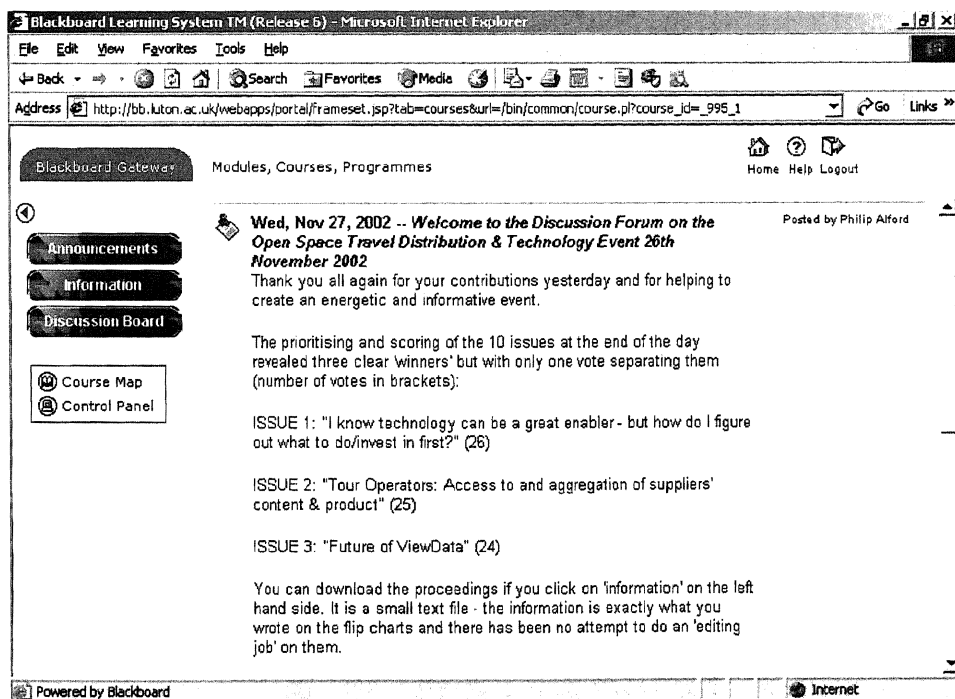
Open Space was an attempt to provide such a forum, however it was clear from the outset that a one-day workshop could only ever hope to initiate discussion and 'start the ball rolling'. In an attempt to gather some momentum, and extend these discussions, the author created a web site through which participants would have the opportunity to set up and contribute to virtual discussion forums. This was similar to the original vision of

Galileo that a community be created where those with an interest in technology and distribution would have a forum to learn, share and discuss ideas.

#### 6.4.2. Creating a virtual forum in Blackboard

The web site was created in Blackboard, the University of Luton's virtual learning environment (Figure 6-2). There were a number of reasons for choosing Blackboard. Firstly it is equipped with a number of tools, including a discussion board, a virtual classroom in which real time interaction can take place, and the facility to email registered users of the site. It therefore offers the potential for creating a space in which virtual communicative action can take place. Secondly, it was relatively easy to organise – the email addresses of the Open Space delegates were given to the university's Blackboard administrator who then created Blackboard accounts for them. Thirdly it was relatively straightforward to create a site as the author had attended a number of Blackboard-training sessions organised by the university and had set up a number of sites to support the delivery of undergraduate and postgraduate modules. Fourthly Blackboard is stable and secure, supported by the university's servers and backed-up on a regular basis. This would help to guarantee a reliable level of service and access.

Figure 6-2: Open Space Blackboard site



Source: Author

In an attempt to kick-start this initiative, the author, in concluding remarks to the Open Space workshop, reminded participants that in addition to sending the results by email they would also be available within 48 hours on the Blackboard site. In addition, each person who had nominated an issue was asked to post a message on their respective discussion forum related to their topic and results. Ten discussion forums were set up, structured around the 10 issues raised at the event. The messages posted on the Blackboard site are included in Appendix 10. The following message by Ed Spiers (Figure 6-3) has been chosen for further reconstructive analysis as it provides further clarification of the issue debated above and also relates to the Travelmole debate from the previous chapter.

**Figure 6-3: Message posted on Blackboard on dynamic packaging**

As sponsor of this topic, my objective was to get feedback on current initiatives and constraints that attendees were aware of.

Perhaps a better choice of title might have been the future of dynamic packaging, because this is the real reason for my interest in access to supplier product.

Its my belief that the technology is largely in place to operate dynamic packaging. Different parts of the industry operate different merchant models - tour operators, specialists, consolidators, on-line travel agents - and each have subtle differences to the generic dynamic packaging definition.

I also believe that consumer buying of travel through e-commerce - i.e. CRM, Content Management and booking engine applications - is now the accepted norm across a wide range of holiday products.

The constraints that are holding back its widespread adoption are the lack of standard links to suppliers, and the commercial business processes in place with those suppliers that will allow travel organiser systems to book/hold multiple travel components whilst a super PNR is created.

As an example, there are no B2B links in place to the UK low cost carriers, and their web sites are, not unexpectedly, consumer-oriented, requiring credit card authorisation before booking confirmation, with no option to cancel.

Links to low cost carriers to access and aggregate can be built, but would rely on potentially unreliable internet screen-scraping techniques

Similarly, hotel CRS and direct hotel links are available, but are currently limited to simplistic functionality suitable only for consumers and travel agents, not for tour operators.

If I had a magic wand, then my top priority would be to transform access technology and open up the commercial relationships to provide real access, on which we can build real aggregation.

In the absence of that magic wand, any suggestions or pointers as to how, and at what speed, we effect this transformation will be gratefully received.

A fuller explanation of my views on the subject can be read at [www.anitetravel.co.uk/home/reports/htm](http://www.anitetravel.co.uk/home/reports/htm)

In this posting, Ed Spiers raises a number of claims, which warrant further reconstructive analysis.

### ***Possible normative evaluative claims***

#### *Foregrounded, Immediate*

“The travel industry ought to adopt dynamic packaging,” “The efforts ought to focus on the suppliers not on the technology”

#### *Backgrounded, Remote*

“There ought to be a concerted effort by the travel industry to bring more suppliers into the electronic supply chain”

### ***Possible objective claims***

#### *Highly Foregrounded, Highly Immediate*

“Technology is not a constraint,” “There is little/no requirement for further technological development,” “The problem lies with suppliers, particularly hotels, which are not in the electronic supply chain,” “Enough consumers are buying travel online to make dynamic packaging a viable strategy”

#### *Less Foregrounded, Less Immediate*



“If dynamic packaging is not adopted then established players would lose business as customers look elsewhere,” “If suppliers do not enter the electronic supply chain they will lose a valuable source of business”

*Backgrounded, Remote*

“The travel industry is not able to meet the changing nature of customer demand”

This reconstructive analysis reveals the normative standpoint which Ed adopts. He takes the opinion that it is the suppliers who ought to be investing in technology in order to move into the electronic supply chain. This is based on the objective claim that many suppliers are using outdated technology which prevents tour operators, agents and online intermediaries from dynamically packaging product content.

Unfortunately there were no responses to Ed in the Blackboard site, underlining again the difficulty in securing involvement in virtual forums. As discussed earlier in this chapter, this was the same problem that Galileo faced in attempting to set up a web site for the travel industry. It reinforces the earlier observation that using forums like Travelmole with an established subscriber base would be a more cost effective use of time and money.

The other two issues which related to developing a new system for travel distribution were the “Future of Viewdata” and “Distribution through multiple websites - are we re-inventing multi-access?” (The full output can be seen in Appendix 8). The following list, summarising the normative and objective claims which the groups made, facilitates a critical view of this issue:

### **Normative claims**

- Tour operators should aggregate content and provide one source of information, in order to help agents compare elements
- There was some debate regarding who should drive forward the initiative for a new system: travel agents, tour operators or network suppliers (which includes ntl travel)
- Tour operator content ought to be available in multiple forms / channels, for example through own branded websites
- Tour operators ought to aggregate content for travel agents and consumers, led by specified parameters e.g. location / cost
- There ought to be a distribution system for package holidays

- There ought to be a panel of senior people from tour operators to progress product content aggregation for both consumers and travel agents

### **Objective claims**

- The lifespan of Viewdata is around 3-5 years and that it will be replaced by Internet Protocol (IP) solutions
- Viewdata requires minimal maintenance, whereas the Internet can “download bugs”
- Agents want to be able to give preference to certain tour operators

The last normative claim was one of the recommendations contained in the group’s conclusions. From a critical perspective the recommendation that the panel should comprise exclusively tour operators is not acceptable or advisable. A tour operator centric panel would be unlikely to look beyond the status quo of the travel supply chain or to consider the involved and affected. The output discussed above clearly demonstrates that suppliers, agents and online intermediaries would be valid stakeholders in such a discussion.

### **6.4.3. Critical reflection on Open Space and Co-operative Inquiry**

This section begins with reflections on the methods, which were used to enter the real world problem context. This reflection is important given past criticisms that the critical approach is theoretically strong but practically weak. It is essential therefore that this study contributes a better understanding of methodological vehicles, which are available for undertaking a critical investigation. In the research methods chapter, Co-operative Inquiry was proposed as the main vehicle for the primary research. It is a form of action research where the participants are relatively empowered and capable of guiding their own investigation.

The opportunity, offered by Co-operative Inquiry, for participants ‘to *critically see through* their subjectivity’ (Reason 1994: 333 emphasis appears in original) resonates closely with the motivation underpinning the involvement of ntl travel and Galileo. Although they did not express it in these terms, the awareness of ntl travel that it needed to start thinking outside its traditional frame of reference parallels this quite closely. Both organisations saw merit in co-sponsoring the Open Space event and in pooling their resources to gain a better understanding of the issues and opportunities surrounding distribution and technology.

However a real world investigation is unlikely to correspond directly to a textbook description and it is informative in this context to study the way the process unfolded. This study will be followed by a detailed analysis of the validity criteria associated with Co-operative Inquiry and the way in which they can be interwoven with an approach deploying Habermas' validity claim criteria.

Stage 1 of Co-operative Inquiry: "A group of co-researchers meet to inquire into some aspect of their life and work" (Reason 1988: 4). The choice of area was inspired by the original vision of Galileo:

... to pull together a cross section of CIMTIG members with a passion for understanding the issues, threats, opportunities and benefits surrounding emerging technologies in the travel industry (Beaver 2001: accessed via [www.cimitig.org](http://www.cimitig.org) 25th October 2001).

Although the emphasis of this vision is on understanding rather than action, it has similarities with Co-operative Inquiry in its suggested adoption of a community approach. However the web site that was set up to facilitate the initiative failed to attract any real interest. There are a couple of potential reasons for this.

Firstly, Galileo appeared to attach relatively little priority to the site with no senior person responsible for championing its promotion. Although a senior member of the Galileo management team launched the site, it was not linked to any specific action or commercial objective. This could help to explain the lack of resources that were channelled into the project. Secondly, the site was designed and hosted by an external organisation, which had co-operated with Galileo on different projects, but this cooperation was now under review, making it difficult for the person coordinating the venture at Galileo to make firm decisions regarding its future design.

The author's roles as initiator, catalyst and facilitator were essential in securing the initial creation of a Co-operative Inquiry group and maintaining its momentum. There was a considerable lead-time involved in bringing the two organisations together, during which members of the group changed. These changes are common in Co-operative Inquiry studies (Kemmis 2001) and in the context of this investigation they were ultimately beneficial as they resulted in a team, which was dedicated to the particular task at hand as

opposed to one that attached a relatively low priority to it. It was a team whose members enjoyed the backing of their senior management and without this it would have failed in its efforts. This was particularly the case with Galileo, which appeared to have a more formal and hierarchical organisational structure and decision-making process than ntl travel, whereby certain decisions took longer as they filtered through the requisite channels. The relative lack of seniority of the Galileo members of the Co-operative Inquiry group may also have been a contributory factor. They did not possess the same level of seniority or autonomy as the ntl travel group member who had considerably more experience in the travel industry and was also part of an internal group at ntl travel responsible for strategic reappraisal.

It is interesting therefore to reflect on whether the whole process could have been initiated from below, thereby providing a significant indicator of its empowering nature. The above comments regarding the seniority of the Galileo participants notwithstanding, both Christy and Tracy, marketing executives with Galileo, were instrumental in pushing the initiative through their organisation. Their determination resulted in Gordon Wilson, Vice President EMEA (Europe, Middle East and Africa) giving his support to the project and attending a publicity event to promote the Open Space workshop.

In a large organisation like Galileo, an important factor is ensuring the support of a senior project champion. The author later learned that the project might have been better placed within the UK marketing department of Galileo rather than in EMEA, which is where Christy and Tracy worked. This opinion, which came from one of the Open Space delegates who worked in the UK office, was voiced because it is the UK office that has built relationships with Galileo's clients in the UK - the principal target group. The difficulty, which the EMEA department had in recruiting delegates for the Open Space event, tends to support this opinion.

The recruitment of the Co-operative Inquiry group depended on extensive networking, consultation and liaison on the part of the author. As an academic embarking on an action research study in the travel industry, it was essential to build up relationships over a considerable period of time. Furthermore, the ability to do this depended, to a large extent, on the individual credibility of the author as perceived by those in industry. This credibility hinged on a number of factors.

Firstly, what was my background and experience in the travel industry? My membership of CIMTIG, being a keynote speaker at a travel industry conference on distribution and holding an unsalaried position as an associate to a high profile travel industry consultancy firm, all contributed to the credibility factor. Secondly, what added value could I bring to the group? My academic status, knowledge of the travel industry, of Open Space, access to a suitable venue for the event, and to additional resources such as the University of Luton's knowledge hub and the services of a graphic designer to design the event's invitation, all helped to contribute added value.

The academic status of, and cooperation with, the University of Luton was perceived as a particular advantage from two perspectives. Firstly, it lent the event a 'think tank' element, which was considered to be an important differentiator from standard travel industry conferences and events. Secondly, the choice of an academic venue and partner provided an element of non-bias, deflecting perceptions that the event would be used as an opportunity for Galileo and ntl travel to sell their services to their clients. These perceptions underline the opportunities for academics to engage with industry in action-based research.

In the remainder of Phase 1 of a Co-operative Inquiry study the group members:

... agree on the focus of their inquiry, and develop together a set of questions or propositions they wish to investigate. Then they plan a method for exploring this focal idea in action, through practical experience (Heron 2005: 1).

The main proposition guiding the investigation was that the travel supply chain was in a state of flux with technology changing at a rapid pace. A related proposition was that technology would play a central role in determining the winners and losers in the supply chain but that the team would have to listen to what participants considered to be the issues surrounding that technology. A third, unspoken proposition was that, as intermediaries, both organisations were aware that if they could not add value in the supply chain then their position was threatened. This was a common thread and it encouraged them to cooperate in this joint venture. Open Space fitted the nature of these propositions with its highly participative nature and bottom-up and loosely structured approach (in terms of delegates being responsible for nominating issues), and it became the agreed procedure for generating action and recording findings.

These were fairly loose propositions, held by the commercial partners in the Co-operative Inquiry group. From a research perspective it might have been useful if the author had engaged the group in communicative action, surrounding the theme of travel distribution and technology, prior to the Open Space event. Using the reconstructive data analysis method, I could then have identified their claims, negotiated a firmer set of research propositions, and then used the findings generated by the Open Space forum to reflect on them. These propositions would also have provided a focal point for re-engaging ntl travel and Galileo in debate after the event in order to determine how the action had caused them to reappraise their thinking.

According to Heron, phase 2 is launched when,

... the co-researchers now also become co-subjects: they engage in actions agreed; and observe and record the process and outcomes of their own and each other's experience. In particular, they are careful to notice the subtleties of experience, to hold lightly the conceptual frame from which they started so that they are able to see how practice does and does not conform to their original ideas (Heron 2005: 1).

Up until the first face-to-face planning meeting in May 2002, between all members of the group, the author had acted as a 'bridge' between ntl travel and Galileo, evaluating their respective objectives and presenting the case for Open Space as an appropriate method for addressing them. During this time it might have been called a 'loose group'. Although there had been a number of telephone calls, conference calls and emails, a face-to-face meeting was essential in creating a feeling of teamwork among the group and of cementing the role of co-subjects. The half-day meeting was instrumental in forging effective working relationships between members of the planning team - Jean Quaife (ntl travel), Tracy Glenister and Christy Tyler (Galileo) and the author. The meeting took place at the University of Luton's Putteridge Bury campus, thereby providing the team with the opportunity to see first hand how the venue could provide the delegates with a 'retreat' from their day-to-day operations. The group gelled well, highlighting the importance of compatible personalities in teamwork. There was no evidence of one member of the group attempting to exert power over the others.

The agreed action took place over the course of the one-day Open Space event and while the Co-operative Inquiry group attended the event, the membership of that group swelled to include the additional staff from Galileo and ntl travel that attended the event. The members of the team engaged fully as participants and made no attempt to stand apart from the remainder of the delegates. This enabled them to post issues and attend breakout groups without being perceived differently and as ‘the sponsors’ by other participants. This was important from a critical perspective in striving to maintain the conditions for ideal speech and to avoid any exercise of power, which might distort the communication. Kemmis reminds us that the action research group is:

...fluid (as action research project groups tend to be), and permits a range of different kinds of communicative role (speaker and listener, permanent and passing membership – as happens in most action research projects) (2001: 100).

For instance, the author, as speaker, introduced the event and, as listener and speaker, attended and joined a number of the breakout groups.

In effect, because of the highly participative nature of the event, all the Open Space participants constituted a large Co-operative Inquiry group, with the issues that they posted representing their propositions, and the smaller breakout groups representing smaller Co-operative Inquiry groups. As noted earlier, there had been no formal propositions as such and those posted at the beginning of the event represented the agenda not only for the day but also acted as firmer propositions for the Co-operative Inquiry process. As noted in the research methods chapter, Co-operative Inquiry works more effectively with groups, which are capable of launching their own investigation, with the facilitator taking more of a background role and this characterised the Open Space event. After the introduction and explanation of Open Space, the facilitator played no further role in the proceedings. The group proved more than capable of launching their own investigations as evidenced by the speed with which issues were nominated and groups convened to discuss them. The action took place as they discussed the issues, drawing on their experience-driven knowledge.

In this way the larger Co-operative Inquiry group was overlapping with Heron’s description of Phase 3 of the process namely, “a stage in which the co-subjects become full immersed in and engaged with their experience” (Heron 2005: 1). Open Space

proved to be a flexible communicative forum, empowering members of the wider Co-operative Inquiry group to take on different roles,

...as a speaker or listener, at the podium or in the gallery, as an occasional participant or as a fully-engaged advocate, or even as the person who finds the discussion irrelevant and slips away by a side door' (Kemmis 2001: 100).

Open Space, with its "Law of Two Feet", allows for this, encouraging participants to move between discussion groups.

Phase 4 of Co-operative Inquiry:

In Phase 4, after an agreed period in Phases 2 and 3, the co-researchers re-assemble to share the experiential data from these Phases, and to consider their original ideas in the light of it. As a result they may develop or reframe these ideas; or reject them and pose new questions (Heron 2005: 1).

This reflection took place as the output of the individual groups was posted on the walls of the main room (Appendix 7 Photo 5), providing participants with the opportunity to read and ultimately vote on the significance of the issues, which had been raised. However although the voting enabled individual reflection it allowed very little time for group discussion, except that which took place between delegates as they read the output on the wall. Given the communicative paradigm guiding the investigation, this was, on reflection, a weakness. Time constraints did not allow for the "Talking Stick" ceremony, which is based on the tribal traditions in Africa, which inspired Owen to devise Open Space Technology. The "stick" (microphone) is passed around at the end of the event to give participants the opportunity to engage in collective debate. This would have been a useful complement to the voting process, combining individual with group reflection and allowing the author to identify and reconstruct validity claims raised by participants during the ceremony. It would have provided additional clarification to the output from the discussion groups. This final session may also have enabled the group to focus on recommendations for the way forward and to have encouraged greater participation in the virtual discussions featured on the Blackboard site. In order to make time for this



concluding ceremony in a one-day event the individual discussion groups would have to be shortened or the number of groups reduced.

The final stage of phase four of the Co-operative Inquiry process is to plan for the next cycle of action. However there was no immediate impetus to do this, for two principal reasons. Firstly, Galileo and ntl travel had always intended the event to be a 'one-off' and from their perspective the process was now complete. For example, when the author had suggested, during planning meetings, the idea of a community web site as a follow up to the event the other members of the group had shown little interest. It was not something from which they could perceive any commercial benefit, again illustrating the necessity for action research projects to contribute to organisational goals.

Secondly, the wider group of participants at the Open Space event represented a range of organisations and this diversity militated against a follow up course of action. There was no particular unifying cause as would be the case where one single organisation organised an Open Space event for its employees. The relative lack of interest on behalf of participants was revealed in the dearth of messages posted on Blackboard after the event.

In light of these reflections it would be informative to explore ways in which more specific calls to action could be built into Open Space, perhaps linking with a virtual follow up through channels such as Blackboard or Travelmole. Nevertheless there were interesting issues to investigate further and on an individual level some participants expressed their interest in further discussion. To this end I used the Open Space event as a platform to arrange further group discussions in particular to explore the emerging theme of how to develop a new system of travel distribution and incorporate dynamic packaging. These discussions are reported in depth in the following chapter. The unfolding of this overall process underlines the aforementioned fluidity of the Co-operative Inquiry method, which is, in many ways, one of its key strengths.

There was no formal attempt by the original planning group to reflect on the overall process, largely due to the unwillingness of ntl travel and Galileo to devote further resources to the project. However there were different forms of post-event reflection by different participants, which help to triangulate the data and add overall validity to the findings.

Firstly, ntl travel's company newsletter featured an article (Appendix 11) on the event, containing its interpretation of some of the discussions and reflecting on the implications for the company. Overall ntl travel uses the reflection as an affirmation that it is meeting the needs of its customers. This appears largely a PR exercise designed to present the company in a positive light. Behind the scenes it is uncertain to what extent the event informed higher-level management thinking. However Heron reminds us that an inquiry may lay the groundwork for further action rather than immediately initiating it.

A second form of post event reflection came in the form of the articles published by Linda Fox in the Travel Trade Gazette (Appendix 9), which combines her interpretation of events, with quotes secured from a range of delegates. This is a form of investigator triangulation. The TTG is the leading publication for the UK travel trade and the fact that the results were sufficiently 'newsworthy' to be published contributes to the validity and relevance of the findings (Decrop 2004).

However, from a communicative angle, it would have been interesting to secure feedback from the wider readership on those articles and the opinions expressed in them. The TTG does not facilitate this and on reflection it would have been useful to publish some articles in Travelmole, the online travel news publication, which allows for reader replies and in some instances generates extensive interactive debate. This was not feasible, as the sponsors had entered into an exclusive contract with TTG. In return for this exclusivity the TTG had agreed to increase the amount of space it would allocate to the event in its publication.

As a third form of post-event reflection, there were a number of messages posted on the Blackboard site (Appendix 10). Although the site did not attract extensive traffic, these messages provide another source of interpretation of the findings. For example, the sponsor of the issue entitled "Trade Associations and Infrastructure Development" posted a message containing a bullet point summary of his group's output. Two of the seven points suggested that the role of a trade association should be to publish case studies of best practice, with one of these points specifically referring to technology. This parallels the recommendation from another group, discussed above, that associations representing small travel agents could publish best practice case studies in order to provide them with the knowledge they require in negotiating with technology suppliers.

These recommendations flag up another potentially interesting route for further research, namely the publication of industry IT implementation case studies which would enable a range of stakeholders to access valuable information. If these studies were published via a major channel such as Travelmole they would attract potentially interesting debate. The following section examines in depth the validity criteria associated with Co-operative Inquiry and the way in which they overlap and support Habermas' ideal speech criteria and the process of validity claim reconstruction.

#### **6.4.4. Co-operative Inquiry validity criteria**

These criteria were described in Chapter 4 but the Co-operative Inquiry epistemology with its different worlds and types of knowledge is explored in more depth here, in particular the way in which it supports a critical approach to stakeholder consultation.

Propositional knowledge is subjects' knowledge about the world, which includes a mixture of attitudes, beliefs and held norms (normative claims) and more formal statements of knowledge (objective claims). The former are concerned with the way things *ought to be* and the latter with the way things *are*. This form of knowledge exists in the posited world and is stated formally in the researched world. Therefore any reconstruction of objective, normative and subjective validity claims would be included formally in the researched world, which the critical researcher would use to identify setting shifts and stimulate further debate. Note that, from a critical perspective, objective 'truth' claims are solely an individual's proposition or beliefs about the nature of the world and not to be taken as the definitive truth. The latter can only be established through the debate and reconstruction of these claims.

The presented world is, "where life is actually played out" and constitutes "the experiential touchstone against which the posited and researched worlds can be grounded" (Heron 1988: 42). From a communicative perspective, the presented world represents the real world backdrop against which to debate and ground the validity claims made in the posited world and reconstructed by the critical researcher in the researched world. The presented world contains experiential knowledge, which can provide co-subjects with the evidence to either support or counter a range of validity claims.

The wording of the Open Space invitation, written by Galileo's marketing agency, referred to creating an "experience-driven environment", "putting the core business needs front and centre", and creating an event "for industry 'doers' only". The event was

targeted at representatives from the presented world as opposed to, for example, consultants who, in an expert role, advise but sit outside this world. The former have the requisite experiential knowledge to fully debate the relevant issues at hand. The Co-operative Inquiry process had created a communicative space in which this experiential knowledge could be tapped, effectively creating knowledge in action.

According to Heron, the results of a Co-operative Inquiry group are founded on the experiences of members of the group and that experience will always be, to some extent, subjective and open to the interpretation of the person having that experience. While subjectivity is inherent to qualitative research, the critical researcher has the opportunity, by tapping that experiential knowledge via validity claim reconstruction, to transform subjectivity into inter-subjectivity, whereby co-subjects develop the ability to position-take (Carspecken 1996). The ability to position-take, to 'step into someone else's shoes', rather than imposing one's own position on a co-subject, facilitates the ideal speech conditions, which Habermas views as essential in preventing distorted communication.

Attempting to identify with, if not necessarily agree with, a co-subject's normative position creates the conditions in which rational debate can begin to take place. Through this transformation process, the group of co-subjects has the opportunity to move from subjectivity, through inter-subjectivity, ultimately to objectivity and 'truth' – defined rationally as that point where sufficient agreement takes place to enable progress. This transformation process is also an emancipatory one in that it frees participants from their constrained view, both of the world and of the other stakeholders who share it. Through this process of self-illumination and group-illumination there is a much greater chance of reaching an acceptable level of truth – a necessary platform for ongoing action.

The overall validity of a co-operative study lies in the level of coherence between the inquirers' experience and action. The level of coherence results from the three-way relationship between research statements, and propositional and experiential knowledge. By acting as a bridge or conduit between the posited and presented worlds, the critical researcher can contribute to this coherence through the reconstruction of validity claims and the identification of setting shifts. This reconstruction can be summarised in research statements that are fed back to the co-subjects in order to stimulate further debate and coherence. These research statements develop, therefore, through an iterative process of cycling between action and discussion/reflection.

Reflection on the different worlds and types of knowledge provides an additional means of developing critique, which is essential to this thesis. This developmental work now continues with detailed analysis of each of the validity criteria associated with Co-operative Inquiry and the way in which they can augment the process of stakeholder facilitation.

### **Cycling between action and reflection**

During the cyclical process two types of feedback occur – positive/additive and negative/corrective. With the former, experience adds to the number of research propositions and research alerts inquirers to deeper aspects of that experience. With the latter, experience clarifies and reduces the number of propositions, which in turn helps to clarify the experiential content itself. Heron recommends that conceptual frameworks be used to help this process of construing the posited and presented worlds. The use of the verb “to construe” is of particular relevance in the context of a critical inquiry, defined by the Merriam Webster Online Dictionary, “To understand or explain the sense or intention of usually in a particular way or with respect to a given set of circumstances”. This definition takes into account the particular circumstances, or the world in action context, in which the investigation takes place.

The model proposed in Chapter 3 is an example of a conceptual model which is used in this investigation to facilitate the action-reflection cycle. By opening up a communicative space and tapping into the experience of a group of participants, the Open Space event led to a number of propositions and claims. For example, the forum, “Tour Operators: Access to and aggregation of suppliers' content & product (dynamic packaging)”, contains a number of propositions both in the output of the group discussion and from the message posted by Ed Spiers on the Blackboard site. The claims, which Ed makes in the message, were reconstructed earlier in this chapter, resulting in a number of additional claims that require debate in order to establish their validity. Furthermore, the analysis of the Travelmole discussion, which also contains postings by Ed Spiers on a similar topic, adds additional insights. This is an example of how the critical researcher can use validity claim reconstruction to provide additive feedback and help a group of co-subjects to ‘flesh out’ the debate, and support and counter various claims.

On the other hand, as the cycle of action and reflection continues, the critical researcher can deploy validity claim reconstruction to begin stripping the content of confusion and, in so doing, facilitate corrective feedback. The ability of the critical researcher to clearly

identify the negotiation of setting shifts and the shifting of boundaries will enable co-subjects to more clearly focus on the key issues lying behind the investigation and move toward an area of common ground where action can take place.

The importance of this clarification and focus, as a prerequisite for action, was demonstrated during the planning of the Open Space event. The sponsors agreed, quickly and collectively, that if the event did not focus on a particular theme and on a specific segment of the travel supply chain it would lose impact and dilute the findings to the point where they lost their validity. The reconstruction of the Travelmole discussion in the previous chapter illustrates how, as the boundaries are moved outward, the potential scope of the discussion and the range of actors involved and affected, expands dramatically. However, in an action research context, this form of additive feedback must be tempered with corrective feedback in order to move to a position where concerted action is feasible. At the very least, commercial imperatives such as those governing Galileo and ntl travel will demand clarification.

It is essential however that, during additive and corrective feedback, the boundaries of the project is set via a communicative process in which all those, involved and affected, have an opportunity to participate. To set them arbitrarily without consultation, perhaps due to resource constraints, is to fall back on a Functionalist position and, ultimately, a distorted viewpoint.

However, the levels of participation by co-subjects in this process may vary in the same way that different roles within an action research group vary (Kemmis 2001). For example, a group set up to carry out an investigation may start out with a core number of members who are actively involved and directly affected. There may also be a wider group on the periphery representing others, less involved and affected by the project but who nevertheless have valid contributions to make and whose claims should be debated. Certain members of this wider group may become more closely involved and join the core group in taking the project forward and in representing their viewpoints. Similarly, original group members may drop out.

Therefore the fluid composition of a Co-operative Inquiry group accommodates the corresponding fluidity of the boundaries between the involved and affected. The Co-operative Inquiry approach, with its cycles between action and reflection, and flexibility in terms of group composition, allows for the different perspectives held by co-subjects.

This synergy between Co-operative Inquiry and the critical approach is enhanced by Heron's recommendation that, during the cycles of action and reflection, inquirers reflect on others' experiences as well as their own. Doing so will encourage the process of intersubjectivity, which is central to critical qualitative research (Carspecken 1996). The comment by Gordon Wilson at the pre-event press conference, that Galileo wanted to create a forum for people who would not normally discuss these issues, points to the lack of opportunity for different sectors of the travel industry to reflect on each others experiences and underlines the importance of creating communicative spaces (Kemmis 2001).

### **Balancing content convergence and divergence**

Another, related, validity criterion recommended by Heron is the extent to which a Co-operative Inquiry group balances the study of a system in its entirety with each of its interdependent parts in more depth. Heron refers to this as cycling between divergence and convergence of experiential content and conceptual mapping of that experience. The study of a separate part may be deemed important enough to warrant its own process of cycling between action and reflection. For example, the Open Space event started with a broad topic, "travel distribution and technology", and breakout groups discussed divergent parts of this topic, including the role of trade associations, technology and small travel agents, and content aggregation. By the close of the event, after the reflection and voting session, the group had converged on three key issues relating to the inability of current technology and business relationships to support the effective sales and distribution of packaged leisure travel. This represents an important part and is one that is taken forward for additional study in the following chapter.

### **Types of reflection**

A third validity criterion relates to the different types of reflective thought. Firstly, descriptive reflection involves each member conveying the content of the experience to both him and to others. This can be achieved through a mix of verbal, textual and diagrammatic communication. The Travelmole forum has demonstrated the potential for electronic discussion spaces to allow this experience to be conveyed. The second form of reflection, evaluative, is central to the critical approach and involves searching for coherence between the different worlds and types of knowledge. Evaluative reflection is the stage where validity claim reconstruction can be deployed in order to help reveal where coherence lies.

Heron advises that conceptual maps be used to assist this stage and the flow diagram charting foregrounded and backgrounded validity claims, setting shifts, and boundaries of the Travelmole discussion is an example of how such a map can begin to paint a picture of a subject area. This picture acts as a base for exploring areas where coherency can be reached. Thirdly, practical reflection is the action, which is to be taken, following the descriptive and evaluative reflection. This validates the output from the first two stages and also feeds back into the loop for further evaluation.

### **Falsification**

The ability to identify false propositions is another means for improving the validity of a Co-operative Inquiry study. For example, objective or subjective validity claims may be false but have to be proved to be so. Falsifying subjective claims is difficult because they relate to the personal world of the person making that claim who enjoys “privileged access” (Carspecken 1996: 165) to the factors that support the claim. Carspecken suggests a range of techniques for validating subjective claims.

Firstly, where recorded interviews have taken place, check for consistency throughout the interview. Secondly, if possible interview the same person repeatedly, again to search for consistency. Thirdly, check to see if the person’s actions support their claims. Fourthly, and again in an interview scenario, the interviewer must develop the skills and awareness to ensure that the interviewee has the opportunity to accurately reflect his inner state. By allowing a co-subject to express his subjective state, the interviewer is facilitating intersubjective representation. It allows others to position take with that subject. Carspecken argues that this is self-empowering as it enables the subject to express himself in his search for self-affirmation. It also allows his co-subjects to recognise, or not, some of themselves in his subjective state.

Falsifying objective claims is less complicated as this is an area to which all co-subjects potentially have access. However Heron cautions against collusion among group members who may adopt a pseudo-reality. This collusion militates against the ideal speech conditions and may be carried out to attain positions of power or to follow a hidden agenda. Heron suggests a couple of corrective measures.

Firstly, that the initiator challenges the write-up of co-subjects’ experience. This is similar to the process that underpins validity claim reconstruction. The act of challenging



is inherent to this process because it puts the person making the claims in the position where he has to explain and defend the claim. Or, alternatively, if he refutes the interpretation of his claims, he again is put in the position where he has to explain the refutation. Secondly, Heron suggests that fellow group members challenge each other's experiences. This process can be seen at play in the Travelmole discussion where contributors to the debate openly challenge other's claims. This leads, in several cases, to the original contributor defending his position, which in turn creates additional claims to be debated and defended.

### **Sustaining authentic collaboration**

Heron cautions against over domination by the initiator of a Co-operative Inquiry on the basis that it would preclude the conditions for ideal speech. Open Space proved to be a method, which countered this threat and created an environment in which authentic collaboration could be secured. Participants were empowered to set their own agenda and to take ownership for the discussion of the issues that they nominated. In order to counter over domination by the initiator, Heron recommends that different members take on the role of facilitator. This is effectively what happens in Open Space with each participant having an equal opportunity to nominate and facilitate the discussion of an issue. Furthermore, as stated earlier in this chapter, in several instances participants collaborated to ensure that a number of similar issues were rolled into one discussion forum.

Heron also cautions against power imbalances within the group where some members dominate and others are reluctant or unable to contribute effectively. The potential downside of Open Space is that a skilled facilitator does not moderate the individual breakout discussion forums and therefore it is easier for some individuals to dominate the discussion. However the method contains a number of elements which make it possible for all those attending to make a contribution.

Firstly, participants can nominate an issue at the beginning, ensuring they 'have a voice'. Secondly, they can offer to write the output for a group. Thirdly, they can leave a group and join another if they find the discussion uninteresting or they have nothing further to contribute. Fourthly, they can nominate an issue at anytime during the event if there was something they would like to discuss but was not covered in the list of issues at the beginning. Fifthly, the Open Space format allows for a "graffiti board" – a flip chart, white board, etc., placed in a central area where participants can make brief written contributions. Sixthly, participants are free to write their own views on the output from

each discussion forum when it is posted on the “bulletin board” – in the case of the ntl travel / Galileo event, the walls of the main conference room (Appendix 7 Photo 5).

From the author’s observation, the group, which attended the Open Space event, had a keen interest in debating the issues surrounding travel distribution and technology and securing their collaboration and involvement did not pose a problem. Each participant had their experience, which they could draw on and use to illuminate an area of inquiry. Additionally, the participants made use of the opportunity to discuss issues and to network outside the discussion forums. This informal collaboration is as authentic and valid as that which takes place in the forums.

The plenary session, referred to above, gives participants the opportunity to view the entire group output and to have an equal vote in deciding which issues are deemed to be most significant. Significant discussion accompanied this stage as participants viewed the final output prior to casting their votes and listened to each other’s opinions and interpretations of the results. This again optimises the level of authentic collaboration.

Finally, the use of an electronic discussion board facilitates additional collaboration in a number of ways. Firstly, as demonstrated by Ed Spiers’ posting, it is a means through which nominees of discussion topics can clarify the output of their group. Secondly, it allows others to respond, starting a process of interactive debate such as that seen on the Travelmole site. Thirdly, it provides the opportunity for those who did not attend the event to comment on the output. This may potentially identify stakeholders who are affected by the outcomes but were not originally involved. Fourthly, it gives a voice to those who were at the event but who, perhaps due to domination by more powerful participants, did not feel the event was a collaborative venture. The relative anonymity of electronic discussion may help to alleviate their inhibitions. Heron suggests individual cycles of reflection and experience as a means for countering domination by other participants and the virtual forum creates a communicative space, which may encourage less powerful participants to reflect on their own experiences.

### **Open and closed boundaries**

This criterion is very similar in nature to the concept of the involved and the affected that is central to the critical approach. Heron stresses that, during a Co-operative Inquiry, non-members should record their own experiences in addition to having them recorded by group members. This helps to ensure that those who may be closely affected by the

subject under study are given an authentic voice. For example, during the Travelmole discussion, Sam, the travel agent, entered the forum and provided a non-technical, small travel agency perspective. The opportunity for non-members to record their experiences also helps to emancipate them from their constraints. This is in contrast to the Positivist paradigm where the researcher looks upon other people not as participants in the process but as research subjects. The Positivist researcher attempts to capture rich experience through a questionnaire and convey the results through quantitative means and through his interpretation, rather than those who live the experience.

### **Variegated replication**

Heron recommends that the design and findings of each inquiry must be clearly documented to enable any follow up studies to develop the concepts and explore overlap. This is a common validity criterion for qualitative research and, in part, is an attempt to counter Positivist criticism that findings lack validity and reliability due to the level of subjectivity involved. The author has used thick description to document in detail the diagnosis and action planning stages. The design of Open Space is well documented by its founder, Owen, whereby the participants are responsible for documenting their findings. The reconstruction of validity claims is, by definition, a new interpretation of a person's claims by the critical researcher. In this regard it is potentially open to the subjectivity criticism. However two points need to be made in response to this criticism.

Firstly, as Heron asserts, replication cannot be exact but rather will be conducted through the researcher's own constructs. Secondly, the reconstruction is used as a tool to help a group of co-subjects to cycle between experience and reflection through generating both additive and corrective feedback. In other words the reconstruction process is a catalyst for further discussion.

### **Coherence in action**

The final criterion relates raises the question, 'Does the coherence between the different worlds and types of knowledge facilitate action?' This is, in many ways, the ultimate test of validity for an action research project and, in an *emancipatory* action project, does it lead to some form of emancipation for the stakeholders involved and affected? From a rational, critical perspective how do these validity criteria enhance the ability of the critical approach to resolve conflict and achieve consensus? However before addressing these questions the critical researcher must reflect on what he hopes to achieve through

integrating aspects of validity claim reconstruction with the Co-operative Inquiry epistemology.

Heron emphasises that achieving coherence does not mean achieving unanimous agreement – on the contrary the different perspectives and overlapping views of group members, help to illuminate a common area of inquiry, thereby increasing the validity of the findings. The Merriam Webster Online Dictionary definition of ‘coherent’ includes the following terms: “consistent, understandable, cohesive and coordinated, and as having clarity or intelligibility”. Therefore if a study’s findings can help to clarify a problem context in a consistent and cohesive manner, then the study has achieved a level of validity.

This is similar to Ulrich’s (1983) position that reaching a critical solution does not provide a definitive answer but helps to prevent participants from deluding themselves. From a communicative perspective, this is achieved through the debate of objective, normative and subjective claims. For example, the Open Space event started this process of illumination where three of the top five issues point to the shortcomings of the existing system of travel distribution. This highlighted the fact that there are weaknesses in the status quo of travel distribution, and to carry on believing that the existing supply chain relationships will remain static is an example of self delusion. However in order to create a base for action, further clarification will be required, which can only be achieved through additional cycles of action and reflection.

Therefore, rather than having a definitive start and end point with intervening stages, in the manner of the systems development life cycle, the process of achieving coherency is an ongoing one. The world of action and the presented world are fluid worlds and a critical epistemology must be cognisant of that. For example, in a Co-operative Inquiry study the admission of a new person or organisation to the group will bring new experiences and knowledge to bear, along with unique normative values. What the critical researcher, as a co-subject, must aim for through the process is the identification of ‘common ground’ that can act as the basis for *a level of consensus, which is sufficient for co-subjects to agree on a course of action.*

During the planning of the Open Space event members of the Co-operative Inquiry group would sometimes use the phrase “in an ideal world” referring to things they would like to do but were not practical within existing constraints. This underlines the fact that they

were in fact operating in the 'real world' with its tight deadlines and resource constraints. Sometimes decisions had to be made even if all the facts or someone's opinion were unavailable. If the process and the action result in emancipation, for example through removing constraints imposed by the status quo, empowering people through knowledge, or removing self delusion, then the study has achieved political change – a goal that is central to a critical investigation.

Similarly if each co-subject can 'buy into' the conclusions of the study through the way in which they relate to their own experience and the way in which they can be employed in action, then the groundwork has been laid for addressing conflict and achieving a pragmatic level of consensus. New knowledge will be created on a continuous basis in the world of action, with boundaries shifting all the time. Therefore the idea of some form of static end truth is a misnomer. Engaging in the Co-operative Inquiry process is a means of achieving change through action, with the focus on the process rather than the end. The world of action helps to create both the presented world and experiential knowledge through the creation of practical knowledge. This world of action is the real world to which people belong and in which they spend their daily working lives. It therefore represents people's reality and it is essential that a critical approach, based on communicative action, is embedded in, and made relevant to, this world.

The critical approach, with its overtly political agenda for change, must contribute to an improved world of action – the world to which co-subjects in an investigation return when the investigation is complete. The emancipatory action researcher does not conduct an investigation 'at arms length' and then return to a university research environment, removed from the world of action, to discuss his findings or indeed to publish them in academic journals, which are seldom read by industry practitioners. Instead his research is based in, relevant to, and ultimately validated by, the world of action.

The detailed reflection, which has just been completed on the Co-operative Inquiry validity criteria, will be incorporated into the augmentation of the model at the end of this chapter. However the author first proposes to extend and strengthen the theoretical underpinning of the model by examining the contribution, which a further element of Habermas' Theory of Communicative Action can make.

## **6.5. RECRUITMENT OF FOLLOW UP CO-OPERATIVE INQUIRY GROUP**

As with the recruitment for Open Space, the principles of boundary critique and the involved and the affected were applied in recruiting the follow up Co-operative Inquiry group. In the case of Open Space, the author had secured invitations for Colin O'Neill and Steve Pattenden, in order to represent the views of smaller independent travel agents. For the same reasons they were invited to participate in this phase of the research, as was Maurice Scott, Business Development Director with Travelcare - a large chain of independent travel agents. Alastair Gilchrist (E-Commerce Director, easyJet) and Jerry Foran (Pricing & Distribution, British Airways) were also invited to join the discussion in order to address the absence of suppliers at the Open Space event. Although not available for individual interviews their contribution to the group discussion would give an interesting supplier perspective.

The group's participants (apart from the two airlines) were recruited from the Open Space event and on the whole represented those participants with whom the author had established a rapport and who would be willing and able to make a meaningful contribution to the discussion. However aside from these practical considerations, those recruited, represented different positions in the tourism supply chain, including travel agents, tour operators, network providers and technology suppliers. This was considered an important criterion from the point of view of each participant being able to give different perspectives on the issues.

The empirical data were generated through individual face-to-face interviews with each participant (apart from the two airlines), followed by a real-time, Voice over Internet group discussion. The interviews were loosely structured around what the participants considered, from their own perspectives, to be the ideal future design of travel distribution in the UK. The Idealised Design method (Ackoff 1981) was used by Midgley and Munro (1998) in their study of housing provision for older people and was identified by them as being particularly useful in teasing out the boundary judgements that participants make in support of their idealised design. From the perspective of this study it proved a useful way of encouraging participants to raise normative and objective claims in support of their vision and also some of the barriers to achieving it.

In analysing the interview transcripts, the principal objective was to establish the normative position held by each individual participant. To reiterate a point made in earlier chapters, the ability to identify the 'ought' positions of others is the "seed of the

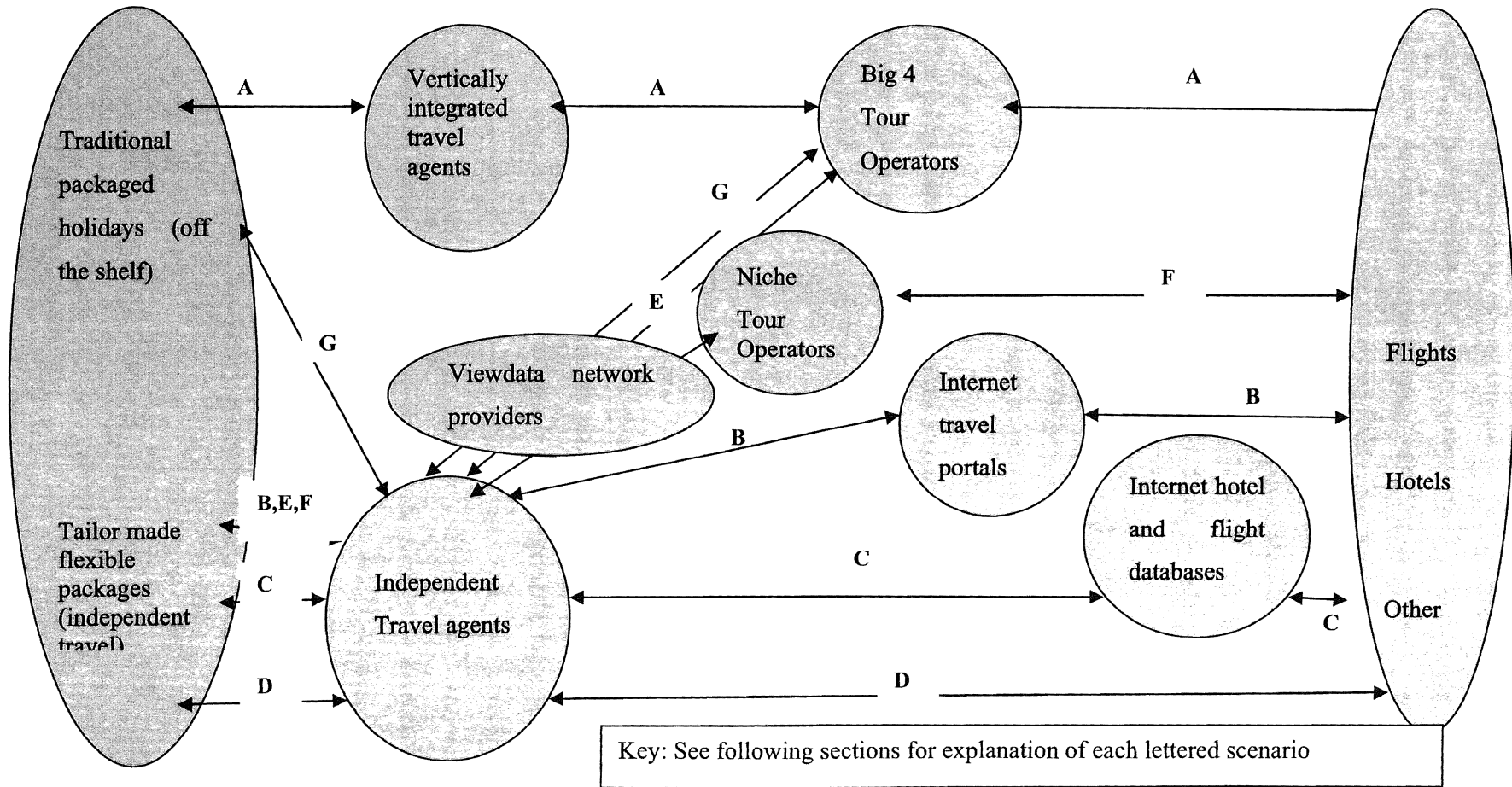
critical perspective” (Kemmis and McTaggart 2000: 590). The reconstruction was structured along the following lines. Firstly, the participant’s main normative position was stated in one sentence. This is followed by a number of major normative and/or objective claims which support that position. Finally, each of these major claims was supported by extracts from the interview, together with a detailed reconstructive analysis of them. The reconstruction follows the same format as that in Chapter 5 and therefore to avoid repetition the following section contains the scenarios that emerged from the reconstruction. Appendix 12 contains the reconstruction of two of the interviews in order to illustrate the reconstructive format.

## **6.6. SCENARIOS EMERGING FROM INTERVIEWS – A CRITICAL VIEW**

A number of scenarios emerge from the reconstruction of the interviews (Figure 6-4). These represent a critical view of the main issues which emerged from Open Space relating to a system of distribution for the holiday travel industry. Each scenario is underpinned by a series of objective and normative claims, which collectively represent the propositional knowledge of the interviewee. Each scenario is expanded on below along with participants’ claims that either support or counter it.

Before considering each individual scenario it is informative to reflect on the role which the Co-operative Inquiry validity criteria play in assisting the process of building a critique. In constructing this section, the author is taking knowledge from the posited world and, having critically reconstructed it, presenting it in the researched world. This presentation then acts as the catalyst for further communicative action during which participants will draw on their experiential knowledge to fully debate the claims that arise. In this way, the debate takes place against the backdrop of the presented world. The Internet-based live discussion forum, the analysis of which follows this section, facilitated this debate.

Figure 6-4: Travel distribution scenarios





During these cycles of action and reflection, it is the task of the critical researcher/facilitator to map the convergence and divergence of the experiential content and to facilitate the stripping away of that content in order to arrive at a position of enhanced clarity. This is where the group discussions follow naturally from the individual interview analysis. The latter established the positions to which each participant subscribed and the former were then used to foster debate and the process of corrective feedback (Heron 1988). It was not envisaged that participants would arrive at a position of absolute consensus, for this would be unrealistic. However, the process outlined above facilitates the development of a critique that is central to the aim of this thesis and, it is argued, is essential if IT planning is to lay claim to being rational'.

### **Distribution Scenario A**

*Summary of scenario:* The big 4 vertically integrated tour operators sell 'off the shelf' package holidays through their own distribution network.

This cuts out the independent agent and the Viewdata network providers and reduces the amount of investment they need to make their reservation systems compatible with other industry systems, as they can build their own in house systems.

*Relevant objective claims:* Firstly, there is conflict of opinion on whether this strategy actually represents a priority for the big 4 tour operators. For example, Maurice claims that it is a substantial and growing percentage of their business, while Steve and Alister claim that it is less significant. Secondly, the mass holiday market is static while the market for flexible products is growing, thereby predicating this strategy on a declining market. The third set of claims centre on the legacy technology of the big 4 and point to the advantages of focussing on the mass market. According to Nick and Maurice, legacy technology is unable to respond to the flexible demands of the emerging consumer. Ed and Alister, who both claim that bolting on applications provides a solution to the problem, contest this claim. Jean counters this, based on her experience at British Airways, claiming that the cost of bolting on applications to the core reservation systems is not financially sustainable. Alister does concede that, in the longer term, it will prove increasingly difficult to maintain the legacy technology due to the lack of suitably qualified personnel.

## **Distribution Scenario B**

*Summary of scenario:* Independent travel agents develop a more direct relationship with the consumer, using the technology of virtual tour operators (Internet travel portals) to package supply elements.

The Internet travel portal transcends the border between principal and aggregator (see Figure 1-1) because in some instances they aggregate content and sell it as an agent would for a commission. However they also subscribe to the 'merchant model' whereby they act like a tour operator, packaging elements of supply and marking up their own margin before selling to the consumer.

*Relevant objective claims:* Firstly, Internet travel portal technology would enable travel agents to dynamically package for their customers. Secondly, consumer demand for more flexible travel arrangements is growing. Thirdly, Colin contends that travel agents do not currently possess the technology required to meet the demands of the independent traveller. Fourthly, Nick holds the backgrounded claim that those organisations that do not change the basis for their segmentation and design processes around customer behaviour will lose out to competitors that do. Fifthly, Nick also claims there are two worlds – one where the customers' needs are being met (the world of the online travel portal and low cost airline) and another (the traditional tour operator to travel agency distribution) which is outdated and whose share will steadily decline. Sixthly, Maurice claims that travel agents and virtual operators complement one another due to customer's preference for face-to-face contact when buying more complex products. Seventh, Colin supports this, claiming that the consumer lacks the confidence and trust to buy on the Internet. Eighth, he also claims that this is a better scenario for travel agents, as they do not yet possess the technology to present supplier information directly to the consumer.

*Relevant normative claims:* Firstly, Maurice, Colin and Steve advocate that the travel agent ought to become the personal agent of the consumer, not the tour operator. Secondly, Colin believes that the travel agent ought to complement face to face and telephone selling with web based methods. Thirdly, Nick holds the view that travel agents ought to abandon the traditional ways of operating and change to meet the new needs of the customer. Fourthly, Ed, although holding a largely tour operator-centric view, believes that the industry should find solutions that bypass the 'big 4'. Fifthly, Colin shares a similar view, claiming that there ought to be a force to counteract the dominance of the big 4.

## **Distribution Scenarios C&D**

*Summary of scenarios:* The independent travel agent dynamically packages content from suppliers, either direct (D) or via aggregators on the Internet (C).

Many of the claims relevant to this scenario are similar to those for (B) above and will not be repeated here.

*Relevant objective claims:* Firstly, the technology does not yet exist to present this information to the consumer in a satisfactory way. Secondly, Colin claims that, in order for the independent travel agent to fully own the customer relationship, he will need to be able to access a pool of suppliers directly.

*Relevant normative claims:* Firstly, Ed believes that the model of distribution ought to be based on aggregation. The presence of Internet-based aggregators in this scenario fits that model. Secondly, Colin advocates that independent travel agents package the no frills (low cost) airlines.

## **Distribution Scenario E**

*Summary of scenario:* The independent travel agent dynamically packages content from the big four tour operator reservation systems, via the Viewdata network providers.

This scenario was introduced by Jean and appears to run contrary to scenario A where the big 4 pursue a direct sales strategy. However, there are a number of claims, which are relevant to this scenario and some, which may support it.

*Relevant objective claims:* Firstly, in the background, Maurice claims that tour operators do not cooperate with travel agent. This lack of trust may affect the likelihood of developing a working relationship between the big 4 and independent agents. Secondly, the demand for traditional packages is stagnating. This may create an opportunity for the big 4 to tap into the growing demand for flexible holidays, using the independent agent as a sales channel. Thirdly, the claim that legacy technology cannot address this market would have to be debated as this would act as a barrier to the development of this scenario. Fourthly, Colin claims that the multiples value the role of the independent agent because of the impartial advice they provide – the independents are necessary to the big 4 because of the lack of consumer trust in the multiples.

*Relevant normative claims:* Firstly, Maurice holds the view, although not in the foreground, that tour operator reservation systems ought to be able to let agents match demand and supply more effectively. Secondly, Steve holds the opinion that tour operators ought to develop systems with the user, not the consumer in mind. This would take the form of agent login areas to which the consumer did not have access. This is something that the low cost airlines are increasingly doing.

### **Distribution Scenario F**

*Summary of scenario:* Independent agents work in close collaboration with niche tour operators, thereby serving both the mass and independent consumer.

This is not a new scenario; however a number of claims are made which are relevant to it.

*Relevant normative claims:* Firstly, Colin includes this as one of the three strategies that independent agents ought to follow. Secondly, Steve claims that independent travel agents ought to work with those specialist tour operators that value loyalty.

*Relevant objective claims:* Firstly, the growth in demand for more flexible travel supports this scenario. Secondly, Nick claims that those travel companies that target the customer by lifestyle rather than product will be the future winners. Arguably, with their specialist products, the niche operators are in a better position to do this.

### **Distribution Scenario G**

*Summary of scenario:* Independent agents continue to sell package holidays to the mass market

Despite scenario (A) and the claimed pursuit of an in-house distribution strategy by the “big 4”, independent agents claim that they play an important role in the distribution of this product.

*Relevant objective claims:* Steve makes two relevant claims. Firstly, tour operators can afford to pay commissions to independent agents through the cost savings operators would make if they embraced Internet technology. Secondly, the large critical mass of independent travel agents renders them important to the big tour operators. Thirdly, Colin claims that the multiples value the role of the independent agent because of the

impartial advice they provide – the independents are necessary to the big 4 because of the lack of consumer trust in the multiples.

#### **6.7. ANALYSIS OF VOICE OVER INTERNET GROUP DISCUSSION**

This facilitation technique proved very effective in generating dialectical debate while at the same time obviating the need for participants to commit large amounts of time in attending a face-to-face discussion. The author was initially concerned that the technology would act as a barrier to meaningful debate; however on the contrary participants appeared to enjoy the experience, with the discussion lasting in excess of one hour - no formal training was required with the tool proving intuitive. Two participants needed additional technical support in order for them to connect to the VIPER server from behind their corporate firewalls. However in both cases this was addressed quickly by opening up the relevant ports in the firewall for the discussion and then closing them again when it was finished. Participants were very receptive to the idea of a virtual discussion, perhaps due in part to the fact that using technology to convene a discussion about the role of technology appeared a natural method. They liked the fact that only one person could talk at a given time as it enabled them to express their opinions fully and without interruption. The author acted as moderator of the discussions although in reality little moderation was required as the discussion unfolded in a natural fashion with no one individual seeking to dominate proceedings.

By logging on to a spare PC and then plugging a tape recorder into that PC, the author was able to record the discussion. This was transcribed and submitted to validity claim reconstruction. The ability to convene online discussions and record them for further analysis represents a significant step for a critical approach to stakeholder consultation, which relies on communicative action and discourse analysis. Although virtual techniques are not a substitute for the quality of face to face meeting, they add considerable value in different contexts. For example it would not have been possible to convene a follow up discussion to Open Space if the participants had had to commit the time to travel to one place. This factor was identified in the tourism partnership literature where, for travel, time and budgetary reasons, participants could not attend every meeting and therefore placed themselves and the overall process at a disadvantage.

Following the reconstruction of the individual interviews, a group was recruited to further debate the issues arising. All of the interviewees with the exception of Ed Spiers (who was on a business trip) joined the group. As previously discussed in the Research

Methods chapter, it is important that the methods used to test a communicative model contain dialectic between stakeholders in order to allow claims to be fully debated. The Voice over Internet forum provided this, allowing participants to present their viewpoints and challenge or agree with those belonging to others. The aim of this discussion was to strip away content and further clarify the issues surrounding the development of a new system of travel distribution – a theme running through the Travelmole debate, Open Space and the interviews.

The emphasis on clarification is designed to illustrate the point that the critical approach can successfully enable action to take place and that it possesses the methodological ‘teeth’ required to instigate change. During the planning and execution of the Open Space event it was clear that those who inhabit the world of action prefer to work on the basis of concise information, which can lead to prompt action.

During the discussion the author acted in a facilitative role and opened up the debate on the theme of customer-driven versus product-driven culture in the travel industry. This is based on the output from the individual interviews, which placed the consumer centre-stage. The following analysis of the group discussion unfolds as a dialogue and contains reconstruction of certain sections of the dialogue. These sections were chosen on a number of bases, all of which serve the purpose of achieving enhanced clarity on the issue of designing an improved system of distribution. Firstly, they contain a setting shift, as a participant changes the normative standpoint of the discussion, perhaps by moving a claim from the background to the foreground. Secondly, the participant adds a claim not previously made in the interview. Thirdly, participants either agree or disagree on a specific claim.

## **6.8. CRITIQUE OF ISSUES ARISING FROM GROUP DISCUSSION**

The reconstruction of the validity claims raised during the group discussion illustrates the depth of insight that can be gained from just sixty minutes of Voice over Internet dialogue. The objective of this critique is to identify areas where enhanced clarity has been achieved through reconstruction of the discussion, particularly as it pertains to the scenarios identified earlier. Diagramming the ebb and flow of setting shifts proved a useful tool in critiquing the Travelmole debate in Chapter 5 and the same technique has been deployed in this section to the initial claims in order to assist the critique (Figure 6-5).

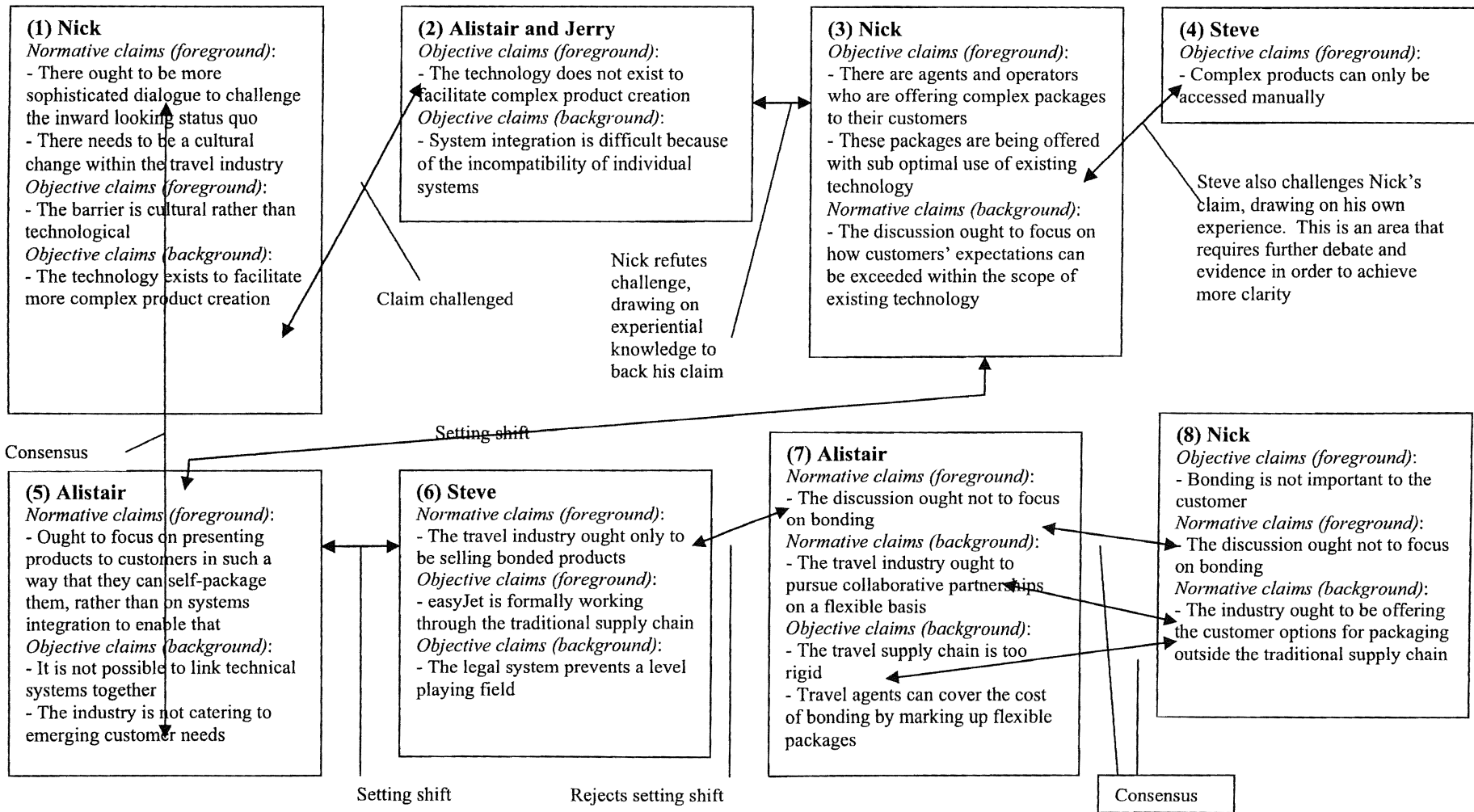
Nick sets the scene for the discussion with his normative claim that there ought to be a cultural change in the industry, which challenges the status quo. However, although Alistair and Jerry do not challenge this normative setting, they do bring to the foreground, Nick's claim that the technology exists to enable the creation of more complex product packages. In challenging this claim, Alistair and Jerry negotiate a setting shift, making technology the focus of the debate. Their challenge also indirectly questions the ability of the industry to step outside the status quo of travel distribution when the technology does not enable it to do so.

Nick counters the challenge, claiming that agents and operators are currently creating more complex products, enabled by existing technology. However Steve enters the discussion and, rather than accepting Nick's normative setting, also challenges the claim regarding technology. Steve draws on his experiential knowledge to support his counter claim.

Although there is clearly the need for more discussion and evidence, this short extract has questioned the availability of technology to facilitate a challenge to the status quo of travel distribution. This is a critical issue as it relates directly to the ability of the travel agents and tour operators to respond to the needs of the emerging new independent customer and thereby impacts on a number of the scenarios outlined above.

Alastair changes the normative setting and diverts attention away from technology, claiming that the industry ought to focus on the way in which products are presented to the customer. This, he claims, is a better way of serving the flexible customer rather than attempting to integrate complex systems. This again is a critical setting shift as it impacts on the technical scenario that Alister Beveridge sets out in his interview. Alister Beveridge was not able to join the group discussion and had he had the opportunity would have responded to this claim. However the backgrounded objective claim underpinning Alastair Gilchrist's normative setting, namely that it is not possible to link together systems, is one that would have to be brought into the foreground in order to clarify both the desirability and feasibility of integrating systems.

**Figure 6-5: Reconstruction of Internet group discussion**





Steve, rather than acknowledging Alistair's setting shift, negotiates his own, attempting to introduce travel agency bonding as the normative setting for the debate. He uses the example of easyJet expressing an interest in working through tour operators as an opportunity to support his argument on bonding. His backgrounded objective claim that the legal system does not enable a level playing field for travel agents has implications for those scenarios, outlined above, where the travel agent becomes the personal expert agent of the customer, rather than a booking agent for the tour operator.

However both Alistair and Nick reject Steve's setting shift and agree on a new normative setting, namely that the industry ought to focus on options outside the traditional supply chain for meeting the customer's needs. For a brief period, Alistair and Steve reach consensus on the need to cater for both the traditional package holiday customer and the independent traveller. However in response to Nick's normative claim that there ought to be a new basis for collaboration in the industry, Steve renegotiates his normative claim on bonding. His backgrounded, objective claim that agents and operators are constrained by the legal system impacts directly on Nick's normative position that the industry ought to be exploring new working practices. Steve would argue that this is not possible within existing constraints – the legal system is constraining the agent's life-world.

However once again, Nick rejects this normative setting. While Steve's attempt to fully discuss bonding is not successful this is clearly an issue that will need to be resolved before any rational decisions can be made regarding new technology-enabled business models. The only direct response comes from Alastair with his backgrounded claim that travel agents might be able to cover the additional costs of securing a bond by marking up flexible product packages that they sell to their customers. Bringing this into the foreground would provide an interesting channel of debate in order to try and resolve the impasse.

Nick also adds the claim that all participants have agreed that technology is not a barrier. However that claim has been disputed and a satisfactory resolution has not been attained. Maurice accepts Nick's normative setting that agent/operator models need to change but adds the objective claim that the human resource drain threatens travel agents' ability to change. This is an example of an objective claim that impacts on the normative infrastructure.

Colin asks for clarification on an earlier claim made by Nick that there are unacceptable cost levels within the travel industry. Colin is taking the opportunity to challenge Nick's implication that travel agency commission fees are a surplus cost. This request for clarification underlines the importance that participants attach to gaining a full and open debate on a key issue. Nick attempts to support his claim with evidence from British Airways, which has cut out commission payments to agents. Using this example could also be seen as a means to persuade Jerry, who works for BA, to take a similar normative view. Nick then concludes his contribution with a setting shift claiming that agents ought to accept cost cutting as a fact of business life. This is a contentious claim as BA has, on numerous occasions, angered travel agents with their decision to gradually eliminate commission payments. This is a clear area of conflict that would need considerable debate.

Through the ebb and flow of the communication, a number of normative and objective claims are made and setting shifts negotiated – some accepted and some rejected. One of the objectives of the model is to identify areas where an acceptable level of consensus exists and which can be taken as the grounds for progress on IT decision-making. There are three such interrelated areas in this discussion.

Firstly, participants agree that there are two distinct types of customer: those that want an off the shelf standard package and those who want more flexible arrangements. In many ways this is nothing new, however what is more significant is that there is agreement on the normative perspective that new ways of doing business should be developed if the growing demand for more flexible packages is to be satisfied. It provides a point of reference for future discussion. Secondly, organizations ought to look outside the traditional supply chain for new business opportunities. This is an important area in which to secure normative agreement as it encourages participants to challenge the status quo. Thirdly, participants agree on the advantages to be secured through collaborative working. This is related to the second point in that those inhabiting the traditional supply chain ought to explore opportunities with those outside it and vice versa.

These three areas represent a normative infrastructure to which all participants can subscribe. The empirical evidence reviewed in this study illustrates the necessity of such an agreed infrastructure as a basis on which to make rational decisions regarding the implementation of IT. It represents the solid foundations on which future communication action can be based. However the discussion also flagged up a number of areas where

further debate is needed, in order to resolve disputed validity claims, and these are outlined below.

*Normative claims that warrant further debate:*

- The issue of travel agency bonding ought to be addressed in order to provide a level playing field.
- The industry should focus less on technical solutions and more on the way in which the product is presented, allowing the customer to access it in his own way
- Agents ought to accept the fact that travel suppliers and tour operators will try to cut costs

*Objective claims that warrant further debate:*

- The technology exists to facilitate the creation of complex packages by agents and operators
- Complex products can only be accessed manually
- The human resource drain from travel agents is a threat to new business models
- Travel agents can cover the cost of bonding by marking up flexible packages

A criticism which emerges from the interviews and discussion is that a large number of organizations in the tour operating and travel agency sectors are unable to think outside the constraints of the traditional tourism industry supply chain, which has existed for 30 plus years. Nick draws the analogy that, “the travel industry continues to fiddle while Rome burns”, by which he means that the status quo supply chain is no longer valid. This illustrates the inability of the industry to deliver the choice, and availability, which the customer is increasingly demanding. As a result customers are, in Habermasian terms, withdrawing legitimacy from this system and beginning to package their own travel, drawing on services provided by the low cost airlines and the new breed of online travel agent. Rather than a process of life-world renewal taking place whereby the package holiday sector examines its predicament through communicative action and new ways of thinking, inertia has taken hold.

In undertaking a programme of emancipatory action research, the critical researcher’s findings will be validated, ultimately, by the way in which they contribute to the creation of a better world. What constitutes a “better” world involves subjective judgements, however from a critical perspective there are a number of questions that can be asked. Firstly, does the research contribute to a more *rational* and *truthful* view held by those

actors participating in the world of action? The critical interpretation of “rational” is that position where the truth is arrived at through unforced consensus and the power of the better argument. It is that position, which stakeholders can subscribe to of their free will and without the exercise of coercion or power. During the forthcoming analysis the author will aim to identify where such convergence occurs, thereby presenting future Tourism IT scenarios that are based on rational debate.

Secondly, does the research contribute to a clearer view of the system/life-world balance and the factors that affect the harmony of that balance? According to Habermas, this balance is essential to a better society and thereby it is a valid perspective from which to consider the system of distribution in the travel industry.

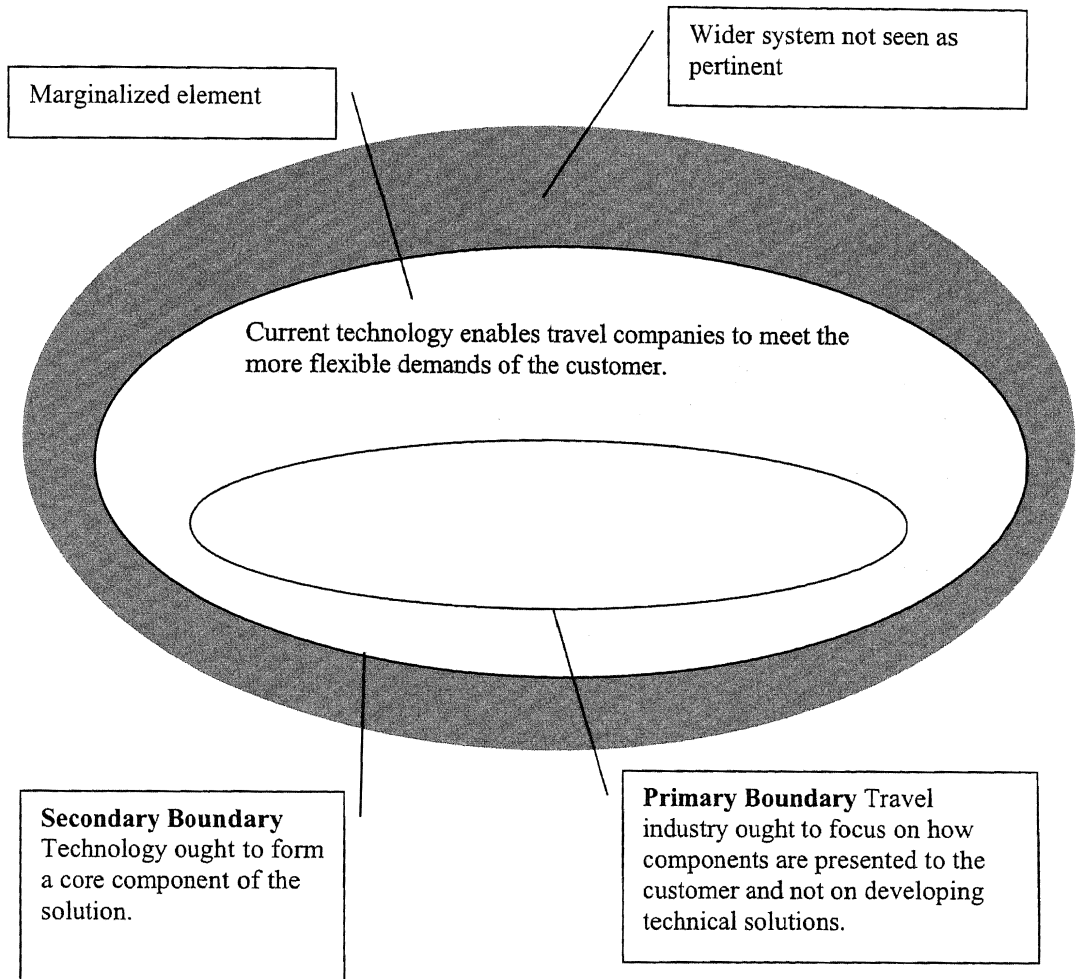
Thirdly, does the research contribute to the taking of concerted action, which emancipates those involved and affected? Heron reminds us that this action may not take place immediately but that the research may contribute ideas and insights that inform action to be taken in the longer term. The author, through his work with the TOWARD Europe group, was in a position to apply the findings obtained through this thesis to a real world action project. More detail is provided on this work in the final chapter, which includes areas for further research.

#### **6.8.1. A critique of the boundaries central to the discussion**

Boundary critique facilitates an additional critical view of the Voice over Internet discussion (Figure 6-6). The discussion revealed that there are areas of both agreement and disagreement, with some participants subscribing to a narrow boundary and others placing the boundary wider. For example, Nick, Jerry and Alastair all agree that the travel industry needs to change culturally and be more forward thinking in the way in which it meets the customer’s demand for increasingly flexible travel arrangements. However Nick disagrees with Jerry and Alastair on how they ought to meet that new demand.

He holds the normative view that the industry ought to optimise its use of existing technology to package flexible holidays, while Jerry and Alastair hold the view that travel companies ought to concentrate instead on how the components are presented to the traveller and less on technology. Lying behind this normative disagreement is the contested objective claim regarding the ability of current technology to meet the changing needs of the customer.

**Figure 6-6: Boundary critique of Voice over Internet discussion**



Source: Author

In the context of this particular element of the discussion (and it should be noted that this is just one element), Jerry and Alastair subscribe to the narrower, primary boundary and Nick to the wider, secondary boundary. The objective claim regarding technology lies in the marginal area in between. According to Midgley, if this marginal element were to be accepted, then Nick's position would hold sway, but if rejected, then Jerry and Alastair's position would prevail. However Midgley acknowledges the complexity involved in boundary placement, and in this case even if Jerry and Alastair were to concede that the technology does exist, it would not mean that they then, by default, agree with Nick's normative position that technology should form a core part of the solution. However it would inform and change the nature of the debate.

The question also arises as to who should have a say on accepting or rejecting marginalized elements, bearing in mind the concept of the involved and affected which underpins boundary critique. Figure 6-6 represents the claims of only three participants and the sweeping in of new participants and new evidence might alter the boundaries and shed new light on the marginalized elements. For example, Nick refers to agents and operators who “delight their customers on a regular basis” and it would be informative to hear them clarify, from their perspective, what “delighting customers” actually means, how they are doing it, and what role technology plays.

During the Open Space discussion one of the breakout groups concluded that it would be useful for best practice case studies of technology use by smaller travel agents to be published in order to provide agents with insights. Such studies if made available would help to inform the debate under discussion here. This sweeping in of stakeholders and new information is something that a skilled facilitator could enable if he thought it would aid the critical process. For example, he may decide that other participants in the process were being marginalized and that they ought to have a stake in the discussion.

Midgley’s study of housing provision for older people (1998) contains two guidelines, which can assist the practical augmentation of the model being tested in this study. Firstly, his use of the advocacy method, whereby as facilitator he gave a voice during planning meetings to the needs of the user (older people), is a technique that could be useful in the context of Tourism IT discussions. It is not always possible for each participant to attend all meetings and discussions. This may be for logistical reasons or perhaps in the case of the less powerful, because they are excluded from the process. If the author through his role as a Tourism IT researcher was involved in developing best practice case studies of travel agency IT implementation, then he would be able, in the absence of the travel agents, to bring this knowledge to bear on the discussion. In the context of preceding Internet discussion, Colin O’Neill, in his capacity as Sales Director for Advantage Travel, took on an advocacy role for the independent travel agent. There are a number of such consortia in the UK, representing different sectors, which could act in an advocacy role.

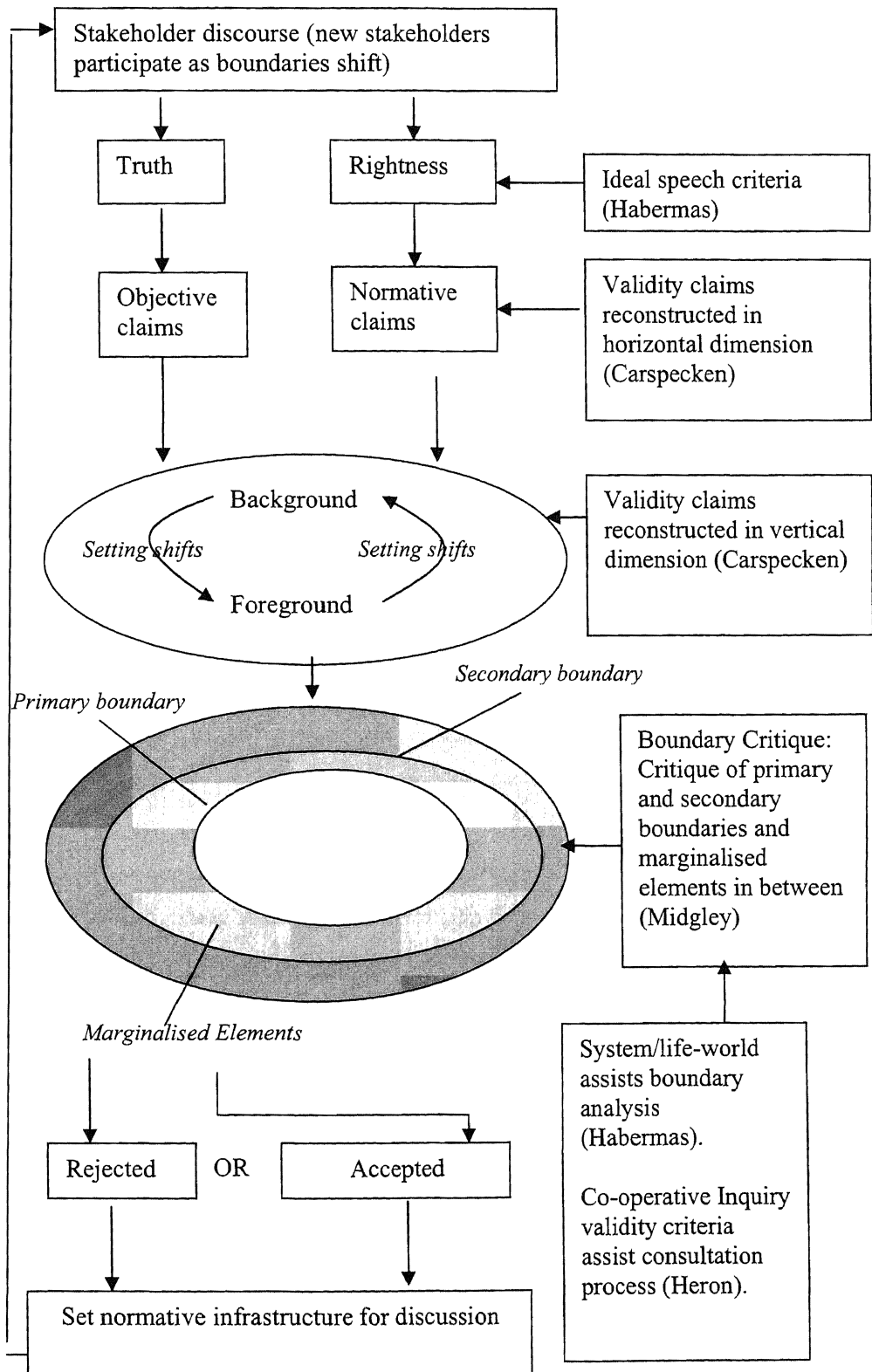
Secondly, Midgley recommends that in situations where stakeholders feel intimidated by more powerful stakeholders, they be given confidential space to express their needs freely and openly. In his case study of housing provision for older people he was thinking of the relative disadvantage that older people might feel when faced with professional

managers. While not the same social setting, we have seen that small independent travel agents constitute a less powerful group and the confidential space that Midgley recommends would allow them to make a range of normative and objective claims without feeling intimidated by the presence of large tour operators or technology suppliers.

## **6.9. AUGMENTATION OF MODEL**

The cycles of conceptualisation-action-reflection-augmentation are central to this thesis and testing the theoretical model proposed at the end of Chapter 3. The augmentation of the model at the end of this study incorporates the Co-operative Inquiry validity criteria (Figure 6-7). Co-operative Inquiry offers a process for stakeholder engagement and the validity criteria associated with that process are useful in augmenting validity claim reconstruction.

Figure 6-7: Augmentation of communicative model (2)





## **7. CONCLUSION**

This final chapter helps the reader to obtain an overview of the entire thesis and to make sense of the study through the following:

- Briefly explain how each objective has been met
- A fuller explanation of the main findings and their importance both from the literature review and from the field research
- The potential contributions of the thesis are embedded within the previous two points
- Critical reflection through Habermas' system/life-world
- Critical reflection on the credibility and transferability of the research
- Suggestions for future research

### **7.1. MEETING THE OBJECTIVES OF THE STUDY**

- a) A critical analysis of the current approaches to Tourism IT implementation as reported in the literature, and through the empirical evidence

The focus was on multi stakeholder, inter organisational Tourism IT and five case studies were investigated, along with some general empirical evidence. The cases and evidence were gathered from across tourism, regardless of individual sector (e.g. destinations, tour operating, hotel industry, etc.). The critical analysis of this evidence was enabled by the application of social theoretical frameworks (System of Systems Methodologies, Lyytinen and Hirschheim's (1987) failure framework, and Burrell and Morgan's (1979) classification of sociological paradigms) taken from Management Science and Social Theory. It revealed the weaknesses associated with applying a technical, problem-solving and reductionist approach to complex, human-centred problem contexts involving high levels of stakeholder communication. The deterministic boundary setting by those in positions of power contributed to the failure of projects such as GTI, ETNA and to a certain degree, EnglandNet. Where there were attempts at consultation, for example in BookTownNet and EnglandNet, these lacked full participation and proved unable to establish a normative frame of reference to which stakeholders could subscribe. The

contribution that a model underpinned by critical theory can make in these cases is discussed more fully later in the chapter.

- b) Critically review the theoretical constructs available to understand how Tourism IT can be managed

The critique through Burrell and Morgan's (1979) classification of sociological paradigms highlighted the shortcomings of Functionalism and Interpretivism as theoretical constructs for the management of Tourism IT. The former, as discussed above, tends to dominate the sector but is ill equipped to manage the complexity of multi stakeholder problem contexts. The latter, while more adept at understanding the human issues involved, does not aim to challenge the status quo or critically appraise the remit and boundaries of the project. While acknowledging the difficulties in challenging the status quo in reality, the fuller discussion of the main findings later in the chapter will reveal how a critical approach based on communicative analysis can highlight the selectivity of stakeholders' positions.

The critique pointed to Radical Humanism as a way forward for Tourism IT – a paradigm which has not been used in the domain but which possesses the theoretical underpinning to enable a critical approach to stakeholder consultation. The identification of the Radical Humanist paradigm as an appropriate theoretical construct with which to manage Tourism IT led to Critical Social Theory and to Habermas' (1984) Theory of Communicative Action. Habermas is established as a critical philosopher within Management Science and his work was a logical choice given the role played by communication in the multi stakeholder projects.

- c) Draw on theory and methodology from outside the tourism domain in order to develop the concept of 'critique', which is central to the aim and objectives

This has been partly addressed with the use of social theoretical frameworks and the theory of communicative action. In addition a review was undertaken of critical systems practice, which led in particular to work by Ulrich (1983; 2003), Midgley (1995; 2000; 2006) and Clarke (2000; 2001; 2001), resulting in the following criteria for critique (these are expanded on later in the chapter):

- Include the involved and affected: this concept is central to a critical approach and promotes boundary fluidity in a multi stakeholder project
  - Identify the 'is' and 'ought' positions of participants
  - Emancipation from the constraints brought about by the selective reasoning of participants which often reflects the status quo
  - Participative: a critique based on communicative action involves dialectic and ongoing interaction between stakeholders
  - Cross disciplinary: drawing on different paradigms allows new perspectives and a stepping outside of a mindset.
  - Self criticism: self awareness relating to the impact that one's own assumptions and norms might have.
  - Intersubjectivity: this is a prerequisite for validity claim reconstruction, encouraging participants in a multi stakeholder context to position-take.
- d) Develop a model for stakeholder consultation which actions Habermas' (1984) Theory of Communicative Action

Given the centrality of communication in Tourism IT, the decision was made to develop a model for stakeholder consultation which would be underpinned by Habermas' Theory of Communicative Action. However while theoretically strong, the critical domain has been criticised for its lack of practical application. The review of Carspecken's (1996) work in the United States provided a means for implementing Habermas' ideal speech criteria: truth, rightness, sincerity and comprehension. The testing of the model on the Travelmole debate demonstrated that the 'truth' and 'rightness' criteria could be applied through the reconstruction of objective and normative validity claims in order to critique the boundaries surrounding the issue and the marginal elements lying between those boundaries. In the vertical dimension the concept of setting shifts and backgrounded and foregrounded claims highlighted the way in which the normative infrastructure changed as the debate progressed.

- e) Test the model using an iterative, inductive action research framework in a 'live' setting

The model which had been developed and tested on the Travelmole discussion was largely a theoretical one and the next objective was to investigate methods, both face to face and Internet-based, which could not only test the model but which could also

facilitate a critical intervention in a live problem context through engaging stakeholders and capturing participant communication. Co-operative Inquiry was chosen as the research framework to guide the study. This study took place in live setting comprising a stakeholder consultation exercise by ntl travel and Galileo, a series of face to face interviews with key informants, and a voice over internet group discussion.

The live test demonstrated how the deconstruction of participant discourse enabled a critical diagnosis of the problem context. It highlighted the boundaries surrounding ntl travel's relationship with tour operators and the identification of the theme: 'Travel Distribution & Technology: The issues and opportunities'. A review of potential methods which could be used to investigate these issues resulted in the choice of Open Space as the primary method by which stakeholders would be engaged. It was chosen on the basis that it was highly participative and enabled an investigation from a stakeholder perspective. It countered the tendency in Tourism IT to set an agenda in advance (as critiqued through correspondence failure) by allowing participants to construct their own agenda (as critiqued through expectation failure).

The use of Voice-over-Internet technology enabled the issues emerging from Open Space to be followed up, stakeholders to be re engaged, and crucially for related discourse to be captured. Prior to this, the use of face to face interviews structured around the concept of Idealised Design had allowed individual positions and the claims supporting them to be critiqued in depth. The deconstruction and reconstruction of participant discourse in this phase enabled a critique of the boundaries surrounding travel distribution and technology. This critique revealed the human and technical complexity of the issue and underlined the importance of debating claims to truth and rightness before implementing technology. For example an issue of primary importance related to the relevance of the existing model of travel distribution based around the packaged holiday, given the changing consumer trends enabled by the Internet. Related to this was debate over whether existing tour operator technology could meet the demands of the new consumer. There was disagreement on this question, illustrating the fact that objective claims as with normative claims require debate in order to establish 'truth'.

Co-operative Inquiry was chosen as the umbrella methodology for the investigation, based on its cycles of action and reflection and the empowerment it affords to the group members. It also comes with a comprehensive set of validity criteria which were seen to complement a model based on validity claim reconstruction and boundary critique. For

example the criterion, open and closed boundaries parallels closely the concept of the involved and the affected.

f) Produce a revised model, which is both theoretically and empirically informed

The final augmentation of the model in the previous chapter saw the inclusion of Habermas' system / life-world and the Co-operative Inquiry validity criteria, discussed above. The former, when applied to critique one of the Tourism IT case studies, demonstrated the tension that exists between the technical system and the complex relationships and communication channels which comprise life-world. What emerges is the importance of technology supporting the life-world and not shaping or controlling it (colonisation). Communicative action is central to renewing the life-world and maintaining a healthy balance between system and life-world. For example, if the emerging needs of the new travel consumer represent the life-world, then it is essential that, through communicative action, this world be understood in order to ensure that the system of travel production and distribution supports the life-world rather than constraining it. System / life-world therefore offer an additional means through which to theoretically critique Tourism IT.

## **7.2. MAIN FINDINGS**

The problem was stated at the beginning of the study as “how do we ensure that, as technological solutions are implemented within tourism, due consideration is given to human-centred issues?” A review of Tourism IT, which drew on frameworks from outside the domain and comprised a social theoretical critique, revealed that the lack of such consideration resulted in failure. It highlighted the mismatch between the use of technical problem solving approaches and complex human-centred problem contexts. Although several of the authors cited in this thesis have commented on the social issues affecting Tourism IT (Mutch 1996; Peacock 1999; Peng and Litteljohn 2001), there has to date been little research published in the literature to propose ways in which to address them, and in general this area has not received recognition within the domain.

This study has established the case for a new theoretical position from which Tourism IT can be managed and the domain critiqued. In the introduction to a special issue of the *Journal of Travel Research*, on Tourism IT, Sheldon (2000) refers to the lack of theoretical and conceptual studies in Tourism IT research. She identifies “theories and paradigm” (2000: 135) as knowledge areas in need of development, advocating the use of

interdisciplinary studies. The Radical Humanist paradigm is established in Management Science as a critical alternative to Functionalism (Positivism) and Interpretivism and it offers an alternative, critical lens through which to view Tourism IT. This approach has enabled a stepping outside of the mindset and status quo of Tourism IT and allowed new perspectives to be taken. The communicative model proposed in this thesis provides a tool for critiquing the boundaries that exist in tourism partnerships and, through this critique, maintaining a focus on human-centred issues.

However, while the model is theoretically underpinned, the route to critique is essentially methodological (Figure 1-2) and is based on generating and reconstructing communication, relying on dialectic and the interaction between participants. In building this model the author has borrowed from boundary critique within critical systems practice. As discussed previously in this chapter under the meeting of Objective C, the work of Ulrich (2003) has been a particular influence, along with that of Midgley (1997; 2006) and Clarke (2001; 2001). Ulrich's and Midgley's work falls under the banner of boundary critique and, in proposing his agenda for the future of critical systems practice, Ulrich presents the arguments for critically systemic discourse (2003). One of his core arguments that critical boundary judgements should permeate an intervention, regardless of the methodology being deployed, and his carefully developed critique of methodological frameworks such as SOSM and TSI, struck a chord with this author.

However, while acknowledging the influence of Ulrich's thinking on this thesis and the theoretical rigour of his arguments, I would argue that there is little in the way of practical guidance in a recent paper (Ulrich 2003) as to how this agenda might be achieved, other than to promote Critical Systems Heuristics as the primary vehicle. Similarly, although several authors (Jackson 2000; Midgley 2000; Clarke 2001; Mingers 2001; Midgley 2006) in CSP refer to the potential of Habermas' theory of communicative action and the ideal speech criteria, little guidance is offered as to how they might be applied methodologically. Only one example was found of the use of Habermas' ideal speech criteria in a practical live setting (Gregory and Romm 2001). In this case the criteria were used to facilitate the discussion as it took place providing a structure to the dialogue; however in this author's opinion the approach lacked depth and provided limited insight into participants' normative and objective positions.

The application of Carspecken's (1996) approach to validity claim reconstruction along the vertical and horizontal dimensions provides a means for enacting Habermas' ideal

speech criteria and bringing transparency to peoples' objective (truth) and normative (rightness) claims. This study has demonstrated how discourse can be deconstructed and reconstructed *after* discussion has taken place, using the claims to rightness and truth to identify stakeholder positions and interests and facilitate ongoing discussion. The reconstruction can be presented not only in textual format, as Carspecken's reconstructions are, but also in tabular (Table 5-1) and diagrammatic (Figures 5-1 and 6-5) formats. The presentation of the reconstructions in these formats is useful for providing participants with an 'at-a-glance' overview of the discussion. It also adds transparency to the process of validity claim reconstruction and boundary critique; otherwise the person undertaking the reconstruction could hide behind a veil of expertise and therefore in his own way exert power over the group. Ulrich stressed the importance of making people "competent" (Ulrich 2003: 331) in critical discourse and promoting the transparency of the reconstruction process could be one way of enabling that.

The presentation of the reconstruction in tabular format shows the clear relationship between normative and 'truth' positions, with stakeholders often using statements of 'truth' to bolster their view of how things ought to be (e.g. Table 5-1). For example, this study found that those, who argue that there ought to a more dynamic web based system of package holiday distribution rather than a tour operator-centric one, support this viewpoint with the objective claims that legacy technology cannot deliver the browse and search functionality which the new consumer requires. However from a critical perspective, truth claims are subject to different perceptions and should be challenged and debated where appropriate in the same way as normative ones. If objective claims are used in certain occasions to bolster normative positions, then it follows that challenging the former could have an impact on the latter. For example if Ed Spiers could successfully defend his claim that tour operator legacy systems are able to support more dynamic packaging, then he could undermine David Jones' and Nick Bamford's normative positions that solutions ought to be found outside the existing system of travel distribution. Resolving normative differences can be problematic owing to their personal and entrenched nature. Debating objective claims instead offers the promise of challenging boundary differences in a less direct and confrontational way.

However to do this Ed Spiers may need to bring in additional stakeholders and evidence in order to present convincing arguments - relying "on argumentation rather than on non-argumentative means such as power or deception" (Ulrich 2003: 332). This demonstrates the way in which validity claim reconstruction facilitates the identification of new

stakeholders – an important dimension encapsulated in the concept of the involved and affected and related to the work by Medeiros de Araujo and Bramwell (2000) on stakeholder recruitment in tourism partnerships. A detailed analysis of the normative and objective validity claims often helps in highlighting new issues and participants that must be swept in to the discussion in order to be able to rationally debate the claim. A further example of this was Nick Bamford’s claim that agents and operators “delight their customers” using current technology. Extending the boundaries of the discussion to admit some of these agents and operators in order to fully debate Nick’s claim is an example of how reconstruction promotes boundary fluidity.

The presentation of the reconstruction in diagrammatic format shows the vertical dimension and the way in which the normative setting - the group’s frame of reference - changes over time as claims are made, accepted or rejected (Figures 5-1 and 6-5). It also provides a more visual representation of the boundaries of the discussion than textual or tabular formats. In this respect it complements the mapping of primary and secondary boundaries and the elements that lie in the margin in between - concepts which lie at the heart of Midgley’s work on boundary critique. For example Figure 6-6 illustrates a significant marginalised element which lies between two boundaries – the primary boundary essentially argues that the industry ought to focus on how the customer is now purchasing travel whereas the secondary boundary promotes a more technology centric view. The reconstruction has enabled the identification of a marginalised element which can focus rational debate surrounding these two boundaries. The mapping of boundaries and the marginal elements that lie between them provides the element of visual mapping which Jamal and Getz (2000) recommend as a focal point for group discussion.

The critical paradigm, as with any other paradigm, facilitates the choice of methodology and methods. Co-operative Inquiry was chosen as the methodological vehicle for this study in part because of its participatory ethos and cycles of action and reflection, but also based on its comprehensive set of validity criteria. The four worlds – posited, researched, presented and action – provide a framework for deconstructing, reconstructing and testing validity claims. The concept of achieving coherence between research statements, and propositional and presentational knowledge and between the inquirers’ experience and action facilitates multiple perspectives on an issue, countering the domination of one voice. The synergy between the validity criteria, validity claim reconstruction and boundary critique points to Co-operative Inquiry as a suitable framework within which to conduct a critical inquiry.



A paradigm also impacts on the choice and application of research methods and the concept of critique (the involved and affected, the 'is' and the 'ought' and the exercise of coercion) developed during this study encouraged reflection on the extent to which individual methods were carried out with a critical intent. For example, in the planning of Open Space (as far as the author is aware, the first time the method has been used in travel), the author, as critical facilitator, adhered to the critical principle of the involved and the affected by securing the invitation of two delegates who could lend a voice to small independent travel agents. Both of these delegates were known to the author through networking at industry events and this underlines the importance of the critical researcher adopting a participatory role, close to the issue at hand.

In addition to face to face methods such as Open Space and interviews, the study made extensive use of asynchronous (Travelmole forum) and synchronous (voice over internet discussion) e methods, creating "multiple other channels" (Ulrich 2003: 330) through which participants can argue their concerns. While not a substitute for face to face interaction, the participants did not appear to find the voice over internet technology a barrier and were able to fully articulate their viewpoints. On a practical level, it would have been impossible to secure the cooperation of the follow up discussion group to Open Space if the participants had been asked to attend a face to face meeting. The use of voice over internet to manage stakeholder interactions goes some way to addressing a limitation identified by Mason (2000), namely the difficulty in securing full attendance at project meetings and the resulting implications for whether stakeholders legitimise the final outcome. These e channels present an additional advantage in that the discourse is easily and unobtrusively captured for reconstruction purposes.

### **7.3. A CRITIQUE THROUGH SYSTEM/LIFE-WORLD**

Habermas' Theory of Communicative Action underpins the model, which the author tested in the real world problem situation described above. It forms the basis for validity claim reconstruction, which, as discussed above, offers a practical edge to Habermas' theory, particularly when used in conjunction with Boundary Critique and the Co-operative Inquiry epistemology. Habermas' theory also includes a "substantive theory" (Kemmis 2001: 93) – that of system and life-world. The relevance of this concept only became clear during the action research and is an example of how the Co-operative Inquiry research process can facilitate additional theoretical insights.

In this section system/life-world is explained and applied in order to critique the case studies and empirical evidence reviewed in Chapter 2 and the issues arising out of the Open Space event. Habermas argues that social practice is affected by system – “institutions, structures, and functions” (Kemmis and McTaggart 2000: 587). The system world is an objective one to which all participants in the research process have access and which lends itself more readily to empirical study (Carspecken 1996). However this is not to say that participants will have no differences in defining the terms in which they perceive reality. Social practice is also affected by life-worlds which are:

... local settings in which we relate to others, making sense of ourselves, our co-participants, and our relationships in the settings of family, workplace, neighbourhood, and so on (Kemmis and McTaggart 2000: 587).

From a critical perspective, the life-world contains the object-enabling structures that shape our awareness and judgment of reality. As the review in Chapters 2 and 3 demonstrated, empiricism is ill equipped to decipher the life-world. Understanding the tensions and interconnections between system and life-world is, according to Habermas, essential in achieving a balance in society.

Life-world is best understood as *my* world and although it can be studied subjectively through an interpretive lens, access is privileged (Carspecken 1996) and participants in the research process rely on the sincerity of the subject who is describing their own world. There are, however, techniques available for testing the level of sincerity, which were explained above in the ‘falsification’ Co-operative Inquiry validity criterion.

Rather than pitting the objective against the subjective, as in the Positivism versus Interpretivism debate, the critical perspective recognises that system and life-world impact upon one another reflexively and it is important to understand the tensions and interconnections of this relationship (Kemmis and McTaggart 2000). If positivists are concerned with *the* world and the way it is, and phenomenologists with *my* world, then criticalists are concerned with *our* world and the way it ought to be. If the positivist adopts an objective view of the world, and the phenomenologist a subjective one, the criticalist takes an intersubjective stance.

Being critical requires recognising the normative positions held by others and this recognition can only be achieved intersubjectively. “Such recognition is intersubjective because it is a process of framing the normative-evaluative claim from the positions of others” (Carspecken 1996: 144). The normative position held by participants contains a number of claims as to how the system/life-world balance *ought to be* and intersubjective recognition is essential if these claims are to be debated. “The researcher is in a position to articulate the normative-evaluative claims of others only when she can recognise them as her subjects do” (Carspecken 1996: 144). This ability to surface the ‘ought’ positions of others is the “seed of the critical perspective” (Kemmis and McTaggart 2000: 590).

### **7.3.1. Tourism IT case study critiqued through system/life-world**

Superimposing the system/life-world framework on Peng and Litteljohn’s study of IT implementation within the hotel industry underlines the importance of achieving a harmonious balance between system and life-world. Peng and Litteljohn observe that Functionalism was incapable of handling “the rich set of informal activities and communications which play an important part in organizational life” (2001: 363). This set of activities is an example of the life-world. The Functionalist approach was more concerned with reinforcing the formal structure of the organization, which involved “creating channels and erecting barriers to the free flow of information” (2001: 363). This structure represents the system.

The hotel chain which failed to achieve its objectives, had attempted to install a computerized yield management system which reinforced the system but ignored the importance of the life-world. The hotel, which achieved success in implementing a yield management strategy chose not to focus initially on technology, but attempted to understand the influence exerted by the “great range of vertical and horizontal relationships” (2001: 363) which represented the life-world. In this way IT could be implemented within an organizational context where there was a better system/life-world balance.

As Peng and Litteljohn observe, life-world processes are essential to the health of the organization:

In the context of hotel chains, the role of lateral communications between units is particularly noteworthy. They may serve as important or even critical knowledge distribution/learning channels in developing new

competencies and as “supporting” networks by which local staff gain motivation and confidence (2001: 362).

The use of the phrase, “lateral communications” reminds us that system/life-world is embedded within the Theory of Communicative Action and underlines “the complementary nature of the two concepts of the life-world and of communicative action” (Fairtlough 1991: 550). Communicative action is the means through which the life-world can be renewed and the status quo of the system, challenged.

Peacock’s empirical research also underlines the significance of the life-world:

When McLoughlin and Harris point out that organizations can often “know less than their members”, this can be seen in the teams of computerized female operatives (universally entitled ‘the girls’) who often have a more precise picture of booking levels and consumer price sensitivity than their line managers (1999: 312).

If IT implementation was to be deemed ‘rational’ from a critical perspective it would place these life-world processes at the centre of its planning. In advocating the application of Habermas’ validity criteria, Kemmis distinguishes between a communicative perspective on rationality and a functional one:

... a *communicative* view of rationality (expressed in communicative action), as distinct from *functional* rationality (expressed, for example, in the Functional terms in which the success-oriented operations of systems are described) (1998: 283).

Although it is easy to view the system/life-world relationship as an adversarial one, this is not the intention. As Kemmis notes, the two entities are mutually supportive:

... system and life-world need to be understood as dialectically-related aspects of social formation in late modernity, not as two separate entities at odds with one another (2001: 101).

In the education sector, Kemmis sees technology as offering “unprecedented opportunities for exploration” (1998: 296) in developing a more communicative view of

planning. In exploring alternative models for information systems development, Lyytinen reflects on the potential for generating discourse and “supporting the ideal speech situation” (1992: 170). He refers to conferencing technology, which could encourage discursive activity and to technology, which would allow the anonymous submission of “radical change proposals” (1992: 170). The potential therefore is for IT to create “communicative spaces” (Kemmis 2001: 100) in which communicative action can take place.

In these spaces organizational actors are given the opportunity to “explore and address the interconnections and tensions between system and life-world aspects of a setting as they are lived out in practice” (Kemmis 2001: 98). Later in the chapter, the author will demonstrate how virtual learning and communication technology, developed at the University of Luton, was used to create such a communicative space, in which the key issues arising out of Open Space were taken forward for further discussion and reflection.

### **7.3.2. Open Space output critiqued through system/life-world**

The system/life-world framework is particularly useful for critiquing the main issues arising out of the Co-operative Inquiry on which this and the following chapter are focussed. This critique centres on four phases associated with system/life-world: Thematization, Rationalization, Mediatization and Colonization.

Open Space was the chosen vehicle for the Thematization phase during which a subject becomes the focus of conscious debate. “An Open Space event usually takes the form of a theme or a question which the participants accept responsibility for tackling in collaboration with each other” (White 2002: 153). The theme, viewed as important by ntl travel and Galileo was “Travel Distribution and Technology: The Issues and Opportunities”. In creating and agreeing to sponsor the discussion of this theme, both organizations were acknowledging the importance of creating, in the words of the event’s invitation, “an experience-driven environment” in which they could pool their life-world knowledge and that of their clients in order to better understand how to harness technology.

There are two possible outcomes to Thematization; either mutual understanding is quickly achieved, leading to a renewal of the life-world, or further debate is required leading to another phase, Rationalization. The Rationalization phase results in modification of the life-world by “conscious rational debate rather than going on as it was

or evolving by unconscious processes” (Fairtlough 1991: 553). The “going on as it was” mindset is often attributed to the Functionalist position with its adherence to the status quo (Burrell and Morgan 1979). On the contrary, “conscious rational debate” places the emphasis on communicative action.

Three of the top five issues arising from the Open Space event revealed that further debate and “new norms of behaviour” (Fairtlough 1991: 553) were required. These issues relate to the need for a new technology-based system (system), which will support more dynamic, online, real time sales and distribution processes (life-world). This need is due primarily to changing consumer trends, which include an increase in the number of people buying travel on the Internet and also the growth of the low cost airlines, which has presented an opportunity for consumers to build their own holiday packages.

However a cautionary note is to be found in the third system/life-world phase, Mediatization, whereby “steering media” (Kemmis 1998: 278) increasingly dominate society. By steering media, Habermas was referring largely to market forces and the state legal and bureaucratic systems. However Fairtlough (1991) suggests that steering media can include electronic news and entertainment media and impacts can be viewed at organizational rather than societal level. In the early 21<sup>st</sup> century, in a Tourism IT context, the Internet should be included, given its immense impact on the travel industry. While acknowledging the benefits of Internet technology, Mutch cautions that:

... this must not be seen as a solely technical issue. Of critical importance will be the construction of the relationships (*life-world*) that accompany the technical networks (*system*) (words in brackets added by author) (1996: 608).

The fourth phase, Colonization, refers to the domination of the life-world by the system:

The effect of the colonization of the life-world by the imperatives of systems is that individuals and groups in late modernity increasingly identify themselves and their aspirations in systems terms (Kemmis 2001: 97).

In a Tourism IT context, an indicator of Colonization would be the formalisation of objectives along purely technical lines. This approach highlights the limitations of

correspondence failure as a criterion for measuring the success of an information system. The objective world of management goal setting becomes the de facto standard against which life-world performance is measured. The review of Tourism IT evidence in Chapter 2 revealed the damaging effects of Colonization. Together with communicative validity, system/life-world provides a useful tool for critiquing the status quo and emancipating actors from distorted communication (Ngwenyama and Lee 1997).

#### **7.4. CREDIBILITY AND TRANSFERABILITY**

Lincoln and Guba proposed the twin criteria of credibility and transferability to replace the positivist criteria of internal validity and generalisability respectively (cited in Mehmetoglu 2003). In the context of this study, credibility is judged from the extent to which the methodology, methods and data collection and analysis adhered to the term 'critical'. The critical nature of the methodology (Co-operative Inquiry) and methods (e.g. Open Space) has been reflected upon earlier in the thesis. The very act of deconstructing and reconstructing discourse throughout the study (Travelmole, Open Space on Blackboard, face to face interviews, and group discussion) ensured that participant validity claims were critically evaluated. This helped to ensure a critical perspective on the data collection and analysis.

It could be argued that the highly personal nature of validity claim reconstruction renders it difficult to replicate. However it should be emphasised that the reconstruction is not subjective but rather intersubjective. It is not intended as a definitive statement of a participant's position – the concept that research can establish the absolute truth is a scientific one and does not apply to a critical social study. The reconstruction is designed as a catalyst for ongoing debate and only through this channel can truth (as defined by consensus among participants) be reached.

In terms of transferability, the pertinent question to ask is not "Can the conditions for ideal speech be created (it is after all an ideal)?" but rather, "How far from the conditions for ideal speech are the case studies reviewed in this thesis?" Where would they be placed on the closure-of-debate-due-to-coercion – ideal-speech continuum (Figure 3-3)? The evidence both from the case studies and the empirical work is that overall tourism stakeholders are willing to engage and, with the growth of Internet communication, there are increasing opportunities to create opportunities for dialogue. Although only a minority of Open Space participants posted messages on the Blackboard site, this was most likely due to the lack of a business case to encourage them. In a commercial project

that case would be exist. Nevertheless more work is required on strategies which can engage stakeholders in participation.

The focus of this study is on the theoretical development of a critical model for stakeholder consultation and not on the generalisability of the findings. This model has been tested in one sector of tourism, the sales and distribution of packaged holidays; however its predication on communication extends its potential to other multi stakeholder contexts where discourse can be captured, reconstructed and fed back to participants for ongoing debate. The detailed ways in which the validity claims have been reconstructed, presented and interpreted provide a template for application in other sectors.

### **7.5. FUTURE RESEARCH**

Having reflected on the potential limitations of the study, some suggestions for future research are provided. Open Space could be improved in a number of ways in order to enhance its critical potential. Firstly, record the discussions to facilitate reconstruction after the event, although the benefits of this would have to be explained carefully to participants in order to secure their co-operation. Secondly, allow time for group discussion at the close to allow participants to debate collectively the output from the day. Otherwise it relies on the voting which is a quantitative technique that does not allow the opinions (norms) underlying it to be explored.

The critique of boundaries through communicative action requires dialectic and there were several opportunities (Travelmole, Open Space, voice over internet forum) where the reconstructed validity claims could have been tested more thoroughly on participants. Firstly, the researcher could attempt to facilitate additional debate in a Travelmole discussion by posting a message to the forum which challenges the claims raised by the participants. Secondly, the researcher could create a closer link between the reconstruction of the Travelmole debate and the Open Space workshop. For example, a critical issue emerging from Travelmole was 'Moving from the old brochure dependent sales model to a new web based browsing model'. This represents an interesting issue to debate in Open Space in that it challenges the status quo of travel distribution. Thirdly, the key points from the reconstruction of both the Travemole debate and Open Space could be used to form an agenda for the Voice-over-Internet group discussion, thereby using reconstruction analysis to more pointedly facilitate ongoing debate.



There are two avenues for further research related to the synergy between communicative action and boundary critique which emerged from this study. Firstly, the study has demonstrated how objective claims are used in support of normative positions and further empirical work could test this relationship. The second, related, area for research is the application of Habermas' system/life-world theory to the critique of system boundaries. In a Tourism IT context, system/life-world is a useful model for understanding the tensions that exist between the technology-derived status quo (often supported by those in positions of power) and those that inhabit the system of human activity – users and other stakeholders. Habermas' system/life-world concept is relatively untested in practical settings and the following questions are designed as guides to empirical study. Firstly, how can communicative action help to renew the life-world and resist colonisation by the system? Secondly, how can the system support life-world processes, thereby ensuring the rational development of technology? Thirdly, how can the four phases of thematization, rationalisation, mediatization and colonisation provide a model for critiquing Tourism IT?

The use of electronic methods, both in conjunction with face to face methods and on their own, to critically facilitate stakeholder interaction represent interesting avenues for further research. For example in January 2006, the author facilitated an Open Space workshop at the Tourism IT ENTER conference in Lausanne where participants were invited to post their issues on a blog, two weeks prior to the event. As only three hours were allotted to the workshop, this technique was partly to save time at the beginning of the live event and also to generate interest in the event. A further possibility discussed at the conference was to allow all conference delegates to vote on the output of Open Space. The technical functionality of Blackboard, and VIPER as discussed in Chapter 6, and other Voice over Internet facilitation tools such as Interwise, potentially facilitates the creation of an entirely virtual Open Space whereby participants can break out into smaller groups. The advantages include the relative ease with which the output can be captured and also the facility for participants to easily access information online during the process and to share files and other information. This represents a new dimension on how emerging technology can be used to represent non-technical views in an organisational problem context.

As a final word, the model proposed in this thesis helps to avoid a situation where “the selectivity of boundary judgements might remain unrecognised or might be taken for granted in a dogmatic way” (Ulrich 2003: 334). However above all it helps to facilitate a

human-centred perspective throughout a multi stakeholder inter organisational B2B Tourism IT project.

## **Appendix 1: Full text of Travelmole article**

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### Viewdata to stay, say industry heavyweights



According to a group of 12 leading members of the Travel Technology Initiative (TTI), Viewdata will not be replaced for the foreseeable future, though eventually it will be travel agents' needs that will drive the shift away from the system.

In a working paper released today by TTI, the sub-committee of 12 high-profile industry forces - representing tour operators, network providers and reservations software developers - scotch the widely held belief that a replacement to viewdata is imminent, conclude that travel agents' needs will drive the eventual shift away from the system and affirm their belief that the TTI's XML standard is the "way ahead".

The group found that travel agents' desire for enhanced content - for example, brochure descriptions and resort guides - and their need to sell over multiple distribution channels will be the major driving force behind a migration away from viewdata.

According to Rapid Travel Solutions' managing director Lawrence Hunt (pictured), presentation is becoming increasingly crucial to completing sales. He said: "We need to show agents something better. There are two key areas we need to develop: Content to bring added value and improved search facilities covering multiple operators."

However, the group advised agents not to hold their breath. The TTI found that developing a replacement for viewdata is not yet a priority for most travel providers - especially tour operators - notwithstanding their concerns about the technology.

Thomson Travel Group's business development manager Sharon Mhende said: "We acknowledge that there is a requirement to consider a replacement for viewdata, but in the short- to medium-term we do not foresee the termination of the technology. At present, other priorities are delaying the development of an alternative."

Saving distribution costs - an often-cited reason for ending viewdata's dominance - was not a sufficiently compelling reason to replace the technology, the group concluded. Although travel agents wish to use Internet Protocol (IP) networks to allow them to access web content and email, Amite Travel Systems' product marketing director Ed Spiers, explained that network providers can already distribute viewdata across their high speed, low cost IP networks. He said: "It's not necessary to replace viewdata to achieve distribution cost savings."

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239

- [Web Winners announced for Travel and Tourism Internet Awards](#)  
28th-Mar
- [Hughes to leave P&O](#)  
25th-Mar
- [American cuts ferry bookings online](#)  
20th-Mar
- [TravelMole's newsletter in HTML format](#)  
19th-Mar
- [Res-Exp Day 1: 'Small travel companies in benefit from new CRS regulations'](#)  
12th-Mar
- [Climate Care launches carbon calculator on new website](#)  
4th-Mar
- [Ferry firms fight for business customers](#)  
27th-Feb
- News archive
- [ARIA names new president](#)  
8th-May
- [Technology training for SMEs](#)  
8th-May
- [Gulfair pilot causes outrage](#)  
8th-May
- [Fate of missing tourists still a mystery](#)  
8th-May
- [easyJet changes into the red](#)  
8th-May
- [Partnered airlines set home use points](#)  
8th-May
- [Travel Stockwatch](#)  
8th-May
- [Is this Virgin on overkill?](#)  
7th-May
- [Air passengers win right to sue Thomson for trauma](#)  
7th-May

When it comes to viewdata's eventual replacement, the group of 12 all agreed that XML, which is capable of delivering enhanced content, should be the basis of any alternative, with the TTI's own XML standard well placed to form the cornerstone of a new system. Launched in January, the industry-led standard facilitates the distribution of package holidays across Internet technology.

TTI says the breakthrough will have seismic implications for the industry. According to the organisation, the industry could soon begin to sell inventory over web-based booking systems, which will enable agents to improve productivity by searching multiple operators simultaneously from a common front-end.



Commenting on the working paper, TTI's general manager Nick Mott (pictured) said: "There's been a lot of hype surrounding the end of viewdata. Our group has analysed the situation and taken the long view on this serious issue. There's no doubt viewdata will eventually need to be replaced. In the meantime, the industry should prepare itself for the post-viewdata world by adopting one industry-wide standard. Different sectors cannot afford to develop a series of alternatives in isolation that do not reflect the needs of the industry as a whole, which is why we believe our standard will win through."

Read our previous stories:

- 02-Apr-02 [Travel Technology Initiative adds four more names](#)
- 28-Feb-2002 [The TravelMole Interview - Lawrence Hunt, Rapid Travel Solutions](#)
- 27-Feb-2002 [Global distribution standard expands into Europe](#)
- 23-Jan-2002 [Standard for agency web bookings agreed](#)
- 4-Jun-2001 [Viewdata's days numbered as Tel-wed buys Rapid Travel Solutions](#)
- 27-Apr-2001 [Viewdata? The TravelMole Insider - Issue 111](#)

*travelmole* 18-Apr-2002

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**edward spiers**, 03 May 2002 @ 18:20 PM

#### Legacy Systems Strategy ...

edward spiers



In response to David Jones' earlier post, the new Anite reservation system will be a replacement for ATOP, FSS and Travellog users. There is a technology and product roadmap in place, and this strategy has been formally presented to both the FSS and Travellog client base. They have also been assured that support and development for their existing products will continue, and that they will not be "forced" to move to ATOP. Their existing investment in systems is secure, and will not constrain them from adopting the new technology Anite @com solutions for CRM, Content, et al

In response to Mike Cogan's post, once again, legacy systems are being incorrectly labelled as inflexible and incapable of functioning as part of a new distribution model. Mike says that "new systems are addressing the consumer's purchasing preferences and are presenting product content alongside price and availability, in a way that viewdata and its legacy systems can't".

This is patently untrue, as Anite's involvement in sites such as MyTravel, Superbreak and Virgin testifies.

I stick by my view that legacy systems ownership doesn't preclude a travel organisation from using the new distribution model. Anite's strategy is to give our clients the best of both worlds - scalable, highly flexible systems with access to the new distribution model now, and a roadmap to 100% new technology in the future.

It's a fact that suppliers with recently developed 'new technology' systems still cannot match the legacy systems for scalability and functionality - if they could then their company revenues and scale

[Healthcare security exposed again](#)  
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8th-May

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[Advanture ticks Asia for 2004 event](#)

6th-May

[Anite can beat internet with 'personal touch'](#)

6th-May

[Travel Counsellors 'founded' by would-be recruits](#)

2nd-May

[First signs of MyTravel recovery?](#)

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['No rethink on Burma' says Intrepid](#)

2nd-May

[TravelMojo interview: Gary David, managing director, Cadogan Holidays](#)

2nd-May

[Management must share the pain: Comment by Jeremy Sidman](#)

2nd-May

[Anite to drop Burma](#)

1st-May

**Travel Agent News**

[ABTA names new president](#)

6th-May

[Fate of missing tourists still a mystery](#)

6th-May

[Travel Stockwatch](#)

8th-May

[Conference sound bites](#)

7th-May

[Ebookers says war took £3m off profits](#)

7th-May

[Dealing with fewer operators improves profits](#)

7th-May

of operation would testify to it. It will be interesting to see who will ultimately win this race - the legacy systems moving to new technology or the "new technology" systems moving to full scalability and functionality. No prizes for knowing which one my pocket money's on.

**Mike Cogan , 02 May 2002 @ 19:22 PM**

**The Mould is Being Broken**

Mike Cogan



It would be easy to dismiss new entrants, such as TWN. However, what we are seeing is a fresh approach to promoting, selling and administering travel products, especially package holidays.

These new systems are addressing the consumer's purchasing preferences and are presenting product content alongside price and availability, in a way that viewdata and its legacy systems can't.

XMI is only a structured data exchange that can help B2B online trading. But, as I have suggested before, it's no panacea and will not address the inherent problems of 30 year-old legacy systems.

**Arvinder Virdee , 02 May 2002 @ 17:02 PM**

**New economy reservation system already available**

Anite may be developing a 'new core reservation system', but, as pointed out earlier, Tour Operators have been using non Viewdata systems for many years now. One such system that is already developed and mature system from World Net, TWN (Travel World Net). TWN is presently being used by one of the largest tour operators in the AsPac region, and is now available in UK. This means that progressive travel companies don't have to wait for XMI specs to be defined and subsequent development to take place - they can reduce costs and increase efficiency from today.

**David Jones , 02 May 2002 @ 12:30 AM**

**One last question**

David Jones



Thanks to Ed for getting back with this information.

I respect his request to constrain discussion to viewdata - but perhaps he could indulge me one last time.....

When he says that the new reservations system "... will offer a future migration path for Anite's tour operating clients", does this include tour operators using the FSS and Travellog systems?

Or are Anite going to be forcing their FSS and Travellog clients to switch to A1OP before they can then be upgraded to the new reservations system?

Since Travelink are Anite's largest competitor in the tour operator market it might be a little unfair to have this "discussion" in public, so I'd understand it if some current FSS or Travellog clients would like to clear up this point on Ed's behalf.

David Jones  
Travelink Systems Limited

**edward spiers , 02 May 2002 @ 11:47 AM**

**Viewdata and Legacy Systems: Anite's product strategy**

edward spiers



Based on the general sentiment at the recent Solutions Distribution conference session, I still believe that the transition from viewdata to XMI/API message-based distribution is happening, but at a pace dictated by the economic imperatives of the vertically integrated package tour operators.

Viewdata, and the prevalence of legacy reservation systems, are not in themselves a constraint. The MyTravel portal is an excellent example of the transition to the new distribution model tightly integrated in the same "legacy" systems that continue to deliver high-volume viewdata bookings.

I'm conscious that we should really constrain comments on this thread to the original theme of viewdata, it's shell life and its likely replacement, but I need to correct David's perception of Anite's strategy and products.

- [Advantage picks Asia for 2004 event](#)  
6th-May
- [Agents can beat internet with 'personal touch'](#)  
6th-May
- [Travel Counsellors 'intimidated' by would-be recruits](#)  
2nd-May
- [TravelMole interview: David Spinkman... founder, Travel Counsellors](#)  
2nd-May
- Travel Technology News**
- [Technology training for SMEs](#)  
6th-May
- [Conference sound bites](#)  
7th-May
- [Bookers says war took 5.4m off profits](#)  
7th-May
- [Dealing with fewer operators improves profits](#)  
7th-May
- [Agents can beat internet with 'personal touch'](#)  
6th-May
- [US agents avoid ot... now paper ticket fees](#)  
6th-May
- [Mission: To make a profit from online flights](#)  
2nd-May
- [No frills added to Traveler's search engine](#)  
1st-May
- [Holidays on under the hammer](#)  
29th-Apr
- [NLL finds new travel and](#)  
29th-Apr

**quick map**



Anite's @com is not a replacement system, but a platform of products that integrate closely to the ATOP and FSS central reservation systems. These products include CRM/Customer Database, e-commerce booking engines, Content Management, Brochure Production, Fares Database, MIS and Resort Management. All the new @com products are "new technology", i.e. windows and/or browser-based, SQL database, and XML/API message driven

A new core reservation system is under development, and will offer a future migration path for Anite's tour operating clients whilst preserving their investment in the @com products that are available now. Details of the new system development timescale are still commercially restricted, but I can say that the schedule does not currently include a "viewdata" module.

**David Jones , 30 April 2002 @ 19:26 PM**

**Lay off Anite please !**

David Jones



"Legacy" systems have taken a lot of stick recently, in the trade press, at the recent Solutions conference and on this web site.

But Anite (and therefore FSS & Travelog) is developing a replacement. It's called @COM and was announced in March 2001.

In the Press release published at the time of the FSS acquisition Simon Tyrell from Anite said that the merger would "... accelerate delivery of @COM".

Does anyone have an idea when its going to be ready ?

Is Anite's plan to switch their ATOP, FSS clients to @COM ? If so will @COM become the new standard system for tour operators ?

And when it's eventually delivered, will it kill off viewdata ?

David Jones  
Travelink Systems Limited

**Mike Cogan , 24 April 2002 @ 17:16 PM**

**Ask sales staff what they think**

Mike Cogan



Ed makes valid points except the last one that suggests that the industry is not constrained by viewdata.

I think we overlook the people who have a real input to this debate - travel sales staff.

Finding and selling holidays using viewdata takes too long and costs too much. If this weren't the case, why are shops and call centres using add on technology from the likes of Comtec and Multicom? Add to that the value of on line brochure content and the problem is all too clear.

The business case is there and last week Thomson admitted it had difficulties in adapting to new requirements.

The only way forward is to reduce selling costs and investing in technology is the solution. But lets not get too excited by XML. As Ed says, the problem lies deeper in 30 year-old legacy systems

**edward spiers , 24 April 2002 @ 12:01 AM**

**The transition from viewdata continues ..**

edward spiers



How do you measure the death of viewdata?


When agents stop using viewdata terminals? They're already starting to use browser based systems to search and book holidays

When the viewdata networks stop charging the tour operators based on connect time? That's already moving to standard commodity IP networks

When tour operator reservation systems start using XML message sets to access availability and booking? That's already happening on many tour operator systems.

Viewdata isn't just a system, its a combination of agent presentation, communications and tour operator system application that's been at the centre of high volume package holiday sales for nearly 20 years

Viewdata won't be replaced overnight, but the critical mass needed for it's replacement is now there. The industry is not constrained in what it needs to do by viewdata per se, only by the investment and ROI needed to adopt its replacement


 **Lawrence Hunt , 22 April 2002 @ 11:57 AM**  
**The industry needs....**



The message we are receiving from consumers, travel agents and tour operators is that they want a faster, lower cost search process for package holidays and travel products. Viewdata is a great standard for taking orders but it will, over time, be replaced with technologies which offer a superior search capability, at lower cost. One of the first operators we worked with in 1997 reduced their Viewdata costs by 80% and doubled conversion ratios, by providing an alternative search tool to agents

We are now able to provide that technology across a number of tour operators, on a fully managed basis, for retail, call centre and on line channels. This, we believe, is the first stage in a migration away from Viewdata.

The TTI initiative is a great opportunity for the industry to accelerate the process of reducing distribution costs and improving the customer experience. It would be good if it was given the support it deserves.


 **Dimitrios Buhalis , 19 April 2002 @ 16:10 PM**  
**View data will be here... what about the Travel Agencies ?**

Dimitrios Buhalis



Yes it makes sense that View Data will stay. However, travel suppliers and intermediaries that are not using the Internet and other modern technologies jeopardise their competitiveness and their future. So the question is not whether the Viewdata will stay but who will be the intermediaries of the future and who will win and lose marketshare and how!

Dr Dimitrios Buhalis  
Course Leader MSc in eTourism  
University of Surrey

 **Mike Cogan , 19 April 2002 @ 08:44 AM**  
**Sam - look at Dolphin Dynamics and Travelfusion**

Mike Cogan




I expect we will see an increase in web based, multi-site search applications, like those now available from Dolphin Dynamics and Travelfusion.

These are similar to the multi-system viewdata search products, such as those offered by Comtec, Multicom and Tarsc.

Sam could have a look at [www.travelfusion.com](http://www.travelfusion.com), which I believe is offering this technology to agents. Dolphin's Flightscanner can be seen at [www.flightscanner.biz](http://www.flightscanner.biz).

Mike Cogan

 **Sam , 19 April 2002 @ 01:02 AM**  
**Common Platform**

I am not a travel technology guru nor a one of the big boys. But what concerns me as a small 'flights only' agent is having to jump from one consolidator's system to another just to check for the best fare & availability. I am referring to the web based on-line fare search & availability systems introduced by so many flight consolidators. As an agent with a customer waiting on the phone line or in my office - this does not help my productivity & drives customers away. Is there any chance in future of a common platform where fares & availability can be accessed simultaneously from various consolidators? Or is there such a system in place today? TTI and myself are perhaps on the same waveband!



## **Appendix 2: Review of travel distribution conference**

## Review of conference (page 1)

### Distribution Strategies for the Travel Industry - Survival of the Fittest?

#### *Conference Review*

Le Meridien Hotel, Nice, France 25-26 June 2001

*By Philip Alford*

The second Pan-European conference organised by Access Conferences attracted around 80 delegates representing a range of travel, tourism and hospitality sectors.

Day 1 was chaired by Russell Amerasekera (Leisure Industries Consultant) who, in his introduction, referred to the dynamic changes affecting distribution in the travel industry. Philip Alford ([www.genesysinformation.com](http://www.genesysinformation.com)) kicked off the conference with a European-wide perspective on emerging trends, including increasing geographic and value chain consolidation, price transparency afforded by the EURO and European data protection legislation, which now affords the consumer greater protection.

The next speaker, Olivier Dombey (Partners in Marketing) spoke on "Distribution Strategies for Hospitality Products". Although creating new channels to market, in reality the web has not led to decreased booking fees and has resulted in organisations having limited consumer access and control over the distribution process. The winners will be those who can effectively manage the flow of data with their distribution partners and can engage the customer in profitable data-driven relationships.

Continuing the hotel theme Pascal Lacharme (Accor Group) presented a case study of the Accor-SNCF partnership. The success of a partnership depends on having a common strategic vision, being prepared to pool resources, and sharing the risks *and* the benefits. The partnership has enabled Accor to reach new customers and SNCF to extract additional value from its customer base.

Philippe Der Arslanian (Amadeus) set out some of the future challenges and opportunities in both the old and the new travel economy. M. Der Arslanian, with tongue firmly in cheek, introduced a few new acronyms: P2P – Path-to-Profitability; B2B – Back-to-basics; GBF – Grow Big Fast (pre-bubble burst); and CCF – Cut Costs Faster (post-bubble burst). Amadeus is positioning itself, in both the Business-to-Business and Business-to-Consumer markets, as a platform providing managed services across a range of distribution channels, in particular the emerging ones of WAP and interactive TV.

In a session devoted to tour operators and travel agents, Anders Holst (Fritidsresegruppen), presented details of the FRG Internet strategy. FRG, based in Sweden, sells 15% of total volume via the Net, making it one of the biggest e-commerce operations in the Nordic area. The *total* cost of this channel is less than 3% compared to 6% in normal channels. Tactics contributing to this success included offering a full range of strongly branded products, providing richer information than the brochure and "keeping the techies out!"

Steve Endacott (UrbanWeb) pointed to the telephone as the tool, which will link legacy systems with the Web. A number of channels can support the "Dream" and "Research" stages of the buying cycle but the phone is the most effective for the "Fulfilment" stage.

Lawrence Hunt (Rapid Travel Solutions) drew on his experience as ex CEO with Dreamticket.com. Despite fulfilment costs at only 2.9% of gross sales, an average transaction value of \$2,212 and average gross margin of 9%, Dreamticket.com ran out of money. This experience led Mr Hunt to include the following in his list of 10 lessons from a start up: "forecast your cash needs, then double them" and "never trust a banker."

## Review of conference (page 2)

Jos Vranken, (Netherlands Board of Tourism), presented a destination marketing perspective using [www.visitholland.com](http://www.visitholland.com) as an example. He argued the case for tourist boards engaging in commercial partnerships and following a more transaction-led business model. Partnerships can help to bridge the gap between the functional areas of providing information and enabling transaction.

In an extended panel session John McEwan (Lunn Poly) and Colin O'Neill (Advantage Travel Centres), debated the question: "Is there still a role for high street shops?" Mr McEwan's answer centred on providing the customer with seamless access across a range of channels, driven by a single customer database. For Mr O'Neill it was the independence and product knowledge of the agents, which make up membership of the Advantage Travel consortium. They will need to draw on these strengths to meet the challenges posed by net pricing and system driven discounts being introduced by the larger operators.

The last presentation of Day 1, was made by Alan Smith, Former CEO, Blue Carrots, on "Using Web Based Community Portals for Distribution." Mr Smith described the advantages of distribution through portals, which attract members with similar marketing profiles (interests, age, etc). Portals provide an effective communications vehicle for building customer relationships.

Day 2 was chaired by Philip Alford ([www.genesysinformation.com](http://www.genesysinformation.com)). The morning session was dedicated to innovative business models. Earl Quenzel (Priceline.com) started the day with the theme of building a "customer centric model." Because the consumer is not able to name a specific brand when using the 'Naming Your Own Price' system, the Priceline 'Demand Collection System' enables suppliers to sell distressed inventory without devaluing brand values. Priceline is committed to building a pan-European brand.

Jon Cockerill (Welcome Holidays) presented a case study of [Easycottages.com](http://Easycottages.com) emphasising that the success of this venture (70% of Welcome Holidays' business is sold through their on-line platform - [easycottages.com](http://easycottages.com)) is due not to technology but to effective Prospect Relationship Management supported by ongoing research into barriers to buying online and innovative call handling systems.

Michel Athénour (Cityvox) presented the following dilemma: "Content is king but who is going to pay for it?" M. Athénour claimed that the answer might lie in a revenue-share model with operators and portals. This is based on Cityvox's experience that users of mobile devices are willing to pay to access the aggregated information, which the Cityvox provides on all aspects of city life.

Paul Hagan ([Travel.telegraph.co.uk](http://Travel.telegraph.co.uk)) outlined the benefits to travel suppliers of the 'clicks and paper approach', which include being associated with a quality brand name and extending the shelf life of promotions. [Travel.telegraph.co.uk](http://Travel.telegraph.co.uk) is able to draw on high quality travel copy from its offline partner but Mr Hagan acknowledged that the newspaper had to protect its non-commercial integrity.

David Dobson, ([Unmissable.com](http://Unmissable.com)) rounded off the innovative business models session. [Unmissable.com](http://Unmissable.com) sell lifestyle experiences, such as driving a Formula 1 car or following a Lapland safari, to the corporate market as well as wealthy individuals. Mr Dobson referred to the "experience economy" and the increasing desire of consumers to express themselves.

In the afternoon four speakers provided the interactive TV perspective. Douglas Hammond (Pearson TV) explained that the industry should sell holidays based on available resources. BT Open World already stores information on 150 destinations with 3-minute video streams and editorial from Lonely Planet. Gary Wardrope (Landmark Travel Channel) highlighted the

### Review of conference (page 3)

convergence between TV and computing, although he acknowledged that legacy systems in the travel industry posed a challenge to further integration. Drawing on experience in the Swedish market, Per Leander (eTV Broadcasting) made the point that creating content is expensive and therefore forging partnerships with local tourism organisations and content providers is critical. Stamos Birsin (Wheel) explored the issue of in-room, on-demand digital entertainment in hotels through a case study of the Quadriga Genesis system. Mr Birsin reflected on the importance of tailoring content, usability and functionality to the needs of different types of hotel guest.

The final session of the conference provided delegates with a future perspective. Simon Gawne (Red-M) discussed the role, which Bluetooth technology would play as an enabler of mobile commerce. His presentation included the prediction that by 2002 50% of mobile PCs will use Bluetooth technology and by 2006 5.3 billion Bluetooth devices will have been installed, providing 'anytime-anywhere' distribution opportunities. The final presentation by Anna Pollack (Desticorp) majored on Collaborative Commerce (cCommerce) based on the concept of 'Business Webs' where businesses and consumers are constantly networked.

### **Appendix 3: ntl travel strategy document**


Slide 1

**Enterprise Planning - Travel & Leisure sector**

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**“Building from a Firm Foundation”**

Jill Cox  
Head of Marketing Travel & Leisure  
16 November 2001




Slide 2

**Travel & Leisure Sector - Agenda**

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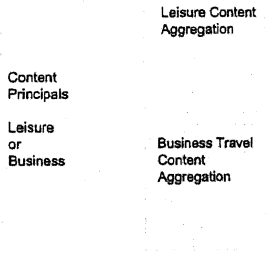
- Overview of the community & distribution channels
- Our current position in that community
- Key industry issues
- Impact on revenue
- Where we can play in the travel community
- Key areas of focus for ntl travel sector

Page 2 Jill Cox 

Slide 3

**The Travel Community - overview**

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Content Principals

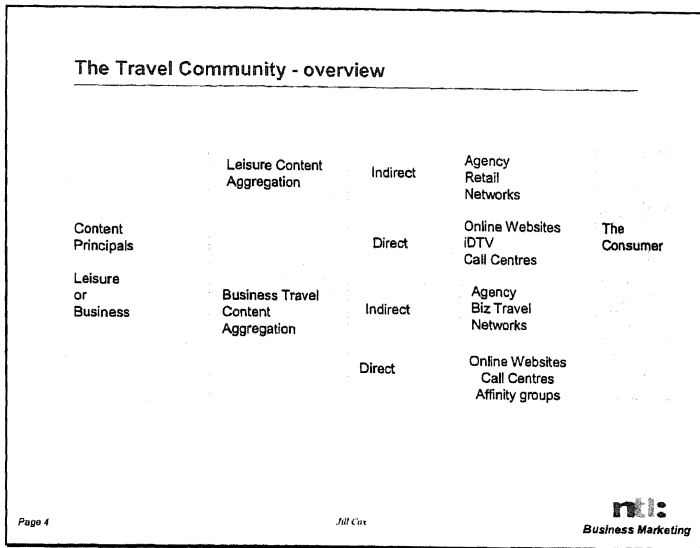
Leisure Content Aggregation

Leisure or Business

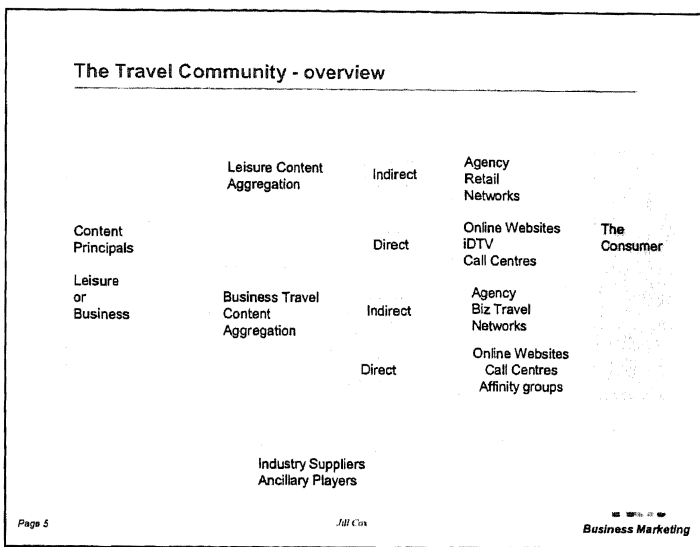
Business Travel Content Aggregation

Page 3 Jill Cox 

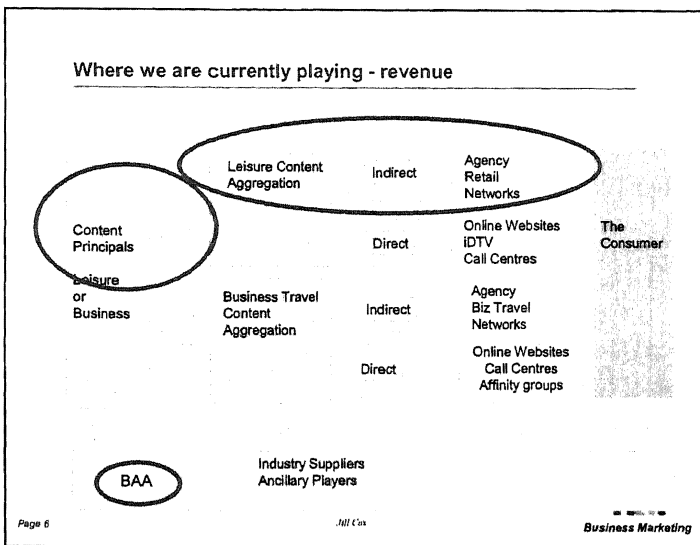
Slide 4



Slide 5




Slide 6



Slide 7

### Key Issues

- Forward integration & bypass
- Horizontal and vertical integration
- Dis-intermediation
- Low margins - high volume business - cash flow critical
- New players leapfrogging - intermediaries and network providers
- Legacy systems / Legacy technology / low investment
- Short term issues = higher rate of attrition
- Broad customer spectrum - Luddite to High tech

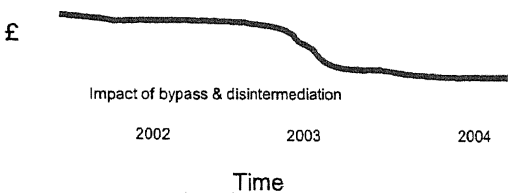
Page 7 Jill Cox 

Slide 8


### Impact on current revenues

**Philip Alford:**  
This is a reference scenario

Gradual drop off and x-tant becomes a niche supplier to small tour operators

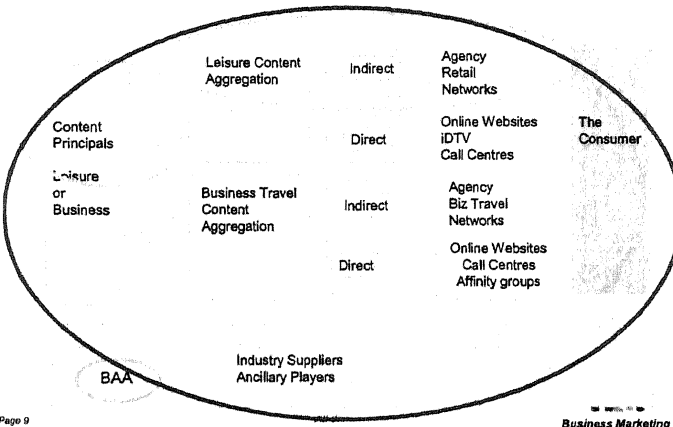



Time

Page 8 Jill Cox 

Slide 9

### Where we can play



Page 9 Jill Cox 



Slide 10

### Building from the foundation

- We can leverage existing ntl competencies
- Broaden our market space
- Need to manage expansion
- Need to focus on key areas for growth within the travel sector

Page 10 Jill Cox **nti:**  
Business Marketing

Slide 11

### Key Areas of Travel Sector Focus

SME	CORPORATES	CONTENT
Retail Agents Biz Travel Agents Hotel groups Attraction Operators Small Tour Operators	Travel principals - existing x-tant vendors Airlines Car Ferry BAA Industry System suppliers Intermediaries Aggregators	Travel principals - existing x-tant vendors Airlines Car Ferry BAA Attraction Operators

Page 11 Jill Cox **nti:**  
Business Marketing

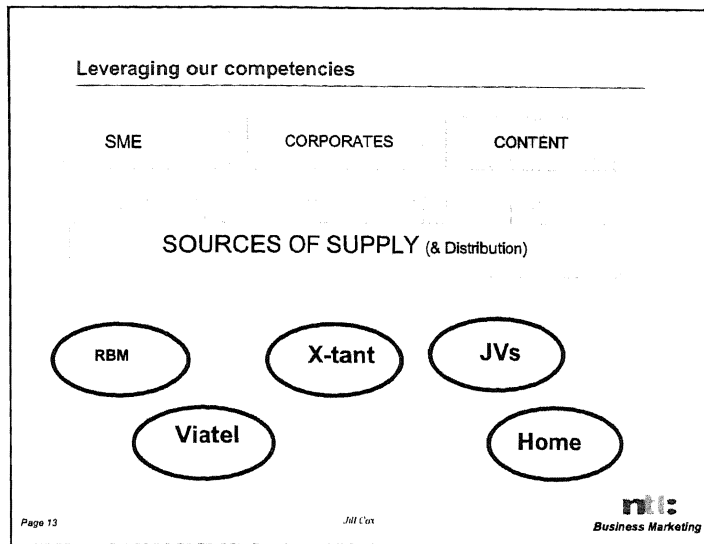
Slide 12

### Sector Focus - BUT ...one, interlinked community

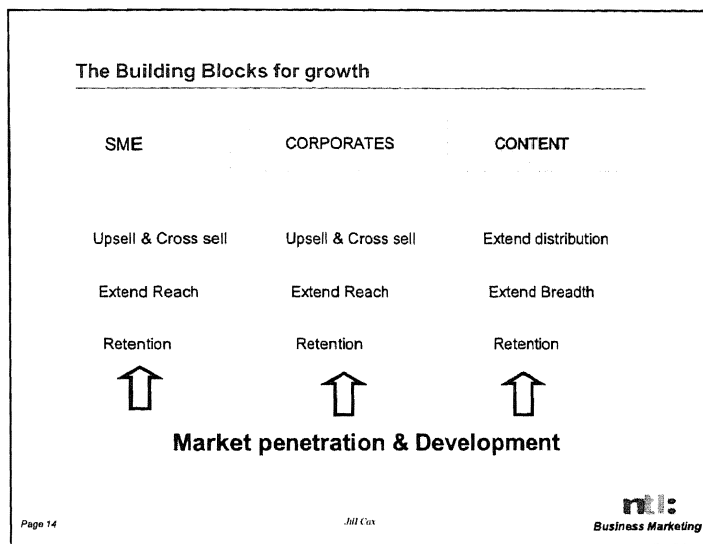
SME	CORPORATES	CONTENT
Retail Agents Biz Travel Agents Hotel groups Attraction Operators Small Tour Operators	Travel principals - existing x-tant vendors Airlines Car Ferry BAA Industry System suppliers Intermediaries Aggregators	Travel principals - existing x-tant vendors Airlines Car Ferry BAA Attraction Operators

Page 12 Jill Cox **nti:**  
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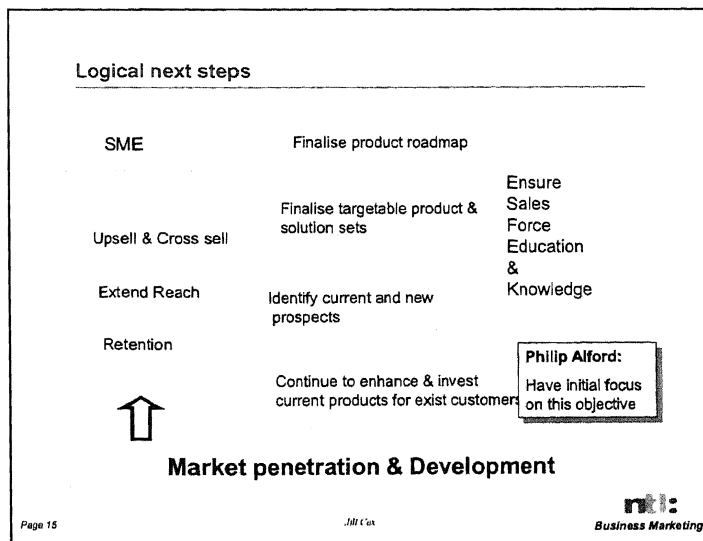
Slide 13



Slide 14



Slide 15




Slide 16

**Logical next steps**

---

<b>CORPORATES</b>	Finalise product roadmap	
		Ensure Sales Force Education & Knowledge
Upsell & Cross sell	Finalise targetable product & solution sets	Leverage ntl/x-tant knowledge base
Extend Reach	Identify current and new prospects	
Retention		
	Surround, protect & upsell	

  
**Market penetration & Development**


Page 16 Jill Cox **nti:**  
Business Marketing

Slide 17

**Logical next steps**

---

<b>CONTENT</b>	Finalise content strategy	
		Ensure Sales Force Education & Knowledge
Extend distribution	Identify incremental distribution opportunities	
Extend Breadth	Identify current and new prospects	
Retention		
	Surround, protect & upsell	

  
**Market penetration & Development**

Page 17 Jill Cox **nti:**  
Business Marketing

Slide 18

**The Bricks in the building blocks**

---

<b>SME</b>	<b>CORPORATES</b>	<b>CONTENT</b>
<b>UPSELL</b>	<b>CROSS SELL</b>	<b>EXTEND REACH</b>
<b>EXTEND BREADTH</b>		
TravelEye	IP Net	JVs & Partnerships
Voice	IP Premise	Leverage ntl brand
DIA	VOIP	
IP Net	DIA	Idtv
Leased Lines	Voice	
IP Premise Package	CCS	
Broadband	E-NGNS	
Solutions		
Centrex		
E-NGNS		

**nti:**  
 Business Marketing


Page 18 Jill Cox

Slide 19

**Implementation - SME & Corporates**

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- Leverage re-branding exercise to reposition x-tant and ntl as serious industry player
- Complete definition & packaging of targeted products
- Define extended SME & Corporate market
- Identify & quantify prospects & opportunities
- Ensure cross skilling and upskilling
- Build bottom up plan with sales & product targets for 2002
- Define appropriate review process


Page 19 *Jill Cox* 

Slide 20

**Implementation - Content**

---

- Complete content strategy
- Explore incremental distribution opportunities
  - White labelling
  - Own brand
  - online
  - IDTV
- Exploit immediate distribution opportunities - GDS partnerships
- Ensure rapid development of the right strategic partnerships (Comtec) BAA


Page 20 *Jill Cox* 

Slide 21

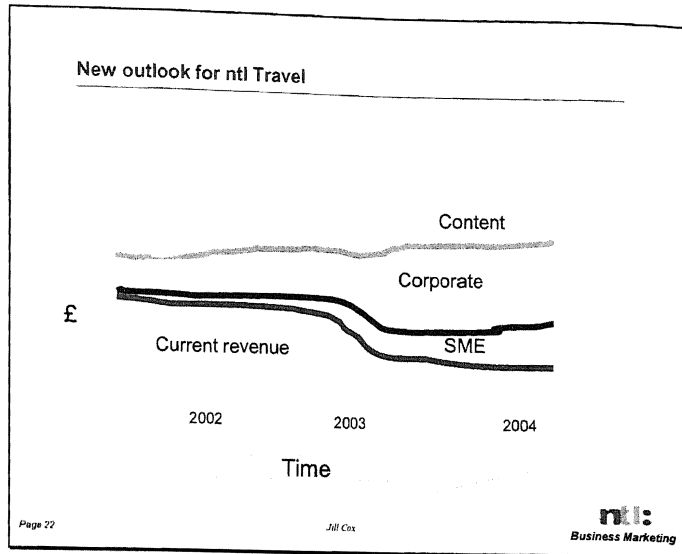
**Potential barriers**

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- Intra & Cross biz communication
- Paucity of MIS
- Rapid cross skilling / upskilling
- Resource constraint
- ntl process
- ntl business re-branding exercise

Page 21 *Jill Cox* 

Slide 22



Slide 23

- ### Summary
- We have the foundation to achieve significant growth
  - We need to ensure the appropriate focus
  - Need to overcome internal barriers
  - Need to ensure cross and up - skilling
  - Need to ensure fully integrated travel sector team
  - And.....
- Page 23 *Jill Cox* **ntl:** Business Marketing

Slide 24

- ### Summary
- We have the foundation to achieve significant growth
  - We need to ensure the appropriate focus
  - Need to overcome internal barriers
  - Need to ensure cross and up - skilling
  - Need to ensure fully integrated travel sector team
  - And.....NEED TO GET MOVING.....
- Page 24 *Jill Cox* **ntl:** Business Marketing

## **Appendix 4: Pre Open Space publicity**

## STOP PRESS

### Coventry agency and operator fails

Coventry-based agency and tour operator Late Express has ceased trading. The business also traded under the names Eurores, Turquoise Tours and Hot Spot, and had more than 500 forward bookings. The company was selling holidays on split contracts and did not hold an ATOL. See page 2

### Galileo trials new booking system in Belgium

Galileo is testing a booking system in Belgium which displays net, negotiated, no-frills, charter and scheduled airline fares. If successful, Galileo plans to launch the system across Europe.

### Go Places agency ceases trading

Evesham-based Go Places has ceased trading. ABTA's financial protection scheme will ensure the agency's customers are able to complete their travel arrangements.

### Ocean Village plans bookings via viewdata

Ocean Village and technology company Chantry have developed a viewdata booking system for agents. The cruise start-up is the first company within the P&O Princess Cruises group to use viewdata.

### Gulf Air promotes tour brand in UK

Gulf Air is to market its tour operating brand in the UK, backed by a £1 million campaign. The launch of Gulf Air Holidays Arabian Experience is accompanied by a deal between the airline and Lastminute.com.

### Sandals to run training sessions at WTM

Sandals is to run three training sessions a day at World Travel Market in London on November 13-14. The company is offering agents free transport from regional departure points to WTM and free entry if they register by October 21.

### Technology firms to host workshop in Luton

A one-day interactive workshop on travel distribution and technology will be held in Luton on November 26. A cross-section of leading trade figures is due to attend the invitation-only event, run by NTL Business (Travel Division), Galileo International and the University of Luton.

## LATE NEWS

# MyTravel gives up right to surcharge

by Ian Taylor

MYTRAVEL has gone out on a limb among the major operators by dropping its right to surcharge customers if airline insurance or fuel costs rise.

The move follows agreement by three of the big four to change holiday contract terms following pressure from the Office of Fair Trading.

Senior industry sources called it "incredibly high risk", and "a gamble".

TUI UK and First Choice Holidays have retained the right to surcharge if costs rise

by more than two per cent of a holiday's price.

But the pair have agreed to revise their terms to notify customers that they will qualify for a refund if these costs fall.

The new terms will appear in the operators' next brochure editions, but will apply immediately - although the OFT acknowledged most customers would remain unaware of this.

A MyTravel spokeswoman said: "We are not anxious about not having the right to surcharge. We have never surcharged anyway - we just reserved the right to do so.

"We were criticised for hav-

ing the terms in, so we have taken them out."

But a TUI UK spokeswoman said: "We added surcharge clauses after September 11, in what was the most volatile market for years. It remains unclear what will happen and no one knows what aviation insurance will cost in the future."

The OFT said it was in talks with another 46 operators.

"We think other companies will now comply more quickly," said a spokeswoman.

Thomas Cook is among those still in negotiations.

The OFT claimed: "We want to deal fairly with operators

and realise there is a cost to them to implement fair terms.

"But our aim is to enforce consumer rights.

"Ultimately, we told them we would take them to court if they did not make changes."

The move finally brings the operators into line with the 1992 Package Travel Regulations.

AITO deputy chairman Noel Josephides (Sunvil Holidays) expressed surprise that they had not complied earlier.

"I was amazed to see some of the stuff still in their contracts," he said.

"But the majors always verge on the edge of legality."

# Star carriers to cut commission?

AGENTS face the prospect of commission cuts from more Star Alliance carriers following

BMI is believed to be ready to cut commission on short-haul and domestic flights from seven to four per cent in January.

<p><b>Booking good</b> page 44</p> 	<p><b>Village people</b> page 45</p> 	<p><b>TECHNOLOGY</b></p>	<p><b>New Endeavour</b> page 46</p> 	<p><b>Opinion</b> page 48</p> 
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# Open house

**KEY PLAYERS** in the travel technology sector are to meet next week to debate pressing issues affecting the industry. The Open Space event, to be held at the University of Luton on November 26, is claimed to be a first for the trade. Participants will discuss whatever subjects are proposed on the day, rather than having a fixed agenda in advance. At the end of the day, delegates will vote on what they think are the most burning issues.

University of Luton tourism and leisure senior lecturer Philip Alford says: "The event should throw up opportunities for further events, small working groups and commercial partnerships."

"We are also setting up an interactive website, specially designed for the event."

The website is part of the university's main site, at [www.luton.ac.uk](http://www.luton.ac.uk)

The Open Space concept is designed to enable people to share ideas and look for practical solutions.

The day will enable industry figures to network with a range of suppliers, from technology providers to operators and agents.

Galileo and network provider NTL Business are sponsoring the event. They hope to gain a clearer understanding of what technology might help the industry.

Gordon Wilson, Galileo's vice-president for Europe, the Middle East and Africa, says: "We don't see it as a sales opportunity. My motivation for getting involved is to brainstorm with people who would not normally get together to discuss these issues."

He expects subjects such as the distribution of no-frills air fares to be brought up on the day.

NTL Business travel division managing director Dave Osborne expects the control and reduction of costs to be discussed.

"People will be looking at what technology does for them today and what it should be doing in the future," he says.

"We see it as a good opportunity to listen to what the real key issues are with leading players."

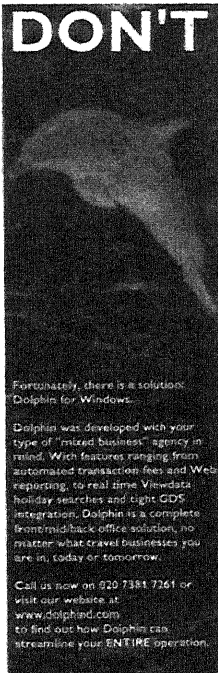
by Linda Fox



From left: Philip Alford, Gordon Wilson and Dave Osborne launch Open Space.

**GALILEO AIMS TO "BRAINSTORM WITH PEOPLE WHO WOULD NOT NORMALLY DISCUSS THESE ISSUES"**

## DON'T



## COMPROMISE!

Is your back office system designed for Business travel but not for Retail? Worse still, do you have one system to manage Business travel and a different system for your Retail shop?

According to our research at least 60% of UK travel agencies have a mix of business but most systems on the market cater for only one aspect of their business.

If this describes your agency then you are probably burning up valuable time and money consolidating information or bending your system out of shape rather than using your system to increase sales, operate more efficiently and service your customers better.

Fortunately, there is a solution: Dolphin for Windows.

Dolphin was developed with your type of "mixed business" agency in mind. With features ranging from automated transaction fees and Web reporting, to real time Viewdata holiday searches and tight GDS integration, Dolphin is a complete front/mid/back office solution, no matter what travel businesses you are in, today or tomorrow.

Call us now on 020 7384 7261 or visit our website at [www.dolphind.com](http://www.dolphind.com) to find out how Dolphin can streamline your ENTIRE operation.

**Dolphin Flightscanner**  
engine **FREE** at  
[www.flightscanner.biz](http://www.flightscanner.biz)  
for the fastest way to book no-frills airlines in Europe.





## **Appendix 5: Invitation to Open Space**

## Front and back of invitation

### REGISTRATION FORM

Please register on-line at:  
[www.luton.ac.uk/knowledgehub](http://www.luton.ac.uk/knowledgehub)  
Or complete and return this form by FAX to:  
**+44 (0) 1582 743959**  
Or by post to:  
**knowledge hub, Putteridge Bury, University of Luton,  
Hitchin Road, Luton, LU2 8LE.**  
For enquiries contact:  
**Mark Magee on 01582 743751**  
**Barbara Billington on 01582 743748**

Name

Title

Organisation

Address

Postcode

Tel

Fax

E-mail

Website

**Signature:**

By Invitation Only

# TRAVEL DISTRIBUTION AND TECHNOLOGY

The issues and the opportunities

A one-day interactive workshop in Open Space

Tuesday 26<sup>th</sup> November 2002

8.30am – 4.30pm

The International Tourism Research Institute at the University of Luton's Business School, in conjunction with Galileo International and ntl business (Travel Division) are pooling a cross-section of like-minded people to understand the issues and opportunities surrounding technology in the travel distribution sector.

Attended by leading figures from industry and academia

Gordon Wilson, EVP and Managing Director, EMEA, Galileo International  
David Osborne, Managing Director, Enterprise Sector, ntl business  
Steve Clarke, Professor of Information Systems, University of Luton

**ntl:business**  
Travel Division

  
University of Luton  
Education for the 21st Century

  
GALILEO

**ntl:business**  
Travel Division

  
University of Luton  
Education for the 21st Century

  
GALILEO

## Inside invitation

### BREAKING WITH TRADITION

The global travel distribution and technology sector is facing challenging times. There are as many issues as there are opportunities. This one-day seminar is designed to address these complex topics in greater detail than ever before.

A departure from the normal seminar format, this Open Space session is for industry 'doers' only. We want the people who, on a daily basis, tackle these issues head on. By creating a sales-free, non-competitive, experience-driven environment, we will be putting the core business needs front and centre. There is no agenda as such. We believe that by assembling the industry's most senior people, we can create our own agenda, an active agenda that will be relevant and real.

This is a unique opportunity for you to be heard and for you to influence the way our industry relates and reacts to technology. By gathering all the key industry people together, in one place at the same time, we're confident the day will be a great success. We do hope you can attend.

### ABOUT OPEN SPACE

Open Space is recognised internationally as an innovative approach to more productive meetings. Groups from 5 to 1500 have regularly demonstrated the capacity to create effective meeting agendas and deal with highly conflicted and complex issues. Remarkably, the meeting once created, is completely self-managed by the group. The role of the facilitator is so minimal as to be invisible.

The Open Space process does not allow for 'drop-ins'. Delegates must arrive on time and stay for the whole event. Breakfast will be available prior to the start of the session and whilst there is no formal lunch break, refreshments, including lunch, will be available throughout the day.

### ABOUT THE VENUE

Set in 500 acres of countryside, this Grade II listed building is home to the University of Luton Conference Centre and postgraduate studies – so it is conducive to thinking and being creative! It is built in the style of Chequers, the Prime Minister's country residence.



## **Appendix 6: Recruiting for Open Space**

## **Open Space Event 26 November 2002 – Sales Brief**

DO NOT SEND TO CUSTOMERS UNDER ANY CIRCUMSTANCES

### **1.0 Introduction**

This document is to provide the necessary briefing for you to sell this event into the key contacts you have defined as invitees. It also provides a re-cap on who to target for attendance at the event.

### **2.0 The Event**

The event is a one day interactive workshop, 8.30am – 4.30pm.

The University of Luton International Tourism Research Institute, in conjunction with Galileo International and ntl are pooling a cross-section of like-minded people to understand the issues and opportunities surrounding technology in the travel distribution sector.

The global travel distribution and technology sector is facing challenging times. There are as many issues as there are opportunities. This one-day seminar is designed to address these complex topics in greater detail than ever before.

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### **3.0 Open Space**

Open Space is recognised internationally as an innovative approach to more productive meetings. Groups from 5 to 1500 have regularly demonstrated the capacity to create effective meeting agendas and deal with highly conflicted and complex issues. Remarkably, the meeting once created, is completely self-managed by the group. The role of the facilitator is so minimal as to be invisible.

The Open Space process does not allow for 'drop-ins'. Delegates must arrive on time and stay for the whole event. Breakfast will be available prior to the start of the session and whilst there is no formal lunch break, refreshments, including lunch, will be available throughout the day.

### **4.0 The Venue**

The event is to be held at the Putteridge Bury campus of the University of Luton. Set in 500 acres of countryside, this Grade II listed building is home to the University of Luton Conference Centre and postgraduate studies – so it is conducive to thinking and being creative. It is built in the style of Chequers, the Prime Minister's country residence.

## **5.0 Selling points**

### **5.1 Benefits to Delegates**

Event delegates will be able to discuss the issues they think are important and network with prominent travel industry people interested in the same issues.

There is the opportunity to influence the direction of the industry and perhaps even reach consensus on some long standing issues.

It sets aside time in the right environment, for thinking strategically - a critical business activity which is easy to put aside in a busy operational environment.

Delegates are likely to leave the event with a clearer view or some new ideas for the future of their business.

There is no sales pitch, and delegates can choose how they spend their day and which issues to spend their time on.

Delegates will be able to make contact with leading academics and researchers in Travel and Tourism.

### **5.2 Other Selling Points**

This is an invitation only event and only the real movers and shakers in the industry are being invited, appealing to their ego and their desire to mix with other movers and shakers.

As an invitee, they are being recognised by an academic institution as being a thought leader with valuable input to academic studies and research, again appealing to their ego and desire to be influential.

### **5.3 Objection Handling**

*I'm too busy in November with World Travel Market.*

The event is being held over a week after WTM finishes, giving time back in the office to catch up before taking a day out.

*It's too near Christmas.*

The event is a full month before Christmas and the date has been set at the best time between WTM and Christmas.

*It's too soon for me to commit to this.*

We have invited people well in advance in order to get the date in diaries and the opportunity to plan other commitments around the event. Leaving it any later may mean the date is not kept available.

*I can't justify a whole day out of the office.*

Strategic thinking is a critical business activity which can only be effective if undertaken in the right environment. This means being away from the office and what better place than an academic environment with other prominent Travel Industry people.

*I get loads of circulars about conferences.*

This is not a circular, but an invitation only event to ensure we have the right people to get the most out of the day. The event is not a conference, but an interactive workshop where you and the other movers and shakers in the industry will set the agenda.

*With no agenda how do I know any issues that interest me will be discussed?*

You will be able to put forward the issues you want discussed and each will be allocated a time slot for discussion with other attendees interested in those topics.

*It all sounds a bit vague, does this format really work?*

Open Space is recognised internationally as an innovative approach to more productive meetings. Groups from 5 to 1500 have regularly demonstrated the capacity to create effective meeting agendas and deal with highly conflicted and complex issues.

## **6.0 Benefits to ntl:business (Travel Division)**

Tactically the benefit is the PR surrounding the event, positioning us as being a strategic leader working with the University of Luton. It will give additional profile to the new brand ntl:business (Travel Division).

The benefits to you as the sales team is this gives you a reason to make contact with other people in your accounts, people you may need an excuse to build a relationship with to enable cross sell opportunities for mainstream ntl:business products.

Longer term benefits are that we get useful input to our strategic thinking, understand the current thinking of the movers and shakers in the industry, possibly influence the direction some issues are taking and build relationships with key people in the industry.

## **7.0 Re-cap on targets**

Prominent industry figures who influence / direct the strategy of their organisation.

Marketing directors, commercial directors, sales directors.

IT/Telecomms directors may be relevant if they have a real influence over strategy.

We are focussing on Tour Operators, Travel Agents, some dotcoms and possibly one or two airlines that are innovative with their distribution. If we include too many different types of organisation in the event we may find the issues to be discussed are too wide ranging.

## **Appendix 7: Photographs of Open Space**

**PHOTO 1**



**PHOTO 2**

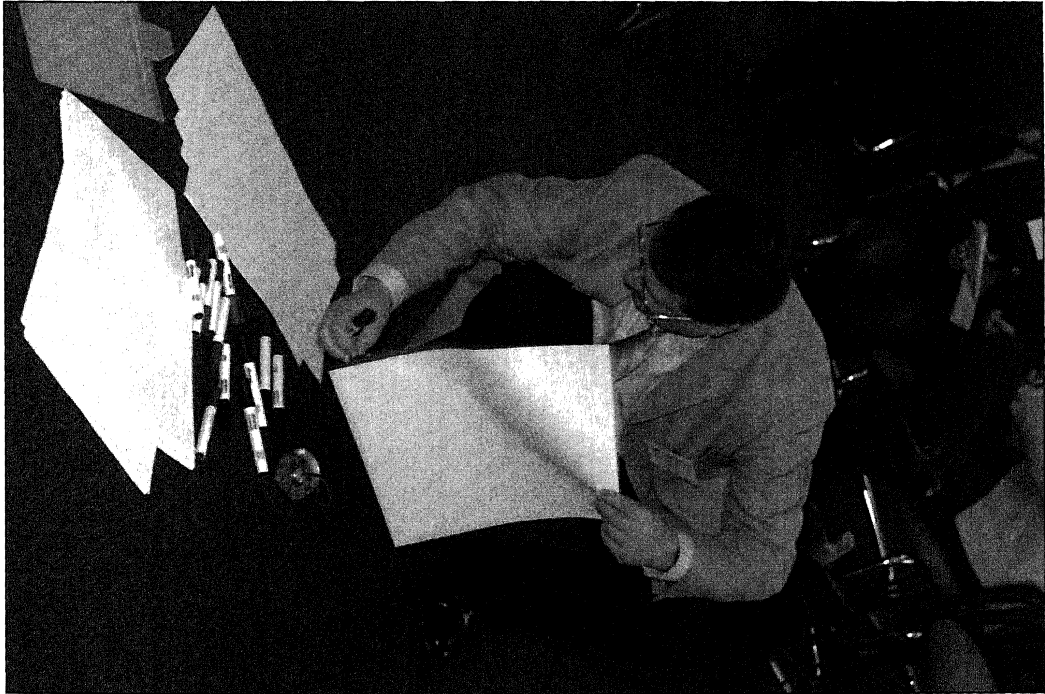




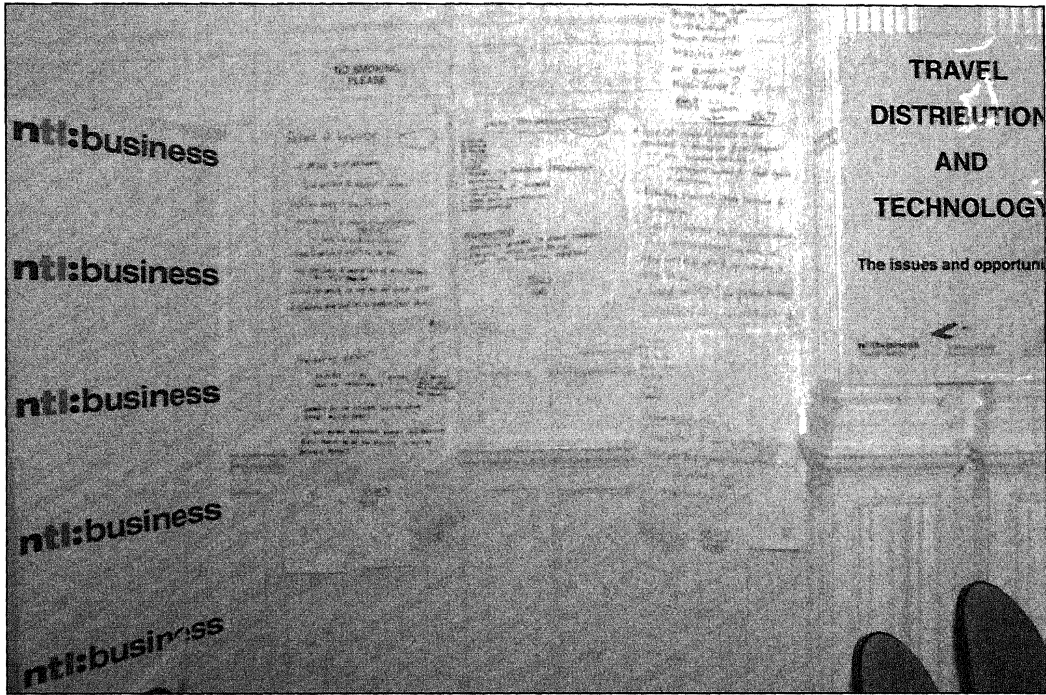
PHOTO 3



PHOTO 4



PHOTO 5



## **Appendix 8: Output from Open Space**

## TRAVEL DISTRIBUTION AND TECHNOLOGY

### THE ISSUES AND THE OPPORTUNITIES

Ten issues were debated during this one-day interactive workshop in Open Space on 26<sup>th</sup> November 2002. A bullet point summary of the output of each discussion forum is listed below. The issues are ordered according to the priority attached to them by delegates who were given the opportunity to vote on which issues they considered to be most significant.

Issue 1: I know technology can be a great enabler - but how do I figure out what to do/invest in first?

#### Areas of discussion:

- Technical issue can be intimidating and confusing - risk of management inertia /'do nothing'
- Process of adaptation/improvement is continuous
- Individuals need to become more techno-aware
- Challenge is greatest for small and medium companies - primary need is to get brand in front of customers
- Delivered solution can fall short of customer expectations: Have requirements been properly stated? How much must customer compromise? Was choice made on basis of lesser of two or more evils?
- Customer must articulate business requirement - no need to be a victim
- Customer rarely gives suppliers enough time/information to understand their needs

#### Conclusions:

- Talk to other companies in a similar position
- But take responsibilities for decision
- Take time to reach correct decision
- Don't compromise on requirement
- Educate yourself on technology
- Clearly articulate business needs

- Understand benefits/costs/timeframes - be realistic
- Consult users

Score: 26

Issue 2: Tour operators: Access to and aggregation of suppliers' content and product.

Areas of discussion:

Who owns content? Who is responsible for accuracy?

- How to aggregate content?
- Growth in Dynamic Packaging
- Suppliers not represented today (at Luton)
- Small operators can't afford technology? Don't like to pay commission.
- Cendant as distributor AND supplier
- Large tour operators already investing in Dynamic Packaging
- Industry is moving towards aggregation, but question of timescales and critical mass.
- Technology is not the problem but barriers imposed by commercial conditions.
- How to get links to ALL suppliers?

Conclusions:

- Speak with suppliers directly?
- Electronic standards for suppliers?
- Standards (for all)
- Local tourist boards are responsible for and own local content.

Score: 25

Issue 3: Future of ViewData

Areas of discussion:

- Move to IP Networks
- Tour Operators need to aggregate content

- Pricing model -> transaction
- Who drives it -> Agency, Network Suppliers? Operators?
- Other forms of distribution eg. XML
- Need one source to compare information eg. price, features - need access
- Solution for smaller operators who are not using VTX
- E-Learning from tour operators to support sales process

#### Conclusions:

- The lifespan of Viewdata is around 3-5 years
- Get pricing model right - need wrap around booking engine
- Front end virtually dead
- Germany has one platform solution, which supports multiple brands
- Viewdata needs minimal maintenance whereas Internet could download bugs

Agencies are not technology specialists; therefore technology must be packaged properly

Score: 24

#### Issue 4: Customer focussed approach

##### Areas of discussion

- Who is the customer?
- No one owns the customer.
- Technology is an enabler to achieving a customer-focussed approach.
- Culture and willingness is the drive.
- Must be a consistent message to all points of contact
- Customer experience involves all points of contact with an organisation (this includes online interaction)
- Need for data protection in CRM systems
- Knowledge management
- Often not only one customer (people rarely travel alone). Means there is complex decision making
- Those who want relationships and those who don't
- Corporate travel rules and systems - who are the decision makers?
- Segmentation by needs?
- Can technology help this?

- Use websites to target different segments (self selection)?

Conclusions:

Understand why customer is important to you.

Ensure culture is willing.

Segmentation is multi-dimensional.

Score: 18

Issue 5: Distribution through multiple websites - are we re-inventing multi-access?

Areas of discussion:

- Tour operators content product / needs to be available in multiples forms / channels - own branded websites; aggregate content for travel agents and consumers
- Branding shouldn't create barriers to distribution
- Agent and consumer wants aggregated content led by specified parameters e.g. location / cost
- Agent wants to be able to give preference to certain tour operators
- Need a "GDS" for package holidays - make it easy not difficult

Conclusions:

Need panel of senior people from tour operators to progress content product / aggregation both for consumers and for travel agents

Score: 18

Issue 6: Trade associations and infrastructure development

Areas of discussion:

- How to use trade associations as a channel for distribution projects (confidentiality issue)?
- Challenge - diversity of membership
- How do trade associations add value in the process (e.g. economies of scale)?
- Partnerships - how to manage the relationship with operators and suppliers?

- How to provide technology solutions to members?
- Travel members need more hands on advice "This is where your trade body thinks you should be going"
- Stopping endorsements of technology suppliers
- What should a trade association be doing?
- Networking, forum, educational, lobbying a catalyst
- Member target association with best voice in the industry
- Meetings International Association doesn't cost anything - what is the tangible benefit?
- Technical solution has to fit the member
- Need to have feedback from members regarding effectiveness of technology in use and this can be the basis of future recommendations
- Publicise best practice - case studies on website
- Ability of association to get a good deal from technology supplier

#### Conclusions:

- Common standards for interoperability, trade associations have a part to play, need to realise full capacity of technology
- Customer research
- Mobilise member feedback
- Cross association collaboration?

Score: 14

Issue 7: The industry needs travel agents more than ever today.

- Why do operators go direct?
- Do operators build websites in order to exclude agents?
- Are travel agents needed more when tour operators are faced with hard times only?
- Are travel agents unbiased?
- Are the young and old the ones most likely to book direct/on the Internet?
- Are the multiples better at selling 'Bucket + Spade' holidays?
- Should all operators/airlines/agents/etc be bonded?
- Do agents attract the less gifted/loyal staff because of lack of training and pay?



Opportunities:

- Own the customer together

Score: 13

Issue 8: What are the barriers to the implementation of distribution technology projects in the travel industry?

Areas of discussion:

- I.T. dept surrounded in mystery - regarded as cost not investment
- Buy-in from stakeholders
- Lack of ownership by business
- Short R.O.I. (6-18 months)
- Critical mass versus first mover advantage
- No standards between each technological solution holding back aggregation of product
- Buy in from within the organization - R.O.I.
- R.O.I. must be tangible
- R.O.I. targets meaningless and only for getting the projects approved
- Because of the volume of projects going on quick decisions have to be made
- If don't see payback in 6 months then do nothing
- People blame the I.T. department - initiative should come from business unit not I.T. dept
- Business has to 'own' the project
- Communication issue
- Travel is a complex business
- Thin margins
- Polarisation of travel industry to 4/5 big players
- Small players follow in the wake of big players

Score: 13

## Issue 9: Online procurement

### Areas of discussion:

- Access to financial billing technology
- Education
- Confidence in systems
- Security
- Back end connectivity
- Benchmarking

### Conclusions:

- Industry to cooperate to achieve standards
- Promote seller best practice
- Lobby for universal broadband

Score: 9

## Issue 10: GDS

### Areas of discussion:

- Main GDS systems – Galileo, Sabre, Amadeus
- GDS systems will be around for some time to come because: They are worldwide; high cost of replacement; no alternative envisaged
- There are plenty of market opportunities for added value suppliers and GDS systems are encouraging this
- GDS systems now have access to low cost suppliers
- Using XML interfaces it is now far cheaper to invest in GDS technology as a supplier

Score:

## **Appendix 9: Post Open Space publicity**

Galileo International and NTL Business travel division sponsored the first Open Space travel distribution and technology workshop in Luton, which attracted 30 leading industry figures. EXCLUSIVE reports by LINDA FOX

# Agents need systems help

AGENTS do not know where to get advice or how much to invest when buying a technology system, according to consultant Nick Bamford.

Mr Bamford, former Travelscene marketing director, said the issue was confusing and intimidating for agents.

"There are lots of ways to find new customers, and channels they could be taking advantage of, but agents do not know how to go about it," he said.

Worldchoice technology director John Lawrence said: "The small guys have nowhere to turn for the basic knowledge."

Advantage Travel Centres sales and marketing director Colin O'Neill said: "Getting the basics right and having a good customer database is key."

Mr Bamford said many agents did not buy a system because it was such a minefield.

But Cosmos IT director Alister Beveridge disagreed.

"Is it not now time for people to be familiar with technology down to a low level?" he asked.

"The companies that succeed are also those with a board-level understanding of technology."

Steve Pattenden, partner in Double S Travel in Luton, said:

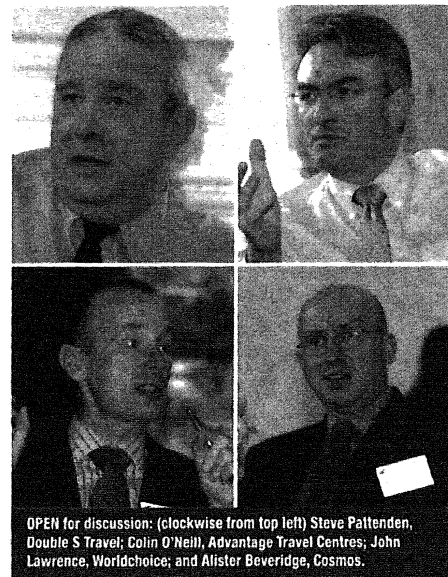
"Our expectations are far greater than the delivery, and until you install a system, you do not have the facility to explore it."

Mr Pattenden said he had chosen a system based on negative feedback he had received about rival technology.

Anite Travel Systems technology director Steve Dobson told delegates to raise issues with their technology suppliers.

"Sometimes systems have the capabilities, but you don't realise it," he said.

Delegates said basic industry qualifications needed to include technology training.



OPEN for discussion: (clockwise from top left) Steve Pattenden, Double S Travel; Colin O'Neill, Advantage Travel Centres; John Lawrence, Worldchoice; and Alister Beveridge, Cosmos.

## CRM is 'the new internet'

THE BIG four travel companies are investing heavily in customer relationship management systems, according to a senior operator source.

Delegates heard that one company had already invested £2 million in the technology and planned to spend more.

The source described CRM as "the internet of 2003" and said operators had missed opportunities to push their brands.

"People haven't got a clue about who they go on holiday with," he said.

"I don't think there is any brand loyalty in the business."

West Midlands Co-op chief information officer Melvyn Taylor said his company was also investing in CRM.

"We are looking to create databases and are trying to track customers through all our different channels," he said.

But Double S Travel partner Steve Pattenden raised concern about operators abusing their position if agents shared customer information with them.

"There are operators that I will not sell, because they take your booking one year and then steal your customer," he said.

## 'Multiples offer poor salaries and expertise'

MULTIPLES have low levels of knowledge and high turnover rates, and offer poor salaries, a senior operator has claimed.

"There are staff who flit from agency to agency," he said.

"We don't pay or train them

well enough, and we have cut back on educationals because of the cost of them."

He added that customers used to be able to deal with the same person every time they visited an agency.

"Now it is a different person every time and customers are just seen as people to get £15 commission off," he said.

The comments were backed by West Midlands Co-op chief information officer Melvyn

Taylor, who said agents' training needed to be addressed.

He added that the chain was recruiting more mature people and putting them on a 10-week training programme.

■ Leading industry figures

were invited to create their own agenda at the industry's first Open Space workshop, hosted by the University of Luton.

The experts decided the most important issues and set up discussion forums on them.

## **Appendix 10: Messages on Open Space Blackboard site**

## Steve Pattenden's posting

The screenshot shows a web browser window titled "Blackboard Learning System 1.6 (Release 6) - Microsoft Internet Explorer". The address bar shows the URL: [http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.p?course\\_id=\\_995\\_1](http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.p?course_id=_995_1). The page header reads "Blackboard Gateway Modules, Courses, Programmes HomeHelpLo".

On the left side, there are navigation buttons for "Announcements", "Information", and "Discussion Board". Below these is a "Course Map" and "Control Panel" section.

The main content area displays a forum post with the following details:

- Forum:** The industry needs travel agents more than ever today
- Date:** 09-18-2003 09:48
- Author:** Pattenden, Steve <[steve@doublestravel.co.uk](mailto:steve@doublestravel.co.uk)>
- Subject:** Travel Agents

There is a "Remove" button to the right of the subject line. The post text reads:

It was gratifying that Tour Operators still feel that the role of the independant agent is important.  
When Operators have disagreements with each other and stop selling their rivals product, independent agents are even more important as a distribution channel.  
The same applies if an operator is having a hard time in the press.

The well trained agent still is the only way of getting proper advice and will normally show the client the "critical book" about the destination and accommodation.

The agent may well have been to the destination as well.

That's the end of my plug for agents..... for now at least!

Thank you for your input everyone and I hope to meet you again in the future.

At the bottom right of the post area, there is a "Reply" button. The footer of the page includes "Powered by Blackboard" and "Internet".

## Top half of Ed Spiers' posting

The screenshot shows a web browser window titled "Blackboard Learning System™ (Release 6) - Microsoft Internet Explorer". The address bar contains the URL: [http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pf?course\\_id=\\_995\\_1](http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pf?course_id=_995_1). The page header reads "Blackboard Gateway Modules, Courses, Programmes HomeHelpLog".

On the left side, there is a navigation menu with the following items:

- Announcements
- Information
- Discussion Board
- Course Map
- Control Panel

The main content area displays a forum post with the following details:

**MODULES, COURSES, PROGRAMMES > TRAVEL DISTRIBUTION & TECHNOLOGY > COMMUNICATIONS > DISCUSSION BOARD > MESSAGE VIEW**

---

**Forum:** Tour Operators: Access to and aggregation of suppliers' content & product Times Read: 27  
**Date:** 09-18-2003 09:48  
**Author:** Spiers, Ed <[edward.spiers@anitesystems.com](mailto:edward.spiers@anitesystems.com)>  
**Subject:** really, it's about dynamic packaging Remove

---

**Tour Operator Access/Aggregation of Supplier Product**

As sponsor of this topic, my objective was to get feedback on current initiatives and constraints that attendees were aware of.

Perhaps a better choice of title might have been "the future of dynamic packaging", because this is the real reason for my interest in access to supplier product.

It's my belief that the technology is largely in place to operate dynamic packaging. Different parts of the industry operate different merchant models - tour operators, specialists, consolidators, on-line travel agents - and each have subtle differences to the generic dynamic packaging definition.

I also believe that consumer buying of travel through e-commerce - i.e. CRM, Content Management and booking engine applications - is now the accepted norm across a

At the bottom of the page, it says "Powered by Blackboard" and "Internet".

## Bottom half of Ed Spiers' posting

Blackboard Learning System 1M (Release 6) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pl?course\_id=\_995\_1

Blackboard Gateway Modules, Courses, Programmes HomeHelpLogc

Announcements  
Information  
Discussion Board

Course Map  
Control Panel

I also believe that consumer buying of travel through e-commerce i.e. CRM, Content Management and booking engine applications is now the accepted norm across a wide range of holiday products.

The constraints that are holding back its widespread adoption are the lack of standard links to suppliers, and the commercial business processes in place with those suppliers that will allow travel organiser systems to book/hold multiple travel components whilst a super PNR is created.

As an example, there are no B2B links in place to the UK low cost carriers, and their web sites are, not unexpectedly, consumer-oriented, requiring credit card authorisation before booking confirmation, with no option to cancel.

Links to low cost carriers to access and aggregate can be built, but would rely on potentially unreliable internet screen-scraping techniques

Similarly, hotel CRS and direct hotel links are available, but are currently limited to simplistic functionality suitable only for consumers and travel agents, not for tour operators.

If I had a magic wand, then my top priority would be to transform access technology and open up the commercial relationships to provide real access, on which we can build real aggregation.

In the absence of that magic wand, any suggestions or pointers as to how, and at what speed, we'll effect this transformation will be gratefully received.

A fuller explanation of my views on the subject can be read at [www.anitetravel.co.uk/home/reports/htrn](http://www.anitetravel.co.uk/home/reports/htrn)

Reply

Powered by Blackboard Internet



## Christy Tyler's posting

The screenshot shows a web browser window with the title "Blackboard Learning System TM (Release 6) - Microsoft Internet Explorer". The address bar contains the URL "http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pl?course\_id=\_995\_1". The page header includes "Blackboard Gateway" and "Modules, Courses, Programmes" on the left, and "Home Help Logout" on the right. A left-hand navigation menu contains "Announcements", "Information", "Discussion Board", "Course Map", and "Control Panel". The main content area displays a forum post with the following details: "Forum: CUSTOMER FOCUSED APPROACH", "Date: 09-18-2003 09:48", "Author: Tyler, Christy <christy.tyler@galileo.com>", and "Subject: Ultimate form of segmentation?". A "Remove" button is located to the right of the subject line. The post text consists of four paragraphs discussing customer focus, starting with "I suggested 'Customer Focused Approach' as a topic for discussion as I wanted to get some feedback...". A "Reply" button is at the bottom right of the post area. The footer of the page includes "Powered by Blackboard" and "Internet".

Blackboard Learning System TM (Release 6) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pl?course\_id=\_995\_1

Blackboard Gateway Modules, Courses, Programmes Home Help Logout

Announcements Information Discussion Board Course Map Control Panel

Forum: CUSTOMER FOCUSED APPROACH Times Read: 10

Date: 09-18-2003 09:48

Author: Tyler, Christy <christy.tyler@galileo.com>

Subject: Ultimate form of segmentation? Remove

I suggested "Customer Focused Approach" as a topic for discussion as I wanted to get some feedback from people as to what they see is a truly customer focused approach to running any business.

The main points noted during the discussion were, firstly that you can't have a customer focus in a company unless the culture is right and willing to take on this approach in the first place.

Secondly it was noted that before you can focus on your customer, you first have to define WHO the customer actually is. In this fast changing world, it is important to remember that the customer is not only the "next person in the chain". They also include suppliers, stakeholders, industry leaders, the media and most importantly, your employees. Customer focus in a company involves keeping ALL these people 'happy'.

Thirdly, it was suggested that technology can certainly be an enabler in achieving a customer focus (i.e. with a CRM system) but again this cannot happen unless the whole company adopts a different approach. It is also vital that senior management buy-in is obtained before a company embarks on the long and difficult journey.

It could be said that a true customer focus means treating ALL your customers as individuals and therefore responding to their individual needs. Sense tells us that this is not possible however as most companies have hundreds, if not thousands of customers. Adopting a customer focus therefore involves moving to a culture which is focussed on fulfilling customer needs, carrying out intelligent segmentation of your customer base and adopting a CRM technology to manage and maintain customer information.

Technology, handled correctly, can certainly help us cope with a future full of customer demands! Reply

Powered by Blackboard Internet

# Graham Barnes' posting

The screenshot shows a web browser window titled "Blackboard Learning System TM (Release 6) - Microsoft Internet Explorer". The address bar contains the URL: [http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pl?course\\_id=\\_995\\_1](http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pl?course_id=_995_1). The page header includes "Blackboard Gateway" and "Modules, Courses, Programmes". On the right, there are links for "Home", "Help", and "Logout".

On the left side, there is a navigation menu with buttons for "Announcements", "Information", and "Discussion Board". Below this, there are links for "Course Map" and "Control Panel".

The main content area displays a forum post with the following details:

- Forum:** Trade Associations and Infrastructure Development
- Date:** 09-18-2003 09:48
- Author:** Barnes, Graham <[gb@hypertrails.com](mailto:gb@hypertrails.com)>
- Subject:** Moderators Summary

A "Remove" button is located to the right of the subject line. The post content begins with: "We were lucky to have direct representation in the room from Advantage, Worldchoice and BITOA, plus participants with links to ABTA, GBTA and the conference and incentives associations."

The post continues with a paragraph: "For me the issue was rooted in the belief that trade associations will probably have to become more proactive in their services to members, and to leverage the channel to their members more in future. I was particularly interested in what that might mean in a distribution context."

Another paragraph follows: "However the discussion around 'basic' member services was quite intense and we didnt get around to this 'future gazing' until the very end of the session."

The post then lists "my main bullet points from the session:"

1. Fundamental traditional association activities - networking, lobbying, education are important but may not be enough to sustain an association's position long term.
2. Associations based on commercial deals (Advantage, Worldchoice) have the advantage(?) of more easily quantifiable membership benefit, provided they can continue to deliver.
3. Recognising and attacking a key issue for members can give an association a real identity and a lease of life for a significant period.
4. Technology advice is best achieved by surfacing and publishing best practice/ case study type feedback from members, rather than by explicitly recommending products and services.
5. Fragmentation is a problem in the incentives/ meetings area - too many associations with insufficient differentiation.
6. Standards - particularly for inter-operability - are very important, but while associations should support their development and introduction, it is debatable whether active participation can accelerate their take-up. (Views differed).

At the bottom of the page, it says "Powered by Blackboard" on the left and "Internet" on the right.

## Philip Alford's posting

The screenshot shows a web browser window titled "Blackboard Learning System™ (Release 6) - Microsoft Internet Explorer". The address bar contains the URL: [http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pl?course\\_id=\\_995\\_1](http://bb.luton.ac.uk/webapps/portal/frameset.jsp?tab=courses&url=/bin/common/course.pl?course_id=_995_1). The page header includes "Blackboard Gateway" and "Modules, Courses, Programmes" on the left, and "Home Help Logout" on the right. A navigation menu on the left contains "Announcements", "Information", "Discussion Board", "Course Map", and "Control Panel".

The main content area displays a forum post with the following details:

- Forum:** What are the barriers to the implementation of distribution technology projects in the travel industry? Times Read: 9
- Date:** 09-18-2003 09:48
- Author:** Alford, Philip <[philip.alford@luton.ac.uk](mailto:philip.alford@luton.ac.uk)>
- Subject:** Summary of session

Below the subject line are "Modify" and "Remove" buttons. The post content consists of several paragraphs:

The most important issue in securing the success of IT distribution projects is to obtain 'buy-in' from the business and ensure that the business owns the project. This is essentially a communication challenge between departments. The I.T. department is often shrouded in mystery and I.T. still regarded by many travel businesses as a cost as opposed to an investment.

Timescale to expect payback and measurement of R.O.I is shrinking to between 6-18 months. The potential problem with this short payback period is that it might create inertia - if can't get the payback then do nothing.

R.O.I targets were considered fairly academic and mainly used to secure approval for projects as opposed to representing realistic targets.

Measuring success of IT projects is particularly difficult for small and medium sized businesses which don't have the resources to commit to monitoring.

Travel described as a complex business with thin margins. It is polarised industry with the major tour operators often leading the way in terms of technology implementation, with smaller players following in their wake.

Summary ends.

There is an interesting survey of global Information Systems managers which flags up some barriers and concerns for implementing technology.

[http://www.csc.com/aboutus/uploads/CI\\_Report1.pdf](http://www.csc.com/aboutus/uploads/CI_Report1.pdf)

At the bottom of the page, it says "Powered by Blackboard" and "Internet".

## **Appendix 11: ntl travel report on Open Space**

2003 issue 1



## more bookings!

NTL Business (Travel Division) adds new content to Traveleye

### THIS ISSUE

#### EYE-OPENER

Jill Cox looks at the tone already set by NTL Business (Travel Division). p2



#### TRAVELVISION SURVEY

How agents see the industry developing in the years ahead. p2



#### GLOBE AWARDS

Find out how agents queue-bust, time-save and open up new markets. p3



#### MY BIGGEST DEAL

Hear how a cancelled cruise led to a \$24,500 booking. p7



#### OPEN SPACE

Reports from the industry think tank on the future of travel distribution and technology. p4-5



#### VIEW FROM THE TOP

Top journalist Jeremy Skidmore's tips on agency survival in an internet age. p8



NTL Business (Travel Division) has announced the launch of exciting new content on the company's market leading selling system Traveleye, dramatically enhancing agents' routes to making bookings.

Through partnerships with two of the travel industry's leading solutions providers, Ramseys and Voyager, Traveleye will offer agents a wealth of dynamic new search functionality, content and management tools, available as optional upgrades to the system.

For the first time, agents can use lifestyle criteria such as family-friendly beaches, childcare facilities and watersports, to search millions of holidays that are featured on SABES, Ramseys' breakthrough web-based multi-operator holiday and charter flight search and booking engine.

Agents will be able to apply these new search criteria to find tour operator brochures online, and then check availability on holidays to resorts that match the customer's

requirements. Information on over four million bookable holidays and flights will be provided in seconds, allowing agents to match customer preferences in the quickest time possible.

Retail and business travel agents can subscribe to Voyager's booking and agency management solution Via Voyager, which delivers multi-session IP viewdata reservations, and enables agents to search by lifestyle options, accommodation facilities and preferred tour operators.

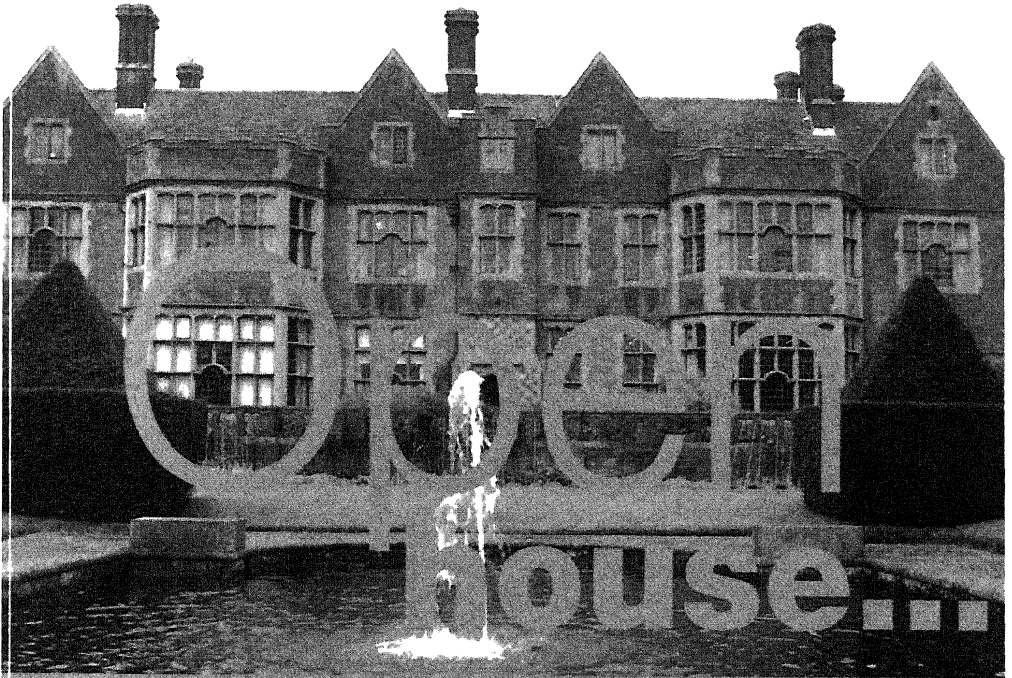
Users will also be able to access Via Voyager's central payments solution, which provides online credit card authorisation from every PC. For payment and ticketing on airline flights, non-IATA agents can queue tickets to Voyager Travel IATA - Voyager's own scheduled air ticketing unit. To capture booking data, Via Voyager provides automatic recording of viewdata booking details into the agency database.

Jill Cox, Head of Marketing, Travel and Retail at NTL Business said:

"These agreements reflect our commitment to develop Traveleye into the industry's most complete portal for agents. By aggregating content in this way, we believe we can offer agents a bookings environment unparalleled in the industry and the tools to close sales in the shortest possible time."

Brian Sheerin, Managing Director at Ramseys added: "As a respected distribution partner NTL Business (Travel Division) will offer us greater visibility, allowing us to reach a higher number of agents and expand our rapidly growing business. By adding lifestyle searching within Traveleye we are helping ensure agents can more closely match holiday availability to their customers' needs."

Dave Cuborn, Director at Voyager commented: "We are looking forward to working with NTL Business (Travel Division) and are confident that a partnership with this key industry provider will allow us to continue our rapid expansion."



On 26 November 2002, delegates from across the travel industry assembled at the University of Luton to debate current topics in travel distribution and technology. The workshop was hosted by NTL Business (Travel Division) and Galileo International.

*Delegates attended from four operators including First Choice, Travelscene and Gold Medal, while West Midlands Co-Op, Ilkeston Co-op and Double S Travel were among the travel agencies represented.*

*A departure from the industry norm, Open Space is a recognised formula allowing delegates to set their own agenda, creating a self-managed meeting environment.*

*Attendees individually brainstormed and sponsored issues, and identified the breakout debates they wished to attend.*

*The day culminated in a plenary session where delegates voted on the issues they considered most important.*

*Here is Travolution's report on some of the core topics.*

*Delegate names have not been divulged in order to retain confidentiality.*

**Speakers include:**

1. Dave Osborne, NTL Business
2. Steve Patterson, Double S Travel
3. Tracey Glenister, Galileo
4. Gordon Wilson, Galileo
5. Nick Bamford, Travelscene
6. Philip Alford, University of Luton
7. Melvyn Taylor, West Midlands Co-op
8. Alister Beveridge, Cosmos Air & Avro
9. Jill Cox, NTL Business



### Investing in the future

Topic 1: Technology is a great enabler, but how do I figure out what to invest in?

#### Areas of discussion

Delegates agreed that technology can be both confusing and intimidating, and the processes of adoption and adaptation often slow. The implementation challenges seem endless - particularly when the primary business goal is to get the brand in front of the consumer.

Numerous delegates believed technology benefits often fall short of expectations and that providers and customers need to work more closely to ensure success.

#### Conclusions

- Agents and other industry technology buyers must specify their business requirements
- Customers should give suppliers more time to understand their needs
- Time should be taken by both the supplier and decision-maker to ensure the correct implementation decisions are made
- Understanding the benefits, costs and timeframes is important on both sides

NTL Business (Travel Division) works with customers to ensure successful and streamlined implementation of technology that responds exactly to customers' needs and helps improve their service.

### The importance of the agent

Topic 2: The industry needs agents more than ever

#### Areas of discussion

Delegates considered why operators go direct to the consumer, and whether they launch websites to exclude agents.

The panel also discussed the demographics of consumers who book online or face-to-face with an agent, the role of the agent in today's society and predictions of agents' roles in the future.

#### Conclusions

- Agents and operators should work together and jointly own the customer
- Operators noted that independent agents provide an important distribution channel
- Agency delegates referred to the need for well-trained agency staff, who should provide a high level of service, in order to retain customers

NTL Business (Travel Division) provides the industry with cutting-edge solutions, ensuring agents can respond to changing market conditions and new technology to remain one step ahead.

### Viewdata

Topic 3: The future of viewdata

#### Areas of discussion

An issue the industry is always keen to debate is viewdata and its future.

As agents look to improve and speed-up selling, new technologies are emerging that can increase productivity.

Open Space delegates believed viewdata will be replaced by Internet Protocol (IP) solutions, which can summarise availability and give improved access to operator systems, so streamlining the sales process for consultants.

New methods of transferring data were also contemplated - for example XML - while multiple operator searching and booking solutions were acknowledged to be a considerable step forward in the hunt for a quicker, more intelligent booking process.

#### Conclusions

- Delegates concluded that the lifespan of viewdata is around 3-5 years
- IP agency selling systems are a key development
- Viewdata requires minimal maintenance, whereas the internet can be difficult to work with
- Future solutions must be properly packaged
- Four operators need to aggregate content, and provide one source of information, in order to help agents compare elements

NTL Business (Travel Division)'s TravelEye is the industry's leading IP selling system. We have also added multi-operator search and booking solutions from Comtec, Ramesys and Voyager including intelligent 'lifestyle' searches, and will continue to add new solutions that allow agents to search, compare and book holidays in the easiest possible way.

## **Appendix 12: Reconstruction of interviews**



## **Maurice Scott (Travelcare)**

**Job title:** Business Development Director

**Organisation:** Travelcare (A nation-wide chain of independent travel agents with sales in excess of £430m per annum)

**Summary of normative position:** Travel agents ought to reduce their dependency on the major tour operators, target the independent traveller, and ally themselves more closely to the virtual tour operators such as Lastminute and Expedia.

### **1st major claim (objective)**

Tour operator legacy systems are a barrier to flexible packaging and the ability of the travel agent to respond to customer demand for flexibility.

R. "So I would say for something the actual ultimate multi-searching tool we're probably 2 or 3 years off, at least, and that's probably - it may not be fully integratable. So I'd say up to 10 years if View Data legacy systems aren't disposed of.

R. But the quality of the data that comes back [from the tour operator to the travel agent] and the ability of a body to actually monitor the data on a tour operator's system and keep it current are just phenomenal, and it's very difficult to see it working.

I. Yeah. I mean it just seems staggering, doesn't it, in this day and age that data can't be up to date, and live, and current?

R: Yeah it does, and it's just the Legacy systems on which they're operating.

R: Quick Heart itself as a database on the lifestyle is fine, getting you to recommend a resort and possibly from there a hotel. It's when you start looking for the - when you go beyond that and say, right, that's a hotel which tour operators have got it and got the hotel, or which tour operators have got accommodation in that resort and availability. And we go through cycles where the data is brought up to date and then the eye gets taken off the ball and the whole thing just falls down because there's some gulch in the system and then you're pulling in data from so many different View Data systems you've got to look at how each one sort of deals with its data, replicate that, make sure it doesn't change it. There's not a willingness there for them to inform you when they're making changes, it's just a very labour-intensive battle to keep that data integrity."

### ***Possible normative evaluative claims***

*Foregrounded, Immediate*

“Viewdata legacy systems ought to be disposed of,”

*Less Foregrounded, Less Immediate*

“Tour operators’ reservation systems ought to be able to let agents match demand and supply more effectively,”

**Possible objective claims**

“Legacy systems cannot provide up to date, live data,”

*Less Foregrounded, Less Immediate*

“Tour operators do not cooperate with agents,”

**2nd major claim (objective)**

The big four tour operators are pursuing a long term in house sales strategy, which includes cutting out independent travel agents and Viewdata network providers

R: I suppose the big boys can, in some way, probably get there [multi-searching] quicker than some of the smaller tour operators and it may be in their self-interest just to be able to do online bookability from their own retail network into their own tour operator.

R: Going Places and Lunn Poly probably aren’t that bothered about multi-searching across all tour operators because they’re pushing 80%/90% of their business sale through their own tour operator.

So, you know, they’re trying to drive more and more through their own, in-house distribution systems, and multi-searching commercially may not be top of the list.

*I: So in terms of, because obviously, you know, you can divide I guess the market up into two out of the, you said the 4 verticals, the big 4 and then the rest of the operators. Do you see any way in which the rest of operators can, you know, make advances in this sector to enable multi-searching by the retailers?*

R: Well I can’t think of any particularly at the moment and by the nature of it if you’ve got 80% of the business, IT [inclusive tour] obviously is business going through 4 tour operators. Unless they get their act together, then the whole thing won’t follow, and if you’re asking smaller tour operators who saw less than 5% market share, you know, you’re going to have to get 20 of them, which is probably unlikely, together, to actually do anything. The - if you - so the simple mathematics of it are that you’d have to get a lot of smaller tour operators who may not have, especially in the current climate, the finance to sponsor such a project.

*I: And what about the View Data network providers, do you see them as having a role to play?*

R: I don't see, you know, they (network providers) don't seem to have the influence or clout to be able to force the issue. And I think the tour operators would rather just see the traditional View Data route and its providers wither away.

R: I think at the root of it all is the fact that your big 4 haven't got a massive incentive to actually provide us with the data. They're more concerned about their own in-house priorities and, of course, commercially they've got other priorities at the moment anyway with the aftermath of September 11<sup>th</sup> and the problems that Iraq has caused."

### ***Possible objective claims***

#### *Foregrounded, Immediate*

"The power of the major tour operators enables them to pursue their own agenda,"

"Viewdata and the Viewdata network providers do not figure in this agenda,"

#### *Less Foregrounded, Less Immediate*

"The package holiday industry is increasingly dividing into two sectors – the four large vertically integrated operators and the remaining independent sector," "The fragmented nature of the independent sector makes it difficult to collaborate on any multi searching initiative," "The big four are not interested in collaborating with the independent sector,"

### **3rd major claim (normative)**

Agents ought to increasingly target the independent traveller and use the technology provided by the virtual tour operators to enable this.

*I: And what do you see as taking its (Viewdata network providers) place, from the tour operators' perspective?*

R: I think we're looking at some sort of direct connections in there (to tour operator reservation systems) from travel agents.

R: Well there's one sort of main plank to the [Travelcare] strategy and that is to move a greater proportion of the business through direct channels, be that internet or telephone booking, and that goes hand-in-hand with the increase in independent travel as well, because we think the independent travel is more likely to book online and also to self-package. So our systems have got to follow that, and particularly our systems in terms of dynamic packaging, putting this one together, fly to a hotel and car hire, in various combinations and maybe over shorter duration than the sort of 14 day package holiday as traditionally delivered.

R: I think it might mean taking the tour operator out, or the tour operator becoming less significant in the equation. What the tour operator is offering at the moment is just a fairly stand package; we can now go to Unijet, sorry, EasyJet and then there's countless hotel websites and book the car hire as well online. So it's a case of how can we marry up all those strands to make something that's easily bookable from the travel consultant's point of view and I think that may be an easier thing to do than change the traditional View Data. It's a case of how we actually present it to the travel consultants and to the public, on the Internet.

*I: Maurice, do you think that the - are the tools there at the moment, you know, technologically speaking, to enable the agent to service this market?*

R: I think the tools are there and I think that what you're actually seeing is a new form of tour operator, a virtual tour operator, coming out of the woodwork. And you look at the likes of lastminute.com and expedia and they're probably successfully dynamically packaging now. So maybe, you know, Travel Care's route is to use their facilities to dynamically package and that isn't something that's totally fanciful at the moment. They certainly are the new breed of tour operator.

*I: That's interesting, because I've heard them being referred to as online travel agents, rather than tour operators, so I'm wondering whether they are a competitor of Travelcare or do they become a supplier?*

R: I think they actually, I think you can look at it - I mean it's a debate we've had recently; you can look at them as whatever you like, you can look at them as a travel agent or a tour operator. But the tour operator model is just completely changing, you know, you can't actually say that they're one or the other. Are they a competitor of Travel Care? Yeah, they are a competitor of Travel Care but they are also - Travel Care also has an ability to fulfil for them as well, because what you've got if you look at lastminute.com, they are a - they haven't got the infrastructure to fulfil the bookings at the moment that they're taking, I mean they're absolutely bombed out. So there's a lot of fulfilment going on for lastminute.com and as you've probably read in the travel press, they've got problems with their own call centres. But basically the level of demand that they're getting means they're having to go out to the more traditional call centre type businesses to fulfil their calls.

*I: And does that sort of work on a commission basis then? You take a commission on the sale from lastminute.com?*

R: Yeah, you work on - you'll do it for so many percent sort of commission (mobile phone ringing) or a fee for handling certain levels of business. As I say, lastminute.com

are using quite a few traditional call centres at the moment to take the flow of calls, which is not insignificant.

*I: So am I to take it from that Maurice, you know, that this self packaging and dynamic packaging opportunity that you need to sort of use lastminute.com, does that mean that the direct links to suppliers aren't available yet?*

R: Yeah; the direct links to suppliers are there; I mean, you can get the direct links to - we've got direct links into hotel groups, hotel search websites, or whatever; we've got direct links into car hire and we've got direct links into flights. It's a case of how you actually present that to the public and pull the whole thing together.

### ***Possible normative evaluative claims***

#### *Foregrounded, Immediate*

"Independent travel agents' technology should follow the trend in customer self packaging," "Agents ought to use virtual tour operators' technology to address this market,"

#### *Backgrounded, Remote*

"Agents ought to work with virtual tour operators to address the power imbalance with the big four tour operators," "Agents ought to reduce their dependence on traditional tour operators,"

#### *Highly Backgrounded, Highly Remote*

"In the longer term, agents ought to develop direct links into supplier and present that information for sale to the consumer,"

### ***Possible objective claims***

#### *Foregrounded, Immediate*

"Demand for independent travel is increasing," "It will be easier for the agent to pull together different direct booking strands than to find a multi searching solution through Viewdata," "The virtual tour operators have the current ability to dynamically package,"

#### *Less Foregrounded, Less Immediate*

"There are complex relationships within the supply chain with companies acting both as partners and competitors," "There is more equal power share between virtual tour operators and agents as the former rely to some extent on the latter to fulfil demand,"

#### *Backgrounded, Remote*

"Agents have not got the ability yet to present the diverse supplier information to the public in a coherent way," "The technology required to present this information may

need a level of investment that is beyond the agent,” “Agents cooperate with the virtual tour operators, thereby addressing this weakness,” “In return the agents provide the face-to-face customer interaction that the virtual players cannot offer,”

### **Summary of Maurice Scott’s position**

Overall Maurice envisages a divergence in the supply chain, with the big four powerful tour operators pursuing their own distribution strategy. This strategy allocates a fairly minor role to independent agents and undermines the bargaining power of the Viewdata network providers, which traditionally have linked tour operators with agents. The new virtual tour operators have the strength and market presence to match the influence of the big tour operators, and agents can strengthen their position in the supply chain by forming strategic partnerships with these operators. However longer term it may be beneficial for agents to be able to present supplier information directly to the consumer in such a way that they can service the growing trend in consumer self packaging. What emerges from Maurice’s analysis is the importance of securing strong bargaining power within the supply chain in order to avoid the threat of disintermediation. It is a scenario in which the exercise of power is a defining issue and where there appears to be little room for communicative action. The system is controlled by the tour operators’ legacy systems, which are incapable of supporting the lifeworld of the independent travel agent. In effect Maurice is advocating, from an independent travel agency viewpoint, that legitimacy be withdrawn from that system and agents engage in collaborative partnerships with the virtual tour operators, which will be more effective at supporting the lifeworld activities of the independent travel agent. The assumptions, lying in the background, that underpin Maurice’s position are based on an increasing gap between agent and operator. Of interest in this debate would be to bring to the foreground his backgrounded claim that agents ought to move closer to supplier reservation systems and thereby begin to dynamically package direct from the supplier. The objective claim that the technology does not yet exist to facilitate this could then be debated. Similarly the normative position that this is desirable could also be debated.

### **Alistair Beveridge (Cosmos)**

**Job title:** I.T. Director

**Organisation:** Cosmos (Tour Operator)

**Summary of normative position:** The industry should have a leisure distribution system in which the individual selling systems are connected.

### **1st major claim (objective)**

The proliferation of selling systems is negatively affecting the overall industry's profitability.

The big problem we have right now is we have to handle multiple systems.

... the look to book ratio is becoming worse and worse and worse and worse, and that's happening because there are more and more selling systems out there that quite simply go out and scan all the view data operators.

... so those selling systems create a problem for us, they generate a lot of traffic but we don't necessarily get the results from it and its becoming worse and worse as more and more suppliers, network suppliers, come into the market and try and steal some of the business away from the view data people.

... small, but importantly, from a travel perspective, they've (travel agency groups) created their own little private network.

And what I envisage, ultimately, is if they become more and more successful and maybe the view data players aren't there in the same format, then of course it's just complete, once they've built the network it doesn't take much to maintain them these days, there's an awful lot of income coming in there, and then we're back to almost the "let's negotiate with the view data suppliers" again.

... the total charges (levied by the Viewdata network providers) may not be unfair for distributing product, but as an uncontrolled cost they're a problem and the fact that they don't offer the full product for us in terms of the full content that we would want to offer.

... the big problem with it is right now the travel market is being generally depressed; one would think that Viewdata charges for us should go down as well but often the reverse happens because the product as with all tour operators, many of us have cut capacity so product might not be quite as available as it was and what that generates is an awful lot more searching.

Surprise, surprise, the charges for running the IP network will be much the same as running the X25 network and I suspect this is a negotiation that will have to happen in due course, because of course as technologists we are well aware of the fact that the IP network is cheaper to run,

... we have to manipulate that data across multiple different channels ... there's a limitation to the methods we do have in distribution at the moment, in that we can't distribute everything that we want to distribute.

... the technology I think is the easy bit. The difficult bit is getting commercial agreement and getting business processes sorted to do this.

### ***Possible objective claims***

#### *Foregrounded, Immediate*

"The look to book ratio is worsening because of the proliferation of selling systems,"  
"The growth of private networks could create a situation where one monopoly (the Viewdata network providers) is replaced by another (private networks)," "The Viewdata network charges are an uncontrolled cost because they are charged on a time basis rather than a transaction one," "The selling systems offered by the Viewdata network providers does not offer the range of content that the tour operators require,"  
"When the market is depressed, network charges increase," "An IP network is cheaper to run than an X25 network," "The Viewdata scanning systems are bad for the industry,"

#### *Less Foregrounded, Less Immediate*

"The major Viewdata network providers are threatened by the new networks," "The technical challenge in achieving more effective distribution is less than the commercial one,"

### ***Possible normative claims***

#### *Foregrounded, Immediate*

"There ought to be an alternative means for the network providers to charge the tour operators,"

#### *Backgrounded, Remote*

"Tour operators ought to explore alternative channels of distribution and reduce their dependence on the network providers,"

### **2nd major claim (normative)**

The system of travel distribution ought to be like the telephone system.

...To sort of - well to me, to really simplify, and I'll expand upon it, I would say it (the ideal system of travel distribution) works much like the telephone

...But of course we'll never achieve that unless we start at the bottom and work our way up and for me, from a clear technology point of view, we have to get an agreed method of



connectivity first. It's no good having the perfect system for distribution if we can't actually talk to anyone, you know.

...Getting all of us in a room together to say, "let's use whatever" via this method and to be quite honest the problem that occurs in these circumstances is someone will say, "x is the best thing since sliced bread", and someone else will say, "abc is the best thing" and, you know, "xyz is even better".

...I suppose to answer your question, I think there's very much a place in the market for the tour operator; we have heaps of experience of doing it; we can most certainly get the best prices through the (*inaudible*) we're purchasing. But it leads to a percentage of that business is changing to recognise that everything else is changing as well.

...and we've gone into Toward with a very open mind and we've basically set the organisation up to be a non-profit making body that's there to try and get agreement within the industry about distribution, but it is controlled by its members, completely and utterly; it's not the management committee going off at some tangent with what they think is best. ...The entire process works through the working groups; if Di Laver has a problem, or has a very strong view on it, then I would say come and join the working group and make sure we know of your views

...Then, of course, it could well be that the methodology's business processes, (*inaudible*) towards publishers as an example, will only apply to the 50 members that are there and it will be the 50 members that use those processes.

...R: And I suppose, to go back years before the first GDS arrived, before Galileo, you know, popped up, it was (*name?*) before that and I was working in travel at that time, and it was a nightmare in terms of a - I was doing agency - I performed sales function at one particular time. For example, if he came in and wanted to book an around the world flight, Travicom had on it a large collection of airlines but we would go into British Airways and book the sector of your flight from London to New York, then we would call up American Airlines and book from New York to Hawaii, then we would call up Air New Zealand to go from Hawaii to go from Hawaii to New Zealand, then Qantas from New Zealand to Sydney and then Thai to go to Sydney from Bangkok and then something else. So we had to go into each system, get the details and then transpose them onto the back office system. And those were just the carriers that were on Travicon and then we had the - and that was the bulk of the business, you know, UK agency and systems. Then of course we had to go off to the Guruda terminal to book Guruda Indonesia Airlines, and the Apollo one, that's actually American, Sabre, they were all separate systems working at our desktop. So of course what happened out of all of that is there was a process similar to this, the airlines all got together, created Galileo and others that are in the

market place now, and of course it's now possible to go on to Galileo and say, you know, "give me a flight from London to London, stopping in New York, Los Angeles, Hawaii", and it will give you a list of carriers, their price, this price and this price, pick the one you want.

...I: *So we're talking about a leisure product GDS, are we, or?*

...R: In effect yes, I think that's exactly what it should be. However I would say that what the market needs is a leisure distribution system.

...I think it is a system but I don't necessarily envisage one giant computer which has all the data in it.

...So the leisure distribution system to me allows everything to be there, but also allows us to define how we connect to it and across which system..

...R: And this is, I don't know if you know in the research you looked at, but maybe a year and a half ago, two years ago, a group of consultants did actually try to create a distribution system, using the internet as the transport mechanism, creating a system with a background to share leisure product. It was called TBS Go, the big switch was the TBS with the "go" on the end. And they went quite a long way down the route, it was very attractive, we were interested, but of course when it came to "we want some money to build the system", the big 4 they all sort of .

...R: I suspect it's happening, it's beginning to happen in a way because people such as Comtec and some of the others, technology suppliers, yes they take view data in the background and they display it in a different way and typically they add extra - ...Endeavour's a good example actually - it's (*fossiled?*) with the Cosmos holiday on Endeavour and all they're doing is screen scrape session to view data, but also they add content onto it, pages of the brochure and text; we don't supply it.

...What I see there is there has to be a strategy in place that recognises that the Legacy system is core to the business and in effect runs the business, but that system, or that infrastructure, should be so designed that the peripherals, for connectivity; for yield management; for brochure production, whatever it may be, finance, are bolted on around the outside using a flexible, modern methodology, whatever, XML is just an example. So ultimately when the point comes for that Legacy system to be replaced, it can be replaced but the systems around the outside remain.

...Anite are a good case in mind in that they have a strategy that particularly addresses that and again, the same sort of process I just talked about, building an infrastructure around the outside so that we can evolve, as much as we can plan the strategy, it could be next year we decide to become the largest ski operator, which is something we've never done.

...R: It's because of the types of technology that they use, never mind the lack of people. Even if we had all the people in the world it's slow, it's not the same sort of rapid development techniques that they use now.

...R: It's a little bit more cumbersome and of course slow means more people which means more expense, realistically.

...R: You cannot avoid it. I mean our main system, as I said, is Cobal, it comes from a company called (*Merit?*) it's a microfocus Cobal, which is recognised, well-used, but they must have a declining share of the market, not only a declining share, you know, yeah well it's a declining share of the market; there's a Cobal supplier, ultimately no one will be buying Cobal products any more. So one day they will turn around to a person and say "we're just not going to support it any more".

...R: So I think it's - I think the vision of one (*inaudible*) that can do everything is just not going to happen these days; not any more.

...R: Yes. That is another issue, but of course we may want to sell 3-night holidays, but the system doesn't actually take it, and again that's a pure - not to say we can't change the system to do it, but then of course the expense of doing it. So we will typically look at a peripheral system that may be able to handle that for us, or we'll (*inaudible*) in the background. It doesn't mean we won't offer the product, but it just means that the business processes in the background could be a little bit messier than we would want them to be. Yes, it's an issue.

### ***Possible objective claims***

#### *Foregrounded, Immediate*

"Any technical solution rests on the ability for players in the supply chain to communicate with each other," "It is possible to keep core legacy systems and bolt on applications with a view to phasing out the former in the longer term,"

#### *Less Foregrounded, Less Immediate*

"It is difficult to secure consensus in the travel industry," "Any solution may only apply to those who have been involved in its conception," "Tour operators won't buy into a solution which is based on a central repository of data - as evidenced by the failed TBS initiative,"

#### *Quite Backgrounded, Quite Remote*

"A top-down solution imposed on the industry will not work,"

### ***Possible normative claims***

#### *Foregrounded, Immediate*

“Any solution ought to start from the ground and work its way up – not one imposed from the top,” “To achieve this, there ought to be a greater spirit of collaborative working within the travel industry,” “Travel organisations should be allowed to define the nature of the system and the way it which in works,” “Any system ought to serve the needs of the stakeholders that subscribe to it,” “Choice should be a central feature of any system – allowing the travel organisation to choose how to connect to the system,” “Any solution ought to be able to incorporate the legacy systems – otherwise it would not secure the cooperation of those operators with legacy systems,”

*Less Foregrounded, Less Immediate*

“Industry stakeholders must be party to any technical solution,” “Legacy systems will be an issue in the longer term in preventing flexible product development by tour operators,”

*Quite Backgrounded, Quite Remote*

“There ought to be a role for the middle man technology supplier such as Comtec,”

### **Summary of Alister Beveridge’s position**

Alister recognizes the importance of collaboration and communication within his industry. He acknowledges the importance of a ‘*agreed* method of connectivity’, the need to ‘*talk*’ and the problems associated with each technology supplier claiming that their solution is the best. This underlines the rationale for developing a model that can help to identify these claims and reach a position where plans can rationally progress. The TOWARD forum he refers to is a good example of a collaborative venture providing the opportunity to create communicative spaces in which the life-world can be renewed. Alister claims that management will not be allowed to dominate the forum. In this claim he is rejecting the Functionalist position in favour of a communicative one.

Alister responded to the author’s request to verify that the summary was an accurate representation of his position. During that verification, Alister clarified the meaning and significance of business processes. For example, if a flight change occurred after the booking was made, that information would have to flow in both directions across the joined up networks. Similarly, invoicing and ticketing would rely on two-way communication. Alister also claimed in his reply that the big four tour operators had the same issues, if not more so, as the independent tour operators. This indicates an area of potential common ground, although it may well be that travel companies are now aware of it and this is where a skilled facilitator can foster that awareness. His position is that the network providers and selling systems are not supporting the lifeworld processes of

the tour operators. There is also a lack of trust of the network providers and selling systems, based on concerns of a monopoly being created.

His use of the phone system as a metaphor, places a lot of emphasis on the need for communication between different stakeholders. Therefore despite the earlier points regarding divergence from the selling systems, the implication is that through communicative action common ground can be established. His advocacy of offering choice to different stakeholders underlines the importance of a system, which serves the needs of that which it supports – freedom of choice is a defining feature of his vision.

His vision is of a system, but one, which stakeholders control and design, not one imposed on the industry by a few powerful operators. In order to give ‘real world’ credence to this vision, he draws on experiential knowledge, quoting the example of failed initiative TBS Go. His claim that a technical system imposed by powerful tour operator interests will not work is given weight by the GTI case reviewed in Chapter 1.

Alister summarised the characteristics of a leisure travel distribution network in an email, confirming my interpretation of the interview:

- A system able to connect operators, suppliers and customers using multiple networks and a common interface
- Technically much like those that exist for the financial industry
- Not a Central Reservation System such as those developed to distribute scheduled airline products
- Must be available to all participants using their network of choice, including the Internet
- Charges to be levied by the network providers, much in the same way that telephone networks charge
- Ability to charge between networks, whereby the networks would agree a pricing policy

Alister’s solution relies on a networked approach where the system is in the background and supports the operations of stakeholders but doesn’t overly dominate them. It should work seamlessly in the background as an enabler of business processes. The various networks and selling systems would be interconnected, enabling one point of access into the tour operator. This is a vision of where the system and life-world are working in harmony

## **Appendix 13: Author's publications related to thesis**

### **Published (peer reviewed)**

- Alford, P. and K. Karcher (2001). The Endeavour Extranet: Building and managing a B2B e-community in the British and Irish leisure travel Industry. In P. Sheldon, K. Wober and D. Fesenmaier (Eds), *Information and Communications Technologies in Tourism*, (176-186). Wien/New York, Springer.
- Seaton, A. V. and P. Alford (2001). Technology by the book: BookTownNet and SME cultural tourism networks. *Information Technology & Tourism* 4 (2).
- Alford, P. (2004). Critical theory - an alternative solution to IT planning implementation problems in tourism. In A. Frew (Ed), *Information and Communications Technologies in Tourism*, (271-282). Wien/New York, Springer.

### **Published (not peer reviewed)**

- Alford, P. (2002). New research for a new tourism – searching for an alternative paradigm. Proposal presented at PhD workshop at ENTER conference, Innsbruck.
- Alford, P (2005). A critically inductive approach to the evaluation of information and communication technology implementation in the leisure travel agency sector. Paper presented at SITI PhD workshop at Queen Margaret University College, Edinburgh.

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