Universidade de Aveiro
Ano 2015

Departamento de Economia, Gestão e Engenharia Industrial

FABIO CARBONE

Gestão da Qualidade do Património Cultural

Análise da percepção dos gestores do património arqueológico

Cultural Heritage Quality Management

Analysis of archaeological heritage managers' perception

Universidade de Aveiro
Ano 2015

Departamento de Economia, Gestão e Engenharia Industrial

FABIO CARBONE

Gestão da Qualidade do Património Cultural
Análise da percepção dos gestores do património arqueológico

Cultural Heritage Quality Management
Analysis of archaeological heritage managers' perception

Dissertação apresentada à Universidade de Aveiro para cumprimento dos requisitos necessários à obtenção do grau de Doutor em Turismo com atribuição da menção honorífica de "Doctor Europaeus", realizada sob a orientação científica do Professor Doutor Luiz Oosterbeek, Professor Coordenador do Instituto Politécnico de Tomar; Coorientação do Professor Doutor Carlos Costa, Professor Catedrático da Universidade de Aveiro e da Professora Doutora Ana Maria Ferreira, Professora Associada da Universidade de Évora.

FCT
Fundação para a Ciência e a Tecnologia
MINISTÉRIO DA CIÊNCIA E DO ENSINO SUPERIOR

Apoio financeiro da Fundação para a Ciência e Tecnologia (FCT). Bolsa de Investigação com a referência SFRH / BD / 70091 / 2010, financiada por fundos nacionais do MEC

A mio padre
Che mi ha insegnato il valore dell' Impegno
E l'importanza della Storia
e
A mia madre,
Che mi ha insegnato il valore della Dedizione
E l'importanza della Libertá

To my father,
who taught me the value of Commitment
And the importance of History
and
To my mother,
who taught me the value of Devotion
and the importance of Freedom

o júri

Presidente	Prof. Doutor Carlos Fernandes da Silva, Professor Catedrático, Universidade de Aveiro
	Prof. Doutor José Manuel Hernández Mogollón Profesor Titular, Universidad de Extremadura (España)
	Prof. Doutor João Luís Cunha Cardoso, Professor Catedrático, Universidade Aberta
	Prof. Doutor Carlos Manuel Martins da Costa (Co-orientador) Professor Catedrático, Universidade de Aveiro
	Prof. Doutor Luiz Oosterbeek (Orientador) Professor Coordenador, Instituto Politécnico de Tomar
	Prof. Doutor Luís Manuel Mota dos Santos Figueira Professor Coordenador, Instituto Politécnico de Tomar
	Prof. Doutor Virgílio Nuno Hipólito Correia, Professor Afiliado, Universidade do Porto e Diretor do Museu Monografico de Conimbriga
	Prof. Doutor Carlos José de Oliveira e Silva Rodrigues Professor Auxiliar, Universidade de Aveiro

Acknowledgement

The process of writing a PhD thesis represents an amazing journey. It is not about *cut-and-paste* all our notes: our *story* shapes the use of these notes, rather than vice versa. We begin with a *research question* and, in the end, we discover that every moment of our life was a clue to the answer.

I would like to thank some of the most important people who helped me to construct this "story" giving a significant contribution to my work, my knowledge, my life. I'm sincerily grateful to my supervisors: **Luiz Oosterbeek** (Polytechnic Institute of Tomar), constant source of inspiration and a model for his intellectual honesty, which - allied to his wit and open mindedness - allow him to brilliantly grasp the complexity of the world around us; **Carlos Costa** (University of Aveiro), who was to me what *Leotychides* was to the Roman emperor Hadrian: "(he) approached things from the most positive and practical point of view, with a clear, dry intelligence which taught me to enhance *things* above *words*, to mistrust mere formulas, and to *observe* rather than to *judge*. He taught me *the method*" (Yourcenar, 1951); **Ana Maria Ferreira** (University of Evora), for her constant and kind availability and significant contribution within our "interdisciplinary team". Thanks to the member of the international jury for their positive contribution, To **Jordi Tresseras** (University of Barcelona) and **Lionello Punzo** (University of Florence), for their kind involvement within the European PhD. My gratitude also goes to many others "allies": **Maurizio Quagliuolo** (HERITY), for the "bulletproof quality" of his constant supervision; **Gaia Marnetto** acute observant, kind colleague and supervisor during my internship at HERITY - World Organisation for the Certification of Quality Management of Cultural Heritage, for the mention of *Doctor Europaeus*. Thanks to all those who have taught me something during these years, working together or just through an informal conversation: **Luiz Trigo** (University of S. Paulo)**, Fernando Amores** (University of Seville), **Lavinia Ciuffa** (AAR Photographic Archive), **Bernie Frischer** (Rome Reborn Project, University of Virginia), **Esther Bichorst** (University of Barcelona), **Louis D'Amore** (International Institute for Peace Through Tourism), **Manuel Salgado** (Polytechnic Institute of Guarda), **Carlos Ferreira** (UA), who challenged me with the idea of the European PhD (welcomed and overcame!); **Elizabeth M. Serra** (Gap Consulting), **Ana Rita Garcia** and **Sara Brito** (ESG, Polytechnic Institute of Castelo Branco), **Anthony Laurel** (IH), **Gian Luigi Corinto** and **Flavia Stará** (University of Macerata), **José d'Encarnação** (University of Coimbra) and **Mark C. Donfried** (Institute for Cultural Diplomacy), among others. Thanks to **Zelia Breda, Irina Amaral, Armando Vieira**, professors and friends, and to **Marilia, Maria José** and all the other PhD colleagues for the useful brainstormings and mutual support; to **João Pedro Melo, Fernando Vieira** and all the administrative staff involved, for their kind assistance.

Special thanks to **Gioacchino Lena**, mentor, model and champion of integrity, who constantly reminds me that life *is not about how hard you can hit, it is about how hard you can get hit and keep moving forward!* I was his student and today we are great friends (but he will never stop to be my *Professor*!). Thanks to ***Generale*** **Arena**&**Céu; Simona&Dino, Gennaro, Stefania, Silvia, Giorgia&Angelo, Antonio&Denis, Bruno, Bea, Riccardo, Luis Henrique** and **Nazzareno Vasapollo**, for their warm support; to **Vasile Staiku**, **Mariana** and **Adina** for their sincere esteem and friendship. My acknowledgment also goes to **Paolo Carafa**, who introduced me to *this idea of being researcher*. Thanks for the support I received from all my friends around the world. Among them, a special thank goes to **Stefano Mazzotta** and his sweet wife, **Vale**, not only for the logistic support (!!!) but, above all, for the friendship that binds us together for over twenty years. An "unconventional acknowledgment" goes to **Bono, The Edge, Adam Clayton and Larry Mullen Jr., better known as *U2***: they inspire me with their hard work, their message and their music every day, since I was fourteen. And every day they remind me *we are ONE*!

Thanks to my parents – **Egidio&Genny** – and to **Erika** and **Alessandro**, for their unconditional love and support.

Every moment of my life was *definitively* the clue to my answers. And every question brought me closer to my one true love: **Ani,** *merci, eshghe man*!

All these persons have added something positive to my work and my life, and I am honoured to share this amazing success with you all. *Grazie*!

Palavras-chave

Património Cultural, Património Arqueologico, Turismo, Gestão de Qualidade do Património Cultural, Turismo sustentável, Desenvolvimento sustentável.

Resumo

Com o presente trabalho nos propomos de analisar a perceção do conceito de *qualidade* por parte dos gestores dos museus e sítios arqueológicos. Para tal, escolhemos analisar algumas áreas patrimoniais abertas ao publico e certificadas por HERITY - World Organisation for the Certification of Quality Management of Cultural Heritage, única certificação internacional deste género e cuja importância já foi oficialmente reconhecida pela UNESCO e pela Organização Mundial do Turismo. A aplicação dos princípios da qualidade e do Total Quality Management à gestão do património cultural se insere nos esforços para uma melhoria contínua da oferta cultural e turística e – no nosso entender – no aumento da capacidade de promover o diálogo intercultural entre população residente e visitantes. Nos questionamos portanto sobre a percepção do significado de Qualidade no âmbito da gestão do património cultural, e de que forma a cultura da qualidade pode proporcionar um maior envolvimento das comunidades locais, contribuindo assim para o reforço da autenticidade e do caracter do destino, bem como do diálogo intercultural entre turistas e residentes. Para responder a estas perguntas, procuramos definir um modelo teórico que, a seguir, confrontamos com os resultados de um trabalho empírico de âmbito europeu sobre a perceção da qualidade por parte dos gestores do património cultural, nomeadamente arqueológico. O estudo aprofundado do que é a Arqueologia, o Turismo e a Qualidade e a reflexão do papel destes três domínios no âmbito mais abrangente do desenvolvimento territorial sustentável representam a base deste trabalho, que se propõe por sua vez de ser um veículo de reflexão no âmbito da criação das políticas públicas de gestão do território e de desenvolvimento turístico. Empreendemos assim uma linha de investigação ainda pouco explorada, dedicada à analise dos princípios da qualidade no âmbito da gestão do património, às suas potencialidades e à medição dos seus efetivos impactos no território, através de uma abordagem integrada e considerando duma forma não convencional, mas sim especular e complexa os dois principais beneficiários: população residente e turistas.

Keywords

Cultural Heritage, Archaeological Heritage, Tourism, Cultural Heritage Quality Management, Sustainable Tourism, Sustainable Development.

Abstract

With this work we propose to analyze the perception of the concept of quality by managers of museums and archaeological sites. To this end, we chose to analyze some heritage areas open to the public and certified by HERITY - World Organisation for the Certification of Quality Management of Cultural Heritage, the only international certification of this kind which has been officially recognized by UNESCO and the World Tourism Organization. The application of the principles of quality and Total Quality Management to cultural heritage management is part of the efforts towards a continuous improvement of the cultural tourism offer and - in our opinion – towards an increasing capacity to promote intercultural dialogue between local population and visitors. In this context, we have therefore investigated the perception of *quality* within the context of cultural heritage management, and how the culture of quality can provide a greater involvement of local communities, contributing to the strengthening of authenticity and destination personality, as well as the promotion of intercultural dialogue between tourists and residents. To answer these questions, we have defined a theoretical model and subsequently carried out an empirical work at European level on the perception of quality by managers of cultural heritage sites, namely archaeological heritage. An in-depth comprehension of areas such as Archeology, Tourism and Quality Management, as well as its role within the broader context of sustainable regional development, are the basis of this work. The latter is intended, in turn, to be a vehicle of reflection within the creation of public policies on territorial management and tourism development. We thus undertook a research line which is still almost unexplored, that is, the analysis of quality principles within the cultural heritage management, their potential and the measurement of their actual impact on the territory, through an integrated approach, by considering in a specular, complex way the two main beneficiaries: residents and tourists.

There is a treasure
that no one can steal from Man.
A port of refuge
for all the Mankind.
This is the "Paideia".

(Μένανδρος, ca.342–291 B.C.)

Contents

Chapter 3

Quality Management and Cultural Heritage

Chapter 4

Methodology

Chapter 5

Data Analysis and Findings

Chapter 6

Cross-cases analysis and discussion

List of Figures

List of Tables

Introduction

Quidquid sub terra est, in apricum proferet aetas (Everything that is hidden under ground, time will return to light). It was what *Quinto Horatius Flaccus* stated in *Epistolae, I, 6, 24*. And, as well as an obstetrician helps mothers giving birth, in the same way the "birth" of these treasures from the earth is aided and assisted by specialists such as archaeologists, in a task of (re)construction of the truth that we could define *Socratic*. But, as well as the obstetrician's duty does not end with the birth of a baby, but continues with the accompaniment of the dynamics produced by the advent of the unborn to the world (at least for the first few months), in the same way the task of the archaeologist does not end (or, at least, should not end) with the discovery of new remains, but rather should continue with the care and preparation of the "future" of these evidences of the past.

This is a concern that technicians and operators were taking in mind, in the course of time. More and more, the issues associated with the management of cultural heritage and archaeology have been included in the agendas for development. The meaning of the latter has recently been challenged as "the socio-economic situation that the human race is going through on a global scale" which in recent years has forced the revision of the traditional socio-economic beliefs. The succession of paradigms in the field of public planning and development is a normal phenomenon. Reflections about development began with the Age of Enlightenment (XVIII century) and positivism (XIX century), and accompanied the Human Being (as well as Social Sciences) until the present day, with questions such as: how (and why) a country develops more than another? What is, finally, development? What differentiates "development" from "growth"? (Pinheiro do Nascimento, 2001: 97)

The economic and social turmoil of recent years have contributed to the need of deep reflections on public management, governance and the new responsibilities of the players involved in development process (Bursztyn, 2001; Pinheiro do Nascimento, 2001: 97; Svara, 2009). This situation is acutely resumed by Bursztyn (2001), according to whom the current crisis of paradigms that move the progress until now, authorizes the "temerity" to think on new ways for human development. With examining this issue from a global perspective, we can easily agree with Bounfour (2005) and affirm that the dominant system, under which we are living, is undergoing a deep transformation. Capitalism as a socioeconomic system is undergoing modification towards a set of new organisational forms, in which drivers are mainly Information technology (IT) and culture (Bounfour, 2005: 4).

The “desired change” is deep and involves different sectors. Svara (2009) observes, for example, that as cities face the challenge of adapting to new approaches to governance, all mayors need to lead with vision and facilitation. In the same way, Von Mutius (2005: 153) points out that immaterial and material assets should be regarded in the future as being of equal weight and essential to be balanced in new ways in all areas of leadership and management activity that is a comprehensive and interdisciplinary leadership task that presents itself as an extension of integrated management developed in the 80’s by the Berliner Bleicher (2011).

With our work we want to analyse the reflections of these paradigm shifts, in the field of heritage management and its contribution in the creation of wealth in terms of knowledge for local communities and visitors. The field of the cultural and intellectual capital for communities was deeply approached by authors like Bounfour and Edvinsson (2005). According with their general conclusions, this field could represent an original and cutting-edge area of research which could potentially change the modalities of public sector planning and development, since it is demonstrated that intellectual capital is valuable to create wealth in a given city, region, nation - as well as in a given company, in private sector (Bounfour & Edvinsson, 2005: xi).

So, if the intellectual and cultural capital is considered a significant value in the development, it is necessary to reflect on the source of this wealth and its management. The development of powerful intangible resources is an essential issue for companies and for public organisations, too. The latter should develop innovative approaches, particularly in specific horizontal fields of action like research programs, fiscal policies, competition policies and system of education (Bounfour & Edvinsson, 2005: xiii). In the case of our interest, the cultural heritage of a given territory, particularly archaeological, is one of these sources of knowledge and enrichment. The ability (and responsibility) to communicate the cultural content of archaeological resources has not always been considered as a function of archaeology, as clearly showed in the works of Carandini (1981) and Manacorda (2007), on the evolution of this discipline. Therefore, we must pass through different stages of maturity of this "Science of Antiquity" (Manacorda, 2007: 29) in order to finally reach a methodological autonomy as well as the awareness of the social responsibility of archaeological research.

The ability to stimulate the collective interest towards the research of its historical identity, through the development and dissemination of archaeological knowledge becomes important for two reasons. Firstly, it becomes an indispensable tool for the preservation of its assets, and secondly, it stimulates the curiosity and openness to new cultures in a global context of commitment to the building of peace, because as Settis (2002: 12) states, "The historical self-consciousness of the peoples and nations is the best antidote to nationalism". So in this worldwide compromise to aim local development in a perspective of global socio-economic stability and peace, the role of cultural heritage and its enhancement for social and economic purposes is crucial. The powerful statement of famous architect and planner Aldo Cazzullo, “peace is like a city: does not exist in nature, so we have to build it” (Cazzullo, 2013), leads us to affirm that cultural heritage should serve as foundation for this “wonderful city”.

The present work fits in this debate. Despite starting from the issue of the quality management of heritage as an instrument of regional planning and development and for the improvement of tourism offer and competitiveness (not only from the point of view of services, but also from the point of view of the authenticity of the destination, as we shall see), in reality the scope and contribution of the study fit into the largest search for new paradigms of global development, confident that the archaeological heritage (and cultural heritage in general) can be a vehicle for social and sustainable economic growth, through the involvement of residents and tourists, and that this concern should be formally incorporate between the minimum standards, internationally shared, of quality of archaeological and other cultural heritage management.

Structure of the thesis

The thesis is structured into five chapters, preceded by a general introduction to the work and followed by the general conclusions. The first part of the thesis is designed to create a solid base of knowledge and preliminary considerations about *archaeology* and *archaeological heritage management* (Chapter 1), the links between *heritage* and *tourism* (Chapter 2) from several points of views. Finally, we analyse in depth the concept of *quality* (Chapter 3) that now is applied to the management of cultural heritage, but it was actually born already several decades ago in the industrial sector. This chapter contains the entire evolution of the concept and the way in which finally it converged towards the services sector and heritage management.

The second part of the thesis, the empiric part, begins with the Chapter 5. The latter is dedicated to the methodology: the “keystone” of the entire work, this chapter contains a detailed discussion on the theory of knowledge, on scientific revolutions and the “theory of complexity", as we adopted a “complex approach” in making this investigation. Still in chapter 5 we clarify the proposed paradigm that is underlying the work. Furthermore, the theoretical model, as well as the theoretical contribution, is exposed in this same chapter. The fifth chapter will present the cases analysed, firstly separately and then through a cross-cases analysis. Finally, we outline the findings resulting from the empirical work. The thesis ends outlining general conclusions and suggestions.

The thesis contains several figures, charts and explanatory tables supporting the text. These are numbered sequentially within each chapter (numbering indexed to chapter as proposed by A. Pereira & Poupa, 2003). For example, the figure 1.3 will correspond to the third figure in the first chapter. We opted for this type of numbering because it seems to allow a more rapid access to the figures which are quickly attributable to a well-defined chapter, thus, to a well-defined topic of the thesis.

Chapter 1

Archaeology and

Archaeological heritage management

Introduction

This chapter is devoted to the central theme of this study: the management of the archaeological heritage and the role of archaeology in the new paradigms of development. The architecture of the chapter is designed in order to provide the reader with the tools necessary to address the issue, and to introduce him in the following chapters. The chapter opens with a clarification of the cultural heritage and its value within the society, in the past and the present day. The increasing attention and epistemological analysis, about the boundaries and contents of cultural heritage has led to new approaches in the guidelines of its conservation and management. The clear and unequivocal definition of "intangible cultural heritage" is a clear example of the result of these technical-scientific reflections. In most cases, these guidelines have been established by eminent supranational structures such as the United Nations bodies including UNESCO. The content of this chapter is largely based on the analysis of these guidelines, as well as the formulation of reflections, constructed on the existing theories about the cultural heritage. After reporting these issues, and to gradually approach the main object of study, the difference between tangible and intangible heritage, from the perspective of their function in the development and social dynamics will be discussed.

This digression on the subject of cultural heritage will serve to define the evolution of its policy of management and its role in society over time. After defining this, we will focus on that part of the cultural heritage which, by definition, represents the remains of the material culture of a community, that is, the archaeological heritage. Furthermore, we'll focus on the discipline that studies the material remains of the cultural heritage, the archaeology, and the analysis of its role within the paradigmatic changes regarding the processes of socio-economic development. To do so, this part of the chapter will address key issues, such as:

- the definition of the scope of archaeology;
- the technical and ethical responsibilities of an archaeologist;
- what is defined as an archaeological site (and what is defined as a non-site);
- what kind of social, historical and archaeological processes are responsible for the creation of archaeological sites;
- the historical, social, identity contents of the archaeological heritage, nowadays and in the past, and their values within communities;
- the practices of management and enhancement of this heritage and, finally,

- the relevance of its contents to the contemporary society, and how they are communicated to the public, and enhanced on behalf of communities' development.

Summarizing, the first part of the chapter will represent the excursus which introduce more complex questions, about the role of archaeology, archaeologist and archaeological heritage within regional planning and development, and the opportunity to manage archaeological knowledge and heritage in order to create a social benefit. Complex process of regional planning that comes completed by the tourist enhancement of these spaces and knowledge.

1.1 Cultural Heritage: meaning and values

Culture is an intricate and inclusive concept, as evidenced by the large existing debate about this term in several scientific fields. Originally, anthropology was conceived for the study of different cultures, which were considered to be static. Recently, a vibrant debate within anthropology has criticized this notion of culture as a bounded, rigid entity. A new approach showing that cultures are in constant contact with one another, and they have been for centuries; due to these meetings, cultures are constantly changing, leaving tangible and intangible vestiges of such everlasting process: what is left is what we use to call cultural heritage.

The English word *heritage* comes from the French *héritage*. The latter derives from Latin *hereditas*, that means *inheritance*, and which is a synonymous for *patrimony*. In Latin language the term *patrimonium* designated the property of the father, a family legacy (Castglione & Mariotti, 1990) or else, a family "heritage". This was its meaning until the XVIII century. According to Amado Mendes (2009: 188), with the French Revolution the term "heritage" purchased a collective meaning, namely, testimony of national history. It was indeed in this same period (1790) which comes the term "historical monument", as advocated by the same author. In this sense, it is nevertheless appropriate to report that, with a more current reflection, Dolff-Bonekämper (2009: 71) alerts us to the weakness of this model, that "defines identity and heritage circles, highlighting, and sometimes even strengthening, the boundaries between them; it is both inclusive and exclusive, defining an inside and an outside, entailing a risk of cultural and political partitioning, both internally, for the groups defined as minorities, and externally, *vis-à-vis* neighbouring states".

Cultural heritage indicates the "goods of a community" or, rather, an "intergenerational legacy" (Umbelino, 2004: 22). Several factors influenced, according to Amado Mendes (2009: 189), the evolution of the meaning of heritage and the reasons that led to the hegemony of the connotation of *cultural* heritage:

1) The democratisation of society, culture and history;
2) Extension of the concept of cultural heritage from fine arts to science;
3) The rapid changes introduced by the 3rd industrial revolution (XX century), which led to the urgent need to preserve the cultural traits that, otherwise, the rapid progress would cancel forever.

The meaning of heritage is clearly defined by the Oxford Dictionary, as a word with an ancient French origin, referred to “valued objects and qualities such as historic buildings and cultural traditions that have been passed down from previous generations”, something "denoting special architectural, historical, or natural value and that are preserved for the nation”. Finally, the Faro Convention defines (Art. 2) cultural heritage as “a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions. It includes all aspects of the environment resulting from the interaction between people and places through time” (Council of Council-of-Europe, 2005).

One can therefore say that heritage is represented by all those rests which talk about the past, the ancient tradition of a particular geographical and cultural area, whose "key factor is its ability to symbolically represent an identity " (Peralta, 2003). Today heritage has become one of the guiding words of contemporary historical knowledge. This term goes from a "notarial" meaning (still used in the late sixties and seventies) to a definition much more compelling and pervasive: it indicates no more goods that are inherited, but the assets constituting the collective consciousness of a group. In this sense, words like 'memory' and 'identity' become almost synonymous (Audrerie, 2003: 23-24).

In this context, one of the key elements that constitute the cultural heritage of a community is the archaeological heritage, that is, the material traces of any human activity over time (Hardesty, 2008; Manacorda, 2007).

1.1.1 The role of cultural heritage within society and development

The Universal Declaration of Human Rights encompasses cultural rights, which invites participation in cultural life in all societies. Such participation fosters the exercise of active citizenship and promotes social cohesion. Many ancient texts demonstrate that the Universality attributed to the message of the cultural heritage, generally, and ancient monuments, in particular, are not the product of a sensibility of our time, translated by the Convention of UNESCO (1972). This sense already pervaded the classical world: very interesting from this point of view the analyses of the letter written by the Byzantine general Flavius Belisarius to his enemy, Totila, when the latter was about to destroy Rome after the siege to the city (VI century). The epistle of Belisarius - as remembered by the principal historian of that period, Procopius of Caesarea (*Wars of Justinian,* 8.22.8-17) was to admonish Totila about the mistake that he would make by razing a city like Rome and its monumental richness, to which Belisarius attributes an ecumenical value. This document is a demonstration of the “lively awareness of urban heritage, perceived as cultural stratification and collective heritage to be transferred to posterity" (Manacorda, 2007: 51).

In our days, a very fast process of modernisation and the scale of change in society confer to heritage an increasing significance. In such circumstances, indeed, evidences of past societies can provide a sense of belonging and security, and define identities, as highlighted by UNESCO, ICCROM, ICOMOS, and IUCN (2013). We also must consider that understanding the past can be of great help for managing the problems of the present and the future (UNESCO et al., 2013).

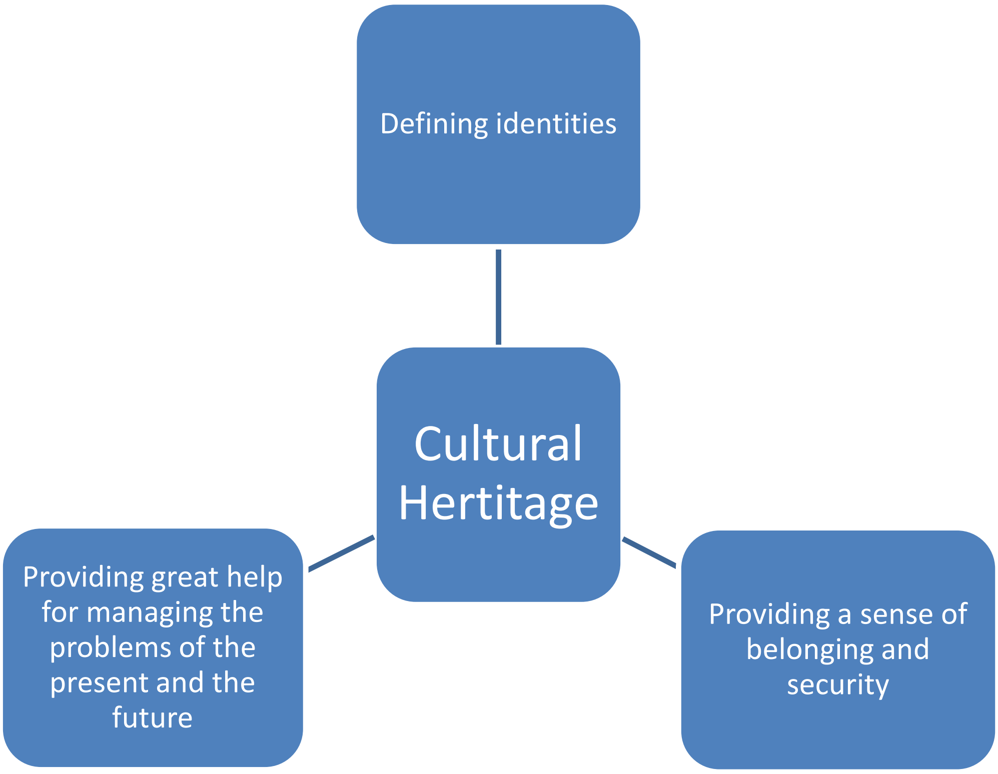

Figure 1.1: Contemporary social role of cultural heritage. Source: adapted from UNESCO et al. (2013)

Fairly recently the international community begun to appreciate the importance of conserving cultural heritage as places where social and cultural factors have been and continue to be important in shaping them, rather than as a series of monuments offering physical evidence of the past (UNESCO et al., 2013). At European level, the so called Valletta Treaty (Council-of-Europe, 1992) defines the guiding principles for the protection and integrated management of the archaeological heritage *as a source of European collective memory and as an instrument for historical and scientific study. All remains and objects and any other traces of humankind from past times are considered to be elements of the archaeological heritage. The archaeological heritage shall include structures, constructions, groups of buildings, developed sites, moveable objects, monuments of other kinds as well as their context, whether situated on land or under water* (Art. 1). The Treaty defines the participation of communities in the management of archaeological heritage as well as the inclusion of the issues linked to the conservation and enhancement of archaeological heritage within the development projects. Few years before the elaboration of the Valletta Treaty, ICOMOS (1990) declared that a knowledge and understanding of the origins and development of human societies is of fundamental importance to humanity in identifying its cultural and social roots.

The notion of cultural heritage and its values may be viewed from a number of standpoints. Amado Mendes (2009: 190) defines several values of cultural heritage:

- Artistic;
- Aesthetic;
- National;
- Cognitive;
- Symbolic;
- Social;
- Economic;
- Educational;
- Touristic.

However, he defends that the heritage itself is a “cultural construction” (Amado Mendes, 2009: 190). Culture is a fluid and problematic concept to deal with. In the approach of UNESCO (2006) it is summarily taken to mean both ‘ways of life’ (beliefs, values, social practices, rituals and traditions etc.) and the tangible (buildings, monuments, objects etc.) and intangible (language, performances and festivals, craftsmanship etc.) expressions and manifestations of society’s values and beliefs. Although the notion of ‘cultural heritage’ was originally conceived within the industrialised and developed world and thus reflected the values inherent in such societies, today the idea has been widened to cover the role of cultural heritage even in the lesser-developed world where there is less emphasis upon grand and permanent structures and recorded narratives.

Generally speaking, scholars like Manacorda (2007: 80) alert on the consequences of a society without history, considering the negative results of some recent examples of denial of history promoted by some sectors of the "technological West". Indeed, the role of cultural heritage and its intrinsic valuesit must also be contextualized in the current necessity to recover a “world of values” justified by what the polish sociologist Bauman (2000) defines *liquidity* of the society today, in which the idea of community, the feeling membership and the presence of solid values is perceived as definitively lost.

On the other hand, the "identity” and the “social” value of cultural heritage is indirectly demonstrated by its manipulation in certain historical periods, for political purposes and propaganda. Carocci (1993) and, after him, Manacorda (2007) observe, indeed, that during and after the Middle Ages some Roman families occupied, unfairly, ancient buildings in order to demonstrate the authenticity and validity of their nobility: the possession of physical rests of the past (the ancient roman structures) and its reoccupation, it symbolically represented a supposed link with the *antiqua nobilitas,* legitimizing the power of these families. Again, in the modern ages, Rome became the Italian capital, according to Vidotto (2006), due to the power of its symbolic dimension, capable of silencing all opposition. Thus, according to the latter author, *archaeology - understood here as the conservation and management of the memory of ancient history - contributed to defining the use, the characteristics and the styles of new public spaces*. Still, some years later, Mussolini based his propaganda (and his search for legitimacy) on the same principle, enhancing (and often misrepresenting) the values of the Roman Empire mainly through the symbolic component of the monumental ruins of the past. The same symbolic and ideological purposes were intended to the *Pergamon Museum* in Berlin, and the whole *Museumisnel*, created since 1824 with the aim to bring together the best monumental manifestations of Western culture, symbolically converging in German culture (Melotti, 2008: 14).

1.1.2 Bridging cultural heritage values with new paradigms of development

The recognition of intangible and ‘movable’ cultural heritage in the Convention for the Safeguarding for the Intangible Heritage (UNESCO, 2003) significantly recognised other forms of heritage that has meaning beyond material manifestations, is transmitted through the generations and which is also central in shaping identity. The latter is one of the most important issues related to the value of cultural heritage: in an increasingly globalised world, characterized by the sharing of ideas and people's mobility, the constant search for connections and roots reflects the individual's need to belong and to know who he/she is.

In this sense, tourism itself is cultural, and its practices and structures are an extension of the normative cultural framing from which it emerges. Consequently, tourism becomes very important to understand ourselves, our cultural values, and the multi-layered relationships between humanity and the material and non-material world we occupy and journey through (Robinson & Phipps, 2004). Often communities only become aware of particular cultural elements of their own heritage through the interaction with tourists: the mobilisation of cultural elements – or 'resources' – may only make sense in relation to the "touristic other", as a symbolic vehicle to define and distinguish the self from the other (D. Picard & Robinson, 2005).

The heritage management assumes an important, unexplored role (as we see in subsection 1.1, in this chapter), by potentially influencing the capacity of development at the local level. Is amply demonstrated the influence of the level of self-knowledge of the regions and their projected image on its openness or resistance to change and to develop: the way you perceive yourself and how others look upon you can become a key asset but under other circumstances it can became a liability (Karlsson & Martinez, 2005: 283). If one considers himself "backwards" or "advanced", he will behave accordingly; in the same way, in the process of building a regional identity and image, the focus on certain characteristics or natural resources rather than others, influences the choice of strategies for the future of that territory (Karlsson & Martinez, 2005: 283). Yet we cannot fall into the temptation to adopt the simplistic idea of the promotion of cultural heritage as the only recipe for development: as Karlsson and Martinez (2005: 283) alert, even a region with strong self-esteem and image based on the glory of its past as well as on strong traditions, if not combines these elements with an effective openness to change, risks losing many opportunities of development.

With regard to the latter issue, Bounfour (2005: 3) alerts that when we discuss the topic of intangibles, we often do not consider the major issue of its underlying socioeconomic system, nor do we sufficiently the real implications of the emergent reality of "knowledge economy". Conceptually, according to this emerging paradigm players and communities are supposed to behave according to certain criteria linking knowledge (in a broad sense) and technology. The knowledge ecology approach (North & Kares, 2005: 255) holds that one cannot manage knowledge, but can create conditions that enhance the knowledge flows. On this bases, North and Kares (2005: 254) speak about the metaphor of regions as knowledge markets, and propose ten pars of criteria to define the capacity of a region, to capture new ideas, trends and developments (North & Kares, 2005: 256-257). Furthermore, eminent institutions like the Council of Europe (2009: 125) insist on the importance of the cultural context of sustainability, linking new paradigm of development to cultural issues. Even the role of culture and heritage in economy is deeply approached, by scholars such as Rypkema (2009: 113) and supranational organisations, like UNESCO (2000b).

It is also important to be aware of the fact that even if the conservation and enhancement of cultural heritage has, in operational terms, a local scale, it implies positive impact on a global scale. The commitment to the protection and enhancement of the cultural aspects of a region/community play a double function, when considered in the context of the new paradigms of development and as part of the on-going globalisation process, and new: local cultural heritage preservation and promotion and global preservation of cultural diversity. As noted by UNESCO (2000b: 39): “just as policies of biodiversity preservation are needed to guarantee the protection of natural ecosystems and the diversity of species, only adequate cultural policies can ensure the preservation of the creative diversity against the risks of a single homogenizing culture. (…) Cultural diversity is the positive expression of the overarching objective to prevent the development of a uniform world by promoting and supporting all world cultures”.

Summarizing, today heritage has become one of the guiding words of contemporary historical knowledge. This term goes from a "notarial" meaning (still used in the late sixties and seventies) to a definition much more compelling and pervasive: it indicates no more goods that are inherited, but the assets constituting the collective consciousness of a group. In this sense, words like 'memory' and 'identity' become almost synonymous (Audrerie, 2003: 23-24).

There is no doubt that in the field of culture and cultural heritage, an important role is played by archaeology and archaeological heritage (we include in the concept of “archaeological heritage” also the “archaeological knowledge” constructed through the archaeological investigation on the material remains of the past). The archaeological heritage represents the material remains of the past and our knowledge about it: it can confirm or not what written sources transmit us about history. This archaeological remains are an authentic window on the past, and most important, not only on "that past" constituted by kings, courts and diplomatic treaties (that past handed down from documentary sources) but also the past of ordinary people, with its own customs and traditions, those who represent our historical and cultural roots. Furthermore, Oosterbeek, Cura, Cura, and Almeida (2011) has recently conceptualised an unexplored value of archaeological heritage, by showing the link between the archaeological knowledge and the awareness about environmental conservation practices, theorizing that archaeology reveals, among other things, the different strategies of human adaptation to the surrounding environment, and its consequences.

This specific knowledge is a great richness and – one can say – a capital for the communities, as a basis for their progress. It is deduced the enormous responsibility of archaeologists in managing this heritage (and this knowledge): promote interdisciplinary networks in order to protect, enhance, and communicate the archaeological and cultural heritage, it means "giving back" this treasure to the community, as a key element of its sustainable development. The past belongs to all, as states Manacorda (2007: 118), and in this context, the same author points out one challenge: how to put everyone in the condition to possess it, then, to know it? This is a political issue, organisational and managerial, archaeological but not only archaeological, and it will be the matter of the following sections.

1.2 Archaeology, Archaeologists and Archaeological Sites

The concept of cultural heritage encompasses many dimensions (material and immaterial) and aspects (research, conservation, promotion, enhancement and tourism mobilisation). Our interest is focused on one of the material components that make up the cultural heritage: archaeology, namely the management of archaeological heritage and its role in the new paradigms of development. Before one could deal with this issue, one needs to be aware about several topics: the characteristics and main goals of archaeology as a science, its history, as well as the definition of archaeological site and all the recent academic debate around this topic.

In fact, nowadays we define archaeology (from the Greek: ἀρχαῖος, "ancient"; and λογία, discussion, science) in a consensual way as the study of human activities in the past through the recovery and study of what is called "archaeological evidence" (Hicks, 2010) as well as the analysis of all the relationships that the archaeologist established between the data found (Carandini, 1981; Manacorda, 2007). As defined by the Valletta Treaty (Council-of-Europe, 1992) an element of *archaeological heritage* (Art. 1) is given if there is any trace of human existence of the past displaying an interaction with the natural environment and enhancing our knowledge of the history of human kind, which was discovered by archaeological techniques.

This concept was developed through several stages during the history, emerging from European *antiquarianism*, during the 19th century. Below, we will analyse more in detail this process (subsection 1.2.1), and will be exposed in detail the characteristics of an archaeological site, and the conceptual issues associated with it.

1.2.1 Archaeology. Evolution of concepts and the birth of a discipline

Excavations of ancient monuments and places have been taking place for thousands of years (Manacorda, 2007), as the intuition of the presence of historical information hidden in the ground is quite ancient. It is demonstrated by the archaeological rests of some tablets discovered at Ur (Mesopotamia), in which we read the earliest proof of what we call today “archaeological practice”, undertaken and coordinated by the Babylonian king Nabonendo (sixth century BC.) in the ruins of a sanctuary, in order to intercept and recover ancient inscriptions that contained valuable information of religious and political importance (Manacorda, 2007: 15). Already in Roman times, the phenomenon of the “dissolution of ancient urban landscapes” (Manacorda, 2007: 46) (such as the remains of some cities and sacred sites of Greece) led to an increased interest in the ruins of these places. In this case however it's more correct to speak of an "evocative power" exercised by these sites, which had the ability to attract cultural "proto-tourists”.

In the Middle Ages these contexts became caves of building material, and only later a renewed aesthetic sense led to a new way of looking at the “antiquities”, especially with regard to decorative objects. It came thus Humanism, during which the critical knowledge of the ancient authors made it possible to connect the texts, inscriptions and coins with the monumental remains (Manacorda, 2007: 46), setting the stage for a different approach to ancient contexts. The lack of a mature methodology of excavation, which would take into account the layering of various "chronological phases" in the same context, the arbitrary excavation and equally arbitrary collection of archaeological objects, caused the loss of many important historical and archaeological data in this period and during the Age of Renaissance (Carandini, 1981; Lanciani, 1971: 187; Manacorda, 2007; Weiss, 1989)

Finally, only during the Age of Enlightenment (17th and 18th Century) were made the first significant steps toward the developing of archaeology as a science, namely by Johann Joachim Winckelmann (1717-1768), considered by Boorstin (1983: 584) “the prophet and founding hero of modern archaeology”. He applied by first empirical categories of style on systematic basis to the classical (Greek and Roman) history of art and architecture. Boorstin (1983) describes the original approach of Winckelmann, which was based on detailed empirical examinations of artefacts from which one could draw conclusions and develop theories about ancient societies, and which represented the very first step in modern archaeology. In fact, nowadays, Hardesty (2008) explain that the documentation of the physical remains of the human past represents the most fundamental goal of archaeology.

Archaeological research reconstructs the history of human presence on a territory according to the signs and that this material remains left on (and *in*) the ground (Manacorda, 2007: 32). Still, Carandini (1981) defends that the work of the archaeologist takes advantage of specific knowledge of the monuments and artefacts of the past, but it also lies in deciphering the stories that the earth can tell. In fact, the stratigraphic excavation required to the archaeologist a new effort: to relate the different soil layers overlapping with the associated structures and the materials contained in them (Manacorda, 2007: 31). In this way, archaeology places past humanity in a historical, geographical, and chronological context, and providing the explanation of past variability and change in the human condition (Hardesty, 2008): the study and the understanding of human and cultural evolution are the main goals of archaeology (Wylie, 2002: 31).

The practice of archaeology does not end with the study of artefacts and structures, as in the past (Manacorda, 2007): the modern archaeological research studies the relationships between "contexts", according to archaeological evidence. The latter may have no monetary value, but contain a number of very important information for the interpretation of the *site* and its connection with other contexts (Manacorda, 2007: 15, 24). In other hands, it represents the evolution of archaeology research, from the "study of the object" to the "study of the relationships" between several contexts.

In order to achieve these objectives, the archaeological research must necessarily be multidisciplinary in its approach. Several disciplines converge in archaeological study: on the one hand, anthropology, history, art history, ethnology, geography (Aldenderfer & Maschner, 1996); on the other hand (and as already mentioned above), geology (Gladfelter, 1977; Watters, 1992, 2000) but also linguistics, semiology, physics, chemistry, statistics, Paleoecology, palaeontology, paleozoology, paleoethnobotany, and paleobotany. Thus one can affirm that the work of the archaeologist has no disciplinary boundaries: to interpret the stories of a site, the study of every available source becomes absolutely necessary, in a process of "Socratic", "maieutic" construction of history. Among the most recurrent, Manacorda (2007: 38) mentions the collection and interpretation of documentary sources, as well as the analysis of historical cartography, and the study of topography; the written sources but also the oral ones: so even an indication of an old farmer who share with the archaeologist the memories of ancient ruins, or inform about a place where, during ploughing, has returned large amounts of ceramic material. All these are also useful sources for archaeological research. Finally, one has the surveys and (normally) the following intensive excavation; the analysis of material culture; the study of the human establishment process, and the analysis of other data, like the ones about local fauna and flora. This is the knowledge on which the archaeologist based his research and his conclusions about the life of a site, determining its history and stories.

Although it is clear the goal of archaeology, the theoretical approach is not consensual, and it was not over time: in the beginning, in the late 19th century, the "cultural-history archaeology" had the goal of explaining why cultures changed, emphasizing historical particularism, while in the early 20th century, a "direct historical" approach compared the continuity between the past and contemporary ethnic and cultural groups (Trigger, 1989). In the second half of 20th century, American archaeologists like L. Binford (1962) and

Flannery (1967) created an archaeological movement against the established “cultural-history archaeology: the "New Archaeology". The movement defended the need for a more "scientific" and "anthropological" approach to archaeology research, and it led to “processual archaeology” (Flannery, 1967; Trigger, 1989). After two decades, this approach was contested from several British archaeologists for its exacerbated appeal to positivism (D. Miller & Tilley, 1984; Shanks, 1991, 1993; Shanks & Tilley, 1987, 1988; Tilley, 1993). So they created a heated controversy between processual archaeology and a new post-processual archaeology. The insights generated by this debate, as well as the review of other contemporary approaches, like neo-Darwinism, cognitive-processualism, took Pauketat (2001) to inaugurate a new approach, more conciliatory: the historical processual archaeology.

Figure 1.2: The Evolution of Archaeology. Source: adapted from Manacorda, 2007

1.2.2 From "caves of antiquities" to "Archaeological sites"

Manacorda (2007: 27) states that the Roman city of Pompeii (Italy) is one of the archaeological areas in which you can see more clearly the fundamental stages of the conceptual evolution of archaeology and archaeological contexts: "from *caves of antiquities* to *archaeological sites*" (Manacorda, 2007: 27). Namely, we can briefly say that in the beginning, under the government of the Bourbons (18th century), the main objective of the excavations in Pompeii was the finding of precious, ancient artefacts. Under the government of Napoleon (19th century) the study of the site was approached differently and systematized. Finally, at the end of the 19th century, the knowledge of the city from its urban structure became clearly the main aim of the excavation. The archaeology assumes a position as a Science of Antiquity, animated by a historical purpose but at the same time strongly based on philological premises.

It is also important to refer other great contribution to the evolution of archaeology in this period (19th century): the observations made by a new science, the *geology*, concerning the relationship between soil layers and the fossils they contain, were applied, later - and successfully - to archaeology, paving the way for the birth of archaeological stratigraphy. The tradition which linked archaeology and antiquary was definitively broken: the recovery of objects from the ground started to have the aim to understand and reconstruct the forms of life and societies in the past (as we previously see in 1.2.1). The areas that appeared distinguished from others by the presence of ruins were defined "archaeological sites", corresponding, as Manacorda (2007) defends, to "places of research".

A *site* is a portion of three-dimensional space, where there are visible signs of aging, which represents the fourth dimension. Furthermore, every place has its "archaeological dimension", that is the stratification resulting by the deposits of history, which can be analysed and interpreted (Manacorda, 2007). Still, according to Butzer (1982) an archaeological site is a portion of space occupied by man to carry one or more activities, and identifiable by the presence of archaeological remains. More recently, some authors recognise that the definition of "site" and the procedures to be used for its documentation remain a controversial issue in the overall methodological debate (Terrenato, 2000).

Today, also due to new technologies that allow the detection of archaeological remains even when these are not clearly visible, the term *archaeological site* indicates a concept much more complex and not always consensual: also those sites that appear "monumentally irrelevant," then, may be considered archaeological sites (Manacorda, 2007). It also has to be considered that contemporary archaeology doesn't consist in the search for monumental rests or beautiful pieces, but in the search for any traces of human activities (content in a territorial unit, namely the site) and the relations between them, as we saw in the previous subsection. The greater conceptual complexity led (and still leads) to the phenomenon that Manacorda (2007: 12) defines as "proliferation of sites": the overcoming of the idealistic assumptions that recognised dignity of "site" only the monumental ruins, and the expansion of the concept of "source", which is now assigned to any trace material, positive or negative, has also expanded the concept of the site, and consequently has increased exponentially the number.

In this regards it is necessary to highlight also another definitions: the *off-sites* (or *non-site*) (Terrenato, 2000). This term refers to those areas where visible archaeological remains exist on the surface, but they do not correspond to the presence of underground rests. In this case, one has to attribute to these rests the same dignity as evidence of past human activity, although we cannot consider that area as “site”, but as “off-site” (Manacorda, 2007: 11).

However the term “site” is normally used at the edge of the discipline and in current language, without taking into account the complexity of the concept (Manacorda, 2007: 8), and it is commonly recognised to archaeology an important social role that goes beyond this technical formalisations. A site is the place where history and human events of the past are crystallized in archaeological stratigraphy (Carandini, 1981). One can say that the work of the archaeologist is to be able to "read" in the best way this "book of stories," and then tell them to the public.

In this sense, even if little or nothing remains of those places that once teemed with life, few traces still hold a large load of memory. Particularly fascinating and touching the words of Calegari (2004: 54):

"Ho avuto modo, sotto una tenda Tuareg, di partecipare a feste, mangiare e fare conversazione; ho visto nascere un bambino e, altre volte, ho incontrato gente che stava morendo: la testimonianza di tutto questo è in pochi rametti conficatti nel terreno"[1].

We wonder, thus, what is a site, and if we can isolate it. Manacorda (2007: 36) considers this question "inadmissible": of course a site is a portion of space, but it has to be linked to other site in order to really make sense. An archaeological site is the place where the quality and quantity of traces which could be founded through the analytical methods of archaeology, can be linked with other assets. These, taken together, help to characterize the area in which are inserted and give it a historic significance. It is then crucial to insert the site in a (local) context. In this regard, it is opportune to define the term "context": according to Pucci (1993: 26-28), Antoine Quatremère de Quincy has strongly contributed (with his writings of 1796) to the construction of the notion of *context* as an organic whole that cannot be disassembled. The context includes not only ancient artefacts and architecture, but also landscapes, forms of life and the culture of the peoples who historically act in it. This concept will be important for approaches to conservation and management of the archaeological heritage, which does not restrict to the object but consider the context in which it is inserted. Furthermore, as Manacorda (2007: 37) reminds, even the most isolated site is linked to others, and it is important to keep in mind this feature and communicate it to the public.

It is very curious the way of construction of the archaeological knowledge and its sharing: the archaeological investigation study is based (not always, but in many cases) also on the destructive practice of the excavation. But we defend with Manacorda the approach according to which an excavation has to be considered simultaneously as the most destructive activities but also the premise for the "eternalizing" of an archaeological context, through its documentation, interpretation and communication (Manacorda, 2007: 45). In this sense, the practice of management and archaeological heritage (and knowledge) enhancement has a strategic role as important part of the territorial planning

[1] "I was in a Tuareg tent and I was able to attend their celebrations, eat and have conversation with them; I have seen the birth of a child, and at other times, I met people who were dying. The testimony of this is in a few sticks placed in the ground."

and in the process of socio-economic and cultural development. The following sections will be dedicated to this topic.

1.3 Archaeological heritage management

The management of an archaeological site or, more generally, the management of the archaeological heritage is a complex process that goes through many phases and involves more different disciplines. One could consider it as the next stage after the research (which in many cases includes the archaeological excavation), but on the contrary (as we shall see) a long term management approach should be included in the very first stages of approach and study of an archaeological area. We can consider this falls within the "new duties" of contemporary archaeologist. The latter, as stated by Manacorda (2004: 145), has a new awareness: he contributes not just to the scientific knowledge on the material remains of the past, but also to the construction of what is the "social memory".

Texts, names of places, old maps and pictures are indirect sources that are the basis of archaeological research, archaeologists looking for physical evidence of the "stories" contained in these sources, because they could confirm or deny (Manacorda, 2007). But after this step, another obligation falls on archaeologist: the preservation and management of the physical remains of the human past and the use of the archaeological records in the context of regional planning, on behalf of population (Hardesty, 2008; Manacorda, 2007). In this sense, Renfrew and Bahn (2012) in their prestigious work - a reference point at world level in the archaeological field - they arise a series of questions, such as: What does the past mean to us? What does it mean for those who have different points of views? And who owns the past, anyway? According with the same authors, these questions lead us to problems of responsibility, public as well as private, that is the uses of the past, and the problem surrounding them, go beyond the specific question of who owns what (Renfrew & Bahn, 2012). On the other hand, authors like Throsby (2010) focus on the shift towards an economic orientation for cultural policies and heritage management.

The practice of preserving for posterity and - we would say today - manage “sites of memory” (real or constructed), it is particularly ancient, and is associated with socio-cultural necessities of order, but also psychological needs and feelings of belonging: how past is interpreted and presented, as well as what lessons one chooses to draw from it, it often involves ideological and political issues (Renfrew & Bahn, 2012: 509). Already in the ancient Rome, the tomb of Aeneas as well as the *Lupercalis* (the cave where a she-wolf had met and nursed the two mythical brothers, Romulus and Remus) they were kept for their symbolic weight and memory (Manacorda, 2007). There is no doubt about the care that ancient Romans gave to these sites of memories, represents the interest ad need for a link with their own origins, and this carefulness was one of the main characteristics of this (and many other) population, as Ravaglioli (1996) remember us. As Renfrew and Bahn (2012) refer as examples, the name of the state of Zimbabwe comes from the eponymous archaeological site, as well as in Israel archaeology is often used to serve the cause of national ideology, and some findings has becoming a symbol of defiance and pride , as well as important tourist destinations.

The concern for the preservation, management and enhancement of the “sites of memory” and monuments of identity, or even *Archaeology of Identity* (Renfrew & Bahn, 2012), became more specialized and formal, and reflected in the legislation. In 1162, when Rome had just organised as a *Libero Comune* ("free city"), a decree of the new senators sanctioned the condemnation to the gallows to anyone who had caused damage to the Trajan's Column (de Boüard, 1911). But only with the Papal Decree known as “The Chirograph of Pius VII on antiquities and excavations”, published in 1802, will be formally reached a new conception of the archaeological resource protection by the State (Pucci, 1993; Rossi Pinelli, 1979: 29). It takes into account not only the vision of ancient artefacts as beautiful collectible items, but recognises also their historical value, stating formally that also the archaeological remains and findings having no aesthetic values deserve protection (Emiliani, 1978: 110-111). We can finally affirm, agreeing with Manacorda (2007: 63), that the Chirograph of Pius VII was a policy measure that paved the way for the present conception of archaeological heritage conservation and management.

In the second half of the nineteenth century, and even more intensely in the first half of the twentieth century, occurs a further evolution in the concept of protection and management of archaeological heritage, inserting it in the broader context of territorial planning. In this regard, Manacorda (2007) indicates the contribute, in the late nineteenth century and early twentieth century, of Giuseppe Fiorelli, responsible for the archaeological site of Pompeii (Italy), by the establishment of a School of Archaeology in the archaeological area. Actually, the school never had the expected success, but it represented a pioneering proposal opened up the way for a modern way of management of the site, programmatically pursuing three objectives:

1. Research;
2. Conservation/enhancement;
3. Training/education.

This paradigm is still valid today. But the innovations of Fiorelli were not exclusively paradigmatic in terms of planning, but also on the political and philosophical. Indeed, he instituted also the "entry ticket" for the public, initiative that had sensational implications for that time: firstly, it meant that the site was no longer accessible only to a small "elite", but it was officially open to a “general public”; moreover, the proceeds from the sale of tickets were reinvested in the study of the site, making the excavation and archaeological research in general a public service in the public interest. Officially, it was in that times that the purpose of archaeology became preserving the material remains of the past for future generations, ensuring the conditions for the transmission of memory (Guzzo, 1993: 143). The remarkable *public role of cultural heritage* (Settis, 2002: 24) implicitly recognises to archaeology and archaeologists an important civil functions. Thus, in an archaeological context that respects its social functions, it is necessary to distinguish between a mere scientific project to a more broad cultural project that celebrates and disseminate the product of archaeological work within the community. In this sense, Carandini (1985: 81) affirms that one of the main issue for archaeologists is to give an order to the apparent chaos of the subsoil, and make it understandable for the public.

According to current model, the three essential moments of the relation of every society with the rest of the past are 1) Research; 2) Protection; 3) Enhancement, closely related, but conceptually and operationally distinct (Manacorda, 2007: 86). The first and the second stage are strictly connected: the historic landscape, such as a building, is a lived body, which must be first known to be protected, through a process of anamnesis that is essential and is the basis for the work of conservation and development (Manacorda, 2007: 48). On the other hand, heritage management requires concerns about conservation as fundamental prerequisites for any development project. However, as observed by Manacorda (2007: 82) the conservation “can become the antechamber of abandonment, if it is an end in itself”, and it is instead necessary to “put the remains of the past in the middle of a dynamic process of searching for identity”. In the light of this reflection appears important, therefore, to clarify that the “protection” does not coincide with the “enhancement” of archaeological heritage.

The enhancement phase represents the culmination of a process that starts with the research and passes through actions of protection (Manacorda, 2007: 85; 88), and it is the activity aimed at improving the conditions of knowledge of cultural heritage and increase its use. In this way, the cultural contents are constantly being revived and interpreted, taking an active role in society. The archaeological heritage enhancement has a vital collective function, which attests to the ability of a nation to recognise their cultural legacy and bring it to life: it is a primary social function, which is expressed at all levels: public, associative, in which private consists of the civil society (Manacorda, 2007: 87). The archaeological heritage enhancement also has a value which we could define "reflective" for Archaeology: according with Manacorda (2007: 94): "The public support for the preservation of the heritage and the development of research will be directly proportional to the amount of people who, visiting an archaeological site, will have been put in the condition to appreciate it".

However, the practice of enhancing brings new challenges to archaeologists, placing them in front of complex issues of technical-scientific order, social and political. Firstly, if it is important to enhance archaeological heritage and the knowledge created by the research, this practice should be taken into account and planned since the early preparation of an archaeological investigation. Thus, an archaeological research project should already contain the plan for the subsequent work of enhancement, despite the difficulties that this process may have. As pointed out by Ricci (1999: 105): "An archaeological project will always be characterised by a degree of unexpected, but the unexpected does not justify the absence of a project, even if flexible". On the other hand, “each new study creates new documents and new monuments” (Manacorda, 2007), which lead to the necessity of a selection of the archaeological remains to study, to protect, to enhance.

This issue manifested itself in a particularly significant way during the second half of the twentieth century, in particular after the Second World War: the population explosion and the strong urbanisation tended to drastically change the traditional appearance and structure of the territories of various regions (Manacorda, 2007: 74-75). Archaeologists needed to combine research and protection (normally on regional scale) and, above all, the management of the archaeological heritage starts to be considered as an important part of the territorial planning process. But in that times, the archaeologists immediately recognised the impossibility to study and preserve the whole archaeological heritage: in many cases they were forced to make a "selection" of the sites, to decide which will be studied and preserved and which will be not, through what Giannichedda (2005: 109) defines as "sentence about the destiny of a site".

All the archaeological sites are different from each other: they could be typologically similar, but each of them has its own history. So, one of the new challenges for archaeologists was to define parameters to evaluate the “value” of a site. From a strictly archaeological point of view, the value of a site concerns the historical value and the quantity and quality of the data provided by the site. But these technical parameters were not (and are not) sufficient from the point of view of the enhancement: the historical value is not easily perceived by the public, because it presupposes a collective “cultural consciousness”, which does not necessarily correspond to the “social consciousness” (Manacorda, 2007). The latter, in turn, is much more sensitive to aspects of communication, in which form and content are intertwined. This new idea permeates the theme of enhancement, understood as "socially useful transmission of the content of the heritage". So, additional parameters are needed to justify the choice of enhancing an archaeological site rather than other: the aesthetic value and monumentality, the type of settlements, the chronology and the state of conservation are some of the parameters to assess the representativeness of a site (Manacorda, 2007: 41). But there is no standard procedure: it is always necessary to take into account many factors and analyse each situation individually to decide the fate of archaeological evidences. Carandini (2000: 146) argues that it is – of course - always legitimate the preservation of the archaeological remains, but he criticizes the practice of leaving visible also the vestiges particularly damaged. Other authors are even more peremptory: Manacorda (2007: 106), for example, recalls in his work that “the enhancement of an archaeological remains is not mandatory!”.

This "critical thinking" about what to "leave in sight" and what not, it is necessary especially in urban areas where, generally, the relationship between ancient and modern is conflicting, and it is very important not to fall into what Manacorda (2007: 96) defines as “Archaeological Fetishisms”. Finally, the enhancement of archaeological remains presupposes, in any case, the existence of an enhancement project in which are involved other competences, including architects and urban planners (Manacorda, 2007: 106) as well as specialists in tourism, communication and education.

And in this regard, another great challenge posed to archaeology by the practice of heritage management and enhancement, is that of the openness to interdisciplinary cooperation. Manacorda (2007: 93) considers the “dialogue with other disciplines” as a “duty” for all the archaeologists, in order to give a social sense to the assets of the past. Furthermore, as noted by (Fazzio, 2005), the meeting between archaeology and other disciplines and competencies within the territorial planning context, created new opportunities for archaeological research and enhancement of archaeological contexts, especially in those regions affected by the process of urban development.

The heritage management (and its enhancement) involves so complex processes for which it is necessary the intervention of different interveners. It is wrong to think that the whole responsibility must be taken exclusively by the archaeologists: the complexity of this operation requires joint decisions and joint actions. The sequence research-protection-enhancement, upon which is based the management of the archaeological heritage (and cultural heritage in general) it requires professional specificities that cannot be held just by archaeologists. It is clear the need of partnership between competences, as well as a “fair” cooperation between public and private sectors (Settis, 2002: 91). The interdisciplinary approach is more visible in interventions such as those of the reconstruction, coverage, musealisation, for example: the alliance between architects and archaeologists is, generally, particularly explicit in the process of enhancement of archaeological heritage. In this regards, Carandini (1999: 21) defends that architects should learn the archaeological stratigraphy and, on the other hands, archaeologists design their excavations in order to make it understandable to architects.

The importance of a dynamic dialogue between archaeology and architecture is well presented by Manacorda (2007: 98). In this context, is worth mentioning the remarkable work carried out for the realisation of the *Antiquarium de Sevilla* (Seville, Spain). Roman and Moorish archaeological remains, dating from the first century BC to the 12th century AD, were discovered when the area was being excavated to build a car park in 2003, in the basement of a local market (under construction). The archaeological remains[2] were, thus, been incorporated in the original project through a masterful work of a musealisation: today, situated in the basement of *Metropol Parasol* in *Plaza Encarnacion* - a large infrastructure of public utilities with huge mushroom-shaped shades covering a market, restaurants and concert space - the *Antiquarium de Sevilla* is a modern, well-presented archaeological museum with sections of ruins visible through glass panels, and underfoot along pavements. For its particular interest, during the realisation of the present research have been followed in depth all stages of evolution of this project, which is reported in the work of Amores Carredano, González Acuña, and Jiménez Sancho (2004). It is a remarkable example of integration of the archaeological heritage in the urban setting and in everyday life of the citizens: indeed, Amores Carredano et al. (2004) speak about the effort for the integration of aesthetic requirements, architectural, conservation and scientific, but also about the *valoración social*, the social enhancement of archaeological remains as one of the principal aims of this project.

Actually, the present work is to focus more on the connections between archaeology and tourism, archaeology and urban planning and management, archaeology and involvement of local communities. This issue introduces, firstly, the question of the interdisciplinary approach also in the training of future technicians, not to make them fully autonomous in the execution of projects (goal unreachable) but, on the contrary, to provide the right sensitivity and openness to the future representatives of different disciplines. One of the analyses we made during the exploratory phase of this study, demonstrate that important universities like *La Sapienza* (Rome, Italy) do not provide to their student in Archaeology courses related with communication, tourism, management, development or territorial planning.

[2] There are 11 areas of remains: seven houses with mosaic floors, columns and wells; fish salting vats; and various streets. The best is *Casa de la Columna* (5th century AD), a large house with pillared patio featuring marble pedestals, surrounded by a wonderful mosaic floor – look out for the laurel wreath (used by emperors to symbolize military victory and glory) and diadem (similar meaning, used by athletes), both popular designs in the latter part of the Roman Empire. Visible also a *triclinium* (dining room) and the *Patio de Oceano*.

1.3.1 Communicating the archaeological heritage and knowledge

As we have mentioned several times before, in the enhancement of the archaeological heritage, the capacity of communication is one of the most important components. In the Oxford dictionary "communication" is defined as the act of imparting or exchanging information by speaking, writing, or using some other medium (and the origin is from the Latin *communis*, public, universal). The construction of archaeological knowledge is something paradoxical, since it is usually based on an action of destruction, particularly in the case of the excavation. The latter is an irreversible process of "dismantling" of the archaeological context, so it is very important the ability of the archaeologists to extract and record the maximum quantity of information from the soil (they will have not a second opportunity to do it!). But the duty of archaeologists does not end (or, at least, should not end) with a mere collection of data: "the destruction must be compensated" - defends Manacorda (2007: 100) – “by the publication of the investigation, museum exhibitions, the restoration of the monumental evidences found”.

When possible, the chance to create an archaeological park is the *non plus ultra*, the optimum condition for the enhancement of an archaeological context: a typical archaeological park aim to insert a site, a monument or other archaeological remains in the territorial context, in an integrated system of services that ensure the enhancement of the landscape, enhancing the connection between nature and culture. These places (as well as the museums or interpretative centres) are spaces where, by definition, occurs a sublime encounter between the general public and the remains of the past (and its contents): it is necessary establish a dialogue between these two parts, and this is a responsibility fully charged to the archaeologists and multidisciplinary teams that manage the area. The quality of the communication becomes the bridge between archaeology and the public, and it becomes also an element of differentiation. This requirement raises a number of questions relating to new forms of communication of the results of archaeological research and, generally speaking, of archaeological knowledge: how to publish an archaeological dig? How to prepare a museum or an archaeological park? In which way one should make a site more accessible and understandable? What are the most recent and most appropriate technologies that could be used for the transmission of the archaeological knowledge on a particular place?

1.3.1.1 Publications

Manacorda (2007) insists on the topics of the "perception" and the "communicability" of the remains of the past: the perception of the importance of certain archaeological contexts is perhaps quite natural for the public (according to the monumentality of the site) but, understanding is not. The ability to communicate the intrinsic contents of heritage is directly proportional to the ability to optimize and enhance the archaeological knowledge for the benefit of society. There is no doubt that excavation reports are fundamental, as well as final publications to share the results of the research with the rest of the scientific community. But, at the same time, in parallel, there must also be one more editorial effort for the production of informational and educational publications accessible to the general public.

In these archaeological publications, therefore, the impact of data should be minimal: it is important to make a synthesis, including graphics that can quickly elucidate the reader on the historical content, and allows him to easily reconstruct that past told by the remains of material culture. Many experts today dedicate big efforts to the dissemination of scientific contents to the general public with informational and educational purposes, through the publication of interesting books based on scientific knowledge. In the case of archaeology and history it seems exemplary and remarkable the effort by authors such as Angela (2007). The ability to translate scientific and historical content for the general public, it becomes a challenge to be taken into consideration as part of the work of the archaeologist.

1.3.1.2 Graphic reconstructions

“The past, to be understood, must be reconstructed!”, strongly asserts Melotti (2008: 40). The graphic reconstruction is a very common form of reconstructing the past to the enhancement of the archaeological heritage. The graphic reconstruction is considered one of the most fascinating and important work of the archaeologist and one of the basic goals of the research (Manacorda, 2007: 102). In terms of tourist enhancement, new technologies offer to archaeology a series of opportunities that lead us to consider new paradigms of fruition of archaeological assets. In this sense Melotti (2008: 3) talks about a kind of “immateriality of archaeological tourism”, as we see in the next chapter, when we face in detail the issue of archaeological tourism. But the practice of graphic reconstruction is not new.

While the "ruins" were the favourite subject of the painting, especially in the Romantic period, because they represented a sense of solitude, in the late nineteenth and early twentieth century, both the artists as well as historians and archaeologists (albeit for different reasons), they started to feel the necessity to reconstruct past contexts, from the existing ruins. Paintings and tables depicting the landscapes of the ruins of Rome, Pompeii, and Europe in general, were brilliant intuitions about the power of representation for the transmission of a site. The reconstructions made in the early '900 by the archaeologist Giuseppe Gatteschi (Alexandria of Egypt, 1866 - Rome 1935) are a great example.

Figure 1.3: Guido Trabacchi (painter) and Giuseppe Gatteschi (archaeologist), 1913. Reconstructive drawing of the Tiber Island (Rome, Italy)
Image Courtesy of Photographic Archive of the American Academy in Rome (url: aarome.idra.info)

Figure 1.4: Tiber Island, Rome (Italy). Copy of a photograph of the late nineteenth century
Image Courtesy of Photographic Archive of the American Academy in Rome (URL: aarome.idra.info)

Through the analysis of these reconstructions (Figures 1.3 and Figure 1.4), we note some important details. Firstly, the archaeologist, in this case Giuseppe Gatteschi, is never the sole author of the drawings: there is a co-authorship by an architect (usually), which demonstrates the inevitable interdisciplinary approach that the enhancement (and understanding) of archaeology requires (as we see previously, in subsection 3.1 of this chapter). Secondly, the author does not just reconstruct, - based on archaeological evidence - contexts and buildings: he tends to "give back life" to contexts by inserting, into the drawing, characters and actions, each of which suggests a story. There is a clear intuition about the importance of reconstructing also the human dynamics inherent to buildings and monuments, in order to better communicate the context and achieve a better interpretation.

Figure 1.5: Ambrosini (painter) and Giuseppe Gatteschi (archaeologist), 1911. “Temple of Castores, and Temple of *Divus Augustus* (*Augusteo*) in the year 310 AD according to the visible ruins“
Image Courtesy of Photographic Archive of the American Academy in Rome (URL: aarome.idra.info)

Figure 1.6: Ruins of the Temple of *Divus Augustus*, Rome (Italy). Photograph of the late nineteenth century
Image Courtesy of Photographic Archive of the American Academy in Rome (URL: aarome.idra.info)

Today, thousands of different archaeological data form the basis on which historical spaces and ancient structures are reconstructed digitally. Computer graphics is the main ally of this practice, through which one can produce a more 'human' and realistic idea of the spaces for the researcher – during the study - and, afterwards, for the general public. Independently from the perfection of the reconstruction, graphic reconstruction (and archaeological reconstructions, in general) is fully appreciated by the public, only when one gives life to the spaces recreated, telling a story which involves the observer (Melotti, 2008: 43).

It is important to underline that, from the scientific point of view, not all academics are fully agreed on the use of these new technologies: in this sense, Melotti (2008: 3) talks about a kind of “immateriality of archaeological tourism”, as we see in the next chapter; Manacorda (2007) warns that some scholars see in these forms of reconstruction exclusively educational purposes, but they do not see the usefulness in scientific context. Carandini (2000: 149), for example, defends that even in a scientific publication is necessary to show the capacity to reconstruct archaeological context, based on the data obtained from the excavations.

Figure 1.7: Graphic reconstruction of the ancient Acropolis in Athens developed by Altair4 Multimedia.
Image courtesy of Altair4 Multimedia - Italy

Actually, according to the same author, the capacity of creating graphic reconstructions represents a proof of the quality and the reliability of the whole archaeological work. The following images are useful to make clear the utility of the reconstructions of the archaeological contexts, for the better interpretation by public and even to support the study phase. Lucrezia Ungaro (2010: 7) agrees with this opinion: she warns that the use of innovative technologies applied to cultural heritage is of undoubted importance if they are not used as a means an end in itself, but integrated into a broader context of interpretation, in which, moreover, they do not abandon the two-dimensionality of the models and graphics.

The same author argues that the virtual reality is something different from a process of contextualisation that you can obtain with other techniques. It cannot be accurately reproduce the historical reality, but we can get closer to the commencement of the environment and scientifically very ancient, possibly with the inclusion of the human element (Lucrezia Ungaro, 2010: 8). The inclusion of the human element, the “humanisation” of ancient environments, represents an important trend for the transmission of content archaeological (An example in Figure 1.8).

Figure 1.8: Graphic reconstruction (watercolour) of the northern exedra of the Forum of Augustus with the scene of a process. Source: Lucrezia Ungaro (2010: 8)

Below, we see (Figure 1.9a) a panoramic view (from southeast) of the remains of the Roman forum as they appear today. The second image (Figure 1.9b) shows a reconstructive drawing of the early twentieth century, and after this (Figure 1.10) a graphic reconstruction of the site (view from southeast) developed on the basis of historical and archaeological data.

Figure 1.9a: Monumental rests of the Roman Forum (Rome, Italy)
View from the southeast

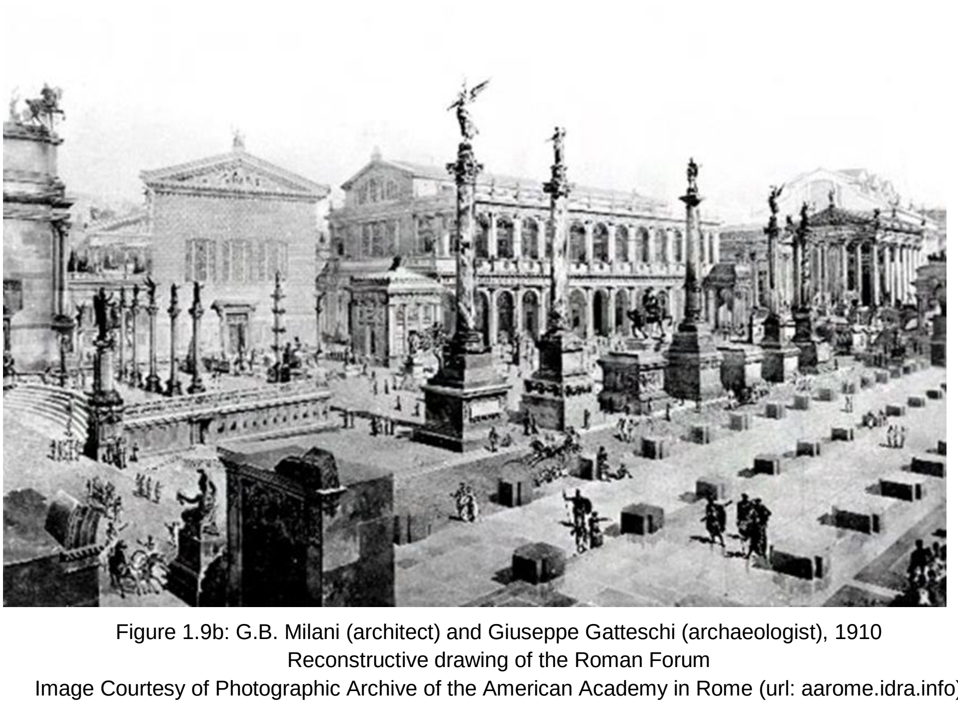

Figure 1.9b: G.B. Milani (architect) and Giuseppe Gatteschi (archaeologist), 1910
Reconstructive drawing of the Roman Forum
Image Courtesy of Photographic Archive of the American Academy in Rome (url: aarome.idra.info)

Figure 1.10: Digital Graphic reconstruction of the ancient Roman Forum (Rome) developed by Altair4 Multimedia
Image courtesy of Altair4 Multimedia - Italy

Furthermore it is important to report other types of reflections that arise from the issue of the heritage enhancement. If it is real that the enhancement projects should meet the balance between the historical value of the assets and the provision of a "archaeological consumption", however, Settis (2002) speaks about the duality inherent to the word "enhancement": it defines both the exaltation of the cultural content of archaeological resources, as well as the use of it for small commercial speculations. And even if the enhancement of the archaeological heritage - and the scientific research itself - can and should have immediate economic impact, would be a mistake to limit just to this dimension all the efforts to enhancement (Manacorda, 2007). This aspect will be developed in a more detail below (chapter 2), in the discussion about the tourist enhancement of archaeological heritage.

1.3.1.3 Plastic models

Also the three-dimensional reconstructions in scale, the so-called plastic models (or scale models) are often used, especially in museums, interpretation centres and exhibitions. These communicative solutions are easy to understand for the general public, inviting the observer to deepen the content transmitted. A plastic model represents complex set of information in a small space (scale), allowing the viewer to understand the topographical organisation, urban planning or architecture of a site in an immediate and realistic way (Manacorda, 2007: 104).

In terms of impact on the observer, the characteristics of the plastic models (three-dimensional, “non-virtual” reality, precise reproduction of the organisation of space) make them real "time machines", fascinating windows on a past in which the viewer is free to enter using his imagination. The scale reconstruction of roads, fountains, intersections, houses, rooms that the observer can "visit", brings back to life - through the imagination of the visitor - these structures (or at least the memory of their use) that there are no more, allowing a full understanding by the public. Some of the more famous "archaeological plastic models" are conserved in Rome, in the Museum of Roman Civilisation. Perhaps, the most well-known is the "scale model" of ancient Rome, by the architect Italo Gismondi (Figure 1.11).

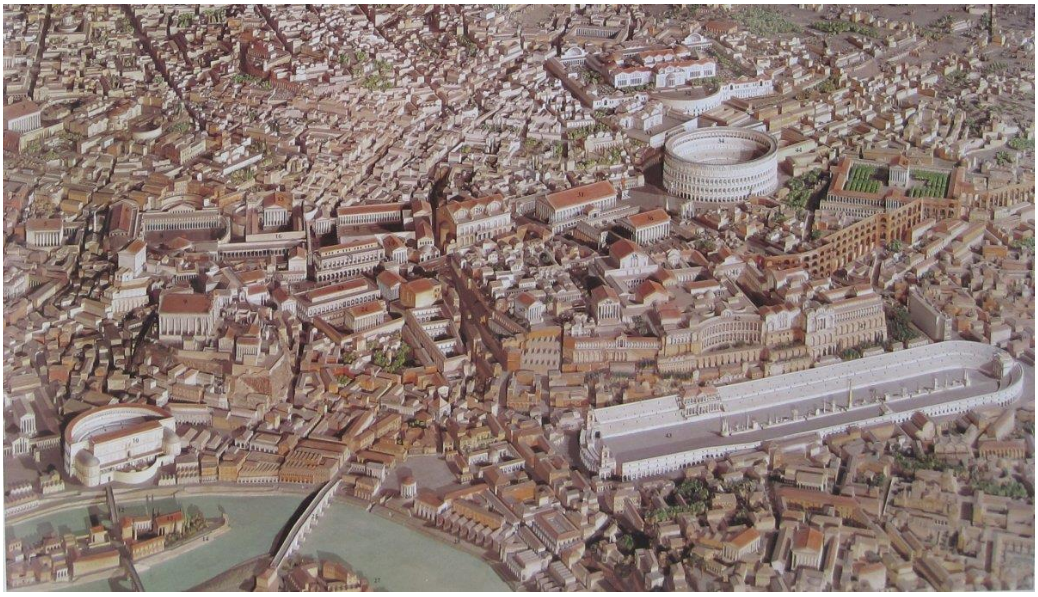

Figure 1.11: Detail of the Gismondi's Model of Ancient Rome. Museo della Civiltá Romana, Roma (Italy)

It is a model at 1:250 scale, elaborated between 1935 and 1971, and it the remarkable result of a large interdisciplinary effort directed by the architect and Italian archaeologist Italo Gismondi. The model is indeed considered an important reference for any serious attempt of reconstruction of the Ancient Rome, even if scholars as Manacorda (2007: 105) while confirming the importance of the work, refer the existence of some partial conclusions and sometimes premature, then contradicted by subsequent research. The Gimondi’s plastic model has been used for more recent projects, as the "Rome Reborn” (Figure 1.12)

Figure 1.12: A view of the valley of the Flavian Amphitheate
Frame from the 3D digital model “Rome Reborne”
Source: http://www.romereborn.virginia.edu/

“Rome Reborn” is an international project whose goal is the creation of 3D digital models illustrating the urban development of ancient Rome from the first settlement in the late Bronze Age (approximately 1000 BC) to the depopulation of the city in the early Middle Ages (approximately 550 AD). Finally, Gismondi's model was also used in the movie industry: in 2000, the famous director Ridley Scott has used the model as a starting point for the recreation of the panoramic views of Rome in the movie "Gladiator" (Figure 1.13).

This panoramic view of the ancient city of Rome shows some anachronisms, since it is based on the plastic of Gismondi, reproducing Rome in the fourth century AD, while the story narrated by Scott in his movie is set at the time of the Emperors Marcus Aurelius and Commodus (II-III century AD). In the latter epoch some of the monuments that appear in this aerial views of Rome, digitally reconstructed from the Gismondi’s plastic, did not exist, yet (like the Basilica of Maxentius and the Arch of Constantine)!

Figure 1.13: Frame from the movie “Gladiator” (2000), by Ridley Scott

This “accident” leads us to reflect on the importance of the historic accuracy and scientific rigor in reconstructive practice for educational, tourist and (why not?!) cinematographic purposes, topic discussed also by Guidi (2011: 294) We will analyse in more detail this important issue in Chapter 2.

The importance of scale models in archaeology and archaeological heritage enhancement is defended by Manacorda (2007: 105), according to which the use of this "plastic model" will not be totally replaced ,in the future, by digital reconstructions: even if the latter are even more dynamic by adding movement, colour and even sounds to an interactivity experience which involves the complex system of the senses, reconstructive physical models will continue to attract the general public and to be important for scholars.

1.4 Archaeology and development: archaeological heritage management on behalf of communities

It will be thus interesting to consider in this context one of the most current issues and the most important message that archaeological heritage and its knowledge brings to society nowadays: on the one hand it is able to reinforcing the sense of belonging of local communities, in a process of identification with the cultural and environmental heritage; on the other hand, and in a more broad sense, archaeology attempts to build an understanding of past human behaviour as cultural adaptations interacting with environment (L. R. Binford, 1992), highlighting, paradoxically, the diversity of cultural behaviour strategies as well as the unity and interaction among them, since - in their essence - they were driven by natural needs common to all mankind all over the planet (Oosterbeek et al., 2011; Throsby, 2010: 171) .

This is an intrinsic but very remarkable aspect of archaeological heritage, which combines perfectly with the current debate on the urgent necessity to educate for sustainability and intercultural dialogue, also according to the assertions of Abdallah-Pretceille (2003), important author in the scientific field of cultural diversity and interculturalism. Consequently, the involvement of the community, especially young people, in the dissemination of archaeological knowledge and the promotion of heritage (Council-of-Europe, 1992), would lead to increased understanding of cultural diversity (Bastos, 2007) and would also reverse the dangerous trend that sees the society losing the conscience about our dependence on nature and the environment (Oosterbeek, 2010).

It is possible to say, consequently, that one of the more important values of archaeology is this capacity to provide us a set of "present messages from the past" (Oosterbeek et al., 2011), which should help us to look better and in a more conscious way at our future. This "message" should be part of non-formal scientific and cultural education and passed to the community, especially children and youth, through the following guidelines:

- Awareness that knowledge is built through a combination of rigorous discipline, methods and dialogue involving often contradictory points of view;
- The necessity of a better understanding of the social and cultural difference of the present world and simulation of children and youth to the notion of intercultural and mutual understanding;
- Instilling awareness and concern for the sustainable exploitation of natural resources,
- The need to reflect and develop a critical knowledge about the unnatural climatic change and motivating the struggle against them.

However, it is absolutely safe to say, according with Oosterbeek et al. (2011), that projects which effectively engage in awareness and socialisation of scientific knowledge are still scarce.

The designation of cultural heritage relates not only to material expressions such as sites and objects, but also to intangible expressions such as language and oral tradition, social practices, rituals, etc. (UNESCO, 2006: 11). Namely, UNESCO (2003) introduced the notion of intangible heritage recently. The present research focuses on cultural heritage and its management, particularly focusing on a tangible aspect, namely archaeological heritage. However, it will be appropriate to report that the content of the material heritage cannot be abstracted from those of the intangible cultural heritage. Canestrini (2001), for instance, argues that both the tangible cultural heritage and the intangible are absolutely necessary for the process of understanding the world, past and present.

From a broad point of view and according to Bontis (2005: 135) historically higher levels of *Intellectual Capital* have been associated with higher standards of living, improved health, and continued increases in international political involvement, even if the power of knowledge and ideas are not often associated with the long-term prosperity of a nation. The UNESCO founding principles (UNESCO, 1945) emphasize that the wide diffusion of culture and the education of humanity for justice and liberty and peace are indispensable to the dignity of man and constitute a sacred duty which all nations must fulfil in a spirit of mutual assistance and concern. It is unmistakable the enormous role that culture and, therefore, cultural heritage plays in a development process.

The educational values of heritage are not enough explored (Amado Mendes, 2009: 191). The different contexts in which heritage are communicated are:

- Formal (school);
- Non-formal (museums, cultural centres, libraries, etc.);
- Informal (mass-media, Internet, etc.).

Remembering that heritage occupy an important role in the creation of the aesthetic sense and a better understanding of the historical evolution of society, as well as in the professional training. Regarding this latter context, he remembers the capacity of heritage to stimulate the recovery of traditional crafts. As formal way to transmit cultural values through heritage enhancement, is the training of the teachers; study visits in heritage sites; the good practice to produce research-papers related with cultural heritage (Amado Mendes, 2009: 192).

The Framework Convention on the Value of Cultural Heritage for Society (Council of Council-of-Europe, 2005) defends the value of cultural heritage as resource for development, issue that will be detailed also in the next chapter. Recently, and for some time already, authors and supranational entities defend the value of cultural heritage as a driver of socio-cultural development, especially through its enhancement and mobilisation for tourism (UNESCO, 2006; UNWTO, 2010). Several authors recognise the important role of heritage in the development process, even from the economic point of view: among others, Throsby (2010) analyses culture and cultural heritage within several perspectives, for example:

- Scope of cultural policies;
- Cultural diversity;
- Culture in urban and regional development
- Culture in economic development.

Always referring to the heritage management process, the same author also clarifies the meaning of the word *valorisation,* defining it as the *process by which value is imparted to some object as a result of deliberative action or external event, such the increase in value accorded to sites of cultural heritage when they are added to the World Heritage List* (Throsby, 2010: 17).

Still, Greffe (2009: 101) recognises cultural heritage as resource of sustainable development and affirms that “everyone in every country, whether living in cities or smaller communities, now recognises cultural resources to be assets capable of generating exports and jobs”. In this sense, and following this line of reasoning, the same author introduces the issue of the alliance between tourism and cultural heritage (Greffe, 2009: 102). In this process, heritage managers should patiently find the essential balance between the protection of the monument/museum and the enhancement for the public, as a guarantee of sustainable conservation of cultural heritage (Lucrezia Ungaro, 2010: 8).

Conclusion

The first objective of this chapter is to create a knowledge base through a literature review to delineate the scope of research and highlight the related theories. In the first part of the chapter is amply demonstrated that the value of cultural heritage (intangible and tangible, namely archaeological heritage) is already addressed by literature and by supranational organisations such as the Council of Europe, ICOMOS, UNESCO and UNWTO, as a driver of socio-cultural and economic development.

Heritage management extends to a broad remit of responsibilities: from the conservation of archaeological sites, historical buildings, landscape, UNESCO World Heritage Sites and the preservation of a community's cultural heritage. Heritage managers have as their main goal, the balance between the preservation of a heritage place or landscape with the need to generate an income. Within the later concern, they also have to prepare – in some cases - the places to meet specific necessities of tourist demand. In the case of archaeological heritage, managers should also promote larger public understanding of it as well as a fuller public appreciation of the importance of archaeology, also through campaigns for the acceptance of museums as guardians of a vital part of the nation's heritage and as the appropriate location for the storage and interpretation of all archaeological material. From the organisational point of view, the term “Heritage Manager” represent thus a set of responsibilities instead of a title, since it comprises several titles according on the administrative/political regional organisation. They come from a wide variety of backgrounds from both within and outside the sector.

In a general way, there is a consensus in the literature about the fact that the development based on enhancement of cultural heritage, has to be linked with tourism activity and the mobilisation of cultural heritage for tourism. In this regard, we emphasized, in section 2, the existing theoretical construct about this topic: the alliance between tourism and heritage. At this point of the work, to make more effective the approach we felt the need to step back and define (subsection 2.1 to 2.3) what is cultural tourism, what is the heritage tourism and consequently what is archaeological tourism (which will be the more specific field of study). The latter concept was the easiest to define, aiming to promote public interest in archaeology and conservation of historical heritage, as a specific niche of heritage tourism. But it was not equally easy to distinguish the first two concepts: after the review, it seems quite safe to conclude that one of the most important difference between cultural and heritage tourism is that while cultural tourism can also cover contemporary cultural events (art expositions and festivals, for example), the same cannot be said for heritage tourism, which by definition is linked to the appreciation of resources related to the past. In this sense, heritage tourism could be considered as a segment of cultural tourism, and archaeological tourism as a segment of heritage tourism. It is important to notice that, in the present work, archaeological heritage and tourism are particularly focused: this interest is related to the general purpose of this study - to find relationship between the cultural heritage and the socio-cultural development of communities – as archaeological heritage is seen as one of the most representative remains of the past. The literature review also revealed that this line of research is not particularly explored.

Another important theoretical conclusion (subsection 2.3) derived from the reflection according to which, in evaluating the potential tourism of a territory, not only the cultural asset itself must be considered as a primary tourist resource, but also the archaeological knowledge produced by researchers, as well as the quality of the edition and interpretation of the archaeological research. This reflection, reiterates the importance of an integrated and multidisciplinary approach to tourist enhancement of a territory. Especially in the case of the "Heritage tourism" and "Archaeological tourism" destinations, the management and development process should begin with (and being integrated in) the archaeological research itself.

This statement introduces to further considerations about policies for tourism development and related impacts on destination (from a socioeconomic and cultural point of view) (section 3): again, there seems to be a certain consensus in the literature about the beneficial effects of the alliance between cultural heritage and tourism. However, the management processes that lead to such benefits are not particularly clear: above all, from a sociocultural point of view, the conviction that the tourist enhancement of cultural, namely archaeological heritage leads to benefits for the local population seems to have in most cases a strong component of intuitiveness. We agree with this intuition, but already in the next chapter we will further develop this argument in order to fill what appears to be a gap in the theoretical construction about heritage management policies and enhancement, towards sustainable development and intercultural dialogue.

Finally, the last section of the chapter approaches the issue of how the paradigmatic change in tourist activity could represent an opportunity: the strategy in tourism development planning and heritage management has to address not only the creation of a qualitatively satisfactory experience for visitors, but must provide assumedly a vehicle for cultural growth for the resident population. In this sense, the opportunity of a qualitatively improved fruition of heritage places (also due its tourist enhancement), such as archaeological sites, acquires a particular importance in the context of formal and non-formal education, awareness, and strengthening of local identity. In this sense, the scientific literature does not seem to respond fully to the appeals and the recommendations of international organisations, which defend the preservation and the tourist enhancement of cultural heritage with social purpose. Large share of attention seem to be directed to the issue of preservation and promotion of the resources itself. In other words, using the Latin authors, and the concepts of classical literature, we might say that the great part of the effort is concentrated on the conservation and presentation of the *Urbs*, and less on *Civitas*, when we speak of tourist enhancement of heritage. Therefore it is important to note that the enhancement of cultural heritage must take place not only through the preservation, presentation and interpretation of buildings, ancient structures and other remains (tangible and intangible), but also by its contextualisation and by the involvement of local people. This practice makes it even more effective the efforts to make tourism a propitiatory of the socio-cultural development, both for tourists and residents.

Finally, this practice contributes for the creation of good ambassadors of the destination. The latter reflections lead us to the analysis of distant but, at the same time, complementary areas, such as management, on the one hand and sociology on the other, namely to the very current issue of intercultural dialogue. All these aspects will be the object of analysis of the next chapter.

Chapter 2

Cultural Heritage and Archaeological Tourism

Introduction

In the previous chapter we have outlined comprehensively the main subject of this work: archaeology and archaeological heritage management. As we have seen, archaeological heritage management concerns not only its conservation (as has been previously explained), but also the creation of more and more effective strategies of enhancement. The latter has as main public the local communities as well as the tourists.

The main issue of this chapter is the archaeological tourism, and it is analysed from its main characteristics and exploring its links with new paradigms of planning and development. The chapter is divided in two main parts: in the first one, the main concepts are exposed and analysed. There is a general approach, introducing the characteristics of the alliance between cultural heritage and tourism (Section 2.1) and after this we clarify the concepts of cultural, heritage and archaeological tourism. Even if the latter is the one on which we will focus, we consider essential to contextualize it theoretically in the broader context of cultural and heritage tourism (section 2.2). Archaeological tourism is deeply analysed in section 2.3: its origins, motivations and new trends, as well as the new perspectives concerning the optimisation of its socio-cultural implications. Archaeological heritage has in itself - as we shall see in the next sections – an intrinsic touristic potential, but our discussions will go even further: it will be adopted an approach that does not consider the tourist fruition of cultural heritage as the ultimate goal, but just one of the several steps to manage the assets more effectively within the local planning strategies for social and cultural development of local communities.

Indeed, the second part of the chapter is dedicated to analyse the effects of tourism on a region. The changes in development paradigms raised new challenges and opportunities for heritage and tourist managers: the association between archaeology, tourism and development is an opportunity to put culture and cultural interchange in the middle of the new process of development, based on knowledge and mutual understanding on a global scale (section 2.3).

The chapter closes (section 2.4) with a further reflection on the mutual benefit of this approach: from the demand side, a great tourist experience in the destination, and an authentic involvement; from the hosting population side, a cultural and socio-economic growth.

2.1 Cultural heritage and tourism

The concept of cultural goods and cultural services are sometimes difficult to dissociate. Their respective definitions and meanings are one of the key issues currently being discussed at the international level. According to UNESCO (2000a: 13) cultural goods generally refer to those consumer goods that convey ideas, symbols and ways of life: books, magazine, multimedia products, software, records, films, videos, audio-visual programmes, crafts and fashion design. They inform or entertain, and contribute to build collective identity and influence cultural practices. On the other hand, it is traditionally understood that cultural services are those activities aimed at satisfying cultural interests or needs. Such activities do not represent material goods in themselves, since they typically consist of the overall set of measures and supporting facilities for cultural practices – promotion of cultural events or cultural information and preservation (libraries, documentation centres and museums) that government, private and semi-public institutions or companies make available to the community. The combination of both terms – "cultural good" and "cultural service"- is commonly referred to as "cultural product" (UNESCO, 2000a: 13).

In tourism, the cultural element is deeply rooted. The world as we know it today exists as testimony to the fact that people travel. Early patterns of travel were fundamentally directed by basic human needs (finding food and shelter), exchange (trade), relationships with natural phenomena (developing new settlements, escaping droughts or floods etc.) and as a result of conquest and conflict (occupation, expulsion, forced migration and re-settlement) (Timothy, 2011; UNESCO, 2006: 8).

Such factors still exert considerable influence on a large proportion of the world's population today, with contemporary pilgrimage routes relatively easy to identify, frequently building on established trading relationships and patterns of Diaspora and relocation. From the late seventeenth and well into the twentieth century, motivations such as curiosity, education and social betterment took over as 'essential' travel evolved into discretionary leisure travel, gradually moving from a pursuit of the social elite of the developed world, to a widespread activity of the masses of the developed world, supported by a highly complex network of support structures and services (UNESCO, 2006: 8).

In a touristic sense, culture refers to both 'peoples' and their ordinary social characteristics, traditions and day-to-day patterns of behaviour which mark them out as ‘different’, as well as to more exceptional representations of creative and artistic endeavour (UNESCO, 2006: 19). Culture, in its widest sense, provides a set of material and symbolic resources that are abundant in supply (arguably infinite), and highly mobile and it is certainly at the basis of international tourism and indeed has facilitated its growth and allowed various societies and sections of societies to participate in the development process. Few places have escaped the interest and the curiosity of the tourists: tour operators demonstrated that they can package even the most remote (or dangerous) location - also contributing for the process of internationalisation of destinations (M. F. Lanfant, 1980) – and the tourism economies of some places are based entirely on cultural heritage (Timothy, 2011).

2.1.1 Cultural heritage within tourism planning and development

Heritage is the major component of primary resources for tourism, as it is “all that identifies, distinguishes and, eventually, qualify a region as a tourist destination” (Umbelino, 2004: 22). The mobilisation of culture in the tourism field broadly uses the same type of approach: tour-operators, tour guides, and tourism planners translate, “commodify” or package particular types of artefacts, spaces, stories and social practices into discourses, products and events that are accessible to tourists. But there is the need for balance between the tourism industry and cultural heritage management, namely between the consumption of extrinsic values by tourists and conservation of the intrinsic values by cultural heritage managers (McKercher & du Cross, 2002: 10). On the other hand, tourists, by definition, spend only a short period of time in any particular place and thus they can only experience selective aspects of the host culture. Such translation and packaging processes happen in any form of intercultural communication and exchange, but in the context of tourism this process of commodification has often been criticised as it unavoidably transforms original configurations and meanings and puts them in ways tourists and other outsiders can understand (Greenwood, 1977). Nevertheless, according with Urry (1994: 233) *Tourism is culture*; tourism, indeed, is centred on the fundamental principles of exchange between peoples and is both an expression and experience of culture (Appadurai, 2002).

As UNESCO (2006: 17) highlights, in treating culture as a resource we should not neglect aspects of agency, as the value and priority of culture relates not only to its intrinsic worth, but to the ways that it is used. This in turn begs questions about ownership of, and access to, culture, and also raises issues with regard to the ways in which culture is ‘read’ by particular typologies of tourists. Indeed, so called ‘cultural products’, as

Therkelsen (2003) points out: generate associations and meanings that are influenced by the cultural backgrounds of the potential tourist. In this sense, tourists do not encounter culture as some value-neutral form or process.

According to the revisited definitions in the *International Recommendations for Tourism Statistics 2008* (UN & UNWTO, 2010), In a narrow sense, the term tourism refers to the activity of *visitors*, which is *a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than be employed by a resident entity in the country or place visited* (UN & UNWTO, 2010: 10). Tourism is therefore *a subset of "travel" and visitors are a subset of "travellers"* (UN & UNWTO, 2010: 10). On the other hand, according with Timothy and Boyd (2003: 6), heritage and how it is understood are inextricably linked to the context in which it occurs, and it has an obvious reflection on its touristic enhancement. However, it is also worth mentioning that exist a very lively debate on this issue, as demonstrated by authors like Cellini (2011) and Yang, Lin, and Uzi (2011). Some studies provide empirical evidence demonstrating that heritage, even in cultural heritage destinations, it is not always among the top motivators for travellers: it is the case of the analyses of the visitors at the ancient Greek theatre of Syracuse, Italy (Cellini, Cuccia, & Reale, 2003) and other studies (Cuccia & Cellini, 2007).

By recognizing into the heritage the value of symbolic collective identity (Peralta, 2003) of a particular area and population, then it is found the key to confer the "uniqueness" that determines the competitiveness of a tourism product, and it is on this basis that has to be structured a destination and its offer. Leask and Yeoman (1999: 2) speak about the existence of a *heritage business*. But for this to be possible - the ability to "acquiring heritage" as a good of trade - there must be "someone" who transforms this feature, produce and offer. Different authors agree on the fact that the process of "marketisation" and "touristification" of the cultural heritage led to the creation of a true *heritage industry* (Ashworth, 1994; Leask & Yeoman, 1999: 2). The latter has an active role in the transformation of heritage resources in tourist attractions. Ashworth and Tunbridge (1996) summarised in the following classes as the products of the heritage industry:

i) Place of interest assets (buildings, sites, cities, etc.).
ii) Individual and/or community memories;
iii) Production of art and culture;
iv) Landscapes and natural resources.

According to Ashworth and Tunbridge (2000), it is demonstrated in last thirty years a growing interest in tourism for consuming cultural heritage resources. The trend towards increasing public attention to the differences ethnic and cultural is reflected, in fact, in the increasing tourist demands for products offering cultural authenticity (Cooper, Fletcher, Gilbert, Sheperd, & Wanhill, 1998). Tourist demands for cultural destinations seeking the symbolism of images and objects from the past, which are offered and definitely represent a world lost and unrepeatable (Leask & Yeoman, 1999).

But the tourist offer that is based on the transformation of heritage in attraction, it is not free from rules: the "Agenda 21 FOR THE TRAVEL & TOURISM INDUSTRY", that applies the document "Agenda 21" to the travel industry and tourism (Lima & Partidário, 2002) aims to highlight the interest of the sector in the protection of cultural (as well as natural) resources, providing a plan and a number of good practices addressed to government agencies with responsibility over the tourism sector, but also to private/non-governmental organisations. However, it is proper to refer that not all the authors agree completely with the latter opinion (as we will also see in subsection 3.1 of this chapter): Greffe (2009: 102) alerts that although the revenue from tourism to the hotel and catering trade is often held up as phenomenal, tourism actually makes only a tiny contribution to heritage in the strict sense of the term.

Yet, by the year 2020 international arrivals are expected to reach over 1.56 billion, and it is expected that culture will continue to be the main driver of this development: Europe is scheduled to be the top receiving region with 717 million tourists, followed by East Asia and the Pacific with 397 million, the Americas with 282 million, and Africa, the Middle East and South Asia (above average growth regions are scheduled to be East Asia and the Pacific, South Asia, the Middle East and Africa) (UNWTO, 2005). Such statistics are useful to better understand the proportion of tourism, not only in economic but also social and cultural terms. The use of cultural heritage for tourism in the broader context of integrated local development is certainly paradigmatic in the process of sustainable development. However, the association between tourism and heritage brings opportunities and threats that will be considered in the following sections, and that - from now we can say - alerted to the need for a strategic and integrated planning of tourism development, and the pursuit of absolute quality in its management.

2.2 Cultural Tourism

The definition of cultural tourism is not consensual (Greg Richards, 1996: 19). Hughes (1996: 707) argues that the term *cultural tourism* tends to be applied to trips whenever cultural resources are visited, regardless of initial motivation, even if, actually, a larger range of aspect should be considered. Cultural tourism could also be considered as a genre of special interest tourism based on the search for and participation in new and deep cultural experiences, whether aesthetic, intellectual, emotional, or psychological (Stebbins, 1997).

Ashworth (1995) states that the main tourist activities linked to cultural events are three. At first, the arts, museums, art galleries, musical events, theatre and opera, among other art forms, are the attraction. It could be considered an “elite tourism”, as indeed it is directed to a segment of the public generally characterized by a medium-high cultural level. However, the formula "art & tourism" seems to be effective, as has been recognised, for example, by the international hotel chain Raddison, which has encouraged its members to carry out partnerships with local historical, heritage, cultural, artistic and theatrical associations through a project called “Raddison Partnering with The Arts”, with the aim of adding value to the product offered (Cooper et al., 1998: 327).

A second category of cultural representations, capable of tourism development, relates to a broader view of culture. This covers the historical and monumental built, defined by several authors as Heritage Tourism (Ashworth, 1995: 265; Yale, 1991: 20). In this kind of relationship between tourism and culture, tourism resource is represented by the preserved buildings, landscapes and places associated with individual personalities, events or historical periods, archaeological sites, castles, etc.

Finally, Ashworth (1995) outlines the relationship between tourism and cultural manifestations of a community. This is the so-called ethnic tourism, where the attraction is understood as a specific place (place-specific tourism) taken as a whole. Such a subdivision, however, is not unanimous: Henriques (2003) , for example, shows the limitation of this approach by describing the vast literature in the creation of a definition for cultural tourism.

It is also important to mention that, according to Bonink (1992), it is possible to identify two different approaches to the definition of cultural tourism: the first, which can be defined as "sites and monuments," focuses attention on the types of attractions visited by tourists (archaeological sites, museums, etc..); the second definition is more conceptual, focusing its attention on the motivations of the tourist , which in this case are purely cultural (Bonink, 1992).

Still, Silberberg (1995) defines cultural tourism as "visits by persons (...) motivated, wholly or in part, by interest in the historical, artistic, and scientific or lifestyle/heritage offerings of a community, region, group or institution. According with this author, cultural tourism, like other forms of tourism, brings together the personal motivation - the market – with the travel motivator - the product. By cultural tourism products Silberberg (1995) refers to institutions, lifestyle/heritage opportunities and to events. These cultural products may be linked. It is therefore possible and even likely to have cultural institutions which are located in a heritage/themed district or downtown become the focal point for community festivals and special events.

In the search of a satisfactory definition of cultural tourism, it is also found a segmentation approach by "classes" of cultural resources supply: Rebollo and Linares (1995: 163) suggest a distinction between a "permanent offer", consisting of resources as museums or cultural monuments; and a "non-permanent offer ", related to specific events on a temporary basis. This leads to Greg Richards (1996), which distinguishes two main uses for the term “culture”: culture as a process, or culture as a product (Greg Richards, 1996: 21). In this latter designation is finally found a keyword to outline what is cultural tourism. A "cultural product" is the result of something dynamic, a process that lead to the birth of something unique, featuring a community which, in turn, considers it as "heritage".

Greg Richards (1996: 24) states that "the problem of definition of Cultural Tourism was the biggest incentives for the release of the "Research Project on Cultural Tourism" by the European Association for Tourism, Leisure and Education (ATLAS) in 1991. Results of this study was the development of two definitions for cultural tourism: a conceptual definition, according to which cultural tourism is the movement of people towards the cultural attractions outside their usual places of residence with the intention of obtaining new information and experiences to meet their cultural needs; and a technical definition, which is defined by the dynamics occurring between the movement of people outside their usual places and specific set of cultural attractions.

The term "cultural tourism" can therefore indicate the consumption (by the tourist) of art, heritage, folklore and all the expressions of culture of a particular community (Greg

Richards, 1996) and environmental assets (UNWTO, 1985). As suggested by Cooper et al. (1998), subdividing the tourism system into individual elements is both necessary and artificial: tourism is a composite system, a multidimensional and multifaceted activity, which has links with many different lives and economic activities. However, due to the extreme complexity of this system, studies in this area imply such subdivisions to better identify the components of this system and understand them.

In tourism system, the resources are an essential component. But what is meant by tourist resources? Firstly, the UNWTO (1978) makes a distinction between resources and tourist resources: "resources" designates the human, material and energy resources that a community has or may have. They become "tourism resources" when they're able to attract visitors. Tourism resources are represented by the heritage that can be assessed for tourism purposes: they are all goods and services that satisfy human needs associated with tourism, through the intermediary of the usage of man and the means to their own cultural environment, political and social (UNWTO, 1978). Ashworth and Tunbridge (2000) make a distinction between primary tourist resources - the area's resources which, by itself, represent the attraction for the visitor - and secondary tourist resources - those who "support" the visitor along the tourist experience. In this regard, Cooper et al. (1998: 326) feel the need to stress that "services and facilities supporting tourism, although essential, not motivate a trip", and that the attractions – natural and cultural resources; events – have this purpose.

Still, Cerro (1993) considers tourist resource all the natural and cultural heritage that can motivate a non-profit movement, whose basic motivation is curiosity, the possibility to travel, as well as the opportunity of an intellectual activity. The existence of this type of tourism resources is therefore a prerequisite for the development of tourist demand, as it represents the basis of the offer. It's important in this context to remember that UNESCO (2006: 19) highlights that tourists do not only encounter cultural heritage as just 'the past', but rather the past of a particular people or community in a living context, by engaging with the cultural heritage of a destination not only through monumental forms but in more intangible ways as the past enshrined in contemporary behaviours and practices. Increasingly various forms of intangible heritage are being mobilised for tourism purposes and experiencing living heritage is a particularly enriching experience for both tourists and the community. Festivals which highlight cultural rituals and artistic performances are often a key element in tourist itineraries. While tourist demand to see cultural displays and rituals can produce conflict with local communities over changing times of performance and content to suit the timings of the tour operator and the curiosity of the visitors, it can also provide a rationale to showcase and effectively preserve enacted traditions which would otherwise be lost (UNESCO, 2006).

We must not confuse the terms *tourist attraction* and *tourism product*: the cultural attractions are part of the cultural tourism product, but not the only component. That is, the tourism product is composed of cultural resources, as well as transport, accommodation, catering, and also the information and promotion (GEATTE, 1993). As tourism phenomena, cultural tourism could be approached both from the supply side as well as the demand side. Analysis of demand implies the concept of motivation: this concept is particularly difficult to be represented in schematic form (Cooper et al., 1998) with increased difficulties with regard to explaining the concept of motivations in the context of cultural tourism and heritage (Ashworth & Tunbridge, 2000). However, according to Cooper et al. (1998), the motivational process in Tourism includes, briefly, the following steps:

i) Trips are initially related to needs that inspire a desire;

ii) The motivation is based on sociological or psychological norms, attitudes; culture and perception acquired, taking the form of motivation, specific to each person;

iii) The image of the destination created and transmitted through various channels of communication, influences motivation and subsequently influences the decision-making regarding the choice of destination to visit.

Briefly and generally defined the field of tourism demands motivations, one can pass to outline the characteristics and motivations of the tourist demand relating to cultural heritage. One difficulty related with this task is represented by the fact that tourists interested in cultural heritage seek a wide range of offers into the destination, to meet different needs: a mix that ranges from learning to leisure; from adventure to resting. Moreover, in some cases the activities they are looking for may be on seasonal basis, while others can be practiced all year; some can be completed in a few hours while others may last for one, two or more days. Still, a study by European-Commission (2002) finds out that exist some common motivations:

- Well-being and physical health;
- Discovery, intellectual stimulation and instruction;

- Experiencing natural uncontaminated sites and landscapes;
- Contact with people from different cultures, by immersing in a more personal and authentic environment than what the "mass tourism" can provide;
- Adventure and emotions.

Tourist destinations which valorise the own cultural heritage, satisfy the majority of motivations / needs of the tourist: the desire for adventure and the need to come in contact with unique cultural realities is fully satisfied by the possibility of, through the enhancement of heritage, "telling stories realistic about the origins of a culture " (Binks, Dyke, & Dagnall, 1988: 89). In the same way, the need for rest and leisure, which features any type of tourist activity, is perfectly compatible with the cultural motivations that lead tourists to the fruition of cultural heritage. To give just one example, see how the four categories of motivations cited by McIntosh, Goeldner, and Ritchie (1995) - physical, cultural, interpersonal and "of status" - are perfectly satisfied by tourist activities in destinations where cultural attractions have particular relevance. Also, the tourist classes defined by Cooper et al. (1998: 69), are potential consumers of tourism products and activities related to heritage, albeit with different approaches and attitudes in making decision, and different level of immersion in local environment of the destination (organised groups; individual tour packages; independent tourist).

According to the authors' analysis presented here, it is possible therefore to say that any tourist can become consumer of cultural products, though more or less intentionally, that is, having whether or not as main motivation for the trip the visit to places of heritage value (Cooper et al., 1998; Greg Richards, 1996). The current trend of demand in the specific context of cultural tourism is resulting in strong growth, the point of making difficult the management of tourist flows in certain areas by requiring restrictions on the fruition of cultural attractions. In certain localities the distinction between mass tourism and cultural tourism begins to be complex to outline (Ashworth & Tunbridge, 2000).

2.3 Heritage Tourism

Heritage tourism is a broad category that embraces both eco-tourism and cultural tourism, with an emphasis on conserving natural and cultural heritage (Pedersen, 2002: 24). It is interesting to highlight a difference existing in the literature, between cultural and heritage tourism. B. G. Boniface and Cooper (2009: 14), in their manual of

Geography of Tourism distinguish unequivocally Heritage Tourism from Cultural Tourism. UNESCO (2006: 11) highlights some useful considerations to better understand the difficulty to defining a clear boundary between the two definitions: firstly, the definition of cultural heritage now also relates not only to material expressions such as sites and objects, but also to intangible expressions such as language and oral tradition, social practices, rituals, festive and performative events. Culture is seen much more to refer to 'ways of life' and everyday practice as well as being manifest in buildings, sites and monuments. Second, we better understand the close inter-relationships between culture and natural environments (UNESCO, 2006: 11).

McKercher and du Cross (2002: 6) defends that cultural heritage tourism is defined as interplay between tourism, the use of cultural assets, the consumption of experiences and products and the tourist. Timothy (2011: 3) uses a clear designation in his work, defining heritage as what we inherit from the past and use in the present day, including both natural and cultural heritage. The same author provides several perspectives about the definition of heritage tourism: it could be defined as people visiting heritage places or viewing historical resources; a personnel connection to the objects or places being viewed; a tourism based on visits by people who want to learn something new or enhance their lives in some way (Timothy, 2011: 4). However, Timothy (2011) concludes that "although there are various definitions of heritage tourism, they all includes element of the Human past as a resource", and that one of the effective ways to distinguish heritage tourists is their level of interest in elements of the past.

As well as Ashworth (1995: 265) and Yale (1991: 20) defend the necessity of distinguishing *heritage tourism*, at the same time Leask and Yeoman (1999) speak specifically of *heritage attractions*: museums, historic houses, parks and gardens with historic value but also nature reserves. As attractions represent the most important component of tourism, cultural heritage represents a strategic element of product differentiation, something highly crucial for the development of a successful tourism product and for the creation of a successful touristic brand (Leask & Yeoman, 1999).

The National Trust for Historic Preservation (USA) defines heritage tourism as "travelling to experience the places and activities that authentically represent the stories and people of the past," and cultural heritage tourism is defined as "travelling to experience the places and activities that authentically represent the stories and people of the past and present. It includes irreplaceable historic, cultural and natural resources.

It is, therefore, a branch of tourism oriented towards the cultural heritage of the location where tourism is occurring. Cultural attractions play an important role in tourism at all levels, from the global highlights of world culture to attractions that underpin local identities (Greg Richards, 1996). Cultural heritage tourism is important for various reasons; it has a positive economic and social impact, it establishes and reinforces identity, it helps to preserve the cultural heritage, with culture as an instrument it facilitates harmony and understanding among people, it supports culture and helps renew tourism (Greg Richards, 1996). Cultural heritage tourism has a number of objectives that must be met within the context of sustainable development such as:

1. The conservation of cultural resources;
2. Quality interpretation to engage the tourists in the history of an asset through an experience in wich they feel confortable (McKercher & du Cross, 2002);
3. Authentic visitors experience, and the stimulation of the earned revenues of cultural resources.

We can see, therefore, that cultural heritage tourism is not only concerned with identification, management and protection of the heritage values but it must also be involved in understanding the impact of tourism on communities and regions, achieving economic and social benefits, providing financial resources for protection, as well as marketing and promotion (Fladmark, 1994).

One of the most important characteristics of heritage (thus, heritage tourism) is that it cannot be divorced from the context of its setting, and heritage is not heritage unless it involves a visit to urban places, often the historical cores of old cities (Timothy & Boyd, 2003: 6). Finally, is important to highlight that heritage tourism has a particular importance due to the mobilisation of various forms of tangible and intangible heritage resources to facilitate intercultural dialogue and exchange, and to create feeling of belonging to a common humanity (UNESCO, 2006: 57). As we see ahead this is one of the principal focus of this study.

2.4 Archaeological Tourism

One can theoretically consider archaeological tourism as a subset of cultural tourism and, within this, a segment of heritage tourism. However, as defended also by (Melotti, 2008), this phenomenon has not yet been properly addressed in order to fully understand all its aspects. Archaeological tourism is an important phenomenon which is also a key to understand important aspects of contemporary society (Melotti, 2008). This consideration could be a starting point for the improvement of the practice of archaeological tourism from several points of views: both from demand and supply sides, as well as from the point of view of archaeology, tourism, society, marketing, and so on.

But among the obstacles to the study of archaeological tourism, there is the difficulty of defining this type of practice: it is a phenomenon commonly referred to museums or archaeological sites, even if a more careful analysis shows its extreme versatility. Melotti (2008) points out that archaeological tourism can integrate and include different experiences, ranging from urban tourism to rural tourism; religious tourism to sport tourism; from thermal and SPA tourism to gastronomic tourism. The Spanish project "Aire de Sevilla" in Seville (Spain), which we briefly describe here as an example, is illustrative of the versatility of archaeological heritage within tourism: a palace of the sixteenth century, in the district of Santa Cruz, Seville, has been restored and opened to the public with its primordial function of a thermal bath of Arabic style. The experience offered to the visitor combines the archaeological experience with the thermal/leisure/relaxing/healt element. It combines history (the structure itself and the ancient tradition of Roman and Arabian baths) with modernity (the use of technology in space management and spa services), and even with gastronomy (tea house, *Teteria*, with typical cakes, and - on request - organisation of thematic dinners). All the senses are deeply involved in an experience that explains exactly how the boundaries of archaeological tourism are particularly weak and this practice is not limited necessarily on a visit to a museum or an archaeological site. Finally, this project represents the immateriality of archaeological tourism, of which Melotti (2008: 3).

The fluidity of archaeological tourism and its growing practice, they reflect in some way some social and cultural aspects of our time: the archaeological tourism, which brings us back to something that "*was*" fulfils the search for authenticity and a sense of belonging motivated by the sense of confusion and loss of identity that the present society suffers, as we examined extensively in section 1 and in the previous chapter.

2.4.1 Managing archaeological heritage as tourism resource

According to Renfrew and Bahn (2012: 540) there is, clearly, an avid popular appetite for archaeology: the past as the past. Some recent international events were created with the main objective to promote archaeological tourism, compare management models and promote the creation of networks. The Mediterranean Fair of Archaeological Tourism (*Borsa Mediterranea del Turismo Archeologico*), for example, is an important international event, the world largest trade fair of interactive technologies, management solutions, and other issues related to archaeology and tourism, also referred for its value in the work of Melotti (2008: 6): held annually in Italy, this event aims to study and share topics dedicated to tourism and archaeology. Another notable example is the “Arqueotur - Archaeological Tourism Network”, which is an a interactive portal in the web led by professionals from archaeological and tourist sectors, co-ordinated by the University of Barcelona and *Ibertur Network*, with support of different public and private institutions, aiming to develop, promote and commercialize archaeological tourism providing detailed information about archaeological sites, museums, interpretation centres, events and historical celebrations, as well as other proposals for public and private stakeholders related to archaeological heritage.

All this ferment around the archaeological heritage and the growing attention to the places of heritage value are undoubtedly a positive factor, but that leads us to a series of considerations, as also warning the Archaeological-Institute-of-America (2008): the number of people that visit archaeological sites rises every year and the increase in traffic can result in damage to sites. In extreme cases, sites have been closed to the public to prevent further damage. The popularity of archaeological sites as tourist attractions means that they are valuable sources of revenue, but unfortunately this is often not matched by reinvestment in proper management to ensure both protection of the site and continued enjoyment of it by tourists. Archaeological sites are fragile resources and inadequate site management will result in deterioration or even destruction of the site and its related social, historical, educational, and economic potential.

The management of archaeological resources towards the tourist fruition represents a success in the process of planning and management of tourism activities and contributes to the creation of revenue to continue the archaeological research. In this sense, it is already been referred the link between the tourist enhancement of archaeological sites and the continuity in research and restoration of such sites. The latest interventions to the imperial complex of *Appia Antica* in Rome (Italy) and its opening to the public represent a good example: since the opening of the archaeological area, still under study, the large flow of visitors has encouraged the public authorities to continue the research work that would otherwise have risked to be incomplete due to lack of public investment (Quattrocchi, 2000).

On the other side, the specific management tools and techniques exposed by Timothy and Boyd (2003: 166) for heritage tourism managers, fit particularly for archaeological tourism, and are the following:

- Controlling traffic, visitor flows and congestion;
- Limiting contact between visitors and artefacts;
- Fees and pricing;
- Providing a way for visitors to leave their mark;
- Providing high quality experiences;
- Marketing and promotion;
- Hardening the resource;
- Interpretation;
- Creating *mindful* visitors (by helping visitors find their way around; making connections to visitors and involving them; offering variety; telling a good story that makes sense; knowing and respecting visitors).

The latter issue makes a bridge to the question of the *destination ambassador*, as we shall see in section 2.6 of this this chapter.

2.4.2 The attractiveness of archaeology as a tourist resource

As widely reported in the previous chapter, archaeological research reconstructs the history of human presence on a territory according to the signs and material remains left on (and *in*) the ground (Manacorda, 2007: 32). Carandini (1981: xvi) explains the tourism potential of archaeology by affirming: "archaeology, as it is curious of what is beautiful and what is unshapely, devoted to aesthetic pleasure and at the same time to history, represents a bridge between the different worlds of art, labour and nature". Angela (2007: 72), an Italian scientist working for years in the dissemination of scientific contents to the general public, claims that the magic of archaeology is the “ability to bring back lost worlds, to meet people that there are no more, get involved in the daily lives of so many centuries ago, and no special effect can imitate this powerful emotion”. Maybe for this reason archaeological sites and historic places are major tourist attractions worldwide. According to the Archaeological-Institute-of-America (2008) in the last few years, visits to historical sites have ranked third (after dining in restaurants and shopping) among activities undertaken by Americans travelling abroad.

From a technical perspective, Carandini (1981: 135) explains the process that leads from the “archaeological discovery” to the “historical narrative”: without going too much deeper in technical issues, such as the method of archaeological excavation, the rules of the "archaeological stratigraphy" or the methods of reconstruction, is however very important to mention the diagram developed by Carandini (1981: 136) to explain the process of narrative and edition of the archaeological investigation. This diagram is structured into six levels: three analytical and three synthetic.

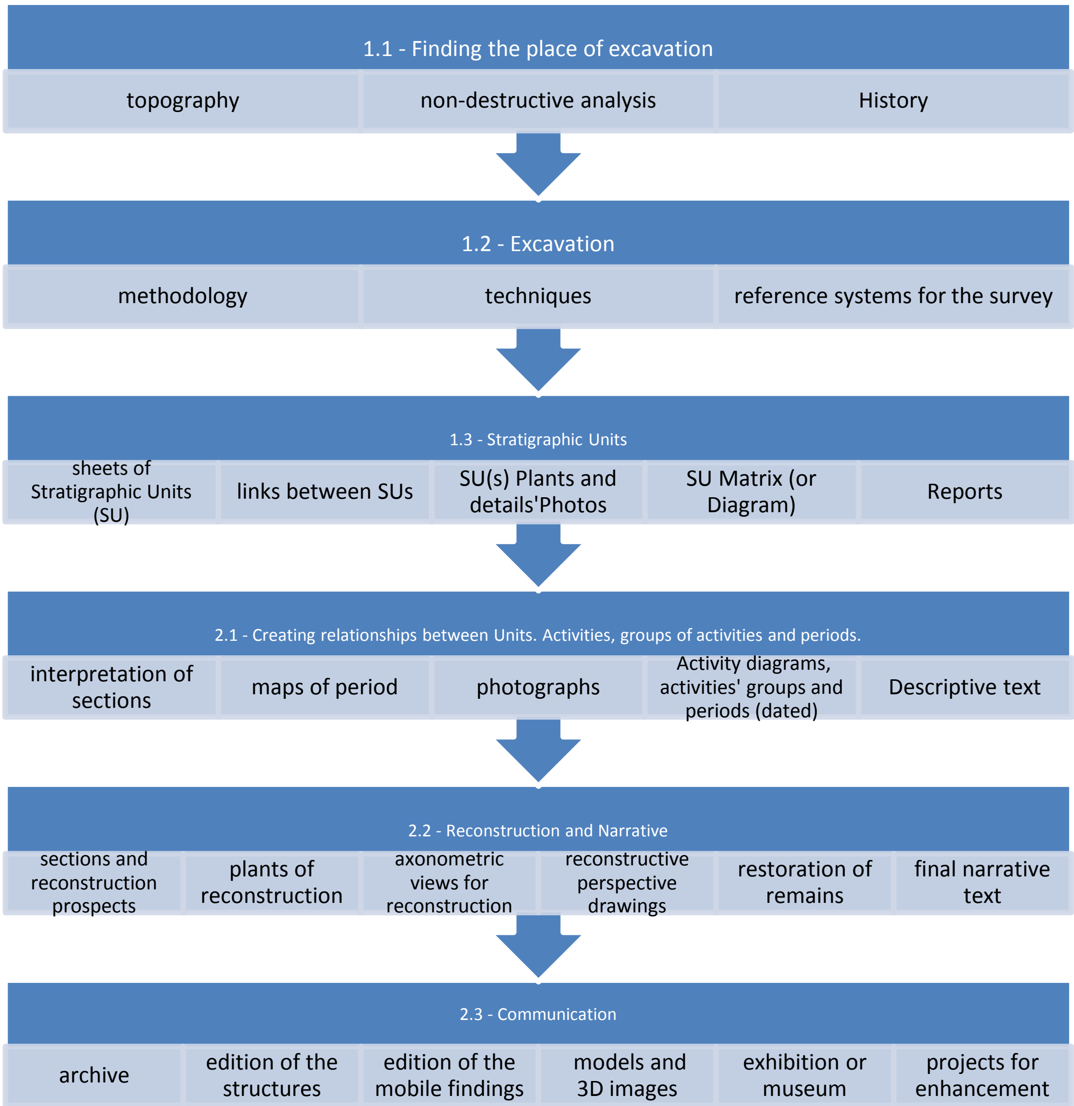

Figure 2.1: Sequence of the phases of an archaeological research

Source: adapted from Carandini (1981: 136)

The phase of interpretation and the phase of edition belong to the last three levels. It is, therefore, to "synthesize" the enormous amount of information produced by the excavation to give it an order, an interpretation. And it is precisely at this stage that the archaeologist crosses the boundary between the material nature of the documental data from the narrative of the human journey (Carandini, 1981: 138). As part of this narrative, Figueiredo (2012) highlights the importance of "archaeological drawing" and "archaeological illustration," both considered "scientific drawing". They are tools to support the study or the transmission of information in archaeology, but while the first is mainly used for technical purposes, the second is important to "contextualize" the finds, making their interpretation accessible to the general public.

By reflecting on this theorisation, one can conclude that the results of the process of interpretation and edition of archaeological research represent, jointly to the cultural asset itself, the "raw material" and the key factor for the tourist enhancement of archaeological heritage. They become an integral part of the local resource that can potentially become a tourist attraction. If the heritage tourism can be considered a subset of cultural tourism, in the same way we define archaeological tourism, which aims to promote public interest in archaeology and the conservation of historical sites, as a subset of the heritage tourism. However, before starting to investigate this issue, it is necessary to clarify that all these classifications are used for a mere reason of concepts' organisation for academic or educational purposes, while in reality, it is difficult to draw boundaries between activities that are complementary and complete each other.

Kirshenblatt-Gimblett (1998) opens her book with the following question: “Why look at a shard of pottery?” The subject studied by archaeology is the material remain of the development (and sometimes disappearance) of a culture: any building, structure or existing work above or below the land surface; any site where there are traces of construction, structures, works (Yale, 1991: 87). Still, ceramic artefacts, tools, weapons, coins and all that material production representative of a society can be considered as “material culture” (Piuzzi, 1990). To the casual observer, archaeological sites are often synonyms for inaccessible places, mysterious but above all, difficult to interpret (Binks et al., 1988). In this sense, (Carandini, 1981) has already asserted in its Manual of Archaeological Excavation that the reconstruction is the ultimate goal of the research. And it has to be in favour of archaeological tourism development and, above all, to meet the ultimate function of every archaeologist: to communicate the past through the vestiges he found.

2.4.3 Archaeological tourism: origins, motivations and new trends

Our research in relation to the "roots" of the relationship between archaeological heritage and tourism, leads us to affirm without hesitation that travelling to visit historic sites, is among the oldest forms of tourism. In this respect, there are theories according to which it could even exist a relationship between this specific activity and the word "tourism": the Swiss Haulot Arthur affirms that the origin of the word *tourism* could be related to the Hebrew world *tur*, we find in the Bible with the meaning recognition trip (Zardo, 2003).
Large flows of visitors directed to sites of strong symbolism, historical and cultural value, pilgrims, travellers motivated by religion, by the intellectual desire to know, or for reasons of social status, performed mostly travels extremely dangerous: in ancient Rome - in Republican and Imperial epoch - travels to the ruins of the ancient Greek temples were considered a key part of the education of young people from high social class. Caesar himself, as well as Cicero and others, started from the *Caput Mundi*, and setting sail from the port of Crotone (Tedesco, 1997), began their journey to Athens to visit the places where they lived and worked the first philosophers . A journey that today we would call "study visits". Historical places and ancient sites, many of which today would call of archaeological sites, were also on the basis of the primitive forms of "religious tourism " groups of pilgrims from different regions of Europe, participated in these trips, known by the name of *peregrinatio* (Kötting, 1950), to visit holy places like Jerusalem or the Roman catacombs (Testini, 1980). This fact led to the creation of true "tourist guides", itineraries and maps. Among the most important are highlighted today - for historical and archaeological importance - the *Tabula Peuntigeriana* analyzed by Bosio (1983); the *Itineraria* (authentic tourist guides from antiquity), including the *Peregrinatio ad loca sancta* (IV century), the *De loci sanctis martyrum* (VII century) and the *Itinerarium Antonini Piacentini*, itinerary written around the year 570 containing much information about churches, synagogues and various monuments in Palestine, Egypt and other regions in the Holy Land (Testini, 1980).

All these places have in common that they are characterized by what today we call archaeological heritage. As explained by Domingues (1997: 144), in fact, even during the Renaissance, in Great Britain was developed the idea that the academic training of students of the most famous colleges such as Eton, Oxford, Cambridge, could only be considered complete after a visit to Rome, namely, to its classical ruins; since 1740, Naples became one of the favourite destinations of these young students, due to the new digs in search of ancient Roman cities of Pompeii and Herculaneum, destroyed by the eruption of Vesuvius in 79 AD (Trigger, 1989).

It must be emphasized that even from an economic point of view, even at that time these trips caused the concrete impacts on "destinations". The spending of travellers was considered very important by the local population, and owners of inns began to compete with their own (Domingues, 1997). Still, Journey into Greece, by George Wheeler, dating from 1670, demonstrates once again the value given by the archaeological heritage of the early travellers. Such travels have deeply influenced the approach to the archaeological heritage, considering it important not only for its aesthetic value, but also for its historical and cultural value, as a legacy of the ancestors. This period also saw the rising of the decisive and definitive demarcation of the figure of the antiquarian respect the figure of the archaeologist (XIII and XIX century) (Bahn, 2002).

Nowadays, we call this type of practice as archaeological tourism. Since this type of tourism reflects certain aspects of current society, such as the loss and search for identity, there are some definition such as “archaeological tourism of post-modernity” (Melotti, 2008: 2), or even archaeological *iper-tourism* (N. Costa, 2005) since it represents the primordial essence of tourism: a journey of search for identity. But in the contemporary practice of archaeological tourism, we can find that, finally, the intellectual curiosity and the search for identity are not the only motivations: as Melotti (2008) refers, exist also some socio-psychological factors that animate the archaeological tourist.

According to this author, in fact, the curiosity for the mummies in Egypt, as well as the enthusiasm in seeing the bodies’ casts of the victims of the Vesuvius’s eruption in Pompeii - obtained by the casting technique employed successfully in 1863 by Giuseppe Fiorelli, director of the excavations at Pompeii, who poured liquid plaster into the empty spaces left in the volcanic debris, creating three-dimensional image of many peoples (and animals) frozen at the moment of that painful and tragic death – they represent a sublimated form of necrophilia. In the same way, always according to Melotti (2008) the fame of erotic figures on Greek pots and Roman, or even the erotic illustrations in the Pompeian *Lupanares*, could be considered a form of voyeurism, a sexual tourism socially acceptable. In both case, these particularly archaeological remains satisfy the desire of different and extreme within the tourist experience.

In any case, we can state that heritage, namely archaeological tourism is a growing phenomenon: recently, as Timothy and Boyd (2003: 11) show in their work, authors are trying to connect the interest of tourists in heritage and culture with the economics of the 1990s, finding out that people valued cultural, historical and archaeological attractions as being more important than a good nightlife or fine food when planning a trip, demonstrating a change in peoples' perceptions from escapism to cultural enrichment. At the same time to, however, this growing phenomenon has been transformed over time, reflecting (as we shall see in the next section) also the changes in our society. It becomes essential, therefore, to accurately analyse the evolution of archaeological tourism that today, paraphrasing Melotti (2008: 41), is increasingly focusing on the sensory aspects of the visit, reducing more and more the gap between education and entertainment. Within a cultural, archaeological experience, there are several elements we thus need to take into account, composing that multisensory capacities which make visitors able to gain rich multimodal experiences (Laursen, 2008: 60).

2.4.4 The archaeological tourism within the contemporary society: authenticity matters (?)

In Chapter 1, as well as in the previous sections and subsections, it is amply demonstrated the typical charm of the discipline of archaeology. As a consequence, this appeal is also typical of archaeological tourism, in which the fascination of the contents and exotic mystery that surrounds them, you add another type of charm. As we have already shown, in fact, today it is extremely difficult to define in a clear way the scope of the archaeological tourism, tourist phenomenon that reflects perhaps more than any other - from the sociological point of view - contemporary trends.

Archaeological tourism reflects, indeed, the search for what is authentic and which is inherited from the past, perceived as an element that allows the salvation from the modern frenzy, or "liquidity", as defined by Bauman (2000). It reflects the characteristics of the society in current times, defined by Lipovetsky and Charles (2004) as "hypermodern time". There is a significant difference between the latter and the modern and postmodern society (typical of the '60s and '70s): while postmodern society has a rejection of what is considered old, responding to the needs of "look beyond", the hypermodern society recoveries the message that comes from the past and enhances it. In this sense, hypermodernity is also characterized by "memory recovering", "remobilisation of traditional beliefs", individualistic appropriation of past and present, without significances institutionally imposed, in a process of" eternal rearrange, based on a principle of "individual sovereignty" (Lipovetsky & Charles, 2004). There is therefore an individual search for meaning and values, choosing as starting point of this search the most visible and tangible remains of the past: the archaeological remains.

On the other hand, the same hypermodern society is characterized by unbridled consumerism (Lipovetsky & Charles, 2004) and by the cult of the “acquisition of what is material”: also this feature is reflected in the archaeological tourism, where the archaeological and historical contents "must be sold" in the form of object. Any object: scarves, ornaments, caps, postcards, T-shirts, miniatures, book ends, letter openers, toys for the children, posters, objects of value that reproduce antique gold ornaments, magnets representing artworks, CDs and DVD, etc., available at the end of any museum visit or book shop of any interpretation centre or archaeological are. Only in this way, through the purchase of “the object”, one can consider the visitor experience as truly complete and satisfactory, perfectly in accordance with the hyper-consumerism of the hypermodern society (Lipovetsky & Charles, 2004). As a direct consequence, we see the emergence of cultural capitalism and the commodification of culture, as we saw in the previous chapter.

In this context, also the concept of authenticity is relativized. It is necessary to ask how the hypermodern man, with his need to take control of the messages and values of the past, perceives the authenticity of archaeological heritage. Actually, the debate about authenticity in the experience of archaeological tourism is not a contemporary issue. The archaeologist who inaugurated a kind of change of trend - shifting the focus from the importance of the authenticity of the site/object, to the importance of its image and its historic cultural content - was Arthur Evans. This British archaeologist brought back to light the ancient palace of Knossos in the early twentieth century. But not satisfied with this important discovery, he reconstructed many structures and painted the colourful drawings which are still associated with this archaeological site, even if they are not authentic, at all (Melotti, 2008: 11).

Many other examples have taken place over the decades, and even today the *anastylosis*, total or partial reproduction of the ancient structures, and the exhibitions of copies replacing the original archaeological items they are at the basis of a large debate. The experience of the York Archaeological Trust it is an example: the great success of this project of study and enhancement of the archaeological heritage of York (UK) has been the involvement and education of local audiences, as well as the growing number of tourists, using new and exciting methods of presentation (Renfrew & Bahn, 2012: 524-525). The "Jorvik Viking Centre", opened in 1984, is a place where the results of archaeological research are communicated to the public in a very original and captivating way: the visitors make a circuit where it is recreated a typical street of the city of York as it appeared (according to the results of studies) during the Viking occupation. The visitor discovers the daily activities, sounds and even smells of the time. The work of York Archaeological Trust, in cooperation with other public and private institutions, is a prime example of archaeological project in urban setting which is at once commercially and educationally successful. However, despite the success of the project, many criticisms are moved from those who consider that this "time capsule" approach comes closer to Disneyland than to serious Archaeology (Renfrew & Bahn, 2012: 532).

Melotti (2008) explains that while the reconstruction of contexts and structures is more widely accepted by the visitor, the same cannot be said for the exhibition in a museum of a fake item, a copy of an original. The same author defends that authenticity is no longer searched in the object itself, but in its message, in that sense of *alterity* and in the sensorial experience, towards a plenty “emotional tourism” (Melotti, 2008: 24). Archaeological tourism evokes a practice of mobility motivated by the knowledge of the past, but a more careful analysis shows that actually tourists are not in search of the past, but of its image, which takes possession through sensory experience (Melotti, 2008: 9), as also supported by Lucrezia Ungaro (2010: 7) who however alerts to the importance of scientific rigor.

First of all, in the practice of archaeological tourism, the excitement of living and taking possession of something "alternative" to our daily lives is given by what Melotti (2008: 9) calls “forms of discontinuity”:

1. Temporal discontinuity (the contact with something not contemporary);
2. Spatial discontinuity (the entrance into special space of the museum or archaeological site);
3. Cultural discontinuity (ancient culture is perceived as “other” than one's own culture);
4. Discontinuity on ontological basis (mummies, necropolis, etc)

About the authenticity of the objects exhibited, the visitor “trusts” the museum institution, which is perceived as a container of authentic messages (Melotti, 2008: 18; 24). Today the object in itself is no longer the central attraction of archaeological tourism. The main attraction is the message, the sense of *altherity*, the charm of the (partially or totally) reconstructed spaces, where the authentic and the copy are alternated to create a final product particularly complex, in which are involved all the senses and where “the authenticity of the archaeological context is given by the authenticity of the emotion experienced (Melotti, 2008: 21) and which, from a sociological point of view, reflects the most recent changes and needs.

The French anthropologist Marc Augé also speaks about the function of the memory of the past within the hypermodern society described by Lipovetsky and Charles (2004): the "pedagogical vocation of the ancient ruins" (Augé, 2004: 43) is one of the several sources, as literature, common experience, psychoanalysis, philosophy, ethnography, to illustrate the interplay of memory and forgetting in the stories of life and death told across many cultures and many times. Memory and oblivion cannot be separated, according to Augé (2004), who states: "Memories are crafted by oblivion as the outlines of the shore are created by the sea."

2.4.5 Importance of communication in archaeological tourism

In the previous chapter, it is widely presented the issue of archaeological content communication. In this section it is appropriate to go even more deeply in this issue, by analysing it from a touristic point of view, considering the communication as an important element of the global offer. Binks et al. (1988), for example, distinguish between "personal-media" and "non-personal media". The distinction - which seems to be quite functional to determine the range of possible options in the choice of frameworks of communication for the presentation and interpretation of archaeological sites - defined as "personal media" those forms of direct communication between the visitors and a guide, which in this case may not necessarily be a tour guide, but an archaeologist or an operator (may even be voluntary) with special training to present the site, namely:

- Informal discussions between visitors and team work;
- Guided tours;
- Demonstrations;
- Reconstructions / historical representations (Living History, which is discussed later in this same sub-section).

All these methods of communication offer a face-to-face with the visitor, which makes the experience much more interactive, customized, more fascinating and engaging for the audience.

On the contrary, the "non-personal media" are represented by all types of publications (paper or multimedia) that aim to help the visitor in the interpretation of the site, but might also serve as a souvenir and provide additional information (Binks et al., 1988). Are considered "non-personal media":

- Posters;
- Flyers;
- Illustrated guides of the site (for adults and children);
- Journals;
- Souvenir booklets;
- Teacher's Pack;
- Books collecting of technical data or reports;
- Audio visual media;
- Panels.

It is important to mention the ever more important role of new technologies in the presentation and dissemination of the archaeological heritage, and consequentially, in the quality of tourist experience linked to the archaeological heritage. The new framework, mainly related to visualisation and computer graphics are used not only at the research stage (Abouaf, 1999) and preservation (Silva, Bellon, & Boyer, 2004), but also in the dissemination and presentation to visitors of artefacts and other archaeological rests, online or in situ (Levy, 2001; Mitchell & Economou, 2000).

On the other hand, in addition to the importance of proper choice of instruments and appropriate communication channels that are of direct responsibility of heritage managers, it is particularly opportune to highlight the existence of a strict link between the cultural, archaeological heritage and certain types of events. Indeed, it exists a different form of representing and reconstructing the history, even more tempting for tourism industry. It is closely related to archaeology and that is known as "living archaeology", "experimental archaeology" or the most consensual “living history”. The Consortium of European Re-enactment Societies is a Union of European Historical Companies, and it was established with the aim of preserving the historical memory and promoting local identities and numerous historical sites throughout Europe, as well as obtaining full recognition for historical evocative manifestations as a precise cultural and educational expression, (http://www.cersonweb.org/download/charter.pdf, retrieved in 18.01.2011).

The general term of "Historical Re-enactment" indicates an activity which intends to operate as an effective promotion of historical knowledge and local culture, through initiatives of entertainment with characters in historical clothes appropriate and a specially made scenario. It means, proposing to the public a set of events, crafts, civic rituals characterizing a particular place and its past. Thus, the Historical Re-enactment is not possible without a preliminary study, research, analysis, experimentation, practice and / or learning (http://www.cersonweb.org/webit/definizione.asp), and it perfectly fits in places with relevant archaeological heritage. In this sense, it contributes strongly to increase the attractiveness of places with archaeological interest and, on the other hand, helps to transmit knowledge (scientific, historic and archaeological) to the visitors in a more simple and fascinating way.

Moreover, the C.E.R.S. draws a difference (even if tenuous) between “Living History” and “Historical Re-enactment”. In the first case, the event aims to rediscover the past in all its forms (civil, technological, scientific, artistic or military) and in its largest sense; in the latter case, the event aims to evoke a specific historical event, whether military, civil, religious, and of which the facts are put on stage. Again, it is evident that these events have strong complementarity with the archaeological tourism, increasing the attractiveness and proposing more effective ways to transmit historical and archaeological knowledge among visitors and local community.

It is important to point out that one has to include into the communicative solution also the sensorial experience offered to the visitors of a museum or archaeological site: from the reproduction of spaces through a total reconstruction of the structures of a site, to the reproduction of noises and scents “from the past”, or even sounds. Melotti (2008) notice that all these elements completing the archaeological tourism experience, lead us to better understand that we are facing a sensorial, emotional experience. And this is, in the very end, the real subject of archaeological tourism today.

This big effort to communicate the archaeological knowledge from several points of view (scientific, technological, social, economic and cultural), represents an important element positioning archaeology into this time of change towards new paradigms of knowledge, based on the (revisited) value of knowledge. In the next sections we will analyse the impact of these efforts in the context of the new paradigms of development.

2.5 Heritage and Tourism within the new paradigms of development

After a clarification about the definition of cultural, heritage and archaeological tourism, it is now opportune to analyse deeply the dynamic interaction between Tourism and Cultural Heritage in the broader perspective of territorial planning and development. Firstly, it is appropriate notice that, as defined by ICOMOS (1999), "at a time of increasing globalisation, the protection, conservation, interpretation and presentation of the heritage and cultural diversity of any particular place or region is an important challenge for people everywhere. (…) A primary objective for managing heritage is to communicate its significance and need for its conservation to its host community and to visitors". The growing concern for the *sustainability* of the development processes, which emphasizes models of growth based on the enhancement of local resources, results in a greater focus on local heritage and its enhancement for social and economic, including through tourism (Herbert, 1995; Hernández & Tresseras, 2001). The latter "should bring benefits to host communities and provide an important means and motivation for them to care for and maintain their heritage and cultural practices" (ICOMOS, 1999). From a financial point of view, McKercher and du Cross (2002) as well as Russo and van der Borg (2002) state that the economic incomes provided by the tourist activity and used for the conservation and preservation of heritage resources, are the greatest benefit of tourism associated with cultural heritage. The area of cultural heritage management integrates then with that of development and tourism management: tourism plays an important role associated with *transformation*, *innovation*, *development* and *marketing*, while the management of cultural heritage becomes responsible for the management and conservation of the cultural resources (Gonçalves, 2012).

In the following subsections we will deeply analyse the several matters of this concern: firstly, it will be introduced the issue of the tourism impacts from a general point of view. After this, it will be analysed the social impact of the tourism activity with focuses on the impacts on local hosting communities. The last part of the section (subsection 3.3) examines the importance of the cultural involvement of the local communities in the process of destination development, and highlights the relationship between the tourist development and the intercultural dialogue.

2.5.1 General considerations on the local impacts of tourism

Any form of socioeconomic development requires careful planning so that it can achieve the objectives that motivate the development process itself. The adopted development policies may be the key to success. The current development policies generally follow the trend of "strategic planning", that is a form of planning that aims to achieve long-term objectives, leaving - as far as possible - the old tendency to define short-term objectives, which in most cases relate only to the profits created by the exploitation of tourism by private (Cooper et al., 1998), a paradigm that the experience demonstrated to be wrong. According to Cooper et al. (1998: 241), tourism planning has several levels:

i) the international level;
ii) the national level;
iii) the regional/local level.

The multi-sectorial nature of tourism requires a particular attention at the planning stage of its development, taking into account all positive and negative impacts (Cooper et al., 1998). However, precisely because of the transversal character of tourism, one of the first difficulties that arise at the moment of outlining an effective policy and a tourism development plan is represented by the need (better, the impossibility) to fully satisfy all the stakeholders involved. The private sector; the public sector; the nongovernmental organisations and the population may bring different points of view on the policy that should be adopted, and sometimes these points of view are incompatible among them (Cooper et al., 1998: 233). Most of the times, each of these actors has different expectations related to tourism development: some, economic, in the short term; others, purely cultural, and so on.

About the positive impact of tourism development and its relation to heritage, C. Costa (1996) states that tourism is compatible with the development and promotion of heritage resources of the receptor areas, and that the two areas (tourism and heritage) are up strongly interconnected, and their individual success depends on the quality of their relationships. On the other hand, a study published by the World Tourism Organisation (1980) on the basis of the analyses of 1619 tourism plans collected worldwide showed that tourist activity, at least until the decade of '80, was not responsible for the consolidation of local resources, but for its degradation, destruction and even irrational consumption. Both statements can be considered true, being underlying a strong dichotomy: the opportunity and the threat that the tourist activity represents at the same time, to the resources of a destination.

Already the Cultural Tourism Charter prepared by ICOMOS (1999) and endorsed by 17 organisations, including the WTO, recognises the benefits of cultural tourism, as well as the various threats associated with tourism development. Among the latter, the overhead of visitors, an undesirable situation, but that is already a reality for several destinations, and for which it is recommended a closer cooperation between the bodies representing tourism and heritage protection and management, in order to obtain the integration of cultural values in social and economic objectives of the State, regional and local resources planning (Lopes, 2000). An integrated tourism development strategy based on the valuation of cultural heritage of the destination aims, however, to ensure advantages at various levels, in the socio-economic and cultural development.

Among the first benefits of the implementation of policies for development and promotion of cultural resources for tourism purposes, is the regeneration and self-sustainability of the cultural public resource, as demonstrated in the study about urban regeneration through tourism, by Ferreira (2003). With regard to urban renewal linked to the enhancement of cultural heritage - particularly archaeological - and tourism, is useful to mention the positive achievements of the project to open the "Trajan's Markets" (II century) in the centre of Rome: according to Quattrocchi (2001), the constant flow of visitors to the ancient *Via Biberatica*, after several actions for the preservation and adaptation, permitted the reclassification of the area and encouraged further action for the conservation of the archaeological and other cultural heritage resources for tourist and for the community (Quattrocchi, 2001: 17).

On the other hand, the economic impacts are those that attract wide attention and that are perceived as the most positive. There is an extensive literature on the multiplying effects generated by tourism in a receptor economy (Cooper et al., 1998), which has its clearest manifestation on the local scale (Cupeto, 2003). It is widely demonstrated the link between tourism development and job creation as well as the revival of handicrafts and other activities of the traditional economy (P. Mason, 2003). In the latter context, exists a very strong reciprocity, since studies demonstrate the role of craft product in tourism development: after the analysis of the case of China, for example, Toops (1993) affirms that it is possible to recognise the government's commitment to produce more different and ethnically distinctive articles as part of development policies, exploring new industrial and crafts markets clearly created by tourism. Finally, souvenirs and crafts can also be transformed into highly diversified "tourist art". With his study, Cohen (1993) reports a good example to illustrate the process of transformation of a single article in a piece of highly diversified tourist art, analysing the case of production of *Dan Kwien* tableware, in Thailand, as a direct result of the presence of foreigners/tourists, representing the external market and which, in this case, are acting as the main initiators of innovation and diversification.

According to Ashworth and Tunbridge (2000: 9) , there are two opposite types of approaches with regard to the economic justification for the tourist enhancement of cultural heritage. According to the first approach, that can be defined as "ethics", is not necessary to have economic reasons for the preservation of cultural heritage; instead, according to the second approach, more "pragmatic", the economic benefit that comes from preservation and promotion of heritage represents a major, if not the only reason for the valuation of available resources. The same authors argue that both approaches (the socio-cultural and economic) can be considered plausible: the isolation of the resources from the tourist pressure can be considered an acceptable policy, but it is also necessary to consider, on the other hand, the existence of cases of success in that heritage that has become an economic resource and its exploitation represents a valuable contribution to the solution of socio-economic problems at the local level.

Anyway, regarding the socio-economic positive impacts of tourist activity, many authors are critic, and from many points of view, Namely regarding the job creation, (Cooper et al., 1998) is deeply sceptical: he highlights that the direct effect of tourism tends to generate - in the short term - a little wide occupational pyramid, resulting in the creation of jobs subject to the lack of possibility to advance in their careers, particularly in sectors such as restaurants and hotels. These latter sectors, more than others, are often characterized by a low skill level manpower that reflects dramatically on the quality of the offered service (Cooper et al., 1998).

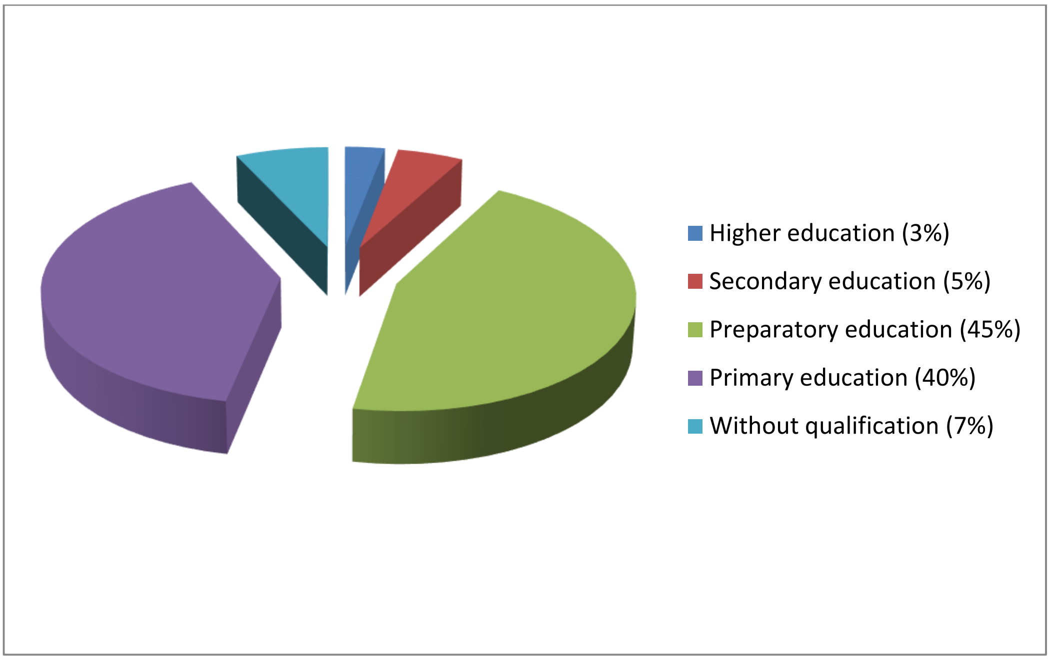

Figure 2.2: Levels of qualification of staff employed in tourism

Source: Adapted from Cooper et al. (1998: 237)

However, the same author admits that this kind of constraints do not exist in other sectors involved in tourism development, because they require a higher degree of expertise and they permit advances in professional careers.

It seems correct to state that in this respect, the tourist valuation of the heritage can tend to minimize this trend described by Cooper et al. (1998). In the specific area of the archaeological heritage, Portugal is an example for the creation of companies linked to cultural heritage and its enhancement: according to the "Directory of Companies and Professionals of Archaeology", proposed by the Almada Center of Archaeology (CAA), currently exist in Portugal more than 955 companies involved not only in archaeological field work but also, and increasingly in projects of enhancement, management and musealisation of cultural heritage, as well as cultural tourism (Raposo, 2005). These have to be added to the large number of Small and Medium Business that characterizes the tourism industry, responsible for much of the economic output and employment, particularly at local level (Buhalis & Peters, 2006).

Still about the negative impacts of tourism, Cooper et al. (1998) claim that one of the most serious adverse effects is the “migration” of skilled manpower from other sectors in favour of tourism. In this case, the weaker economic activities or those which are not significantly related to tourism resent this negative effect by losing work units. A similar effect, mentioned by the same authors, is the “displacement”, that is, the replacement of an expense for another, in favour of development of tourism (Cooper et al., 1998). Also in this case, the tourism industry will develop at the expense of other economic activities.

The enhancement of cultural heritage for tourism purposes may also represent an instrument supporting an increase in self-esteem of local communities based on a deeper historical knowledge and awareness. According to Lucrezia Ungaro (2010: 3) it is important to consider the ability of the heritage managers to start processes of identification, enculturation and education within the different publics through the appropriation of the real meaning of the cultural heritage. To do this, one has to pass from the "'information passively received" to "knowledge" promoting the solid awareness that heritage is part of the personal history and not “only” of that universal (Lucrezia Ungaro, 2010: 3). This process could also reverse the trend according to which tourism can be detrimental to the socio-cultural context in host populations. We will develop this aspect in the following section.

Other negative effects of tourism activity on a destination, namely on the natural environment, are pointed out by Edward Inskeep (1991): the water and air pollution as well as noise pollution are factors of remarkable alteration of ecological balances. With regard to cultural heritage, the same author cites physical damages to historical sites and places of architectural interest, due to tourists’ presence and consequent physical pressure.

2.5.2 Social impact of tourism

To analyse the social implication of tourism activity in the hosting communities, it is important to point out the definition of *community*. The German sociologist Tönnies (1977) differentiates the concept of “community” (*Gemeinschaft*) from the concept of “society” (*Gesellschaft*). In his work, *Gemeinschaft und Gesellschaft*, also mentioned by Weber (2012: 19), Tönnies (1977) defines the *community* as an absolute unit where there is an indistinctive and compact relationship between members: the perfect form of community is the family, for example, but it might also be a village or an extensively small town. In this sense, more recently, Bauman (2001) alerted about the current social need for a recovery of the sense of community.

On the other hand, for Tönnies (1977) “Society”, or *Gesellschaft*, refers to a group of individuals who, while living peacefully, are fundamentally separated. As result of this theoretical separation, we can conclude that one can take into account two different kind of social impacts: on community and on society. In this study we will take into account both, as complementary phenomena which could be managed.

In this subsection we approach the local communities' point of view. Tourism and its wider institutional networks operate an asymmetric relation of power, imposing touristic aesthetics and underlying values to the selection and interpretation of various cultural resources (Nash, 1989). For instance, tourism typically creates its own forms and types of landscape, often revolutionising the spatial and demographic realities of a place. Accordingly, tourism has transformed traditionally marginal spaces like mountains, shores or country sides into tourist visited landscapes (Roger, 1997). At the same time, particular elements, practices or spaces essential to a community's social life may be ignored by tourists when irrelevant or untranslatable in terms of their aesthetics and ways to understand the world. In these cases, central cultural resources remain anaesthetic and invisible to the touristic mind because they do not correspond to any meaningful category (Bruner, 2004). Sometimes tourists aim to reduce this asymmetric relation of power by learning foreign languages and engaging with everyday life practices of host communities.

It is clear the approach of Brito and Silva (2005: 12), which state that *the cultural identity of a people (...) was being perverted and contaminated by the invasion, unplanned and disorganised, of those who market and consume the difference and authenticity*. Although the latter statement appears somewhat extreme and slightly catastrophic, it certainly highlights the importance and needs of tourism development planning and its management, to avoid or, at least, minimize, any damage not just environmental but also socio-cultural. Still, in the field of negative social effects of tourism development, Cooper et al. (1998) warn about the possible increase in criminal activities and prostitution (the latter reflecting negatively also on public health, due to sexually transmitted diseases).

Kirshenblatt-Gimblett (1998) talks about the process of *recontextualisation* and the process of *resignification* of culture and cultural resources mobilised for tourism, which may have positive or negative reflections on host communities. The introduction of tourists often enlarges and "transnationalises" the social spaces of host communities, and doing so, particular elements, social practices or spaces originally without any considered intrinsic relevance for a community's social life may be highly relevant to the tourist gaze. In such contexts, they can be elevated as means for these communities to exchange with the world outside and as a symbolic resource mobilised to define and delimit forms of local and social identity (Lash & Urry, 1994).

On the other hand, where communities recognise particular elements, spaces or practices as 'sacred', the "recontextualisation" and "resignification" of these elements by tourism often generate perceptions of tourism development as a form of aggression (Whittaker, 1994). In such conflicting contexts, tourism not only challenges recognised formulations, categories and boundaries of collective identity, but also relocates the processes of formulating and constructing identity into the new social spaces created by tourism (M. Picard, 1992).

2.5.3 Culture and tourism in the new paradigms of planning and development

Both culture and tourism are key components of development; indeed, in the context of a well-travelled world it is difficult not to consider one without the other. While there is clearly a role for culture and tourism to be part of development in an economic sense, their roles extend beyond this as integral parts of human development whereby social well-being and basic human freedoms and rights are exemplified and enriched by travel and cultural exchange (UNESCO, 2006). This new approach is reflected in the policy of territorial planning and development: stakeholders are moving towards a different approach regarding the tourism development, which is today considered as integrated in broader development plans, based on sustainability (Rauschelbach, Schäfer, & Steck, 2002). As mentioned by UNESCO (2006), there is a growing network of stakeholders involved in tourism development including local, national and international organisations eager to assist in monitoring and ameliorating any detrimental impact on culture and also in mobilising tourism as a force for sustaining and developing culture and economy.

Tourism operates at different levels and displays a number of paradoxes and tensions in the way it is organised, as showed by a deep reflection of UNESCO (2006): at one level tourism is a highly structured and globally inter-connected industry, by operating in a globalised world of flows of transnational capital, multi-national organisations, and liberal movements of people, and ideas (M.F. Lanfant, Allcock, & Bruner, 1995).

On the other hand, despite the apparent 'de-territorialisation' that would seem to underpin international tourism, it is an industry built around the concept of the *nation-state*, each with their own institutions and political systems, economic needs and social/cultural capital, and all essentially competing with one another for the wealth and status that tourism can create: tourism is heavily influenced by the public sector, particularly in the provision of basic infrastructures (energy, roads, runways, water supply etc.) and in the promotion of strong national imagery to attract both tourists and tourism developers, but at the same time tourism sector usually consists of a multitude of fragmented small and medium sized, privately owned and operated businesses, which can be difficult to co-ordinate and legislate for (UNESCO, 2006).

Arguably, the greatest paradox of tourism is centred upon its capacity to generate so many benefits and yet, at the same time, create pressures and problems, as we see in this chapter, subsection 4.1. This is a constant tension across all parts of the world and communities that are touched by tourism and authors like G. Miller and Twining-Ward (2005) make a deep reflection on the monitoring of tourist activity's effects on a destination in the context of sustainable development. The issues involved are often highly complex and sensitive, particularly when dealing with aspects of 'culture' where meanings and values are often problematic to assess and are frequently contested (Clifford, 1987; Cohen, 1993; Saïd, 1978).

In this sense, development policies can be viewed also as a form of *cultural creativity*, since creativity, according with UNESCO (2006) exhibits itself in an artistic and intellectual sense, a technological sense and in an institutional or governmental sense. As a process it is essential for all societies as they navigate themselves through the complexities of modernisation and 'globalisation' (UNESCO, 2000a), and this is particularly the case of tourism development which requires innovative 'products', developed in ways which do not compromise the cultural integrity of the host communities and which maximise social, economic and environmental benefits. Harnessing the cultural creativity of communities is a significant strategy in encouraging greater participation in the tourism development process and can assist in spreading the benefits of tourism throughout society.

The inter-relationship between tourism and culture has become a focal point for policy at regional, national and international level. In policy and planning terms much has been done to protect culture, heritage resources and related environments from the excesses of unplanned and uncoordinated tourism development (Robinson & Boniface, 1999). In this context, P. Boniface (1995: 3) clearly defends that "trying to apply methods from a different age is unlikely to be successful in our times. Approaches such as 'green' and 'eco' tourism, founded on precepts of being gentle to people and places, are fine, but on their own, and without their being given contemporary interpretation and application, such endeavours cannot hope to meet cultural tourism needs and demands on the scale and complexity of the present day”.

In a process of sustainable development, on the one hand, it is possible to contribute to the formation of a correct transnational, national and local identity through heritage enhancement (Lucrezia Ungaro, 2010: 3). On the other hands, tourism can represent a vehicle for intercultural dialogue and cross-cultural understanding (UNESCO, 2006): this is the main subject on which the present study will be based, and moreover it will be considered if this issue is taking into account or not when they talk about quality in tourism, better, cultural heritage management and tourist enhancement. The aim of UNESCO’s “Tourism, culture and Development” agenda is to contribute to the creation of a discerning type of tourism that recognises the principles of cultural diversity, the preservation of cultural and natural resources, their mobilisation for sustainable development and poverty alleviation, and the expression of socially differentiated cultural identities. For instance, UNESCO’ s approach to tourism development is framed by United Nation’s aim to eradicate poverty as defined by in the Millennium Declaration (United-Nations, 2000).

There is a series of best practices collected by the United Nations at the time of the Istanbul conference on "Human Development" in 1996 (B. Pereira & Belém, 2004), that is, a collection of examples of successfully implemented strategies to achieve a sustainable process of development. All these models are based on fundamental principles such as: partnership, impacts monitoring, and sustainability. And also: communities’ empowerment, public participation, transparency, trust and openness, strategic planning, innovative leadership for change, sharing knowledge and know-how (B. Pereira & Belém, 2004). The tourism development policies, therefore, should imply a series of considerations concerning the opinion of the population regarding the process of development itself, community expectations, resources and values that the people possibly want to preserve from the "tourist contamination", the concrete benefits that tourist activity will bring to the community and how, the physical and social carrying capacity of the destination, and so on. A low carrying capacity, for example, may lead to the decision to discourage tourism activity in a particular area (Cooper et al., 1998).

Still, UNESCO (2006: 16) highlights four key aspects of the debates and discussions surrounding tourism, culture and development. First, the mobilisation of culture (and the closely related concept of heritage) for tourism and development; second, the problems and opportunities relating to using cultural tourism as a focus and mechanism for economic development; third, the potential and the realities of cultural tourism as a form of inter-cultural dialogue and exchange and, fourthly, the role of cultural tourism in the agendas of environmental protection and biodiversity. In this sense, it is necessary to emphasize that recently we assist to a gradual but deep paradigmatic change of tourist activity, on both the supply and demand side: from “3S tourism" (Sun, Sand and Sea) to a more articulate, complex and mature "3L tourism": Leisure, Learning and Landscape (Carbone, 2011a: 457). And it is more and more clear the role of tourism in the process of social development: tourism in particular is a tangible way to make intercultural dialogue happen; as a way to create spaces in which different people interact, in which they make themselves visible and accessible to the “other” (Van den Berghe, 1980). Moreover this concept will be approached again as fundamental for our theoretical contribution.

2.6 Destination’s branding, heritage and authenticity: the role of the “destination’s ambassador”

Tourism represents an encounter, between the visitors and the hosting population. Destination development policies should take into account this important aspect of tourism phenomena: in these terms even mass tourism has important and forgotten cultural elements. The first encounter with another culture is most likely to be through the food in the menu and the language of the waiter (P. Boniface & Fowler, 1993; UNESCO, 2006), which in that moment represents the *occasional ambassador of a destination* (European-Commission, 2000b: 11). From the point of view of tourism planning and development, thus, the cultural level and the self-esteem of local communities is particularly important to guarantee a good touristic experience, but also (and above all) to guarantee more opportunities for cultural interchange between visitors and hosting population. The attention on the issue of the “destination’s ambassador”, by the local stakeholder, represents one of the first steps to bridge the “communities benefits” and the “society benefits” of a tourism activity based on culture.

In this way, it becomes possible the meeting between different cultures in what P. Boniface and Fowler (1993) call "global village". UNESCO also adopts this kind of approach as a key factor of success in tourism policy, overall in fragile destination like Cambodia, where, namely, primary school teachers are involved to allow the population to reconnect to the history of the stones and empower them to tell their own stories

(UNESCO, 2006: 67). Only in some cases it is possible to find systematic information on cultural heritage at the local level, usually collected by people or organisations (often NGOs) with specific interests and skills, while in most cases the communities are not even made aware, not recognise their own heritage as something important and unique only because it belongs to their day-to-day (European-Commission, 2002).

The tourism development policies should have the aim to satisfy visitors, but also - and above all - to guarantee a socio-cultural growth to local population, considering the hosting community - albeit with different levels of involvement - as the principal ambassadors of the destination. To achieve these two results (visitors' satisfaction and sociocultural growth of local population) communication is a fundamental aspect: resources have to be interpreted and explained to the tourists, as well as to population, in such a "tourist experience of day-by-day life", as Melotti (2008: 7), reporting the experience of the fruition of archaeological rests in the Athens subway.

In this regards, Cooper et al. (1998) suggest some communication tools:

- Reception facilities;
- Tourist Information Centre;
- Advertising material in paper;
- Dissemination in the mass media;
- Routes and self-guided trails;
- Professional guides;
- Outdoor.

Furthermore one can add:
- Activities of animation, in places of heritage value;
- Organisation of cultural events, located close to cultural attractions.

Such measures can be considered as a possibility to gain attention by the visitor, and can be used to support more formal educational programs directed to the population (Cooper et al., 1998). As UNESCO (2006) suggests, in these terms even mass tourism has important and forgotten cultural elements. Our first encounter with another culture is most likely to be through the food in the menu (Sims, 2009) and the language of the waiter. The latter concept recovers the idea that all the operators of the tourism industry, especially those working in the "front office", as well as the entire local community, they potentially are the ambassadors of the destination. The issue of the enhancement of archaeological and cultural heritage within local population is an added value for the tourism development, conferring authenticity to the destination, through a constant involvement of population.

We chose to explain this idea through the recovery of ancient concepts used by Latin authors and contained in classical literature: the concept of *Urbs* and *Civitas*. We find the distinction between the two concepts in the words of Cicero (first century BC):

> *"quid est enim civitas nisi iure societas civium?"*[3] (Cic. De re publ. 1.49.)

and posteriorly in the sentence of Isidore of Seville (VII century AC):

> *"civitas est hominum multitudo societatis vinculo adunata, dicta a civibus … nam urbs ipsa moenia sunt, civitas autem non saxa, sed habitatores vocantur"*[4] (Etymol. 15.2.1).

We found useful refer to this conceptual distinction contained in the classical writings, to report better and more clearly, according to our research, the existing emphasis on the conservation and presentation of local heritage as built heritage, too often ignoring the enhancement of the "alive environment" (the *civitas*) in which this built heritage (the *urbs*) is inserted. Summarizing, one might say that there is a need to focus on the efforts not only on the conservation and presentation of the *Urbs*, but also on the care and enhancement of the *Civitas*.

Generally speaking, this kind of approach reflects also the latest reflections of many scholars, according to which the Human Being has to be considered the nucleus of the touristic phenomenon and experience (Binkhorst, 2008: 45; Binkhorst & Dekker, 2009: 324; Jager, 2009). An integrated approach benefit the destination marketing, if one considers that some destinations have developed a clear, unique positioning by branding the destination experience rather than the physical attributes of their destination, capturing the consumer's attention with a more compelling and urgent reason to visit (Hudson & Ritchie, 2009). Also Ekinci and Hosany (2006) defend the importance of destination personality, demonstrating that the perception of destination personality in

[3] What is the "civitas" if not the free association of citizens in common laws?

[4] "Civitas" is a multitude of men united by a bond of congregation; it takes its name from the citizens, namely, by the inhabitants of the city. Actually, the walls are the "urbs," while the "civitas" do not indicate the "stones", but the inhabitants.

visitors is 3-dimensional: sincerity, excitement, and conviviality. One can conclude that destination personality has positive impact on perceived destination image and intention to recommend. In particular, the conviviality dimension moderated the impact of cognitive image on tourists' intention to recommend (Ekinci & Hosany, 2006).

These ideas above represent the motivations and the pillars of our entire work: it reinforces the idea of the needs (and of the benefits) of more focus towards the education and the involvement of the local population through the enhancement of cultural heritage. It brings a double benefit: the socio-cultural development of the local population, and at the same time, sets the presuppositions for a tourist experience that has high levels of quality and excellence, helping for a good positioning of a destination facing the increasing global competitiveness. Above all, the conditions mentioned, represent the ideal platform for intercultural dialogue towards sustainable development.

Conclusion

The first objective of this chapter is to create a knowledge base through a literature review to delineate the scope of research and highlight the related theories. In the first part of the chapter is amply demonstrated that the value of cultural heritage (intangible and tangible, namely archaeological heritage) is already addressed by literature and by supranational organisations such as UNESCO and UNWTO, as a driver of socio-cultural and economic development.

In a general way, there is a consensus in the literature about the fact that the development based on enhancement of cultural heritage, has to be linked with tourism activity and the mobilisation of cultural heritage for tourism. In this regard, we emphasized, in section 2.2, the existing theoretical construct about this topic: the alliance between tourism and heritage. At this point of the work, to make more effective the approach we felt the need to step back and define what is cultural tourism, what is the heritage tourism and consequently what is archaeological tourism (which will be the more specific field of study). The latter concept was the easiest to define, aiming to promote public interest in archaeology and conservation of historical heritage, as a specific niche of heritage tourism. But it was not equally easy to distinguish the first two concepts: after the review, it seems quite safe to conclude that one of the most important difference between cultural and heritage tourism is that, while cultural tourism can also cover contemporary cultural events (art expositions and festivals, for example), the same cannot be said for heritage tourism, which by definition is linked to the appreciation of resources related to the past. In this sense, heritage tourism could be considered as a segment of cultural tourism, and archaeological tourism as a segment of heritage tourism. It is important to notice that, in the present work, archaeological heritage and tourism are particularly analysed: this interest is related to the general purpose of this study - to find relationship between the cultural heritage and the socio-cultural development of communities – as archaeological heritage is seen as one of the most representative remains of the past. The literature review also revealed that this field of research is not particularly explored.

Another important theoretical conclusion derived from the reflection according to which, in evaluating the tourism potential of a territory, not only the cultural asset itself must be considered as a primary tourist resource, but also the archaeological knowledge produced by researchers, as well as the quality of the edition and interpretation of the archaeological research. This reflection, reiterates the importance of an integrated and multidisciplinary approach to tourist enhancement of a territory. Especially in the case of the "Heritage tourism" and "Archaeological tourism" destinations, the management and development process should begin with (and being integrated in) the archaeological research itself.

This statement introduces to further considerations about policies for tourism development and related impacts on destination (from a socioeconomic and cultural point of view) (section 2.3): again, there seems to be a certain consensus in the literature about the beneficial effects of the alliance between cultural heritage and tourism. However, the management processes that lead to such benefits are not particularly clear: above all, from a sociocultural point of view, the conviction that the tourist enhancement of cultural, namely archaeological heritage leads to benefits for the local population seems to have in most cases a strong component of intuitiveness. We agree with this intuition, but already in the next chapter we will further develop this argument in order to fill what appears to be a gap in the theoretical construction about heritage management policies and enhancement, towards sustainable development and intercultural dialogue.

Finally, the last section of the chapter approaches the issue of how the paradigmatic change in tourist activity could represent an opportunity: the strategy in tourism development planning and heritage management have to address not only the creation of a qualitatively satisfactory experience for visitors, but must provide assumedly a vehicle for cultural growth for the resident population. In this sense, the opportunity of a qualitatively improved fruition of heritage places (also due its tourist enhancement), such as archaeological sites, acquires a particular importance in the context of formal and non-formal education, awareness, and strengthening of local identity. In this sense, the scientific literature does not seem to respond fully to the appeals and the recommendations of international organisations, which defend the preservation and the tourist enhancement of cultural heritage with social purpose. Large share of attention seem to be directed to the issue of preservation and promotion of the resources itself. In other words, using the Latin authors, and the concepts of classical literature, we might say that the great part of the effort is concentrated on the conservation and presentation of the *Urbs*, and less on *Civitas*, when we speak of tourist enhancement of heritage. Therefore it is important to note that the enhancement of cultural heritage must take place not only through the preservation, presentation and interpretation of buildings, ancient structures and other remains (tangible and intangible), but also by its contextualisation and by the involvement of local people. This practice makes even more effective the efforts to make tourism a propitiatory of the socio-cultural development, both for tourists and residents.

Finally, this practice contributes for the creation of good ambassadors of the destination. The latter reflections lead us to the analysis of distant but, at the same time, complementary areas, such as management, on the one hand and sociology on the other, namely to the very current issue of intercultural dialogue. All these aspects will be the object of analysis of the next chapter.

As result of what mentioned above, it is possible to affirm that the tourism development influences entirely and critically, positively and negatively, the three principal areas of development of an region (according to the pillars of sustainability): economical, environmental, socio-cultural.

Chapter 3

Cultural Heritage

and Quality Management

Introduction

“Heritage places cannot be protected in isolation or as museum pieces, isolated from natural and man-made disasters or from land-use planning considerations. Nor can they be separated from development activities, isolated from social changes that are occurring, or separated from the concerns of the communities” (UNESCO et al., 2013: 2). This new perception of heritage in territorial contexts inevitably entails the challenge of more complex models of management. Many more stakeholders are involved in heritage management: even in the case of a public place, the site managers will still need to work in accordance with all the stakeholders (public and private) and authorities of the territory.

In the previous chapter it was demonstrated the importance of the enhancement of archaeological heritage and the strategic alliance with tourism, in order to share the historic and cultural contents of this resource. In terms of planning and development, McKercher and du Cross (2002) defend, in fact, the good practice of including tourism development plan in heritage management plans. The ability to be competitive and innovative in this field, as well as the guarantee of a positive impact derived from heritage tourism, requires attention to other factors, such as the environment, the involvement of stakeholders and their cooperation, as well as the question of *quality* (McKercher & du Cross, 2002). In this chapter it will be analysed - from the theoretical point of view - the process that led to the introduction of the ideal of *quality* in the field of heritage management.

So as has been done, in earlier chapters, for the presentation of the models of heritage management, in this chapter, whose main focus is the *quality*, will be presented first and foremost the evolution of the concept (section 3.1):, in order to analyse the evolution and find the point of convergence with the practices of cultural heritage management. To reach this goal it will be also essential to present the path of development of the models for heritage management (section 3.2) and, in parallel, the academic reflections on the value of this resource (and its management) within a tourist destination.

Below (section 3.3) it will be finally presented the current debate on the necessity and the modality of applying the principles of Total Quality Management (TQM) to cultural heritage. Will be also described some of the main projects that demonstrate how vibrant is, nowadays, the debate on quality in the context of cultural heritage. In the section 3.4, it will be presented the only certification system specific to the cultural heritage, officially recognised by UNESCO: the HERITY Global Evaluation System.

Please, note: even if this work focuses on the archaeological heritage, this chapter will refer the issue of *quality* in the management of *cultural* heritage, in a more general way. This is because – up to now - there is no specific effort exclusively targeted to the archaeological heritage. Once it will be framed the concept of "quality applied to cultural heritage", it will finally be selected (for the empirical analysis) cases that, in particular, relate to the archaeological heritage.

3.1 Quality and management: theories and models: an overview

In most of the history of Humanity the production of goods was artisanal: the core of the *craft production*, the common method of manufacture in the pre-industrialized world, was the artisan. The latter had a direct relationship with the customer and identified his needs, then he conceived the product, he produced it, checked it, corrected it, sold it and, later, he repaired the product when necessary. The artisan, then, was the one who realized all the activities in the value chain during the life of the product (Juran, 1999: 2.10; Saraiva & Teixera, 2009: 20). On the producers' side, the market was practically self-regulated, and the codes of conduct and best practices were established by professional corporations (Juran, 1999: 2.10).

This model begins its slow but inexorable change in the XIII century, when the population explosion, the technological progress and the intensification of trade determined (at least in the West) a great boost on production levels, impossible to reach through the work of artisans. This leads to a model of production and market relationships based on the progressive increase in the size of *production units* and the consequent separation of tasks, until the birth of *mass-production* (Saraiva & Teixera, 2009: 20) and the theory of management elaborated by Taylor (1911). The main goal of *Taylorism*, which analysed and synthesized workflows, was the improvement of the economic efficiency, especially labour productivity, and it is important to refer that it was one of the earliest attempts to apply science to the engineering of processes and to management, and even if this theory, in itself, was obsolete by the 1930s, most of its themes are still important elements of industrial engineering and management today. These include, among others: analysis; synthesis; logic; rationality; empiricism; work ethic; efficiency and elimination of waste; standardisation of best practices.

The models, especially after the Second World War, succeeded one another through the work of specialists, who theorized the processes that lead to quality. The concept of quality, reflected by these models, had its own evolution. Juran (1999: 2.1) talks about two main meanings of "Quality", of *critical importance to managing for quality*:

1. "Quality" means those features of products which meet customer needs and thereby provide customer satisfaction.

In this sense, the meaning of quality is oriented to income. The purpose of such higher quality is to provide greater customer satisfaction and, one hopes, to increase income.

However, providing more and/or better quality features usually requires an investment and hence usually involves increases in costs. Higher quality in this senses usually “costs more.”

2. “Quality” means freedom from deficiencies—freedom from errors.

Errors require doing work over again (rework) or that result in field failures, customer dissatisfaction, customer claims, and so on. In this sense, the meaning of quality is oriented to costs, and higher quality usually “costs less.”

3.1.1 The evolution of the concept of Quality

The concept of inspection and test is thousands of years old, as is the concept of measurement: application of statistical methodology to the *quality function* (Juran, 1988: 2.4) is basically a twentieth century phenomenon. According to (Juran, 1988: 2.5) *significant efforts to identify the managerial processes inherent in the quality function did not get under way until the second half of twentieth century*. Indeed, increasingly during those decades, and especially after the Second World War, a series of theorists, consultants and managers focused on the improvement of quality, and on the meaning itself of *quality*. The management focuses on processes, standards, technologies used. The *quality*, at this time, was based on the *inspection* of the physical characteristics of the final product, which was drawn by designers, and the statistical method was one of the tools used for the control by sampling (Saraiva & Teixera, 2009). Already in 40s, Feigenbaum (1945) theorized the *Total Quality Control* (TQC), in which, for the first time, the concepts of *quality* and *totality* are associated. Later, the same author refined his theory reinforces the idea that quality is the result of an effort of all individuals who work in an organisation, not just a group of technicians (Feigenbaum, 1961).

Joseph Moses Juran, on the other hand, was one of the first to reflect about the *cost of poor quality* (Juran, 1951). The "Juran Trilogy” is a cross-functional approach to management, illustrating the quality as composed by three managerial procedures:

1. quality planning;
2. quality control;
3. quality improvement.

Juran theorized the need of change within the company: without change, there will be a constant loss, while, on the contrary, during the change could be an increase in costs, but after improving, margins will be higher and the added costs get recovered (Juran, 1999).

Moreover, as quality is directed to *customer satisfaction*, Juran (1988: 2.2) sets the distinction between the *internal customer* from the external customer of any organisation. If a customer *is someone who is impacted by the product* (Juran, 1988: 2.2), the internal customer is the person (of department) who belong to the organisation and is part of it, *despite the fact that they are not "customers" in the dictionary sense, i.e., they are not "client"* (Juran, 1988: 2.2).

The American consultant William Edwards Deming developed a methodology for continuous improvement based on four stages:

- Plan (P): establish the objectives and processes to deliver results in accordance with customer requirements and the policies of the organisation;
- Do (D): implement and execute processes;
- Check (C): check, monitor and measure;
- Act (A): take actions for continuous improvement.

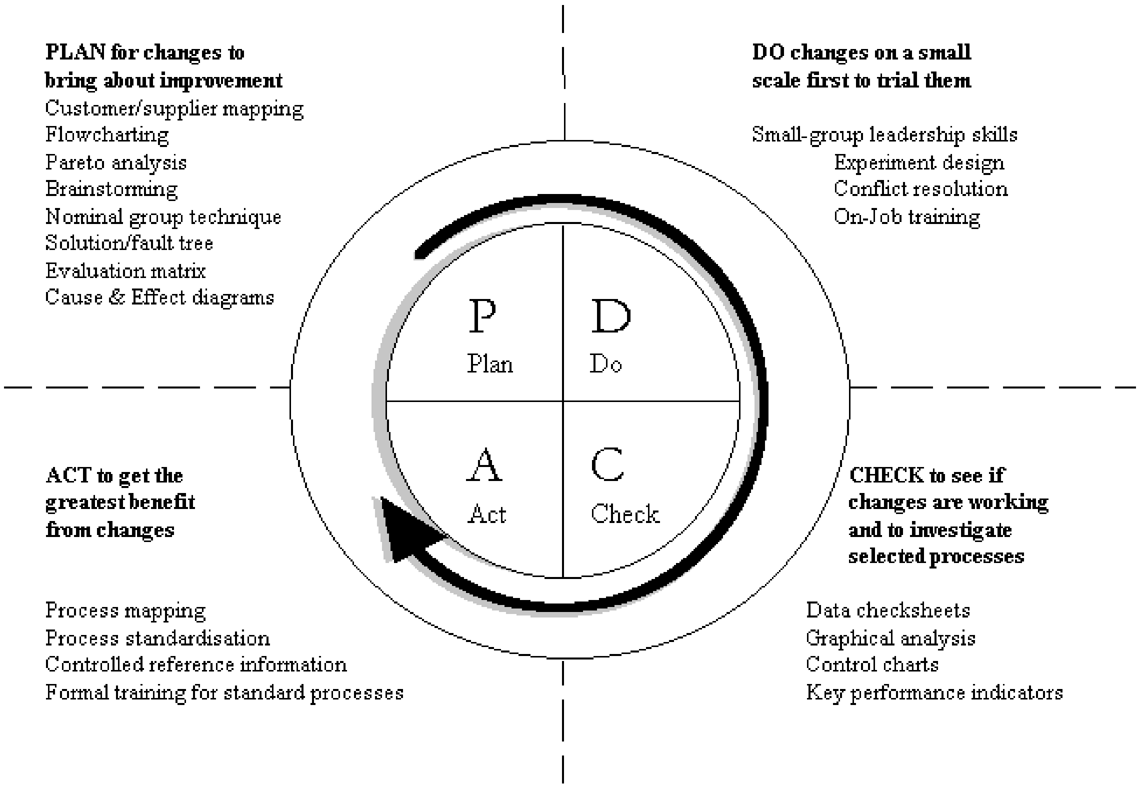

Figure 3.1: The PDCA cycle of Deming. Source: Adapted from Pinto and Soares (2009: 24)

The philosophy of *Deming cycle* (or *PDCA model*) was deeply influenced by the Japanese philosophy of *Kaizen*, a gradual, unending improvement by “doing *little things* better; setting – and achieving – even-higher standards” (Imai, 1986). The PDCA Cycle represents a *learning cycle* to enhance and adjust expectations for the next cycle, repeating the process permanently (Pinto & Soares, 2009: 24).

The concept of total involvement and continuous improvement, as well as more systematic attention to the customer, including through the application of statistical methods for market research (Saraiva & Teixera, 2009: 21), marked a gradual shift of the meaning of quality and of the methods to achieve it. The control of the final product was no longer the best choice for a company: the processes were those that had to be managed through quality, in order to ensure that the best results could be achieved “right the first time”, and they could have “z*ero defects”*, as claimed by Crosby (1979). It led to a new philosophy: the *quality management*.

3.1.2 From Quality Assurance to Quality Management

The term *quality management* has a specific meaning: it does not aim to assure 'good quality' by the more general definition, but rather to ensure that an organisation or product is consistent, according to its

1. quality planning;
2. quality control;
3. quality assurance; and
4. quality improvement (Kenneth, 2005: 41).

The *Quality Assurance* turned in *Total Quality Management* (TQM): it involves all the aspects, moments, sectors of a company, in order to support its efforts to deliver fully satisfactory products to the customer with the minimum economic effort (Calderón Perez & Casas Novas, 2009; Oakland & Sohal, 1996; Saraiva & Teixera, 2009). In this context, a *management system* describes the set of procedures an organisation needs to follow in order to meet its objectives. In a small organisation there may not be an official system, just *our way of doing things*. Often this *protocol* is not written down instead it is in the head of the staff. However, the larger the organisation the more likely it is that there are written instructions about how things are done. This makes sure that nothing is left out and that everyone is clear about who needs to do what, when and how. When an organisation systemizes how it does things, this is known as a management system (www.iso.org).

Moreover, the great projects started in the years '60, '70 and '80, for example for the construction of infrastructures, led to the creation of several quality frameworks: an example is the model developed by Rosenberg and Posner (1979) for the *United States Agency for International Development:* the *Logical Framework Approach* (LFA). It is an analytical tool for objectives-oriented project planning and management, adopted in order to improve the quality of the projects (NORAD, 1999: 7). It is still used today in the design, monitoring and evaluation of international development projects by a large number of bilateral and international development organisations.

The involvement of different industries/companies and interdependent suppliers gave rise to a new *business-to-business* relationship (*B2B*), gave rise to a new necessity, to *ensure quality*: buyers needed framework to recognise reliable suppliers/partners. For this purpose, in 1987 was published the series of standards ISO 9000 (Saraiva &

Teixera, 2009: 21). ISO (International Organisation for Standardisation) is an independent, non-governmental organisation and the world's largest developer of voluntary *International Standards*. International Standards give state of the art specifications for products, services and good practice, helping to make industry more efficient and effective. Developed through global consensus, they help to break down barriers to international trade. On the other hand, this model includes also the process of a certification: as Pinto and Soares (2009: 32) affirm, a certification is the recognition, given by a certification body, that the system implemented complies with the requirements of the standard. As explained in the ISO webpage, a *standard* is a document that provides requirements, specifications, guidelines or characteristics that can be used consistently to ensure that materials, products, processes and services are fit for their purpose (www.iso.org). Among the several standards one can find the ISO 31000 (Risk management), ISO 9000 (Quality management)[5], ISO 26000 (Social responsibility), ISO 14000 (Environmental management); ISO 50001 (Energy management).

As one can see, the concept of quality started gradually to include the concepts of ethics and social responsibility: in a broad sense, sustainability and social responsibility of organisations are directly linked to their competitive factor (Von Mutius, 2005: 156). Businesses increasingly find themselves being assigned new roles and an expanded range of responsibilities, facing the challenge of committing themselves to the community outside the corporation (Von Mutius, 2005: 156). As well as companies have a strategic interest in designing innovative and cooperative relationship with their environments, archaeological heritage managers have the duty to take, as well as the private sector organisations, this responsibility in an ever more consistent way. The management of archaeological knowledge has a particularly important role in this new paradigm of development based on knowledge, because it is now clear that, as Von Mutius (2005: 156) points out, in a net-worked, knowledge-based economy, businesses increasingly depend on the surrounding society, especially on functioning infrastructures, quality research, education facilities and intact natural environment. In global competition these factors can be decisive advantages, and in the future social and ecological dimension values will form part of every business success story (Von Mutius, 2005: 156).

An interesting reflection is made by the international organisation HERITY (2007) about the beneficiaries and the approaches of the different quality management systems: while

[5] Fundamentals and vocabulary (ISO 9000:2005) and Requirements (ISO 9001: 2008).

ISO approach reveals to follow an approach business-to-business (*B2B*), (that is meets the needs of companies to find business partners and suppliers that meet high quality standards), on the other hand TQM instead covers a more general scope. The same authors, however, recognise that ISO system overcomes this restriction with the publication of the standard ISO 9004, edition 2000, which conceptually is placed midway between the ISO and the more traditional model TQM (HERITY, 2007: 3). However, it is worth noting that, in any case, even the approach B2B presents direct and indirect benefits for the final customer.

In the late '80s, and during the following decade, were developed awards recognizing models of excellence in organisations. The *Malcolm Baldrige Award*, which in 2010 changed its name in *Baldrige Performance Excellence Program*, reflecting the evolution of the field of quality from a focus on product, service, and customer quality to a broader, strategic focus on overall organisational quality (Newman, 2010), recognises U.S. organisations in the business, health care, education, and non-profit sectors for performance excellence. The latter concept is defined, according to the official webpage of *Baldrige Performance Excellence Program* (http://www.nist.gov/baldrige/), through the following *Criteria for Performance Excellence:*

1. Leadership
2. Strategic Planning
3. Customer Focus
4. Measurement, Analysis, and Knowledge Management
5. Workforce Focus
6. Operations Focus
7. Results

In Europe it was developed the *EFQM Excellence Award* in order to recognise Europe's best performing organisations, whether private, public or non-profit, according to the following criteria:

1. Adding Value for Customers
2. Creating a Sustainable Future
3. Developing Organisational Capability
4. Harnessing Creativity & Innovation
5. Leading with Vision, Inspiration & Integrity

6. Managing with Agility
7. Succeeding through the Talent of People
8. Sustaining Outstanding Results.

These models, which were originally designed as awards of excellence, quickly became tools to improve global management of organisations (Saraiva & Teixera, 2009: 22).

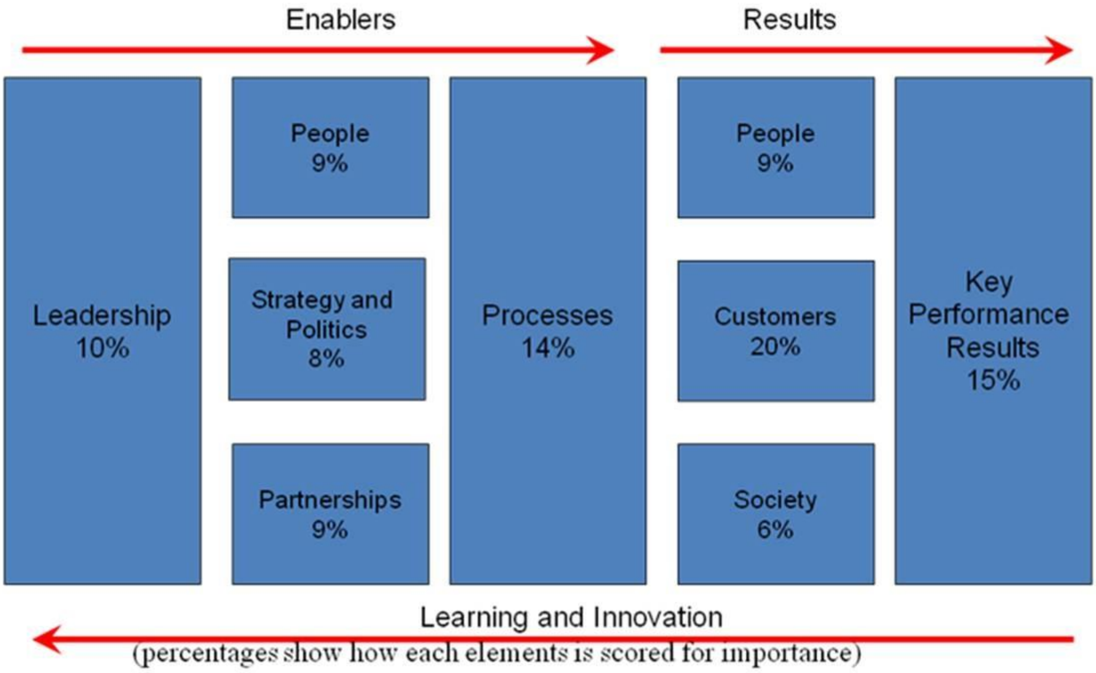

Figure 3.2: The EFQM Excellence Model
Source: EFQM (1999-2003)

Nevertheless, the literature suggests that in the minds of managers of the organisations the concept of quality system is associated with increased "paperwork" and bureaucracy, while the only beneficiary will be the marketing department (Pinto & Soares, 2009: 16). Moreover, specialists in the area of psychology and behaviour, confirm this retraction from those who are - whether intentionally or not - affected by a change in the workplace: for instance, Posen (1999): describe this attitude as a "natural reaction to change," precisely due to the necessity of an increased investment of time and energies, as well as a sort of "clash of values" perceived by the operators, who - in the specific case analysed here - may feel detached from their functions (related to the management and conservation of heritage) all the processes related to quality management. And this is why the whole system is usually perceived by operators as structured only to demonstrate the perfect fulfilment of the requirements of the respective standards, to finally obtain the certification, as alert Pinto and Soares (2009).

One needs also to consider other particular phenomena that can be manifested in the form of behaviour, as a particular openness or resistance to change (“regional traditions” or “entrepreneurial spirit”): in this case, the ability to accept or refuse the added effort required by the application of a quality system, it depends not just on the individual predisposition but also on the regional predominant mentality, that could represent a key element in the regions’ implicit structural capital, and which may be however modelling on the long-term (Karlsson & Martinez, 2005: 283).

It is necessary to clearly define the benefits of quality management systems and carry out awareness campaigns at various levels. Among the others, Pinto and Soares (2009: 16) refer the following benefits:

- Improving the relationship with customers;
- Reduction of nonconforming product;
- Increased employee motivation;
- Lower costs of quality control;
- Improving the organisational environment;
- Improving the organisation's image among stakeholders.

Anyway, the same authors conclude that such a system of quality management could and should exist independently of the will of the organisation to obtain a subsequent certification. A quality management system represents a philosophy that requires the involvement of the entire organisation toward the quality: it is not a subsystem of management, but rather a dynamic system that is based on four main pillars: prevention, objective evidence, "process" approach and systematic approach (Pinto & Soares, 2009: 21-22).

3.2 Cultural Heritage, Management and Quality Management

However, it is appropriate to clarify that there is not a year or a specific publication that marked the beginning of the debate about the quality in heritage management: a long but steady journey has been done since the Athens Conference (1931), which has led to the development of ideas that finally has coincided, from many points of view, with the idea of quality matured in other sectors. The following subsections outline this development.

3.2.1 Paradigms of cultural heritage management: an overview

Cultural heritage management can be described, nowadays, as a global phenomenon, governed by a series of internationally recognised codes and charters which takes systematic care "to maintain the cultural values of cultural heritage assets for enjoyment of present and future generations" (McKercher & du Cross, 2002: 43).

Outlining the historical evolution of this concept, it is to be noted that, until the end of the 19th century, architectural heritage had been a matter of national concern only and most of the laws regarding the protection of historic buildings in Europe date back to that period. Countless association existed in each country, but their scope never went beyond national borders.

Cultural internationalism, as we know it today, was an outcome of the First World War, with the creation of the League of Nations - trying to assure a sense of international stability (Archer, 2001: 14; Bell, 2007; Kawamura, 2000: 135) - and even more of the Second World War, when - as response to the tragic events of the war - was created the United Nations Organisation and established the United Nations Educational, Scientific and Cultural Organisation (UNESCO), with the main purpose to promote peace through science, education and culture .

The Athens Conference (1931) on restoration of historic buildings was organised by the International Museums Office, and the Athens Charter, drafted by Le Corbusier at the fourth Assembly of the International congresses on Modern Architecture (1933) was published anonymously in Paris in 1941 both represent a major step in the evolution of ideas because they reflect a growing consciousness among specialists all over the world, and introduced for the first time in history the concept of international heritage.
In 1957, in Paris, the First Congress of Architects and Specialists of Historic Buildings recommended that the countries which still lack a central organisation for the protection of historic buildings provide for the establishment of such an authority and, in the name of UNESCO, that all member states of UNESCO join the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM) based in Rome.

Based on the revolutionary guidelines of Athens Charter and the new paradigm of internationalisation and sharing of the awareness about the preservation of heritage, the Second Congress of Architects and Specialists of Historic Buildings, held in Venice in 1964, has produced the International Restoration Charter, better known as Venice

Charter (ICOMOS, 1964). The document contained in itself the summary of all the small but crucial changes in the last thirty years in the paradigm of cultural heritage management, stating *it is essential that the principles guiding the preservation and restoration of ancient buildings should be agreed and be laid down on an international basis, with each country being responsible for applying the plan within the framework of its own traditions and cultures.*

It is therefore emphasized the notion that the protection of heritage is a common interest at the international level, and for this reason, the orientations for the preservation of cultural heritage they become supranational. At the same time, it is clarified that the concrete actions of preservation and conservation, however, they become exclusive responsibility of different countries, also in respect of the culture and *modus operandi* of each. It is important to notice that, as stated in Article 1 of Venice Charter (ICOMOS, 1964), *the concept of historic monument embraces not only the single architectural work but also the urban or rural setting in which is found the evidence of a particular civilisation, a significant development or historic event.* And it continues by stating that *this applies not only to great works of art but also to more modest works of the past which have acquired cultural significance with the passing time.*

The Venice Charter (ICOMOS, 1964) contains thirteen resolutions about heritage preservation and conservation, and it is interesting to notice that, in the Article 5, it states *the conservation of monuments is always facilitated by making use of them for some socially useful purpose*: this issue will be approached several times in the years ahead, as particularly critical, and it will be also subject of a more detailed discussion in the present work. In the same congress - Second Congress of Architects and Specialists of Historic Buildings – was created the International Council on Monuments and Sites (ICOMOS), an international non-governmental organisation for the conservation and protection of cultural heritage places (buildings, historic cities, cultural landscapes and archaeological sites). It is dedicated to promoting the application of theory, methodology, and scientific techniques to the conservation of the architectural and archaeological heritage, on the basis of the principles enshrined in the Venice Charter. More specifically with regard to the archaeological heritage and its management, ICOMOS has at its disposal a specific committee: the International Scientific Committee on Archaeological Heritage Management (ICAHM) advises ICOMOS and the World Heritage Committee on matters that pertain to all aspects of the management of archaeological sites and landscapes. These include formulating and propagating standards and best practices for both archaeological research and cultural resource management.

Since then, ICOMOS and UNESCO have drawn more and more specific documents that represent the evolution of the concept and scope of cultural heritage management. Among them: the Florence Charter on Historic Gardens (ICOMOS, 1981); the Charter for the Conservation of Historic Towns and Urban Areas, also known as Washington Charter (ICOMOS, 1987); the Charter of Protection and Management of the Archaeological Heritage (ICOMOS, 1990) and – very important in the particularly context of the present study – the International Cultural Tourism Charter (ICOMOS, 1999). Important also to highlight the Convention For The Safeguarding Of The Intangible Cultural Heritage by UNESCO (2003), because of its importance in formally recognise the needs to include the intangible cultural heritage into the scope of cultural heritage management. Finally, an earlier ICOMOS charters (ICOMOS, 2008) stress the importance of public communication as an essential part of the larger conservation process (variously describing it as “dissemination,” “popularisation,” “presentation,” and “interpretation”). According with this document “every act of heritage conservation is by its nature a communicative act” (ICOMOS, 2008).

The overall objective of these documents is to internationally outline the procedure for the conservation and enhancement of cultural heritage in its most varied manifestations. And this occurs for both the tangible heritage as the intangible on varying scale and with varying complexity, but generally within a five-phase framework:

1. Inventory;
2. Legislated protection;
3. Asset management professionalisation;
4. Stakeholders identification and consultation and
5. Situation review (McKercher & du Cross, 2002).

3.2.2 Heritage Management today

There are several socio-economic and cultural aspects that, nowadays, one can recognise as linked with heritage and its management, as shown in the following figure.

Figure 3.3: Multiple aspects associated to heritage and its management, nowadays

Source: adapted from UNESCO et al. (2013)

Heritage managers need to be able to consider in an integrated manner all aspects relating to heritage. Their task, today, is to identify and act on strategic opportunities to develop the sites with high level of quality (Drummond & Yeoman, 2001; Leask & Yeoman, 1999) and working in partnership with key local and regional stakeholders (Pedersen, 2002: 24).

Nonetheless, it seems that organisations that deal with the management of archaeological and, in general, cultural heritage show the same phenomena that Drucker (Drucker, 2001) described for non-profits organisations. He affirms that "they were proud in being freed from the taints of *commercialism* and be above such *sordid factors* such as financial results, and for this reasons they rejected the concept of *management* (…) as closely associated to profit sector" (Drucker, 2001: 40-41). This phenomenon has similarities with some public institutions responsible for heritage management, who reject the traditional concept of *management* in the field of cultural heritage. Drucker concludes his reflexion about non-profits organisation by stating that they finally understood that "they need *management* even more than the business sector, precisely because they do not have the *discipline of financial results*: they understood that good intentions are not a substitute for *organisation, leadership*, *responsibility*, *performances* and *results*. All these factors require *management*, which - in turn - starts with the *mission*, which allows organisations focus on *action*, defining specific *strategies* to achieve the crucial *goals*. It creates a disciplined organisation, and it prevents, by itself, most degenerative disease for organisations: the fragmentation of its resources, always limited in things that are *interesting* and that *seem profitable* instead of focusing on a small number of productive efforts” (Drucker, 2001: 41).

3.2.3 Heritage Management and Quality

The term *management* is more and more often accompanied by the word quality. If it is true for industry and services’ sector, in general - as was presented in the previous section - as regards the management of the heritage, some scholars and consultants talk about *the cultural exception* (HERITY, 2007: 9) and the last two decades has seen the birth of the first serious approaches through the prism of the most recent trends and philosophies about quality. A great impulse was given by the European Commission, which has invested significantly in preparation of recommendations for local stakeholders and has already made great efforts to raise awareness and promote a culture of quality: the *Integrated quality management (IQM) of urban tourist destinations* (European-Commission, 2000a) is one of the publications that aims to reach this goal, in order to achieve the general objectives of the European Union, namely the promotion of the European citizen’s interests, growth and employment, regional development, the management of cultural and natural heritage as well as the reinforcement of a European identity. Although this publication contains "only" recommendations and suggestions for stakeholders, the formula "integrated quality management" (European-Commission, 2000a: 21) began to appear, and marks one of the milestones for the growing of the debate.

The intensification of the debate on this issue - on the academic level and managerial - is demonstrated by the growing number of academic works of scholars as Go and Govers (2000) or the annual international meeting, some of them most focusing the heritage for tourism, like the MEDITERRANEAN ARCHAEOLOGICAL TOURISM EXPOHOSITION, at Paestum (Salerno, Italy); the WTE – Word tourism Expo[6], that focuses on heritage management and its tourist enhancement in the places that are part of the UNESCO World Heritage List; and other that focus more the management and conservation, like “The Best in Heritage”, launched in 2003 by the *European Heritage*

[6] In the exploratory stage of the present research, the author participated at the third edition of this meeting (Assisi, Italy).

Association (Zagreb, Croatia) an annual presentation of awarded museum, heritage, and conservation projects and institutions (at national and international level), where managers share valuable information and outlining best practices in asset management[7]; and the HERITY International Congress, that will be analysed hereafter. In this sense, authors like Manacorda (2007: 90) points out the necessity of sharing internationally standards and methods of interdisciplinary intervention and management.

3.2.4 The quality of heritage management for tourism

Several authors from the area of tourism were concerned to be seized of quality management in cultural attractions, such as P. Boniface (1995), Johns (1999), Leask and Yeoman (1999), Drummond and Yeoman (2001), (Laws, 2001), (Natali, 2005) (Lindblom, 2011), Many authors In the particular field of tourism mobilisation of cultural heritage, one cannot forget that exist a difference between heritage "resource" and "tourist attraction". This conceptual approach is particularly important towards a more competitive practice of heritage management for tourism. The relationship between tourism and heritage is a fertile field of study, and a large literature exists about this subject. According with Lumsdon (1997) it is possible to distinguish three different element conferring competitiveness to a tourist destination: natural resources, climate and culture. International and domestic travels are increasingly motivated by the will to experience cultural heritage, which has become the essence of tourism in many tourist destinations worldwide (Dallen, 1996). The increased demand for cultural experiences and the mobilisation of cultural heritage to attract tourists (Bowitz & Ibenholt, 2009) has made cultural heritage one of the most powerful factors of competitiveness for tourist destinations. Then, the importance focuses on the management and enhancement of cultural heritage as tourist attraction. But in order to achieve the best results from this effort, it is necessary to be fully aware of what constitutes an attraction, since we start from the notion that heritage, itself, does not represent a tourist attraction, but a resource of the territory with the inherent potential to become a tourist attraction (Pearce, 1991).

The theorisation about this issue provides a valuable theoretical tool to support the management of cultural resources for tourism, and the use of this knowledge by the stakeholders interested in heritage management and sustainable cultural heritage

---

[7] Organisers of “The Best in Heritage” will just let them present themselves and will neither evaluate nor give awards. The aim is to present quality projects in anything concerning the care and communication of heritage. And the development of this new paradigm: the systematic concern for the "level of quality" heritage management.

tourism development (McKercher & du Cross, 2002) is itself a valuable resource for the success and competitiveness of a destination. For first, it is the unanimous view that the attractions represent a key element in the development of products and tourist destinations (C.A. Gunn, 1994; Horner & Swarbrooke, 1996; Lundberg, 1985; Swarbrooke, 1995). Traditionally, attractions have been neglected in the tourism industry (Cooper et al., 1998: 140), on behalf of sectors like hotel trade, transport and travel agencies (Leiper, 1990; Lew, 1994; Pearce, 1991). In the field of cultural heritage, the management practices imply several aspects: Stevens (1991) proclaims that the interpretation itself, for example, may become the most important aspect of a cultural attraction, because it provides an essential bridge between the resource and the visitor.

MacCannell (1976) provides one of the first conceptualisations about the components of a tourist attraction. According with this author a resource should have three components to be considered an attraction:

1) A tourist;
2) A place to be seen; and
3) A marker, that is, something that provides information on the site.

C. A. Gunn (1988: 49) describes schematically an attraction as a system of three concentric rings, where the ring in the middle represents the "nucleus" (the resource itself); the second ring represents the "inviolate belt" or "region" (the area surrounding the resource); and finally the third ring," zone of closure" (all the secondary tourist resources, infrastructure and services supporting the tourist activity). Later, Leiper (1990: 370) considered a tourist attraction as a system of three elements: the human element (the tourist, a person with touristic needs); a sight (meaning, the feature to visit, the “nucleus” of the system) and at least one "marker", or "informative element" (information about the nucleus).It should be noted that Leiper (1990) emphasizes that an attraction only exists where these three elements interact.

Pearce (1991) focuses on the characteristics that determine the success of tourist attractions and briefly, he theorizes that a tourist attraction will be successful if:

1) Visitors have a clear perception of the resource present on the site;
2) The activities offered are clearly understood;
3) The physical attributes are varied and aesthetically pleasing.

These conceptualisations help heritage managers to understand the difference between resource and tourist attraction, and provide the theoretical tools for the tourist enhancement of the assets. This type of approach to heritage management guarantees efficiency and effectiveness in the transformation process of a resource into a tourism attraction. But this is not only useful in positioning process, destination branding and competitiveness, as it becomes also strategic for collateral aspects of tourism activity in a destination, such as social development.

The social implications of tourist activities and their relationship with heritage are emerging with increasing force: in 1964, the "Venice Charter for the Conservation and Restoration of Monuments Sites" (ICOMOS, 1964) claims (art. 5) that "the conservation of monuments is always facilitated by making use of them for some socially useful purpose". Later, in 1990, the "Charter for the protection and management of the archaeological heritage" defended that "the presentation of the archaeological heritage to the general public in an essential method to promoting understanding of the origins and development of modern societies" (ICOMOS, 1990). Finally, in 1999, it was officially defended a "dynamic interaction between tourism and cultural heritage" (ICOMOS, 1999). In the same year, the UNWTO creates the Global Code of Ethics for Tourism (UNWTO, 1999), a fundamental frame of reference for responsible and sustainable tourism, which clearly recognises the *Tourism's contribution to mutual understanding and respect between peoples and societies* (Art.1). Academics are creating new perspectives in the field of Cultural Tourism Research (G. Richards & Munsters, 2010) and wondering about the compatibility between sustainability and competitiveness in destinations (Gomes de Moraes, 2006). In this debate, we gave our contribution by making a consideration about the "paradigmatic shift from 3-S' Tourism (Sun-Sea-Sand) to 3-L' Tourism: *Leisure, Landscape* and *Learning"* (Carbone, 2011b).

In summary, the empirical evidence and theoretical knowledge demonstrate the necessity of promote cultural heritage as a distinctive element in the construction of the brand of the tourist destination, and to address the increasingly pressing competitiveness between destinations. This necessity arises, however, the emphasis on issues related to the management of assets and the needs to understand clearly the stages of the process of transformation of a resource into a tourist attraction, in order to ensure the effectiveness and efficiency of efforts. The platform of knowledge is, itself, a resource for this purpose, a theoretical tool of support for management and development, leading to quality processes and results. In this sense, Quagliuolo (1998: 18-19) defends the importance of the culture of quality in heritage management, intended as a tendency to ongoing improvement and a constant attention to the needs of the users of heritage attractions, whether tourists or residents.

Oakland and Sohal (1996: 3) state that whatever type of organisation one works in, competition is rife, and, generally speaking, quality is the most important of the competitive weapons. In the specific case of cultural heritage management and its tourist enhancement, Conti (1998) adds that the approach of Total Quality Management would bring many benefits and improvements in the results of the efforts of the organisations in charge.

3.3 Tourism and cultural heritage in the perspective of Total Quality Management

Since the 80's were born organisational models for the quality, in order to help managers to identify and manage all the variables that are important to meet the expectations of all customers (internal and external), and TQM models are those that more comprehensively address the issue of the adequacy of an organisation for its own purposes (HERITY, 2007). The literature review has shown that the field of quality management applied to heritage tourism and cultural heritage is not particularly developed. As seen in previous sessions, the most recent theories on quality management point to a primacy of TQM philosophy (Conti, 1998). It seems appropriate to search for data (both sectorial and scientific) related to the application of this concept to the management of cultural heritage for tourism purposes.

Conti (1998: 30) explains that the concept of TQM is characterized by the shift of emphasis from the quality of products and services, to the quality of the organisations that produce these products and services. This different paradigm related to quality management can represent the point of convergence between heritage management and quality. Still, Conti (1998: 30) shows that the implementation of quality management through TQM leads to an increased focus on leadership, culture and values of the organisation; continuous improvement, involving the area of human resources and influencing processes, being applicable to all types of organised human activity, both in the sphere of profit as in the non-profit. At this point, with fully agree with Marnetto (2009: 54), when she affirms that the cultural asset must be seen as an organism and not just as a place, so the TQM philosophy becomes fully applicable to cultural heritage management.

At the same time, even supranational entities recognise, due the dramatic expansion of interpretive activities and the introduction of elaborate interpretive technologies and new economic strategies for the marketing and management of cultural heritage sites, the need for basic principles of management, namely for the Interpretation and Presentation as essential components of heritage conservation efforts and as a means of enhancing public appreciation and understanding of cultural heritage sites (ICOMOS, 2008). In recognizing that interpretation and presentation are part of the overall process of cultural heritage conservation and management (ICOMOS, 2008) seeks to establish seven cardinal principles, upon which Interpretation and Presentation should be based:

- Principle 1: Access and Understanding
- Principle 2: Information Sources
- Principle 3: Attention to Setting and Context
- Principle 4: Preservation of Authenticity
- Principle 5: Planning for Sustainability
- Principle 6: Concern for Inclusiveness
- Principle 7: Importance of Research, Training, and Evaluation

Once demonstrated the consensus existing around the necessity of creating well-defined and internationally agreed principles for heritage management, and the opinion that the application of quality systems could have a decisive importance in this field, one can report the pertinent reflection of Natali (2005: 30) about the importance of quality and its certification. The author defends that the demand for quality is an imperative and a differentiating factor in every sector of society to face an increasingly exasperated competitiveness, and in this context the implementation of quality certification represent a useful tool for users and consumers in order to extricate itself from the many "quality proposals" (Natali, 2005).

Between the different costs and effort associated with the implementation of a system of quality management in an organisation, and listed by Pinto and Soares (2009: 26), there is the time spent in assisting the various activities and preparation of necessary documentation. Although there is a growing sensitivity on the part of the profit organisations to consider such efforts as an investment, and not a cost (Calderón Perez & Casas Novas, 2009; Pinto & Soares, 2009) according to the exploratory interviews conducted for the present research, most of heritage managers interviewed believe this effort excessive and almost useless. This led us to investigate more deeply the perception of the operators of cultural heritage management about quality management systems.

Thus, if one recognises quality systems as a useful frameworks in the management of assets - and taking into account that, as Natali (2005: 30) highlights, quality is also increasingly associated with the concept of sustainability, being considered the key to the sustainable development strategies – as a corollary of this proposition the certification becomes an additional added value for both the users and heritage managers. For this reason, the next session will be dedicated to the quality certification system applied to cultural heritage management.

3.3.1 Awards and certification

The need to recognise, in the context of "organisations" that operate in the heritage those who strive to achieve excellent levels of their performances and the quality of their results, gave birth to several official international recognition and awards. The Best in Heritage, for example, launched in 2003 by the European Heritage Association (Zagreb, Croatia) is an annual presentation of awarded (at national or international level) museum, heritage, and conservation projects and institutions. Directors and managers of the awarded sites explain why their institution/project was declared the best in the previous year, receiving a prize or award. Organisers will just let them present themselves and will neither evaluate nor give awards: the aim is to present quality projects sharing best practices at international level.

An important award at European level is the *European Museum of the Year Award* (EMYA). It is annually organised by *The European Museum Forum* (EMF), European non-profit organisation that operates under the auspices of the Council of Europe and is involved in far-ranging activities throughout the cultural field. The EMYA was created in 1977 under the auspices of the Council of Europe, with the main purpose of “recognising excellence in the European museum scene and encouraging innovative processes in a museum world which still took the more traditional view to focus exclusively on collections rather than on their use for the benefit of society” (search: http://www.europeanmuseumforum.info/). A further recognition of the excellence displayed by the winning museums in the approach they take to museum work, while complying fully with the EMYA criteria, is the *Council of Europe Museum Prize*. It is a unique award intended to highlight the need to preserve and promote the European cultural heritage as a factor uniting the Council of Europe's 47 member states.

There are a fairly large number of awards at various levels, for excellence, innovation and quality in the field of cultural heritage, especially in the museum sector. A more systematic approach was given, however, by HERITY, an international organisation, which has created a quality assessment framework for the management of cultural heritage, through the study, revision and application of previous excellence and quality models from other areas, such as those shown in the previous section. This model has been the basis for the establishment of criteria that evaluated the quality of management, certifying it. This system is commonly known by the name of *HERITY Global Evaluation System*.

3.4 Recognition of quality management for cultural heritage: *HERITY Global Evaluation System* (HGES)

After analysing in the previous session some of the most important awards and certifications within the cultural heritage - avoiding enumerating the countless systems adopted just at local or regional level – in this section we focus on what is the only worldwide certification also recognised by UNESCO. As Pinto and Soares (2009) highlight, *Quality* is the result of an organisational compromise between culture, politics of quality, and the use of certain resources and appropriate frameworks (ensuring excellent performance and their continuous improvement) which must also be recognised. As the same authors stand, the certification should not be the only objective of implementing the quality system, however, it is the unequivocal evidence, among employees, customers, and other interested parties of the efforts made by the organisation at the level of quality (Pinto & Soares, 2009: 32). It becomes an integral part of the application of these concepts in the management of cultural heritage.

Regarding the Cultural Heritage Quality Management, as pointed out by Natali (2005: 31) the affluence of visitors often represent a quantitative data used as an indicator of quality of a site or museum, even if it can actually bring misleading information to managers and even to the public. In this context, the HGES represents a valid methodological proposal for the assessment of cultural heritage management (Natali, 2005: 30). *Operational relevance, scientific basis and credibility" are the characteristics evidenced by UNESCO to describe the results of the HERITY certification system*, as reported by Marnetto (2009: 52). HGES is a tool that allows a periodic assessment of cultural sites, including those entered in the UNESCO List of World Heritage Sites, and should be used as a support tool for heritage managers and as platform for dialogue with the tourism industry as well as operators of regional planning (Natali, 2005: 31).

3.4.1 The HGES. Background

HERITY - International Organisation for Quality Management of Cultural Heritage was launched in Italy in 1994, by the DRI – Interregional Agency for Cultural Programming and Tourism, as an international forum with the main objective to create an effective proposal for the management of cultural resources. The term HERITY results from the combination of two words: QUALITY and HERITAGE. This fusion reflects the concept underlying the evaluation system, a concept born in 1994, whose contents were developed until 1998 (Quagliuolo, 2001: 251).

HERITY has been testing its principles up until 1998 when they were adopted. Only after some years, in 2002, it was decided to codify this know-howby setting criteria, parameters prerequisites and indicators. The main objective is to evaluate the quality level reached at the cultural heritage places open to the public (museums, monuments, churches, castles, palaces, villas, parks, archaeological sites, etc.). Quagliuolo (2001) has explained that the certification is based on an assessment of the sites management with regards to the degree of the dimensions exposed in the following table:

Table 3.1: Dimensions considered and examined by HGES

Dimension	Definition
Perceived Value	Tangible and intangible relevance commonly attributed to a good, regardless of the reason.
Preservation Capability	Procedure to establish the conditions for the creation, maintenance and/or growth of perceived value over time.
Transmitted Information	Set of actions implemented for the dissemination of the knowledge about the perceived value.
Provided Services	Direct or indirect activities aimed to the appreciation in optimal conditions of the perceived value of an asset.

Source: adapted from Quagliuolo (2001: 250-263)

The main set of questions and problems to be answered came from the observation of visitor behaviour in Rome, as an example of Art City characterized by cultural vestiges and activities as well by significant tourism pressure.

From a technical point of view, the HGES was specifically designed for Cultural Heritage and brings together the logic of various quality and certification systems, such as ISO, TQM systems, or, again, the classification systems of *Michelin* (Natali, 2005: 32). Today, HERITY is present in different countries, like Italy, Spain, Brazil, Portugal, Sweden, United Kingdom, Lithuania, Czech Republic, France, Turkey, among others.

3.4.2 HGES: Assessment

HERITY was specifically designed to measure the performance achieved in the management of cultural heritage (Natali, 2005: 32). HGES can be characterized as:

1) multi-dimensional, as it analyses and describes four different dimensions of cultural heritage;
2) multi-purpose, since it is directed to the needs of the public as well as operators and stakeholders;
3) multi-perspective, reaching its results thanks to the contribution of different sources: self-assessment of responsibility, an external evaluation and the opinion of the public.

The specific objective of HGES is assessing the cultural asset based on:

- 4 different criteria (perceived value, conservation, communication capacity, services), which refer to
- 182 requirements, divided into
- 16 areas (parameters) (Quagliuolo, 2001: 251).

Principles, criteria, sub criteria, indicators and requirements of the HGES are the result of nine years of meetings of experts from the cultural sector, communication, organisation, Total Quality Management, law and economics; both from private sector as well as institutional, from 15 countries (Natali, 2005).

During the assessment period, four different points of view are considered for the evaluation:

1. Managers of the site;
2. HERITY specialists;

3. Visitors;
4. Stakeholders.

The layout of the process is:

1. A "visual synthesis" of results (the *HERITY Target*);
2. A the introduction of a control system that can be easily managed by operators;
3. A detailed report of the evaluation to the managers.

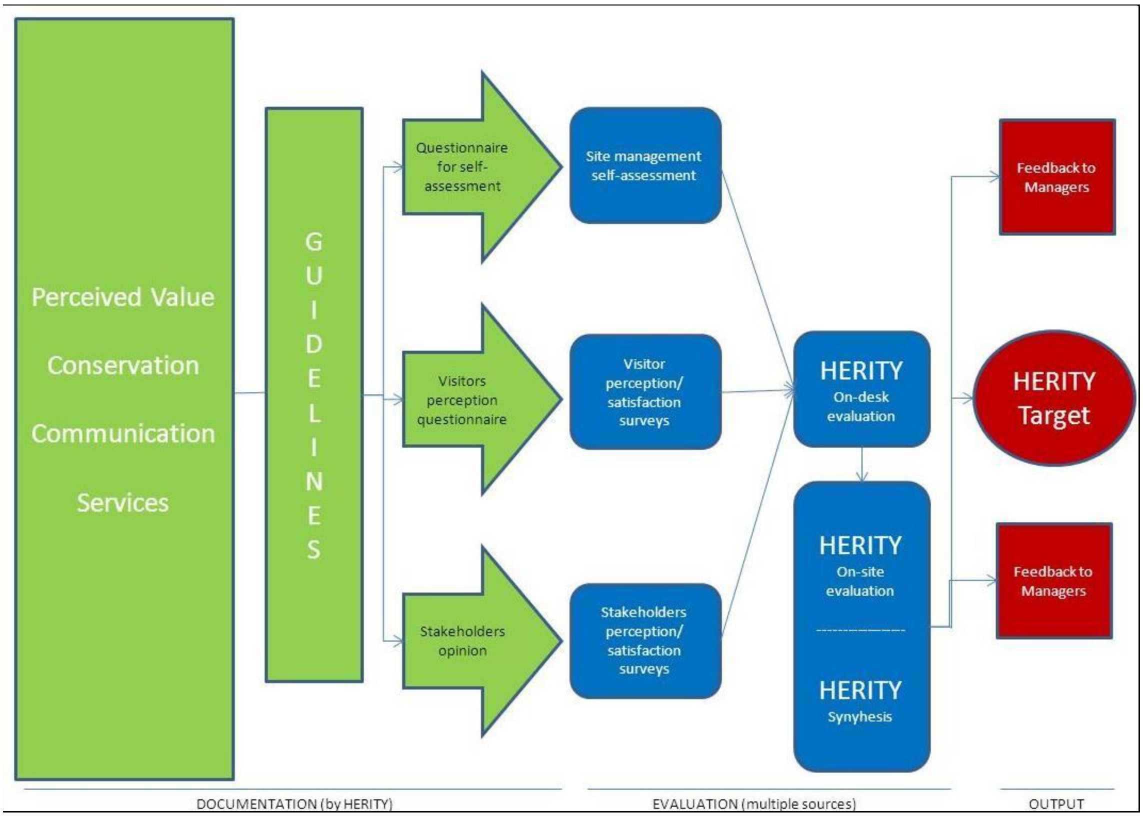

Figure 3.4: The HGES Assessment Process
Source: adapted from HERITY (2009)

The *Herity Target* which is normally affixed to the entrance of the certificated site and illustrate the result of the evaluation on a scale from one to five (Figure 3.5), combining the opinions of the managers, specialist and public.

Figure 3.5: The HERITY Target of the Napoleonic Museum in Rome
Source: http://herity.it/Siti/Museo%20Napoleonico.htm, accessed in July 4th, 2014

The four quadrants of the Herity Target provide to the public the following information (Table 3.2):

Table 3.2: Information provided by the HERITY Target

QUADRANT (Dimension)	PROVIDED INFORMATION
Perceived Value	Importance of the heritage place.
Preservation Capability	State of maintenance, preservation and restoration.
Transmitted Information	Information provided to the visitor, thus, possibility to understand the message and interpret the heritage place.
Provided Services	Quality of reception and services offered. Opportunity to better appreciate the visit thanks to its facilities.

On the other hand, the report elaborated by HERITY at the end of each assessment, becomes an effective instrument for heritage managers in order to measure the success of management plans and detect areas in which it is necessary to intensify efforts (Natali, 2005: 32). In other words, it is possible to say that HERITY is an intermediate instrument, and provide the following services:

1. Helps public to decide;
2. Encourage managers to improve standards
3. Provide guarantees to institutions on respect minimum levels (Quagliuolo, 2001).

HERITY attributes its appreciation for a period of three years. A system for monitoring and re-evaluation at the end of three years period verifies the level reached and adjusts the assessment.

In the following sections and chapters it will be focus particularly the second of these three points, especially about the practice of communities' involvement in heritage management, and in order to evaluate specifically the positive contribution of the HGES regarding the social function of heritage and its tourist use. In fact, in a provocative way the Council-of-Europe (2005), during the Convention on the Value of Cultural Heritage for Society, replaces the question "How can we preserve the heritage?" with the query "Why should we enhance heritage, and for whom?", remembering that the promotion of *knowledge* and *cultural values* are vehicles of involvement and participation in cultural life for all citizens, as defined by the Universal Declaration of Human Rights. The text presents heritage both as a resource for human development, the enhancement of cultural diversity and the promotion of intercultural dialogue, and as part of an economic development model based on the principles of sustainable resource use. In this respect it falls within the scope of the Council of Europe's priorities as set by the 3rd Summit of Heads of State and Government in May 2005 (Council-of-Europe, 2005).

Conclusion

In this chapter was analysed the evolution of the theory of quality and, in parallel, the application of those principles to the modalities and politics of heritage management. The main objective was to find the point at which these two concepts converged: it seems fair to conclude, as first remarks, that the convergence of the philosophy of "quality" with the paradigms of heritage management became possible only when, theoretically, the "Quality Management" turned in "Total Quality Management". Before this stage, in fact, the concept of quality was related purely to the control of conformity of the final products, concept well known in the field of industrial production, but difficult to apply to the services sector.

With the new approach of TQM, the focus was no longer merely on the final product, but on the organisation's culture and values, processes, ethics and continuous efforts for improvement towards excellence. Furthermore, the idea of the existence of *internal customers*, not only *external*, is the demonstration of a greater ethical (but also pragmatic) concern about the satisfaction of the needs of those who provide the services (this point will be taken up further on, in the conclusions of this chapter, because it will be shown a reflection on the identification of internal and external customers in the management of cultural heritage). Consequently, the idea of "quality" was more and more often associated with the idea of "sustainability". Thus, at this point, the evolution of the concept of quality met the evolution of the paradigms of heritage management.
The idea of a better management of heritage in order to improve the presentation to the public (usually tourists) it is quickly made way: there are special awards that recognise excellence, and - after a long and precise interdisciplinary work to adapt the principles of total quality management to heritage - it was created a system of certification: HGES, recognised by UNESCO and, so far, unique in the world. The capacity to preserve for future generations, communicate and offer support services for the fruition of the heritage are the main dimensions of interest. In the exploratory phase it was possible to detect the great satisfaction of the technicians and heritage managers about the certification, which is seemed more effective as a valuable management tool, rather than a support for the visitor. However, the latter has great indirect benefits, because the better is the management of the site, the better is the quality of the offer.

In the second part of this thesis we analyse the issue of quality applied to heritage management in order to focus the relationship that might exist between the principles of quality management of cultural heritage and socio-cultural development of the local community, as well as the improvement of the tourist experience in terms of authenticity, character of destination and intercultural dialogue.

Chapter 4
Methodology

Introduction

Each process of research starts within a broad area of interest, in which one identifies the problem to be investigated. But usually the area of interest turns out to be too extensive and it is not sustainable thinking to complete the study in a single research project. It is thus necessary to reduce the range of action to be able to formulate a clear, reasonable research question. This phase requires a very large commitment to bibliography review in order to contextualize the study and, to focus in a particular aspect of the area of interest and therefore, defining it with greater accuracy from the starting point. The clearer the starting point (thus, the research question), the clearer would be the whole course of the research process.

The general objective of this research is to analyse the effects of the implementation of the quality system within organisations that manage the archaeological heritage, particularly from the viewpoint of local population involvement and the improvement of the tourist experience through the promotion of the intercultural dialogue. The specific objectives are that of analysing the cultural heritage managers' perception of quality, and understanding to what extent the involvement of the resident population and tourists is taking into account as a dimension of quality.

As "there is no science that can be deprived of philosophy" (Dennett, 1997), the first part of the chapter (Section 4.1 and Section 4.2) is dedicated to the presentation of the main philosophical currents, underlying the scientific approaches. In this regards, fundamental topics like the concept of "blind intelligence" and that of the "complex thinking" are approached in this chapter. We present their evolution, the theory of knowledge, the concept of scientific revolution and the debate existing about all these issues. Then in a logical sequence, the process that led us to the identification of the problem (Section 4.3) will be presented, going through the preliminary stages and exploratory research (Sub-section 4.3.2) to the formulation of the research question (Section 4.4). Our theoretical contribution, generated within this process, is exposed in Section 4.4: the "*paideia* approach to heritage management", that represent a proposal of model for the management of cultural heritage particularly focused on the involvement of local communities, in order to obtain a double result, the socio-cultural development of the population and a consequent improvement in the quality of the tourist offer.

In order to answer to the research question, we need to construct a research design, which we present in this chapter in Section 4.6. as we cannot discuss about a research design without considering its meanings within the related paradigm, as the latter helps to inform both methodologies and methods used in social sciences (G. Jennings, 2012). The paradigm used for our research is identifies in the Subsection 4.6.1. The following sub sections present the method adopted (sub section 4.6.2) and the techniques of data collection (sub section 4.6.3) as well as the sample considered for the study.

We also aim to explain how the logic of this work fits into that of *complexity*, which for some time now is providing an alternative to the *reductionism* adopted for centuries to explain the world that surrounds us. Still, as *an epistemological revolution is not just about the area of scientific knowledge, but it reflects the entire spectrum of our cultural possibilities and social* Licata (2011: 49), we place our work within the field of scientific research and also in that of culture and society.

4.1 Investigating the social world during a "scientific revolution": positioning our study

The argument with which we want to open this chapter is that of scientific approaches to the study of phenomena, and the process that has led us to identify a particular paradigm. It is always necessary to clarify what is our approach to the matter and, by extension, to make explicit what is the way we perceive the social world that we are investigating. It requires a deep ontological (what is the nature of what can be known? What is the nature of reality?), epistemological (what is the nature of the relationship between the investigator and the investigated object?) and methodological (how should the researcher find knowledge?) reflection, thus completing the overall framework of the research paradigm.

This process was particularly complex given the multidisciplinary nature of our research: management, cultural heritage and tourism. Each of these areas has its own particular research tradition, so our first task was therefore to admit the impossibility to access the knowledge of a phenomenon through the more traditional form of scientific approach (as we shall see in the following subsections) and search for a scientifically valid holistic approach. However, this necessity reflects the current scientific revolution in progress which manifests itself precisely in the search, by the researchers, of a more comprehensive approach to the phenomena investigated.

A few years ago this task – the definition and selection of the approach and the underlying paradigm for a scientific research - was “relatively simple”, and in some cases, even if not explicitly, still exists - the supremacy of the positivist paradigm. The process through which one could measure and mathematize the phenomena of the world around us, by generating absolute truth, it was considered science. All the rest was not. This approach has led to great discoveries, but also has gradually separate science from philosophy and from the *humanitas* and the *res humana*. In recent decades, it has been started (paradoxically, from the field of physics, traditionally positivist) what Kuhn (1970) generally defines a “scientific revolution”. Scientists have begun to cast doubt on the possibility of being able to explain the world "just" reducing it to mathematical models. In short, the social sciences have embraced this "revolution", conceptualised in the philosophy of science by the sociologist Morin as the “theory of complexity”. This theme will be presented and discussed in depth in the next sub sections. Meanwhile, it is important to emphasize that the change currently in progress presents opportunities and threats, especially from the epistemological point of view, for the researchers of our times. However, we embrace the challenge and do not avoid the responsibility of making choices. On the contrary, we welcome this responsibility as well as the opportunity to participate actively in this process of innovation. We embrace the opportunity to actively participate in the contemporary Scientific Revolution.

4.1.1 Research paradigms and Scientific Revolution

One cannot discuss about methodologies and methods without first considering their significances along with the related paradigm, as the latter helps to inform both methodologies and methods used in the social sciences (G. Jennings, 2012). A paradigm is associated with ontology, epistemology, methodology, and axiology (Guba, 1990: 17; Egon G. Guba & Yvonne S. Lincoln, 1994: 105). *Using a questionnaire, take the role of participant observer or, alternatively, build a random sample is equivalent to accept a conception of the world. No theory or method of investigation is justified by itself: its effectiveness, its own definition of survey instrument depends, ultimately, from a philosophical speculation* (Huges, 1980: 33).

The paradigms differ from each other by how they respond to the three fundamental questions to be answered in order to define our vision of the surrounding world and, consequently, the way we intend to investigate it:

1. The ontological question (discourse on the essence);
2. The epistemological question (discourse on the knowledge);
3. The methodological question (discourse on the method) (Corbetta, 1999: 21).

According to Corbetta (1999: 21) it is not a sociological theory, but a general conception about the nature of social reality, about human nature and the way to get to know this nature. The notion of "paradigm" - already used in Antiquities from Plato and Aristotle - is often used today in an ambiguous way in the social sciences, as a synonym of theory, system of ideas, and/or research process (Corbetta, 1999: 17). Finally, we wonder: what is a paradigm? how many paradigms exist? Why and how does occur the succession of these paradigms? The key to the answer of these questions lies in the excellent work of Kuhn (1970).Kuhn elaborates a reflection on the historical development of the sciences: he rejects the traditional idea of science as a progressive and linear accumulation of new acquisitions. Historians of science have gradually realized, through Kuhn (1970: 3), that the idea of defining scientific progress as a linear succession of discoveries was substantively wrong. He affirms that “a discovery like that of oxygen or X-rays does not simply add one more item to the population of the scientist’s world. Ultimately it has that effect, but not until the professional community has re-evaluated traditional experimental procedures, altered its conception of entities with which it has long been familiar, and, in the process, shifted the network of theory through which it deals with the world” (Kuhn, 1970: 7).

There are "normal times" and "revolutionary times" in science: the latter are those in which the relationship of continuity with the past is interrupted and starts a new "construction". From this point of view, "normal science" (the science in “normal times”) often tends to suppress fundamental discoveries, when they subvert its basic assumptions (Kuhn, 1970: 10; 94-95). Nevertheless, what Kuhn (1970) defines "scientific revolutions" are inevitable and they result in a change of the problems to propose to scientific investigation, and the criteria by which one determines what actually is an “admissible problem” (or a valid “problem-solution”) for science. In other words, it is “a transformation of the conceptual structure through which scientists look at the world” (Corbetta, 1999: 18). Kuhn (1970) assumes this “conceptual structure” as the “paradigm” in science: a *research paradigm* is a philosophical framework that guides how scientific research should be conducted. It is based on people’s philosophies and their assumptions about the world and the nature of knowledge (Collis & Hussey, 2009: 55; Corbetta, 1999: 18). It is the identification of the underlying basis that is used to construct a scientific investigation (Bogdan & Biklen, 1982: 30)

The way leading to the creation of knowledge, was initially – and for many hundreds of year - just one, the one followed by the natural sciences (Kuhn, 1970). It was strictly based on positivism, which has its roots in the philosophy of realism, as remembered by Collis and Hussey (2009: 55). The primary mode of the research inquiry of positivism is *theory-testing* based on deduction (Layder, 1993): the hypothetical-deductive bases of the investigation must be tested through statistical generalisation (E.G. Guba & Y.S. Lincoln, 1994; Tsoukas, 1989). This approach has been very useful, for example, to the great discoveries in the field of physics: models used to describe the physical world on scales extremely large like the *Big Bang*; or extremely small, like the *Corpuscular theory of light* by Newton (Licata, 2011: 19).

Works such as "*Philosophiæ Naturalis Principia Mathematica*" by Sir Thomas Newton (XII century) must be considered a marvellous contribution to Human knowledge: the affirmation of the "quantitative", in science, begins, according to Leonardi (1991: 20) already in the seventeenth century with Galileo and, in the social sphere, within an epoch even more remote with the transition from feudal society to mercantile society. Now, the medieval *Doctor Angelicus* Thomas of Aquino stated in his work: *"Veritas est adæquatio rei et intellectus"* (*De Veritate*, I, 2). Thus, if "knowledge is a continuous process of adaptation between things and intellect", between the world and the questions and answers that we use to explain, we had to assume that the way of "pursuing the truth" could change, based on new evidences, as we'll see in next subsection. Anyway, it is very important to keep in mind that, by paraphrasing what Licata (2011) affirms, the question is not to defend or deny a certain scientific paradigm, but rather to understand its limits and overcome them through new approaches to the analysis of the phenomena of the world around us.

4.1.2 A Scientific Revolution in progress: from the "Blind Intelligence" to the "Complex thinking"

Positivist paradigm represented for hundreds of years the only way for scientist to infer and to create scientific knowledge (Kuhn, 1970). Reductionism - the typical epistemological approach of the positivist paradigm - has been, therefore, the only way to "explain" the world and to "produce" science. Supporters of the reductionist approach sustain that a complex system is nothing but the sum of its parts, and that the understanding of each system can be given by reducing it into smaller composing elements. Positivism has been for three centuries the way leading to scientific inference and knowledge, and has been the "godmother" of several important discoveries. But, on the other hand, it is also true that due to the implicit limitations imposed by:

- Its ontological beliefs, (reality exists in itself, regardless of the researcher);
- Its epistemological position, dualist (researcher - object studied) and objectivist;
- and Its methodological assumptions(based on the deductive process and the "mathematical formalisation")

positivist paradigm has been constantly revised and adjusted (Corbetta, 1999: 27). At least as long as it could!

In the early twentieth century positivist orthodoxy gave way to revised forms of positivism: neo-positivism and post-positivism can be considered an "evolution of the positivist thought (as will be discussed in more detail in the next sub section). The trend of reductionism is to enclose the world and the way it works in what, in science, are called models that can be tested. But do these models really explain the reality of the phenomena that we try to explain?

In the 1930s, for example, the biologist Karl Ludwig von Bertalanffy began to work on his "General Systems Theory" that finally published in von Bertalanffy (1968). His theory, in which the world is understood as an interlocking network of systems and subsystems, whose interactions give rise to further higher-level systems (M. Glaser, Krause, Ratter, & Welp, 2008: 77), was later suggested as a connecting approach for all sciences. The inclination to give up the assumption of linearity in dynamical systems to investigate more exhaustively their behaviours (Arecchi, 2004: 11; A. Scott, 2004) has led to the recognition of "Complex Systems". A "Complex System" is that in which the general characteristics of collective behaviour are more important than the individual constituent. It is a "non-linear system" (A. Scott, 2004) in which the overall effect is not simply given by the sum of the causes, so that we cannot just study each part of the system to infer about its global behaviour (Creswell, 2014: 8; Licata, 2011: 7).

Therefore, a relatively new trend was born and has spread from scholars from several fields: from neuroscientists as Damasio (1994) and doctors as Dossey (1999) to social scientists as Morin (1993) and experts of the method as Collis and Hussey (2009: 55). Norberg and Cumming (2008) consider the Complex System Theory as the more important 'intellectual parent' of Socio Ecological System. These scholars were highly critical with those who said to be able to explain through mechanistic/reductionist approaches, the human mind or the world around us (Damasio, 1994; Licata, 2011: 30). The supremacy of reductionism has been challenged since the 70s of the XX century and in a more decisive way in the 90s by proponents of a comprehensive, multifaceted, holistic (Dossey, 1999), complex approach. They assumed that epistemological reductionism was no more able to answer questions posed by phenomena recognised as complex by scientists like Lloyd (2006).

The systematisation of this new attitude in philosophy is attributed to Edgar Morin, with his work *Introduction à la pensée complexe*. The French sociologist and philosopher announced a "scientific revolution" with his statement: “Today we are, perhaps, at the end of an epoch and, hopefully, at the beginning of new times” (Morin, 1993: 121). Morin’s text contains a severe critique of what he calls "blind intelligence", which characterizes the "classical science" inaugurated by Descartes and Newton. Among the criticisms advanced by Morin (1993) there is the *disjunctive and reductionist attitude* of “classical science” that led to the separation of the science itself from the philosophy, as well as a general fragmentation of knowledge that made us no longer able to see the interconnections between disciplines. The author closes the series of criticisms to the "classical science" and his apologia of "'epistemology of complexity" launching an explicit call to “get out, as soon as possible, of the prehistory of the human mind" and " the barbarism of ideas " (Morin, 1993: 120-121).

If we recognise to the French sociologist the theorisation of the “epistemology of complexity", on the other hand we cannot entirely agree with his criticism, somehow excessive, against positivism. From this point of view we totally agree with the Italian physicist Licata (2011: 19) who states that *the efforts of the positivist scientists in the last three centuries actually enabled us to describe forces, particles and their evolution in the cosmological scenario, therefore it is impossible to be ungrateful towards reductionism*. We agree with the fact that a changed sensitivity and the changed socio-economic and technological conditions led to an evolution or rather, a scientific revolution as Kuhn describes it: however, complexity should not "deny" reductionism, but rather overcome it and complete it. Still paraphrasing Licata, the problem is not to condemn or defend reductionism, but to be able to consider where this is successfully applicable or not (Licata, 2011: 20).

Back to neuroscience, for example, we have to recognise that the “complex thinking” led to the new discoveries about the mechanism of "vision". And this is the perfect metaphor of the transition from one paradigm (the positivism) to another: the reductionist approach led to infer that the mechanism of vision would be similar to a photographic camera, that is, when we "see" something our brain is simply recording what already exists. Today, the “ecological theory of vision” explain us that we do not just photograph the world (as suggested by reductionist neuroscientists) but “we take impulses and shape them through a *semantic memory*” (Julesz, 1991). In other words, personal experience is even more important than the mere mechanics: we do not record passively the world, we rather "build" it in an active way; we “construct” it, making choices about what to observe, how to interpret the data, and constantly changing the conceptual perspectives based on our experience and our goals. If, according to Licata (2011: 33), “the idea of *vision* as a synonym for *photographing the world* is perhaps the largest sensory support to the idea that *the world is already there*”, that is the fundament of the ontological realism (Corbetta, 1999: 26-27), in the same way we could affirm that the “ecological theory of vision” represents the sensory support to a new scientific approach, as well as the metaphor of the overcoming of positivism toward a new post-positivist paradigm and its ontological, epistemological and methodological assumptions: the *constructivism.*

4.2 Scientific Revolution and social sciences

4.2.1 Scientific approaches within social research

Talking about scientific paradigms, it is particularly important and interesting to focus on their evolution (or “revolution”) and on how they affect, generally, the social way of seeing the world. The reductionist legacy within socio-economic systems were overpassed by Max Weber, a figure that we will discuss later in this section due to his important epistemological, ontological and methodological contribution: he opposes to historical materialism - which theorizes a rigid relationship between the economic structure and the social superstructure – by giving more emphasis to the role of cultural manifestations, such as religion (Weber, 2012: 7).

From an epistemological point of view, social sciences and social research were actually born “under the auspices of positivism” (Corbetta, 1999: 24). In a positivist view of the world, science was seen as the way to get at the truth, as the world and the universe are deterministic and operate by laws of cause and effect that scientist could determine if they applied the unique approach of scientific method: *science was largely a mechanistic or mechanical affair* (Trochim & Donnelly, 2006: 18). Positivist scientists sustained that, despite the different objects of study, social sciences and natural sciences should be investigated with the same logic of inquiry, objectively, by proceeding through deductive reasoning to postulate theories that could be tested, convicted that observation and measurement was the core of scientific endeavour (empiricism) (Trochim & Donnelly, 2006: 18).

Hence the assertion of a "methodological units" between the “natural world” and the “social world”, as it is clearly stated by Durkheim (1895: 7): *the sociologist should take the same attitude of physicists, chemists and physiologists*. The positivist research, finally, adopts the deductive method to reach the inference.

On the other hand, according to the inductive process, the empirical observation and the identification of regularities in an empirically studied context will allow to reach generalisations or universal laws (Corbetta, 1999: 25-26). Between the end of the nineteenth century and early twentieth century, through the gradual revision of orthodox positivism, *logical positivism* was born and let to the creation of the *neo-positivism* (between 1920 and 1930): the ontological and epistemological conceptions were basically the same, but one of the great innovations of the neo-positivism was to introduce in the social sciences the "language of variables". With the measurement of the concepts, the distinction into dependent and independent variables, the qualification of their interrelationships, the formulation of causal models, it was possible to "depersonalize" the social world and submit it to empirical test (Lazarsfeld & Rosenberg, 1955).

The evolution of the positivist paradigm leads to a greater openness towards a world that is more complex and has less deterministic approaches. It happens only from the 60s onwards, when the modern positivism or post-positivism, admits that the reality cannot simply be “photographed”, because the researcher draws with him a series of social and cultural circumstances (Corbetta, 1999: 30; Trochim & Donnelly, 2006: 19). Even the researchers from natural sciences had to admit the inadequacy (total or partial) of reductionism as an approach to understand complex systems. Thus, at the same time, despite the previous effort to apply the same rules of natural sciences to social research, theorists quickly came to the conclusion that the characteristics of positivism does not always fit perfectly to social research.

Actually, this debate around the “Methodological Unity” (Corbetta, 1999: 25) between the natural world and the social world started in the late nineteenth century. One of the first distinctions based on epistemological differences was between "natural science" and "science of the spirit": the object of the natural sciences is made up of an external reality, and this reality continues to be external to the observer during the all cognitive process, which leads to an explanation of the observed phenomena with a process based on cause-effect laws. On the other hand, in the “science of spirit” occurs an involvement (direct and indirect) of the researcher in the observed reality, so that knowledge comes through understanding of this. The differentiation between *nomothetic* and *idiographic* sciences has been delineated in the same historical period by Wilhelm Windelband (Corbetta, 1999: 33): nomothetic sciences aim to provide general laws, while idiographic sciences tend to the comprehension of the individual phenomena. From this point of view, more recently authors as Trochim and Donnelly (2006) have affirmed that most social research is generally concerned with the nomothetic rather than the individual, as it often studies individuals but with the aim of generalizing to more than just the individual.

In the early 20th century Max Weber also defines the difference between:

- *dogmatic sciences,* such as jurisprudence, logic, and aesthetics;
- *empirical sciences of action,* such as sociology and history in which individuality is accepted within the process of inference as *interpretation* and *comprehension* of the motivations behind the action (Weber, 2012: 21).

These ideas opened the way to *interpretivism*, as they were applied to social sciences by Weber (1922), who pointed out, however, that *any interpretation, as well as all the science in general, aspires to the “evidence”* (Weber, 2012: 22).

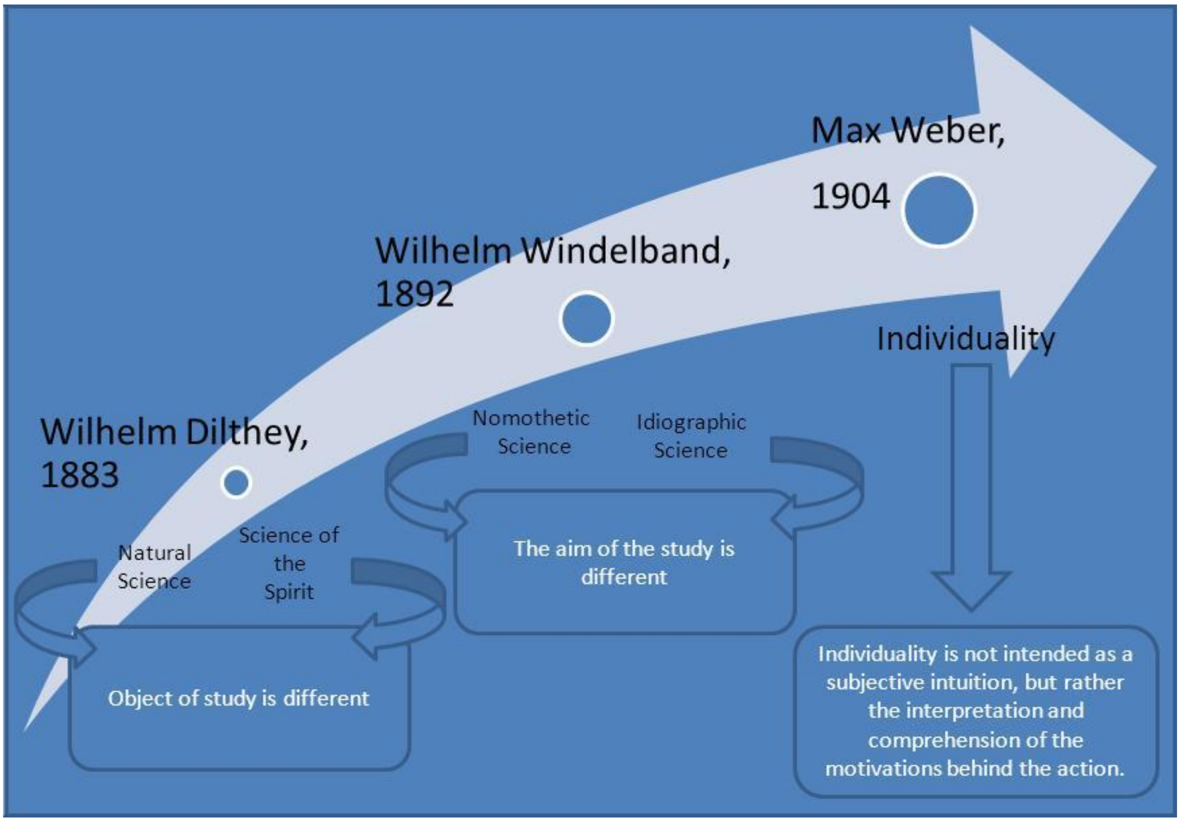

Figure 4.1: Evolution of the concept of *interpretivism* trough the XIX and XX century

Weber moves away from his predecessors as he asserts that the difference between natural and social sciences does not lie on the object of study, but rather on the "individuality" that characterizes the approach and processes of historical social sciences. But this individuality cannot represent a limitation to scientific objectivity: Weber does not deny the need of separation between *knowledge* and *value judgement*, as any science – including social historical sciences – that should keep away from value judgments. Finally, *generalisation* is another issue approached by Weber: despite the character of individuality of the approach of the social sciences, the work of researchers involves the creation of *Ideal Types*. They represent "forms of social conduct that can be observed repeatedly in the behaviour of human individuals", thus presenting "typical uniformity of behaviour". Ideal types are therefore an abstraction derived from the isolation - from the multiplicity of empirical data - of some elements coordinated within a coherent framework and without contradictions (Rossi, 1958: 30, 35). The ideal type is therefore, according to Corbetta (1999: 36) *an abstraction that comes from the empirical recognition of uniformity.*

The epistemological separation between the “explanation” (through cause-effect laws and reductionist models) and the “comprehension”, the “interpretation” of the reality, had now been defined. In more recent times, and with the development of ideas concerning the concept of complex systems, complex approach, complex thought (already largely discussed above), some scholars, such as Hirschman (1986) and, after him, Orlikowski and Baroudi (1991) reinforce the assumption that, in contrast to the positivist paradigm, other paradigms were more appropriate for exploring complex social phenomena that require working with people and real life experiences, and where the researcher seeks to understand the research problem by reflecting, probing, understanding and revising meanings, structures and issues, that is, people cannot be understood without studying their perceptions of their own activities. As we see in the previous subsection, the “ecological theory of vision”, that showed that the perceived reality is something *complex* and *constructed* by the observer, now supports the paradigm of constructivism.

Thus, as well as in other scientific fields, “complex thought”, have influenced the scientific approach to the issues of social complexity by expanding the ontological and epistemological horizons. An epistemological revolution is not just about the area of scientific knowledge, but it reflects the entire spectrum of our cultural and social possibilities, so that taking a critical position against a reductionist science is not only an exercise of intellectual honesty regarding the cognitive filters and scientific knowledge, but it is an indispensable premise of individual and social freedom (Licata, 2011: 46, 49). Finally, the epistemological alternative to the positivist reductionism can be loosely labelled as *interpretivism*: whereas positivist reductionism focuses on measuring phenomena, interpretivism focuses on exploring the complexity of social phenomena with a view to gain interpretive understanding (Collis & Hussey, 2009: 56-57). But once again it is necessary to interpret positivist reductionism and interpretivism just like two opposite poles of a *continuum of paradigms*, as Collis and Hussey (2009: 61) define it.

Table 4.1: Comparison between the two main paradigms

		Positivist reductionism	Constructivist Interpretivism
Main Approaches		Quantitative	Qualitative
		Objective	Subjective
		Scientific	Humanist
		Traditionalist	Phenomenological
Philosophical assumption	Ontological assumption	Reality is objective and singular, separate from the researcher	Reality is subjective and multiple, as seen by participants
	Epistemological Assumption	Researcher is independent of that being researched	Researcher interacts with that being researched
	Axiological Assumption	Research is value-free and unbiased	Researcher acknowledged that research is value laden and biases are present
	Rhetorical Assumption	Researcher writes in a formal style and uses the passive voice, accepted quantitative words and set definitions	Researcher writes in an informal style and uses the personal voice, accepted qualitative terms and limited definitions
	Methodological Assumption	Process is deductive. Study of cause and effect with a static design. Research is context free. Generalisations lead to prediction, explanation and understanding. Results are accurate and reliable through validity and reliability	Process is inductive. Study of mutual simultaneous shaping of factors with an emerging design. Research is context bound. Patterns and/or theories are developed for understanding. Findings are accurate and reliable through verification.
Main Aim		To construct a positivist science	To obtain phenomenological insight and revelation
Operational Features		Use large Sample	Use small sample
		Artificial location	Natural location
		Be concerned with hypothesis testing	Be concerned with generating theories
		Produce precise, objective, quantitative data	Produce “rich”, subjective qualitative data
		Produce results with high reliability but low validity	Produce findings with low reliability but high validity
		Allow results to be generalized from sample to the population	Allow findings to be generalized from one setting to another similar setting

Source: adapted from Collis and Hussey (2009) and Bryman (2008)

4.2.2 Qualitative and Quantitative approaches

As we have seen until now, scientific paradigms represent different ways of seeing the world that regulate the scientific approach to it. In fact scientific paradigms affect the procedures to arrive at the "truth" and "knowledge": the methodological dichotomy between "qualitative approach" and "quantitative approach" can thus be considered a direct continuation of the debate about the interpretative paradigm and the positivist. Qualitative measurement comes from a long tradition of field research, originally in anthropology and then subsequently in psychology, sociology and the other social sciences (Trochim & Donnelly, 2006: 142). Within the latters, the debate between quantitative research and qualitative research has not been constant. In the '20s and '30s (XX century) both approaches provided high-value products and contributed greatly to the advancement of the discipline, while in the 40s, and for all the 50s there was a return of the supremacy of quantitative perspective (Corbetta, 1999: 43).

Still in the first half of the '60s, the authors felt a certain "academic discomfort" in bringing forward their qualitative studies: a very representative example is Gans (1962: 350) who, by almost apologizing, defines his study "non-scientific". In the second half of the '60s and in an even more consistent and definitive way since the late 80s, sociologists such as Goffman (1959), Schutz (1967) and B. G. Glaser and Strauss (1967) have invigorated the debate between qualitative and quantitative approach with their work which focused on the *grounded theory*. Finally to overcome this dichotomy Trochim and Donnelly (2006: 144) consider that there is no real difference between *quantitative* and *qualitative* data, since:

- All qualitative data can be coded quantitatively;
- All quantitative data is based on qualitative judgment.

But back to the difference between the two approaches, first of all it is important to say that, even if we assume that scientific paradigms underlying the quantitative and the qualitative approach are, respectively, the neo-positivist paradigm and the post-positivist constructivism/interpretivism, they are the two extreme points of a “continuum of paradigms” which was already extensively discussed in the previous section, and there are many intermediate positions.

4.2.2.1 Main objectives of the different approaches

The two approaches have in their objective the first major difference that has an impact on the methods employed: while quantitative research tends to "explain" the reality, by disassembling it in "dependent and independent variables" and organizing it into models, qualitative research tends to “comprehend” the phenomena, and the motivations of the subjects (Corbetta, 1999). In other words, the objective of positivist research is to explain the causal relationships between variables that make up a phenomenon. To do this, quantitative researchers use to “transform” phenomena and the reality in mathematical models, in order to be manipulated in repeatable tests which provide reliable results. The purpose of the research inspired by the interpretive paradigm is another: the researcher is immersed in reality to understand it, from the inside, in its more complex aspects.

4.2.3 Deductive and inductive reasoning

According to Hill and Hill (2009) the theoretical review consists principally in the review of literature on the chosen topic, from which one can formulate an interrelated system of questions, defining a problem (Almeida & Pinto, 1995). In this context, two broad methods of reasoning are often referred as the deductive and inductive approaches.

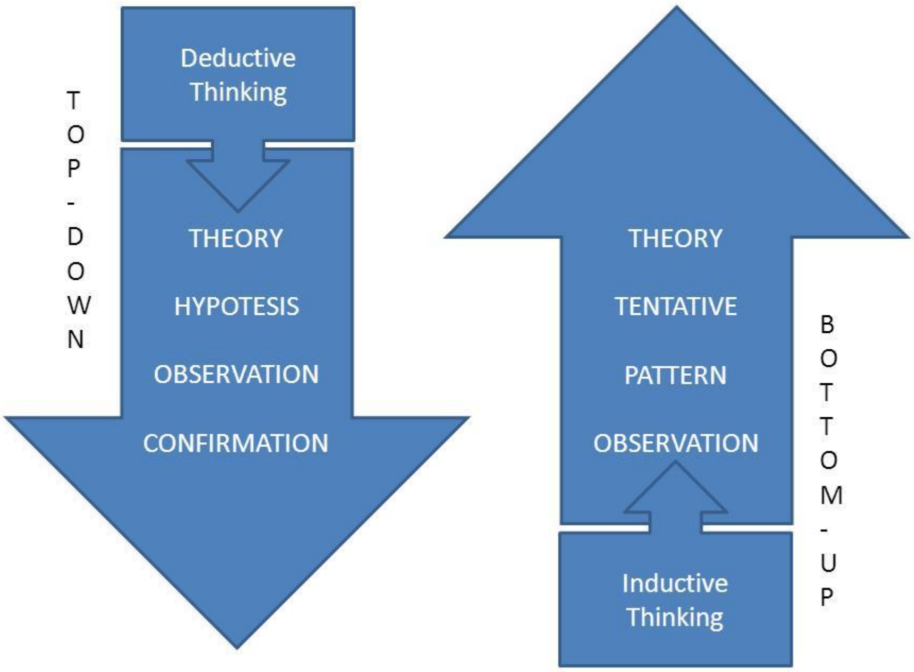

Figure 4.2: Deductive and inductive approach in scientific research
Source: adapted from Trochim and Donnelly (2006: 17)

The characteristic of deductive process in quantitative research - which defines the logical path from theory to empirical evidence, then return to the theory - provides a great investment in the theoretical review, from which arise a set of hypotheses to be tested in the subsequent empirical phase (Hill & Hill, 2009).

In contrast, qualitative research has an inductive, constructionist and interpretive approach - even if qualitative researchers do not always subscribe to all three of these features (Bryman, 2008: 366). Among the implications of adopting an inductive process in order to reach inferences, there is the choice to create "theories" - or better, the elaboration of the Weberian *Ideal Types* - from the experience, so that a deep theoretical revision is deliberately omitted from the early stages of research. More orthodox qualitative sociologists completely avoid a prior theoretical review, to not affect *a priori* to their ability to interpret reality. A typical example is the adoption of the *grounded theory* (Corbetta, 2003: 33; Creswell, 2014: 13-14). Among the more moderate qualitative researchers, however, the necessity of a theoretical revision and literature review is recognised, not to create and test hypotheses and theoretical models, but to extract those "sensitizing concepts" - opposed to "definitive concepts" - which “orient” the research work (Blumer, 1969: 149-150).

Furthermore, quantitative research is rigidly structured in phases since its very beginning (as we can see in Table 4.2) while qualitative research is "open" (Corbetta, 1999: 50, 55), that is, it is free from fixed patterns, as the elaboration of its structure is a "work in progress" occurring as long as the observer penetrates the reality studied.

Table 4.2: Traditional stages of scientific research

Stages	Steps
Conceptualisation	Identification of the problem
	Exploration
	Problem formulation
Construction	Construction of the analysis model
Verification	Data gathering
	Data analysis
	Conclusions

Source: adapted from A. Pereira and Poupa (2003: 18)

However, as J. Mason (1996: 43; 46; 59) points out, this does not mean that qualitative researchers do not need to engage in some detailed and rigorous planning: qualitative research is not an easy option, and represents an hard intellectual, practical, social and ethical challenge for the researcher, and usually it represents a very large commitment in terms of time and resources.

4.2.4 Collection and data analysis within quantitative and qualitative methods

Corbetta (1999: 62) distinguishes the *hard* data from the *soft* data: the former are characteristic of quantitative studies, while the latter are typical of the qualitative approach. It is also important to be aware about the discussion of J. Mason (1996: 35-36) about the *qualitative data sources* and *methods*, that is concern with the differences between the concept of *generating data* rather than *collecting data*, precisely because most qualitative perspectives would reject the idea that a researcher can be completely neutral collector of information about the social world. This author explains that we can perceive people (or phenomena) as “data sources” in the sense that they are repositories of knowledge, evidence or whatever relevant for the research: observing this people, talking to them and collecting products that they had generated is the first step to create data through the implementations of our “data generation methods” (J. Mason, 1996: 36).

Finally, it is important to mention that there would be a third option, that of "mixed-method". The adoption of a “hybrid” approach resulting by mixing the qualitative and the quantitative approach, it is still the subject of a very vibrant debate within sociological scientists. On the one hand, this approach is promoted as an adequate choice, as natural complement to traditional qualitative and quantitative research, by authors such as Johnson and Onwuegbuzie (2004). But, on the other hands, authors Collis and Hussey (2009) as well as Corbetta (1999) they have serious doubts about the maturity and validity of this approach, especially for less experienced researchers.

If the two different methodological approaches represent the methodological manifestation of two different paradigmatic assumptions about reality, then the intellectual and philosophical exercise will be extremely difficult to encounter the meeting point of these two (sometimes opposing) points of view. Therefore, we embrace with enthusiasm the challenge of "choice", without fear, because we make our the words of Patton (1990: 38-39) when he states: " *I prefer pragmatism rather than unilateral loyalty to one of the two paradigms. I prefer the "methodological appropriateness" to the "methodological orthodoxy", as different methods are appropriate for different situations.*

4.2.5 Multidisciplinary approach, interdisciplinary and transdisciplinary studies

The evolution of the scientific approach to the study of reality has stimulated further changes, including the tendency to overcome disciplinary boundaries. The transdisciplinarity (Bambara, 2000) represents for us the more complex and developed approach in this context (and the one we chose for our study, as we'll see below). According to Nicolescu (2008) the existence of "different levels of reality" and the "complexity" are among the methodological assumptions on which transdisciplinarity is based on. This research approach has the objective to achieve a holistic comprehension of the world, by being at the same time:

- between the disciplines;
- across the different disciplines and
- beyond each individual discipline (Wickson, Carew, & Russell, 2006)

Another critical defining characteristic of this research approach is the inclusion of stakeholders in defining research objectives and strategies in order to better incorporate the diffusion of learning produced by the research (Wickson et al., 2006): collaboration between the parties involved in the research is considered an essential feature of this approach: such collaboration is not only at the academic level, but through the active collaboration with people involved in the research and community-based stakeholders. Thus, transdisciplinary collaboration undertakes a great importance in the context of development, as it not only generates new knowledge that go beyond disciplinary boundaries, but make these results available to the parties involved in the study to contribute actively to their growth (Bambara, 2000; Wickson et al., 2006).

Even the multidisciplinary approach, which has in recent years been overtaken by the term interdisciplinary approach, is closely related to the concept of complexity. The two concepts differ from each other due to their different fields of application: while the concept of “multidisciplinary approach” I more used in a practical context (from architecture to art), the term interdisciplinarity, taken from the world of pedagogy, is applied to academic contexts. However they indicates an holistic approach by combining the perspectives of two or more academic disciplines, creating something new by crossing boundaries, and thinking across them (Ausburg, 2006; G. Gunn, 1992; Klein, 1990). The difference between interdisciplinarity and transdisciplinarity is that the former approach concerns the transfer of methods from one discipline to another, allowing the investigation to overcome disciplinary boundaries even remaining in the context of disciplinary research; the latter, on the contrary, as the prefix *trans* indicates, is between disciplines and beyond any single discipline, in order to obtain a holistic understanding of the world (Wickson et al., 2006).

4.2.6 Pros and cons of investigating during a scientific revolution

If investigating in the middle of a scientific revolution could represent, on the one hand, a major intellectual challenge, on the other hand, it could pose risks given by the fact that the two major paradigms are still seen as antithetical. The secular epistemological beliefs of "reductionist omnipotence” (Licata, 2011: 25) remained (and still remain) alive in contemporary science, sometimes tacitly, but continuing to classify as "scientific" only what one can calculate and measure accurately, and only those disciplines capable of mathematize their approaches (Licata, 2011: 26).Positivists aim to measure the frequency of a phenomena, while “interpretivists” adopt a range of methods that “seek to describe, translate and otherwise come to terms with the meaning (…) of certain phenomena in social world” (Van Maanen, 1983: 9). In contrast to positivist paradigm, the interpretivist *qualitative approach* is typically inductive, and deny hypothesis (Bryman, 2008: 366) as well as the reductionist models, being considered for this reason by the more orthodox positivists as a "non-science".

Thanks to the new horizons opened up by the emergence of the "complex thought", we now know that those disciplines considered “non-scientific”, they just could not mathematize their approaches because it was just impossible to do it, as they deal with complex systems and phenomena. And at the same time, today, paradoxically, all those disciplines which was considered as “non-scientific” are providing valuable information for the understanding of complex systems (Licata, 2011), paving the way to the final overcoming of the dichotomy between the humanities and sciences.

Finally, it is important to embrace this challenge of our time and participate in this revolution, aware as we are of the influences that changes in scientific paradigms have on the common way of seeing the world, therefore on the forms of managing it. Particularly, the word *Management* is today perceived as very fascinating, but its meaning is generally understood in a limited way and reductive (Licata, 2011: 43). It is our duty - through the promotion and the proposal of alternative ways to approach the reality – to overcome the legacy of reductionism and to give back to the word *management* its integrity and its full meaning: it is not just about the organisation and controlling of material, financial and human resources, but rather is *knowledge management*, and management of the complexity that characterizes each system.

4.3 Statement of the problem

The general objective of the study is to explore the complex and relatively new phenomenon of the application of *quality* within the archaeological cultural heritage management. As it is presented in the following subsections, in a first phase (exploratory phase) we used the model HERITY (Chapter 3, Subsection 3.4), and included the dimensions that HGES takes into account.

The specific objective is to understand the perception of quality by the archaeological heritage managers. So, our analysis focuses on specific dimensions that, based on literature, we believe should be included in the concept of quality within archaeological and cultural heritage management, such as the involvement of local population and the improvement of tourists' experience through interaction with local communities. Thus, a theoretical model was elaborated to orient our analyses and field work.

The aim of the present *exploratory research* is not to identify causal relationships as a positivist paradigm would, but instead to consider the complex nature of the research problem. Thus, the choice has fallen on a qualitative paradigm to explain (not to measure) the phenomenon investigated.

4.3.1 A methodological clarification on the choice of the topic

The literature review with focusing on the three main areas of this study, namely – archaeology, heritage quality management and tourism – was fundamental to create a strong base of knowledge in order to start the reflections and to be able to proceed to our problematisation. In particular, the management of the archaeological heritage, as a tourism resource and a way of local socio-economic development was chosen by the researcher also due to personal motivations: born and raised in a region of Italy in which a great abundance of archaeological resources co-exists with a terrible socio-economic and cultural degradation.

From a methodological point of view, we feel the necessity to make some clarifications in this regard: the bibliographic research led to discover the existence of a series of studies - in areas that are completely different from each other – "inspired" by the researchers' life experience. M. Scott (1968) was a gambler, and decided to analyse gamblers' behaviour scientifically; Becker (1963) was a musician, and carried out a social analysis of a group of jazz musicians; Hall (1976), frequenter of a dance school, developed a study on the socialisation of girls who aspire to be dancers; Romero (1992), Mexican housekeeper in the United States, analysed the social context of Mexican women crossing illegally the border of the State to provide their services to American families. More recently, Wolkowitz (2009), get politically involved in gender issues and particularly sensitive to this matter, elaborated a study in the same field. These kinds of studies are said to belong to the so called "autobiographical sociology" (Friedman, 1990). Even if in the latter a sociologist examines one or more past personal experiences as a way of identifying and investigating something sociologically relevant (Friedman, 1990), we would still like to distance ourselves from this classification. Even if we recognise the undeniable influence of our life experience on the choice of the research area, the latter is not, however, closely linked to this experience.

4.3.2 Exploratory phase and preliminary investigation

Our research includes some areas of theoretical and sectorial knowledge of which we did not have a previous exhaustive knowledge. The exploratory phase of the study has allowed us getting the maximum information before moving on to the phase of problematisation. Particularly, we felt the necessity to complete and integrate the theoretical knowledge of the concept of quality and quality control systems (presented in

Chapter 3) with a practical approach that would allow understanding of the perception of operators in different sectors: cultural and productive.

We planned a series of visits in a number of firms in different areas, where we have conducted unstructured interviews and arranged informal meetings with the quality managers. From a methodological point of view, the choice of unstructured interviews were justified by the fact that *the more open-ended the questions, the better, as the researcher listen carefully to what people say or do* (Creswell, 2014: 8-9), and because unstructured interviews are particularly useful for exploring a topic broadly, and when conducting site visits or casual focus groups designed to explore a context or situation (Trochim & Donnelly, 2006: 147). Talking with these technicians, even in an informal way, taking advantage of the ease of access at some firms, given by professional reasons, has been of great help to clarify doubts that arose in relation to the implementation of quality systems, and to collect the perception of the operators in this regard.

With regard to the heritage management sector, semi-structured interviews and direct observations have been carried out in December 2011 in four museums, in the city of Rome (Italy). To systematically write down all observed phenomena and events, as well as all information that were somehow related to the theme in a “Research Diary” was considered to be appropriate. The museums as well as the firms visited in this period and the data collection techniques adopted are shown in the Table 4.3.

The visit and contact with these organisations was essential to fully understand the concept, culture and practices of quality management in its various aspects and manifestations. In December 2012 a second round of visits and analysis has been carried out on the field in the city of Rome, in order to gather more data and make new observations. In this period, the heritage places visited were:

- Coliseum;
- Archaeological area of the Roman Forum;
- Trajan's Market;
- Capitoline Museums;
- Museum of Ancient Sculpture of Giovanni Barracco;
- Museum of the Walls;

- National Roman Museum;
- Area of the *Domus Romanae* (Palazzo Valentini).

The detailed study on the city of Rome was essential and preliminary to the selection of sites to be analysed as a sample of the population (see Subsection 4.7.4.3). Some of the data arosen from these interviews were also used in the empirical study.

Table 4.3: Exploratory Research

EXPLORATORY RESEARCH						
Organisation	**Sector**	**METHODS**				
		Semi structured interview	Unstructured interview to the main responsible for quality	Unstructured interview to the employees	Direct Observation	Document Analyses
Oliveira & Irmão, S.A., Aveiro (Portugal)	Industrial Sector		V	V	V	
LOVE TILES - Grés Panaria Portugal, S.A., Aveiro (Portugal)	Industrial Sector		V	V	V	
Meliá Ria Hotel **** (Aveiro) **Best European Hotel for the segment of business tourism in 2012.**	Tourism		V		V	
Museo delle Civette, Rome (Italy)	Culture (Museum)	V		V		V
Museo della Civiltá Romana, Rome (Italy)	Culture (Museum)	V				V
Planetario e Museo Astronomico, Rome (Italy)	Culture (Museum)	V				V
Museo Napoleonico, Rome (Italy)	Culture (Museum)	V				V

Still in the exploratory phase, namely between 2010 and 2011, was the accompaniment of the project *Antiquarium de Sevilla* (Seville, Spain), from its design to the opening of the centre (also described in Chapter 1). It was a particularly important project to follow as an example of integration of the archaeological heritage in the urban setting and in everyday life of the citizens of Seville: Amores Carredano et al. (2004), responsible for the project, stated since the very beginning about the importance of the social enhancement (*valoración social)* of those archaeological findings. Moreover, the project also aims to alter the traditional tourist flows, extending the tourist route of the city. These experiences allowed the acquisition of new knowledge. At the same time the establishment of a "research diary" from the beginning of the project was particularly useful.

Other exploratory activities within our research were conducted in the period between July 10, 2013 and September 12, 2013. In the latter period, with the supervision of HERITY we have visited several museum assessed by HGES (Table 4.4), where we have met their representative and conducted some unstructured interviews with visitors and local communities, which we have registered in the Research Diary.

Table 4.4: Museums visited in Lazio region in order to choose the third case study in Italy

List of museums visited	
Name	**Location**
Museo del Mare e della Navigazione Antica	Santa Severa
Museo Archeologico di "Villa Ferrajoli"	Albano Laziale
Area Archeologica Privernum	Priverno
Museo Archeologico a Priverno	Priverno
Museo Medievale a Fossanova	Priverno (Fossanova)

Also in this case, our impressions and some citations from non-structured interviews were recorded in the research diary as field notes, while interviews with the representatives of the Roman museums were transcripted and regularly encoded in our codebook (attached).

4.3.3 Statement of the problem

Our study needed an intensive literature review due to the interdisciplinary feature of the study. The areas in which we moved were schematically presented in the figure 4.3.

Figure 4.3: The main areas studied during the literature review

The main areas in which we had to become familiar are listed below:

- Archaeological and cultural heritage management;
- Quality (development of the concept, its principles and practices);
- Sustainable development;
- Heritage and archaeological tourism (in particular as regards the authenticity and the relationship between tourists and residents).

As presented in Chapter 2 and 3, the role of cultural heritage within the current paradigms of development form different points of view is clear. Among these, we chose to focus on the following, which seem to complement each other:

1. The role of archaeological, cultural heritage within the process of a global peaceful and sustainable development;

2. The role of archaeological cultural heritage in the context of tourism development, as a competitiveness key-element, and as an element that confers "uniqueness" and authenticity to tourism destinations, improving the experience of the tourist.

The reason why we focus on these two main dimensions is the fact that we consider them closely related. Tourism is widely recognised as a vehicle of intercultural dialogue between visitors and local communities (Chapter 2), and this process should be based on each destination's cultural heritage enhancement. This relationship is perfectly summarised by D'Amore (1988b), according to him, tourism brings peoples of the world closer together through the understanding of different cultures, environments and heritage, and it is potentially one of the most powerful vehicles for promoting understanding, trust, and goodwill among peoples of the world. In this statement we recognise three "macro-dimensions":

Figure 4.4: The macro-dimensions of the study

According to the "paradigm of complexity", as shown in subsection 4.2.1, it is not possible to answer a research question in a mono-disciplinary perspective. Since this is the paradigm that mainly reflects our position as researchers - thus the one we apply in conducting our research - we aim to grasp the dynamic links between the main dimensions of the phenomenon we're approaching, in order to have a holistic view of this aspect of the complex reality.

The affirmation of D'Amore (1988b) we cited before is particularly relevant when we consider the current socio-economic situation. In this context, interesting and revealing is the analysis of the authoritative British newspaper *The Economist,* which identified some parallels between the current situation and the one that preceded the Second World War ("The First World War. Look back in angst," December 2013 - January 2014). Even if *“the memory of the horrors unleashed a century ago, makes leaders less likely to stumble into war, today”*, we need to be mindful of the danger of “complacency” and “nationalism”. Indeed, “*the most troubling similarity between 1914 and now is complacency. Business people today are like business people then: too busy making money to notice the serpent flickering at the bottom of their trading screens*” and *“Politicians are playing with nationalism just as they did 100 years ago” ("The First World War. Look back in angst," December 2013 - January 2014: 13).* Then, investing in the culture, intercultural dialogue and in the establishment of new tools of participatory democracy is a real and urgent necessity.

In the previous chapters we have analysed the models of quality management of cultural heritage, and among these, particular emphasis was given to the model HERITY, as the most complete one. The HGES considers the following dimension (Quagliuolo, 2001: 251):

- Perception of cultural significance (VALUE);
- State of maintenance, preservation and restoration (CONSERVATION);
- Information provided to the visitor (COMMUNICATION);
- Quality of reception and services offered (SERVICES).

But if we accept the validity of the statement of D'Amore (1988b) – then we need to consider – and insert into the concept of quality management of cultural heritage - in which condition, the promotion of tourism as a vehicle for intercultural dialogue, understanding and peace will happen. First of all, we must consider the issues related to regional management policies: we found that in the context of planning policies and territorial development, the management of cultural heritage was particularly focused, on the one hand, on the issue of conservation and, on the other hand, on the "tourist" attractions with predominantly economic reason, paying less attention to the level of involvement of local populations (Carbone, 2011b; Carbone, Oosterbeek, & Costa, 2012). Therefore, we concluded that while the main focus is still directed towards the technical infrastructure that would only respond to the needs of conservation, there are also significant gaps in the level of local population involvement as a fundamental part of the archaeological cultural heritage management (Figure 4.5).

Figure 4.5: Positioning our study through the gap founded from literature

A program of protection and promotion cannot be limited to the conservative aspect of the material remains, but should re-establish a renewed relationship between population and the evidence of their past.

In this context and on the basis of such acquired knowledge, we formulate a philosophical speculation on the modality and purpose of managing archaeological heritage, on behalf of socio-economic development of local communities and towards a more responsible tourism development. In the following, next subsections, we present this theory.

4.4 Theoretical Contribution. *Paideia* Approach to cultural heritage management

4.4.1 About *Paideia*

Initially, the word παιδεία, *paideia* (*paidos*, child) meant simply "education of children". But, as we shall see, this primitive meaning is far from the high sense which later acquired. The fundamental aim of education was, initially, the aristocratic formation of the man as *Kalos Agathos* ("beautiful and good"). But since the fifth century BC, ancient Greek society required something more than this kind of education: in addition to form the *man*, education should also form the *citizen*. Consequentially, the old education, based on gymnastics, music and grammar was no longer enough. Historically, the fifth and the fourth century represented the classical age of the *paideia*, and it is no coincidence that this peak will coincide with a so problematic period: moral and spiritual bankruptcy of the brilliant V century allowed the Greeks to capture the essence of their education and culture (Jaeger, 1995: 484).

It is, then, in this time that the *paideia* was established as educational ideal of classical Greece, representing the task of building the man as *man and citizen*, or, as Polacco (2001: 48) affirms, “the *free man*: free to fully affirm himself on the basis of his cultural heritage, without renouncing to compete and loyally collaborate with others”. Plato defines *paideia* as follows "(...) the essence of all true education, or *paideia*, is what gives men the desire and eagerness to become a perfect citizen and teaches him to send and obey, and justice as the foundation" (Jaeger, 1995: 147).

Actually, defining the term *paideia* and the concept behind it is an arduous task. Werner Wilhelm Jaeger (1936) one of the major classicists of the 20th century, produced a profound and complete (perhaps the most profound and complete) study on this topic. Since self-government was important to the Greeks (Sowerby, 1995), the purpose of the *paideia* - combined with *ethos* (habits) - was made a man good and made him capable as a citizen or a king. As mentioned before, this education was not about learning a trade or an art, but was about training for liberty and nobility: in a way, *Paideia* is the cultural heritage that is continued through the generations (Jaeger, 1995).

In literature, it can be found definitions that perfectly and brilliantly describe the depth of the concept, as the following: *You cannot avoid the use of modern expressions such as civilisation, culture, tradition, literature or education, but none of them coincides with what the Greeks meant by paideia. Each of these terms only constitutes an aspect of that overall concept, and to cover the whole field of the Greek concept, we would have to employ them all at once* (Jaeger, 1995: 1). This author states that this issue is indeed difficult to define and, like other large-scale concepts, such as philosophy or culture, it is difficult to be completely closed in an abstract formula. The ideals of *paideia*, molded in the classical period, played an important role in the subsequent evolution and expansion of the Greco-Roman civilisation (Jaeger, 1995).

Philosophically, the doctrine which seems to have been ground of Socrates’ actual beliefs is expressed in the proposition of “*virtue* (*arete*, excellence) *is knowledge*”

(Sowerby, 1995: 123). The wise man who knows what is good and what conduce to human happiness will do what is good and conduces to true human well-being: it is possible to learn what conduce to true human good and happiness, and, once learnt, the knowledge will be irresistible. His ethical concern did not lead Socrates to prescribe rules of good conduct, but was directed towards the increase of self-awareness (ancient Greek aphorism γνῶθι σεαυτόν, *Know thyself*) as a prerequisite to the health and well-being of the *psyche* (Sowerby, 1995: 123). Furthermore, by considering the dialogue as the primitive form of philosophical thinking and the only way for mutual understanding among individuals, and considering this as a practical objective pursued by Socrates (Jaeger, 1995: 501), we can finally conclude that the educational process of *paideia* could be resumed two conceptual phases: firstly, the formation of the free-man through the knowledge of himself, his culture; secondly, and consequently, the preparation and the peaceful encounter with the others.

It should be noted however that some authors show some perplexity about the real value of this philosophical approach that, practically, for the first time, proposes a direct proportionality between "education" and what we would today call "development". Pinheiro do Nascimento (2001: 96) for example, calls into question the feasibility of such a philosophical approach - at least in ancient times - due to the elitist character of the education itself at that time, which makes it impractical to achieve the ideal proposed. It is not our intention however, to dwell on this kind of reflections: they discuss the feasibility and potential limitations of this philosophy, but this criticism is related to a particular social context and historical period, the ancient Greece. These considerations are beyond our intent.

4.4.2 Applying *PAIDEIA* to heritage management

Once exposed to the meanings of the Socratic concept of *Paideia*, and assumed this philosophy as universal and timeless in its vision of the role of education in human development, let construct now on these assumptions our consideration on the applicability of this philosophy to the management of cultural heritage within the context of worldwide socio-economic condition today.

The latest generations are experiencing the challenge of radical change in the paradigms of development and social dynamics: Blackshaw (2010: 34) notes that in the Bauman’s work *Unsicherheit* is the German word that the sociologist uses to define the complex combination of the uncertainty, insecurity and precariousness which characterized society nowadays.

We consider that the Socratic ideal of *Paideia* - summarized by the Greek aphorism "Know Yourself" (γνῶθι σεαυτόν) - should paradigmatically be applied to heritage management. In short, as well as Socrates identifies two phases of the growth process of a Man:

1. "the construction of the self" (from the cultural point of view) and
2. the encounter with "the others" (other cultures).

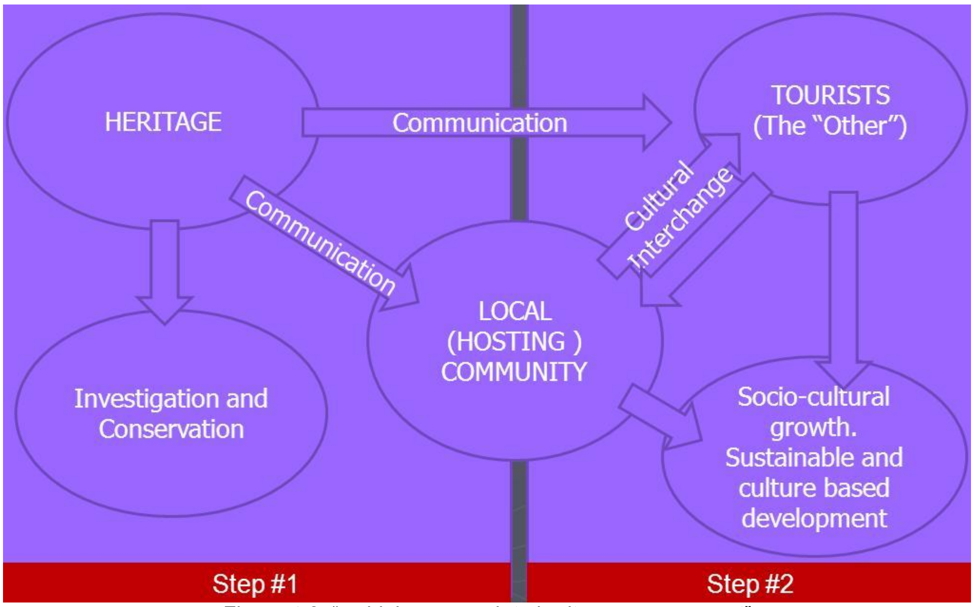

Figure 4.6: "*Paideia* Approach to heritage management"
Graphical representation of the concept

Reflecting this process, and based on the assumption of Abdallah-Pretceille (2006: 475) according to which *cultures can no longer be understood as independent entities, but need to be contextualised in terms of social, political, and communication-based realities*, one of the main aims of heritage management should be:

1. the cultural and social development of local communities based on cultural heritage enhancement, emancipating the community through the reinforcement of their cultural identity;
2. the development of cultural, heritage and archaeological tourism which has as its goal not just the economic income for the destination, but especially that of the socio-cultural growth: in other words, invest in tourism activity as a vehicle of

intercultural dialogue and cross-cultural understanding through the encounter between tourists and local population.

The sequence of these two phases is not necessarily chronological, but it must absolutely be conceptual, through a constant focus on the involvement of local communities in heritage enhancement. In this way, it becomes possible the meeting between different cultures in what P. Boniface and Fowler (1993) call "global village".

4.4.3 Bridging tourism and community development on the basis of heritage enhancement

While the term community is used in a number of non-spatial contexts (for example *academic community*), it is mostly used to refer to the people who make up a defined geographical area. The concept of *community development* could in theory be applied at international, national, regional and down to the village scale, but it is mainly applied at district level: the ideal successful local community is seen as ne which has *social capital*, where sporting, cultural and social organisations and events have high level of participations and where peple are enerally connected (Veal, 2010: 237).

The subject of the social impacts of tourism and participation of local communities is a broad field of study. However, the specific scope of the partnership between tourism and heritage management through the involvement of the local populations is an unexplored field. Eminent authors in this field, like McKercher and du Cross (2002: 215), alert about the necessity to contextualize the heritage in the local socio-cultural environment and to engender greater community support for the further conservation of valuable tangible and intangible assets (McKercher & du Cross, 2002). Still, in the context of the theory of the Asset-Based Community Development (Kretzmann & McKnight, 1993), according to which *communities can drive the development process themselves by identifying and mobilizing existing (but often unrecognised) assets, thereby responding to and creating local economic opportunity* (Mathie & Cunningham, 2005), one can recognise in cultural heritage one of these resources.

On the other hand, leisure is seen as a component of such community development and this has resulted in the emergence of *social development*, *sport development* and *arts/cultural development* programmes, as well as community-related tourism development programmes (Veal, 2010). It has lead to a paradigm shift whitin leisure and tourism planning policies: in general, leisure-oriented community development is designed to reach members of the community which the traditional approach to leisure provision has not been able to reach, as Veal (2010: 237) points out, remembering that the community development approach is *community orientated* rather than *facility orientated*, that is, managers and team ar focused on the communitys' benefits and not only on the facilities' management.

Literature is unanimous in affirming that this kind of approach - the involvement of the local community in the context of cultural tourism development - benefits the tourist activity and the destination, from a point of view of image, marketing and experience offered to tourists, and at the same time, also benefits the local population. But, while the benefits for tourism are particularly approached and studied (producing theories and practices about the importance of authenticity in the experience of tourism and contact with local communities), the processes that lead to effective socio-cultural benefits for the residents lack further investigation, and more detailed.

After the literature review, for which we used keywords like "heritage management", "heritage tourism" and "quality", and the analyses of the theories (and their evolution) in the same fields, we comes to the following considerations: on the one hand exist strong recommendations (theoretical and sectorial) to manage cultural heritage as a platform for intercultural dialogue (also through its tourist enhancement), and for sociocultural growth; on the other hand, the concept of "quality" and "quality management" within heritage management and tourism heritage, despite being a powerful tool in the competitiveness of a tourist destination and the structuring of its offer, not includes, however, these social dimension, namely the social and cultural potential of heritage management and its tourist enhancement. We can say that there is a gap between the supranational recommendations and the existing paradigms of heritage management and touristic enhancement, and it requires systematic investigations.

After these considerations, as a conceptual basis for the present investigation we elaborated a conceptual management proposal that should bridge the gaps described above, in theoretical terms, defining an approach to management of the assets that takes into account the social dimension in a more effective way. The results of this approach should integrate the concept of quality within heritage management, by supplementing it. We named the theoretical proposal as "*Paideia* approach" to cultural heritage management for tourism and local communities.

4.4.4 *Paideia* approach to heritage management on behalf of local communities' development and tourism

The fascination of the "complex" approach we talked about in the first part of this chapter and that we adopt, lies on the possibility to consider different aspects and expected effects in a holistic way. In the conceptualisation of the *Paideia* approach to heritage management we consider the possible effects on the local community and at the same time, in an holistic way, the improvement of the tourism experience. The two processes are considered as complementary to one another. Finally, the concept exposed ideally trace back to a contribution to the promotion of intercultural dialogue based on the involvement of the local population in heritage management and the tourist activity.

The issue of the enhancement of cultural heritage within local population is an added value for the tourist experience, conferring authenticity to the destination, and it is fundamental to optimize the opportunity of cultural interchange between tourists and local community. The Human Being is today the nucleus of the touristic phenomenon and experience (Binkhorst, 2008: 45; Binkhorst & Dekker, 2009: 324; Jager, 2009), and the "personality of a destination" is expressed in three dimensions: sincerity, excitement, and conviviality.(Ekinci & Hosany, 2006). Actually, If we carefully analyse the phenomenon of encounter of a tourist with the cultural aspects of the visited destination, we would immediately notice that the very first encounter between cultures does not happen in a museum or an archaeological site, but in a more or less rapid conversation with the waiter, as also P. Boniface and Fowler (1993) and UNESCO (2006) point out. In these moments of meeting, the waiter, the taxi driver, the passer-by to whom one asks for information, are *occasional ambassador of a destination* (European-Commission, 2000b: 11).

From the point of view of tourism planning and development, thus, it is particularly important the cultural level and the self-esteem of local communities is particularly important to guarantee a good touristic experience, but also (and above all) to guarantee more opportunities for cultural interchange between visitors and hosting population. The attention on the issue of the "destination's ambassador", by the local stakeholder, represent one of the first steps to bridge the "communities benefits" and the "society benefits" of a tourism activity based on culture

4.5 Definition of the Research Question

The definition of an ideal model for the management of archaeological and cultural heritage (subsection 4.3.3) leads to reflect on the meaning of quality management in the same area, continuing the debate of authors such as Conti (1998) and Quagliuolo (1998, 2001), in the field of quality management in cultural heritage.

According to what previously said, the questions that oriented our logical process towards the research question are shown in Figure 4.7.

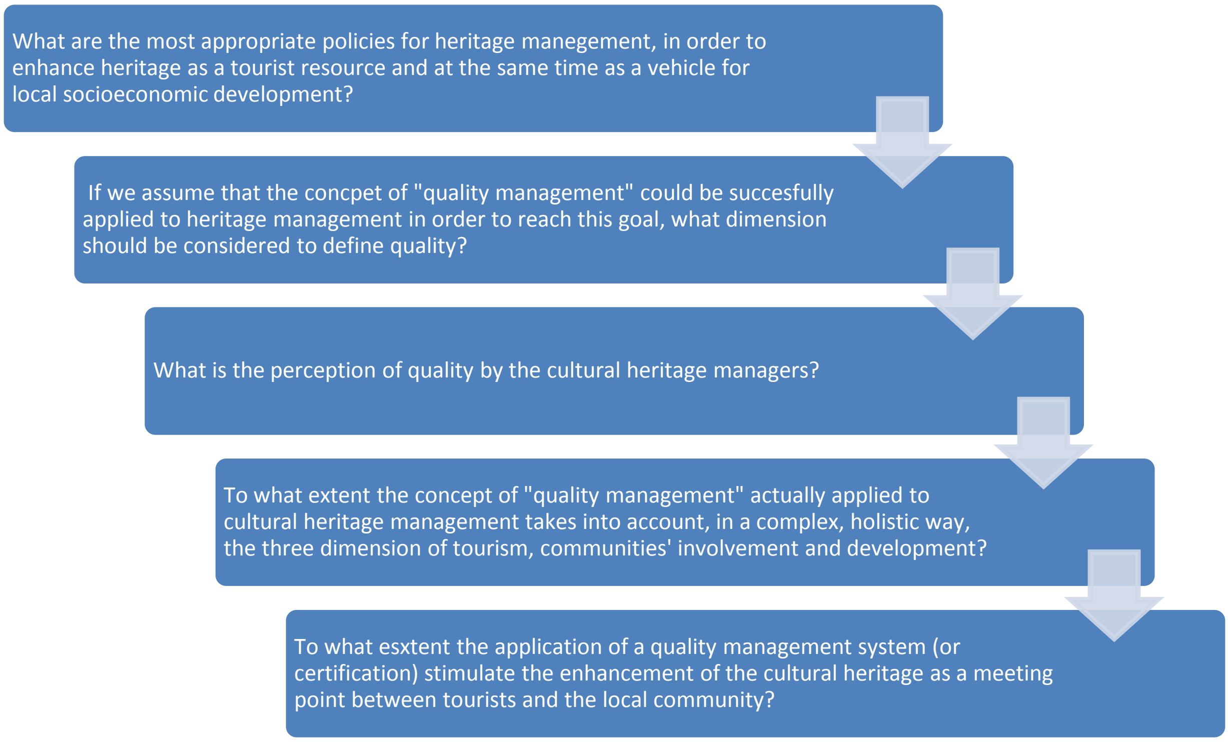

Figure 4.7: Questions at the basis of the problematisation

The application of the concept of quality in the management of cultural heritage, as well as the effects that it brings, especially from the point of view of the positive contribution for tourism activity and for local socioeconomic development. In particular, we will focus on the links that may exist between the concept of quality and the involvement of local population trough two different but complementary perspective: on the one hand, the improvement of tourism through the greater involvement of the local community, giving a greater authenticity to the tourist experience towards an improvement in the global tourist offer. On the other hand, to increase awareness among residents about the local heritage in order to make them ready to engage an intercultural dialogue with the tourist, towards social, cultural and economic development. Based on all the above arguments, the main question we ask and which opens the way to our field research is thus the following:

To what extent the implementation of quality management systems for heritage sites contributes to boost the participation of local communities and their encounter with tourists?

We propose, therefore, to comprehend:

1. How Quality Management is perceived by the heritage operators? (and still: “Is Quality Management in heritage enhancement perceived as a bureaucratic framework by the operators?”)
2. What is the impact of the implementation of quality management systems on the level of self-awareness of the local population?
3. How does the implementation of quality management systems for heritage sites play a role to boost the visitors’ experience?
4. Among the dimensions of quality in the management of cultural heritage, to what extent operators consider that of the promotion of the encounter between tourists and the local community and intercultural dialogue?

4.6 Theoretical Model

In order to answer to the research question Creswell (2014: 199) talks about the need of a "qualitative codebook", that is, a theoretical model with a set of dimensions to be compared with the empirical model emerged from the field research. We elaborated a theoretical model where we define several dimension constructed on the three macro-dimensions identified in the subsection 4.3.2 (Culture and Cultural heritage; Tourism; Encounter between tourists and residents). Each dimension includes several sub-dimensions created based on literature. The main dimensions are shown in the following table (Table 4.5).

Table 4.5: Dimensions of the theoretical model

Dimension 1 – Quality within heritage organisation
Dimension 2 – General impact of Quality System within heritage management
Dimension 3 – Impact of Quality Management on local communities' involvement
Dimension 4 – Quality Management and local communities' encounter with tourists
Dimension 5 – Quality and Economic impacts
Dimension 6 – Destination Branding, Heritage and Authenticity

Each of these dimensions is associated with the macro dimensions defined in subsection 4.3.2, as shown in Figure 4.8a.

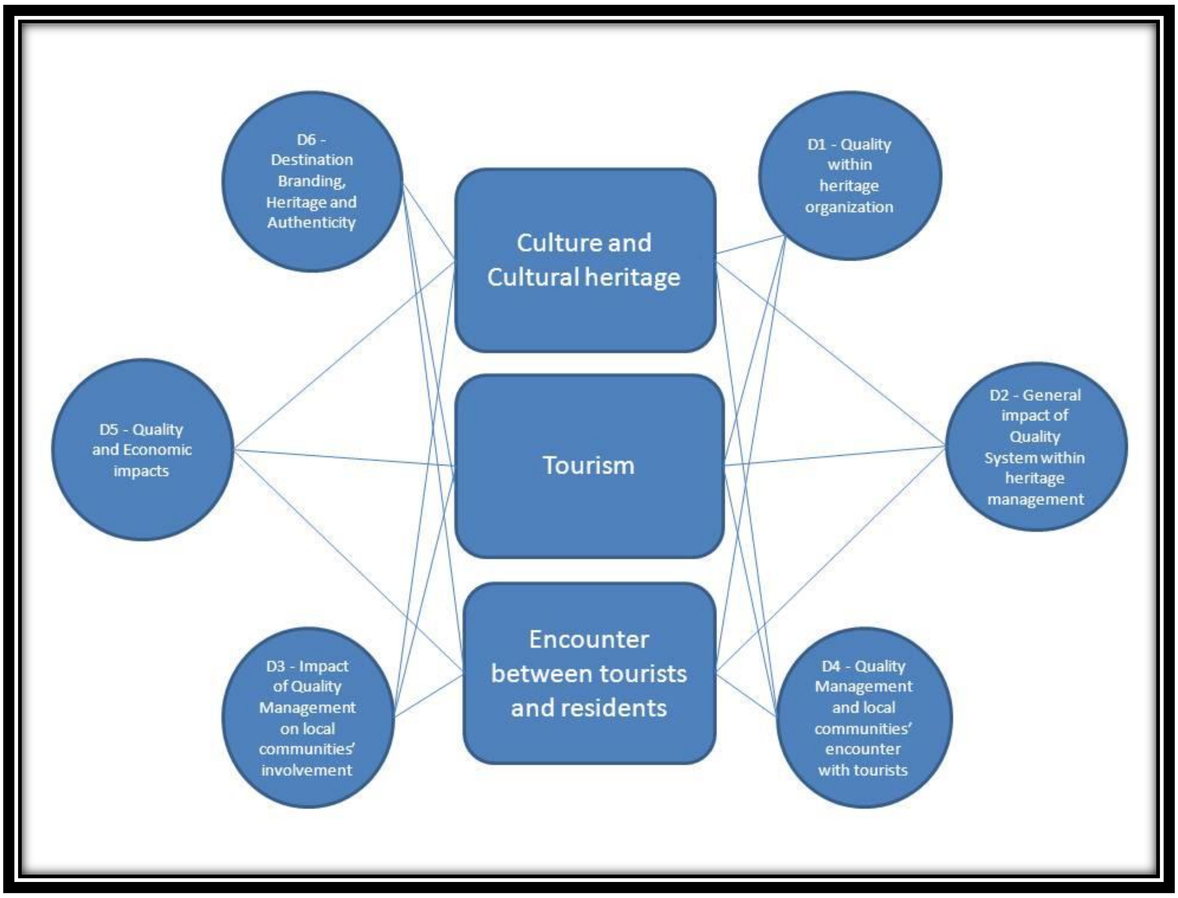

Figure 4.8a: Association between the macro dimension and the micro dimension of the study

It is necessary to consider not only the relations between what we defined as the *dimensions* and the *macro dimensions*, but also analysing from a *complex* point of view. Thus, the result is a complex system of relationships that is the phenomenological scenario inside which is positioned our research (Figure 4.8b).

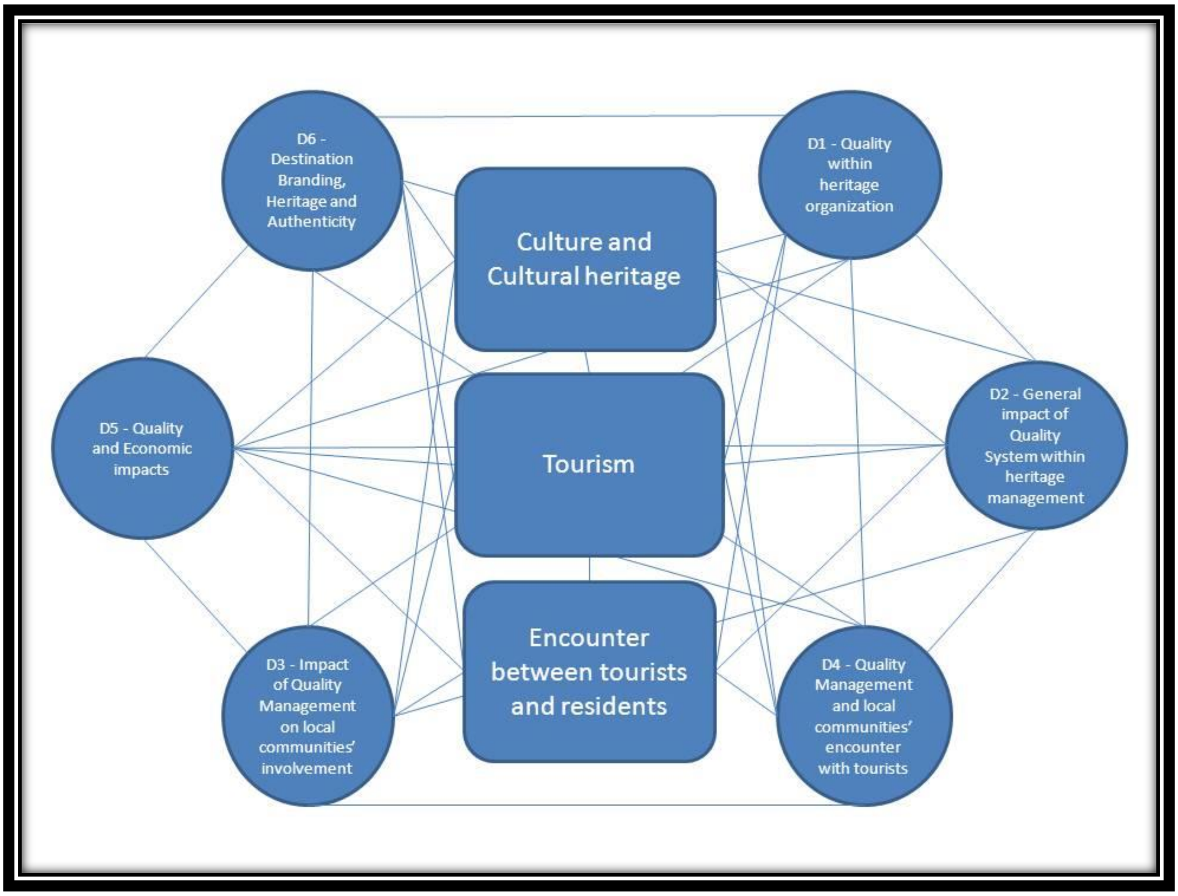

Figure 4.8b: Overall relationships between the dimensions of the study

Before considering the choices made in order to conduct the field study, we present in more detail our *theoretical framework* (Figure 4.9).

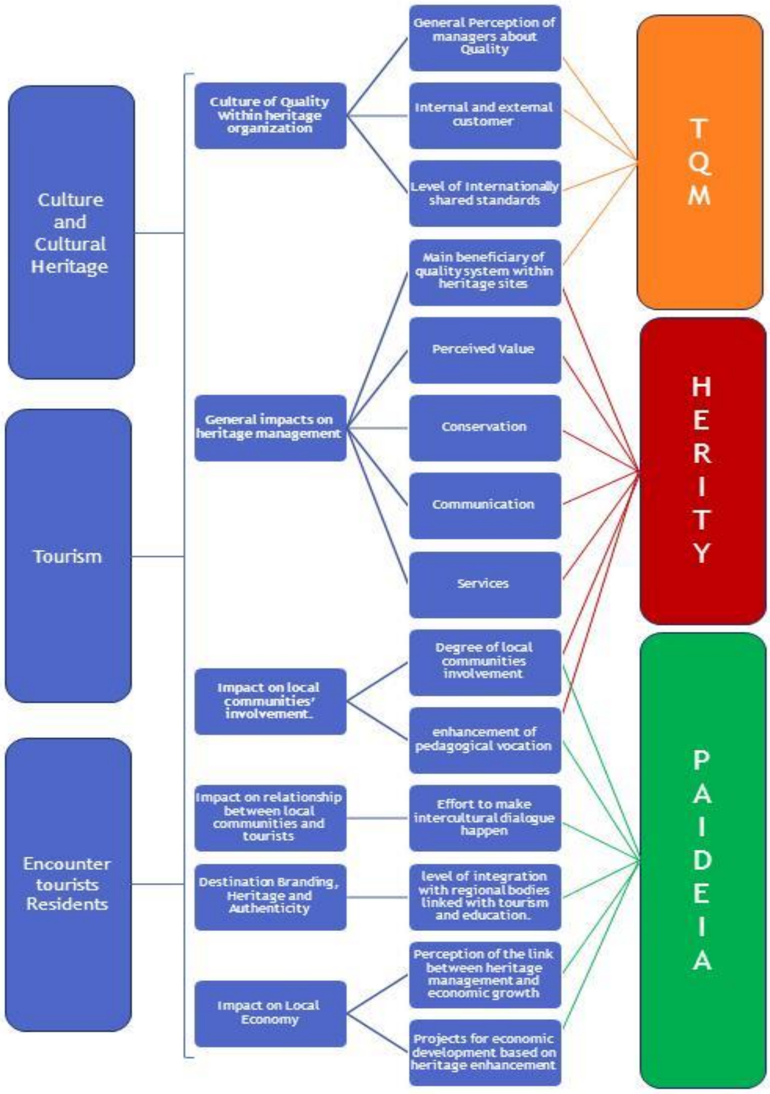

Figure 4.9: Theoretical framework

4.6.1 Dimension I - Quality within heritage organisation

If one aims to investigate the implementation of the principles of Quality within heritage management and related effects, exploring certain dynamics and the perception of the Culture of Quality within heritage organisation seems appropriate. Hence, one must understand what is the **Perception of quality by the operators** (sub dimension I), since Pinto and Soares (2009: 16) state that *in the minds of managers of the organisations, the concept of quality system is associated with increased "paperwork" and bureaucracy, while the only beneficiary will be the marketing department*.

In addition, it is important to understand what is the opinion of the heritage managers about the recipients of their work, given that the father of Total Quality Management, (Juran, 1988) distinguishes between *internal* and *external* customer (sub dimension II, **Perception of the internal and external customer**). In this respect, in fact, Quagliuolo (1998: 18-19) clarifies *the importance of the culture of quality in heritage management, intended as a tendency to on-going improvement and a constant attention to the needs of the users of heritage attractions, whether tourists or residents*.

Then, according to Karlsson and Martinez (2005: 283), *the ability to accept or refuse the added effort required by the application of a quality system, depends not just on the individual predisposition but also on the regional predominant mentality - that anyway may be modelling on the long-term – which represents a key element in the regions' implicit structural capital*. Consequently, the **perception of managers about the dominant mentality** and their responsibility in the long-term process of change is adopted as Sub dimension III. At this point, it is necessary to investigate the heritage managers' **perception regarding the adoption of internationally shared standards and methods of interdisciplinary intervention and management** (Sub dimension IV), since Manacorda (2007: 90) assert that, the necessity of sharing internationally, standards and methods of interdisciplinary intervention and management.

4.6.2 Dimension II - General impact of Quality System within heritage management

The implementation of the culture of quality within an organisation that deals with heritage management has, thus, a series of internal dynamics. First of all, it is important to determine the main beneficiary of a quality system. According to Marnetto (2009: 52), *the main target of the system of the HGES is the public* and, more specifically, Quagliuolo (2001) states that this system helps visitors to decide about their visits, encourages managers to improve standards, and, finally, provide guarantees to institutions to respect minimum quality levels. Consequently, the definition of the **main beneficiary of quality system within heritage sites** is considered in the Sub dimension V.

Then, the literature identifies four different dimension involved in the quality management: **perceived value, conservation, communication capacity, services**

(Quagliuolo, 2001: 251). So one has to consider how quality management affects these areas.

4.6.3 Dimension III - Impact of Quality Management on local communities' involvement

At this point, the study focuses more specifically on the research question, and aims to investigate (in a more direct way) to what extent the degree of involvement of the local population is considered part of the heritage quality management. Actually, according to P. Boniface and Fowler (1993), *through a constant focus on the involvement of local communities in heritage enhancement, the meeting between different cultures in a "global village" becomes possible*. The latter concept is in fact the basis of this study, and has been theorised by the researcher in the previous chapter, where the "*Paideia* Approach to Heritage Management" is widely exposed in the section of the "theoretical contribution".

Accordingly, the **Degree of local communities' involvement** is considered as the Sub dimension X. In fact, there is "the necessity to contextualize the heritage in the local socio-cultural environment and to engender greater community support for the further conservation of valuable tangible and intangible heritage" (McKercher & du Cross, 2002). Still, especially with regard to the archaeological heritage, the literature suggests the *pedagogical vocation of the ancient ruins* (Augé, 2004: 43), and this is the reason why the **Effort to use heritage for pedagogical purposes** is taken as Sub dimension XI. It combines perfectly with the current debate on the urgent necessity to educate for sustainability and intercultural dialogue as confirmed by Abdallah-Pretceille (2003), important author in the scientific field of cultural diversity and interculturalism.

With regard to this dimension of our theoretical model, it is important to bear in mind the academic debate on the participation of local communities from the point of view of tourism development. Tourism, as a service-based industry, is particularly dependent on the support and co-operation of host communities (Cole, 2006) and this community-oriented approach is a widely accepted theory (C.A. Gunn, 1994; E. Inskeep, 1994) towards the implementation of principles of sustainable development which should be characterized by a consensus-based decision-making and a fair distribution of benefits among stakeholders (Tosun, 2006). Our theoretical model thus takes into account the involvement of local communities in the process of heritage management not only due to the necessity of awareness and socio-cultural development, but also based on the theoretical debate about the process *to involve local communities as a key agent in the decision-making and planning of tourism destinations in order to ensure positive local attitudes and improvement in communities' quality of life* (Malek & Costa, 2014).

4.6.4 Dimension IV - Quality Management and local communities' encounter with tourists

P. Boniface and Fowler (1993) stated that *the very first encounter between cultures does not happen in a museum or an archaeological site, but in a more or less rapid conversation with the waiter*. Actually, if we consider the role of tourism in the process of social development: it is a tangible way to make intercultural dialogue happen; as a way to create spaces in which different people interact, in which they make themselves visible and accessible to the "other" (Van den Berghe, 1980). According to the UNWTO (1999), *tourism contributes to mutual understanding and respect between peoples and societies*. And such intercultural encounter can be achieved and promote, from its starting point, the cultural heritage. According to the ICOMOS (1990) *the presentation of the archaeological heritage to the general public is an essential method to promote understanding of the origins and development of modern societies*. A process that is also pedagogical, within the context of the necessary intercultural education defended by Abdallah-Pretceille (2003), who affirms that *l'introduction de la diversité et de la complexité culturelle commande de rectifier que la variation n'est ni un épiphénomène, ni un facteur peturbateur*[8] (Abdallah-Pretceille, 2003: 3). Bizarro (2007) collects a series of interdisciplinary work conducted in the same direction.

The role of "cultural mediator" (Abdallah-Pretceille, 2003: 59; Taft, 1981) does not belong to the resident population anymore, but to the heritage itself, as a starting point of a dialogue and channel of communication between cultures. Tourism, indeed, is centred on the fundamental principles of exchange between peoples and is both an *expression* and *experience* of culture (Appadurai, 2002). Finally, it is widely recognised that in the

[8] "The introduction of diversity and cultural complexity order to rectify that the difference is not an epiphenomenon or a factor of disturb."

process of sustainable development, tourism can represent a vehicle for intercultural dialogue and cross-cultural understanding (D'amore, 1988a; Swarbrooke, 2000; Throsby, 2010: 194; UNESCO, 2006), For all these reasons, the **Effort to make intercultural dialogue happen** is taken as Sub dimension XII of the present study.

4.6.5 Dimension V – Quality and Economic impacts

The cultural policies of heritage management, as well as the involvement of local communities in this process, has a positive economic impact on the region, as largely demonstrated by Throsby (2010). The link between cultural heritage, tourism and job creation also thorugh the revitalisation of the traditional regional economy is widely discussed by author such P. Mason (2003) and, again, Throsby (2010), among others.

In this particular dimension our focus is indeed addressed to the cultural benefit of tourism in the attainment of the “critical mass” of interest necessary to maintain the viability of a society’s culture, especially the culture’s art forms: the opportunity to sell native crafts or to perform to an enthusiastic audience can entice locl artisans to continue traditionl art forms that otherwise may no longer be seen as a viable means of income (Cook, Yale, & Marqua, 2010: 305). It is necessary thus to define the heritage managers’ perception about this specific topic and its link with quality management.

4.6.6 Dimension VI - Destination Branding, Heritage and Authenticity

The perception of destination personality in visitors is 3-dimensional: sincerity, excitement, and conviviality. Destination personality has positive impact on perceived destination image and intention to recommend. In particular, the conviviality dimension moderated the impact of cognitive image on tourists’ intention to recommend (Ekinci & Hosany, 2006). An integrated approach, benefit the destination marketing, if one considers that some destinations have developed a clear, unique positioning by branding the destination experience rather than the physical attributes of their destination, capturing the consumer’s attention with a more compelling and urgent reason to visit (Hudson & Ritchie, 2009). Finally, it is recognised that heritage is the major component of primary resources for tourism, as it is *all that identifies, distinguishes and, eventually, qualify a region as a tourist destination* (Umbelino, 2004: 22).

4.7 Research Design

Research design provides the glue that holds the research project together and it's the specification of how the research question will be answered (Trochim & Donnelly, 2006: 158). In Figure 4.10 our research design is graphically exposed, and in the next subsection all of its element are explained and justified, from the paradigm used (subsection 4.6.1) to the choice of data collection techniques (subsection 4.6.3). Finally, the population of the study and our sample is also presented (Subsection 4.6.4).

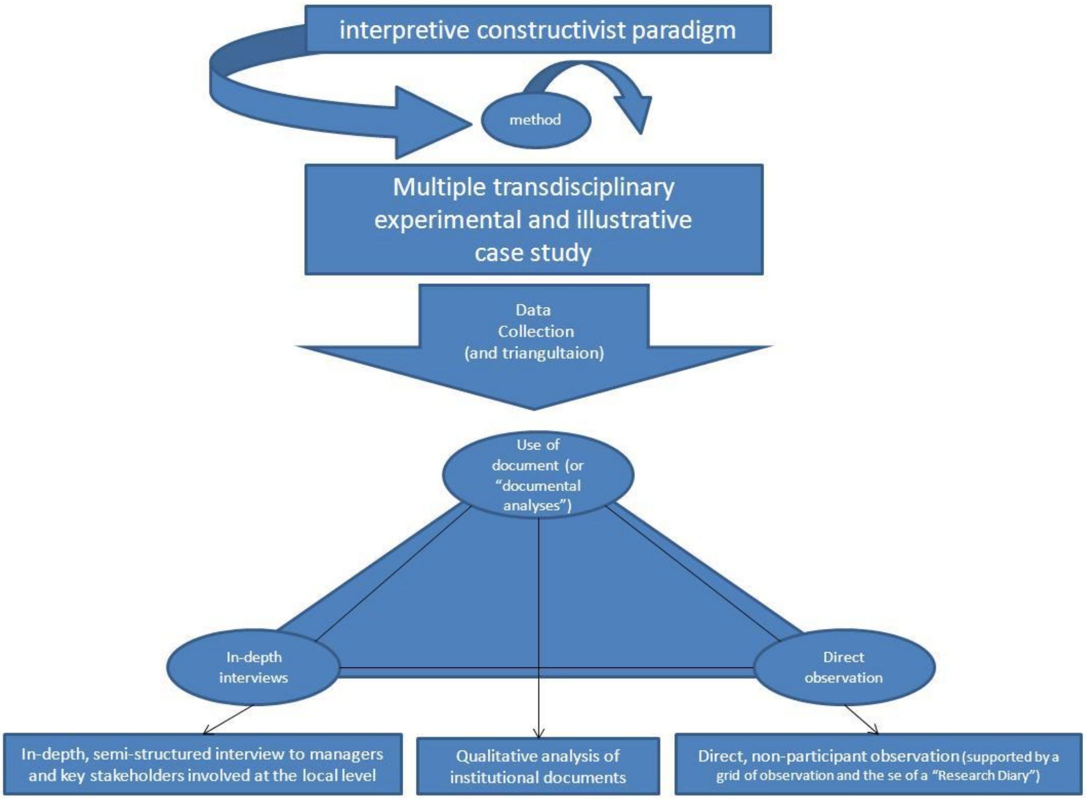

Figure 4.10: Graphic presentation of the Research Design

4.7.1 About the research paradigm

As we have extensively discussed above, the definition of the research paradigm is essential and preliminary to the definition of research methods. In the case of this study, our approach to reality is based on a post-positivist, interpretive/constructivist paradigm, which implies and emphasizes, among the objectives of the study, to understand the motivations underlying the behaviour of the agents involved in the phenomenon considered. In line with the paradigm adopted, the research approach is qualitative (see also subsection 4.2.2). As Trochim and Donnelly (2006: 142) state, qualitative research is typically used:

- For generating new theories or hypotheses;
- For achieving a deep understanding of the issues;
- For developing detailed stories to describe a phenomenon;
- For mixed methods research.

So, while quantitative research can describe phenomenon generally, qualitative research enables us to get at the rich complexity of the phenomenon (Trochim & Donnelly, 2006: 143). Therefore, the choice of a purely qualitative approach seems to be the most adequate. At this point, in presenting our research design it is appropriate to recall that qualitative approach does not advance according to a linear itinerary made of pre-arranged, systematic stages, but it operates rather as an irregular flow of decisions prompted by the changing configuration of the events that happen on the field (Cardano, 1997: 50). For example, even the choice of the cases to be analysed in the present study (and that we present below) has not been defined from the beginning, but rather has been the result of deep reflections made as the study progressed in its exploratory phase.

4.7.2 About the method

Once presented the paradigm adopted and the type of approach chosen, we can now define the method by which we are going to answer the research question. The method chosen is that of the *case study*, which is defined by Trochim and Donnelly (2006: 147) as *an intensive study of a specific individual or a specific context*. The case-study method has the potential to bring out various angles from which a particular topic can be discussed (Keitumetse, 2009: 204), and it represents an holistic analysis *to obtain a deep understanding of a contemporary phenomenon in its real context, using multiple sources of evidence* (Beeton, 2005: 42). Particularly, it is valuable with regard to its ability to explain the complex relations in a multi-faceted sector such as tourism as shown by Beeton (2005: 37).

Furthermore, it seems appropriate to associate to our method (case study) a series of adjectives in order to better define and place it within the theoretical and sectorial point of view. We define thus the method we adopted as a

Multiple, transdisciplinary, experimental and *illustrative case study*

Considering that the adjective *multiple* refers to existence of several cases considered in order to create comparisons (as we'll see below), let us analyse the meaning and implications of the other attributes. Firstly, a *transdisciplinary* research aims to achieve a holistic comprehension of the world (see also subsection 4.2.5 in this chapter), by being:

- between the disciplines;
- across the different disciplines and
- beyond each individual discipline (Wickson et al., 2006)

Another defining characteristic of this research approach is the inclusion of stakeholders in defining research objectives and strategies in order to better incorporate the diffusion of learning produced by the research (Wickson et al., 2006). The following figure (Figure 4.11) illustrates more details graphically.

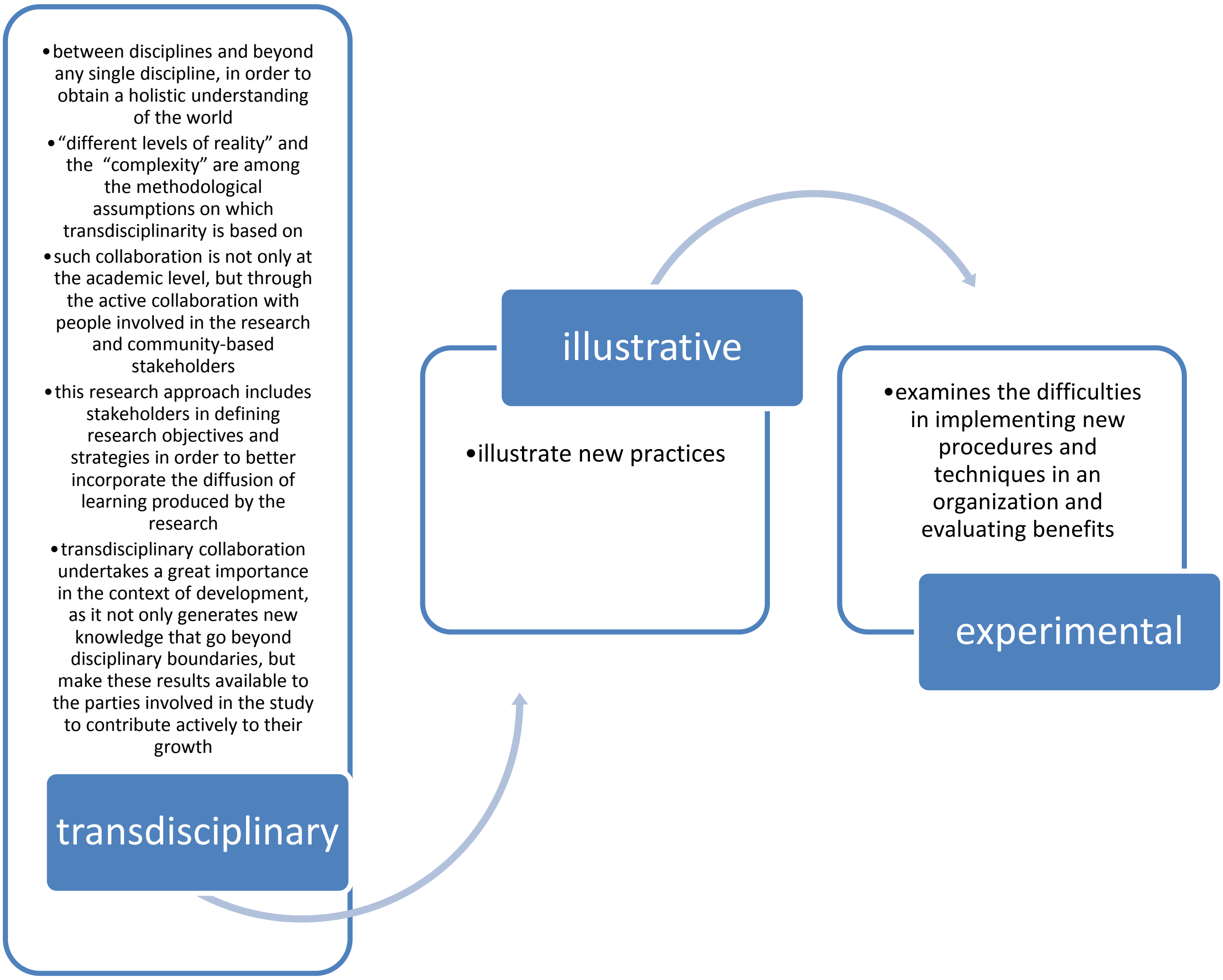

Figure 4.11: Additional attributes of our multiple case study

Transdisciplinary collaboration undertakes a great importance in the context of development, as it not only generates new knowledge that go beyond disciplinary boundaries, but make these results available to the parties involved in the study to contribute actively to their growth (Bambara, 2000; Wickson et al., 2006). On the other hand, an *experimental* case study aims to examine the difficulties in implementing new procedures and techniques in an organisation and evaluating benefits, while an *illustrative* case study aims to illustrate new practices adopted by particular companies (Collis & Hussey, 2009: 82). In addition, the typical procedures for the realisation of a case study are summarized below, in Table 4.6:

Table 4.6: Typical procedures of a case study

TYPICAL PROCEDURES OF A CASE STUDY	
Selecting the case	Not strictly necessary a representative case (or set of cases) since the aim is not the statistical generalisation.
Preliminary investigations	The process of becoming familiar with the context in which one is going to conduct his or her research. To determine the approach on this phase, it may be helpful to reflect on the paradigm adopted and also to consider the purpose attributed to the research.
Data Collection	Determine HOW, WHERE and WHEN to collect data. The methods used include documentary analysis, interviews and observation, and the evidence may be qualitative, quantitative or both.
Data Analyses	Possibility to choice between "within-case" analysis or "cross-case analysis"
Writing the Report	Create an appropriate structure and demonstrate that analysis and conclusions can be linked to the masses of data collected.

Source: Adapted from Collis and Hussey (2009: 83)

Finally, although for the present study we chose a purely qualitative approach, we must remember that Bryman (2008: 53) points out that "case study" method is frequently site for the employment of both quantitative and qualitative research: in future studies it will be possible to complete our qualitative study by improving it with quantitative or mixed data.

4.7.3 About the techniques of qualitative data collection and triangulation

The focus of qualitative analysis is the interpretation and understanding of phenomena in their social institutional, political, economic and organisational context (Parker, 2004: 159). Patton (2002: 433) clearly affirms that *there are no formulas for determining significances. (…) No straightforward tests can be applied for reliability and validity. In short, no absolute rules exist except perhaps this: do your very best with your full intellect to fairly represent the data and communicate what data reveal given the porpoise of study*. In our case, we have capitalized our prior experience on archaeological digs -

where one reflects on the relations among the material evidences of the past in order to interpret them and “construct a story” - proceeding as an archaeologist does.

An archaeologist uses to raise his head from the square meter of land on which he is bent, in order to have an overview of the entire context and constantly grasp the relationships between emerging evidence. In the same way, in the course of the present research we chose to regularly "put down our instruments for a while" and "raise our head" in order to capture the overall vision and relationships between emerging evidences. And so as it occurs in a stratigraphic excavation, those moments were fecund of reflections and considerations which, in itself, may be considered *findings*.

This actually reflects the considerations and guidelines on the process of collecting and analysing data in qualitative research, provided by authors such as Creswell (2014: 194), Patton (2002: 433) or still Marshall and Rossman (2011) and Merriam (1998), according to which the boundaries between the stages of data collection and analysis are far from being well defined in qualitative research and that, indeed, in most cases are simultaneous.

It is also important to be aware about the discussion of J. Mason (1996: 35-36) about the *data sources* and *methods*, that is, about the differences between the concept of generating data rather than collecting data. This author explain that we can perceive people as “data sources” in the sense that they are repositories of knowledge, evidence or whatever which is relevant for the research: observing this people, talking to them, collecting products they had generated: it is the first step to create data through the implementations of our “data generation methods” (J. Mason, 1996: 36).
Yin (2009: 101-114) lists six typical sources of data and evidences for the case study research (our method, presented in the Subsection 4.7.2):

1. Interviews;
2. Direct Observations;
3. Documentation;
4. Archival Records.
5. Participant Observation;
6. Artefacts.

We did not consider in our study the last two categories mentioned by the author. For the present research we have exclusively consider:

1. Direct observation;
2. In-depth interviews;
3. Use of document (or "documental analyses").

The latter methods are related, according to Corbetta (2003: 11), to the three elementary actions that man puts in place in order to analyse the social reality that surrounds him:

1. Observing;
2. Questioning;
3. Reading.

Our choice is the result of deep reflection and study of the techniques previously applied to other research, as we will show in this section. First of all, one has to define them as sources of qualitative data[9] as shown in Table 4.7.

Table 4.7: Typical sources of qualitative data
Source: adapted from Trochim and Donnelly (2006: 146)

SOURCES OF QUALITATIVE DATA		
In-depth interviews	**Direct observation**	**Written documents**
Individual interviews (one-on.one) and/or group interviews (including focus groups). Data can be recorded through stenography, audio recording, and video recording and written notes. - The aim of the interview is to probe the ideas of the interviewees about the phenomenon of interest.	The process of observing a phenomenon to gather information about it. Data can be recorded in many of the same ways of interviews and through pictures.	It refers to existing documents (as opposed to transcripts of interviews conducted for the research). It can include newspapers, magazines, books, websites, annual reports and so on. Written documents are usually with some form of "content analyses".

In collecting data, one need to develop strategies and be alert to opportunities for triangulating data, in order to enhance the credibility of the collected data, the related

[9] Actually the authors Trochim and Donnelly (2006: 146) define these as "major categories or types of qualitative data", but we believe the most correct definition would be "major sources of qualitative data."

analysis and the resulting assertion one makes (Parker, 2004: 162). The choice of adopting more than one technique of data collection reflects our paradigmatic position: as, according to post-positivist belief, all measurements are fallible, therefore, we emphasizes the importance of multiple measures and observations – each of which may have different types of error – and there is a need to use *triangulation* across these multiple error sources in order to get closer as much as possible to what actually happens in reality (Trochim & Donnelly, 2006: 19).

In our research the importance of the comparison of data arose through the interviews, direct observation and the information extractable from the institutional documents lies, for example, in the fact that *documents contain "non-reactive" information, in the sense that they are not affected by the interaction between researcher and the studied person, as it could occur within interviews, avoiding distorting effects* (Corbetta, 2003: 116). *Methodological triangulation* is usually used in researches related to management and quality in cultural heritage: Lindblom (2011), in order to carry out a research on the trend of the growth of quality in the management of cultural heritage in Norway, uses a methodological triangulation which includes the use of the following data collection techniques:

1. Text analyses (of Environmental Impact Assess Report, in order to understand in what extent the cultural heritage was taken into account);
2. Survey (online questionnaire);
3. Semi-structured Interviews.

In the latter case both quantitative and qualitative methods were used, *to give reliable, detailed and balanced representation of the results* (Lindblom, 2011: 52). As Harrell and Bradley (2009: 10) point out, often when selecting the method for primary data collection, researchers query whether focus groups, interviews, or surveys will be most appropriate to the research effort. A deep reflection was conducted in this regard (Table 4.8).

Table 4.8: Benefits and limitations of the three different data collection techniques considered

	Focus Group	Interviews	Surveys
Depth of Information	+	+	-
Resolution of seemingly conflicting Information	+	+[10]	-
Determination of Relative Emphasis on Issue	-	+[1]	+
Generalizability	-	+[11]	+
Timeliness	+	+	-
Involvement and enthusiasm on the part of respondents	+	+	-
Sensitivity of Issue	-	+	+
Classification of Issue	-	+	+

Source: adapted from Harrell and Bradley (2009: 10)

The period of data collection has taken place between January 2013 and August 2014, during which we travelled at the places to be analysed in Spain, Portugal, and Italy in order to carry out:

1. Face to face interviews with the main managers (and other stakeholders of interest);
2. Direct observation (supported by the use of a research diary and an observation grid, in attachment), and
3. Collection of official documentation.

The way we have applied the chosen techniques of data collection is presented in deeper detail in the following subsections. Data analysis process was aided by the use of a "Computer Assisted Qualitative Data Analysis Software" called NVivo, version 10. The latter is produced by QSR International Corporation, based in Melbourne, Australia.

[10] With specific questions.
[11] Large number of interviews.

4.7.3.1 Interviews

Particularly with regard to the use of *interviews* - it is important to relate the difference between *interviews* and *surveys*, as this is one of the main reasons that stands at the basis of the methodological choices presented here. Interviews differ from surveys by the level of structure placed on the interaction: they are discussions, usually one-to-one between an interviewer and an informant, meant to collect information on a specific set of topics, and they can be conducted in person or over the phone (Harrell & Bradley, 2009: 6). Surveys consist in a fixed set of questions that can be administered by paper and pencil, as a Web form or by an interviewer who follows a strict script (Harrell & Bradley, 2009: 6): one of the benefit of conducting interviews or focus groups instead of surveys, is that individuals appreciate the opportunity to express their opinions and experiences in person, rather than in “another pen-and-paper survey”, as is pointed out by Harrell and Bradley (2009: 10). The same authors suggest that interviews and focus groups are most likely to provide the depth of information as well as a very complete response.

Still, Spradley (1979) distinguishes *respondent* (who answers to a questionnaire) from *informant* (who has the opportunity to express themselves more freely in response to a semi-structured interview or participating in a focus group): in the first case, subjects respond to a researcher’s question or complete a questionnaire, and they are considered *respondents* because they have answered queries built in the researcher’s semantics, following a logic and we can define *closed* and using categories pre conceived by the researcher. Instead, a researcher using an informant learns from the informant how things are defined and categorized. Obviously, the ideal situation would be to use the subjects either as informants that as respondents, in different phases of research. Finally, Harrell and Bradley (2009: 10) indicate another large difference, by affirming that w*hen the research effort is time-constrained, surveys may be least appropriate because survey efforts often take longer to field correctly*.

Since our intent is to interpret as most detailed possible the attitude of the agents interviewed, we considered the *presence interview* as the best choice to be able to record not only the responses of the informants, but also to combine with them all those information that can be obtained from the careful, simultaneous observation of the physical context (Patton, 1990), the social context, the formal and informal interactions, and all those “expressive dimensions of human action” (Hammersely & Atkinson, 1983: 107).

We chose to involve, as informants, key actors in the management of cultural heritage. 14 interviews were carried out, and in the Table 4.13a, Subsection 4.7.5, this part of the work is summarized, namely the informants involved and the institution/organisation they belong to. Some methodological considerations that justify the number of the interviews are contained in the Subsection dedicated to a general overview on the empirical work (Subsection 4.7.5).

All the interviews were finally transcribed integrally in their original language, and some quotes were used as evidences in the data analysis (see chapter 5). To strengthen the external validity within the exposition of qualitative data, all the quotations of excerpts from the interviews has been made keeping in the original language followed by our English translation.

4.7.3.2 Direct observation

On the other hand, some considerations have to be done regarding the choice of the direct non-participant observation as a technique of data collection. Even if in similar studies has been adopted the strategy of *participant observation*, as in Atkinson (1995), Gouldner (1954) Jorgensen (1989: 12) (according to which participant observation is particularly suitable when the phenomenon is poorly studied), we preferred to adopt the technique of direct (non-participant) observation for several reasons, some of which are reported by reported by Trochim and Donnelly (2006: 147), as for example:

- It does strive to be as *unobstrusive* as possible so as not to bias the observations and it suggests a more detached prospective (Trochim & Donnelly, 2006);
- It tends to be more structured than participant observation;
- The researcher is observing certain sampled situations or people, rather than trying to become immersed in the entire context;
- Direct observation tends not to take as long as participant observation.

In addition, as the study was conducted within public organisations, participant observation would have required a set of permissions that would heavily delayed the course of the fieldwork.

Finally, even if we have made extensive use of technology (digital camera, digital recorder, etc. - see the attached “Protocol of Study”) as suggested by Trochim and Donnelly (2006: 147), an essential tool of data collection used during the direct observation and the interviews was the compilation of a “research diary”. The previous experience in the area of archaeological research has been particularly useful for this purpose: as an archaeologist records all the details of a dig in his “diary of the excavation”, including among his notes even small colour differences observed in the soil, as he knows that in a following step of investigation - when these elements will be correlated to achieve an interpretation - these details, apparently meaningless could become fundamental; in the same way we recorded systematically every detail of the overall experience in the place studied.

Thus, the description and analysis is also based on the data gathered during the direct observation and collected through the three instruments of data collection:

1. Research Diary;
2. (creation of) Photographic archive;
3. Observation Grid.

The latter was specially elaborated on the basis of the previous analyses of the museums that, since 2007 and until 2012, was awarded as “European Museum of the Year” for their outstanding achievements for public quality and excellence.

4.7.3.3 Document analysis

The study was completed by the analysis of the following source of data:

1. Monographic publications;
2. Print and digital Press Archive;
3. Institutional documents;

4. White papers[12] and *Grey Literature* (Debachere, 1995: 95) in general, included the HERITY assessment reports of each museum analysed.

4.7.4 About the population and the sample

The case study method involves the definition of a *population* to analyse, from which - if necessary – the researcher can draw a sample (Fortin, 1999: 203-204). The tools and techniques of quality are the operational dimension necessary to support the implementation of the principle of Total Quality Management and the implementation of the processes of continuous quality improvement in business and organisations (J. A. García, Brea, & Rama, 2012: 495). For this reason, in order to analyse the perception of heritage managers towards Quality and its effect in heritage management, we have chosen to analyse those organisations which – in the field of archaeological heritage - adopt formal tools to ensure or certify their quality.

Hence, the characteristics of the chosen population can be defined as follows:

1. Archaeological areas or museums;
2. Places officially open to the public (it guarantees that they are being officially enhanced for the public, tourists and residents);
3. Place with a certification of quality management, as one may assume, on the basis of what J. A. García et al. (2012) state, that it expresses a clear commitment, on the side of the managers, with the application of quality principle.

The HGES is the only system of quality certification for heritage sites, so the presence of this certification has been chosen to be a characteristic of the studied population. This research is extended to three European countries: Portugal, Spain, and Italy. In the sub-sections 4.7.4.1, 4.7.4.2, 4.7.4.3 the process of selection of the case studies considered for each country will be presented.

[12] A “White Book” (or “White Paper”) is defined by the Oxford Dictionary as following: “A “book of rules, standards or records, especially an official government report, bound in white”.

4.7.4.1 Spain

At the time of the study, in Spain HERITY GES certified only four archaeological museums. The museums analysed were:

1. Caesarugusta Forum Museum;
2. Caesarugusta River Port Museum;
3. Caesarugusta Public Baths Museum;
4. Caesarugusta Theatre Museum.

These museums have a common municipal management and together they constitute the Caesarugusta's Route, in the city of Zaragoza, representing our first case study.

4.7.4.2 Portugal

In Portugal, at the time of the research, there were 29 certified sites. Since 2008, the Portuguese Municipalities of *Abrantes*, *Alcanena*, *Constância*, *Entroncamento*, *Ferreira do Zêzere*, *Mação*, *Ourém*, *Sardoal*, *Tomar*, *Torres Novas* and *Vila Nova da Barquinha*, joined together in a "inter-municipal community": the *Comunidade Intermunicipal do Médio Tejo* (Figure 4.12).

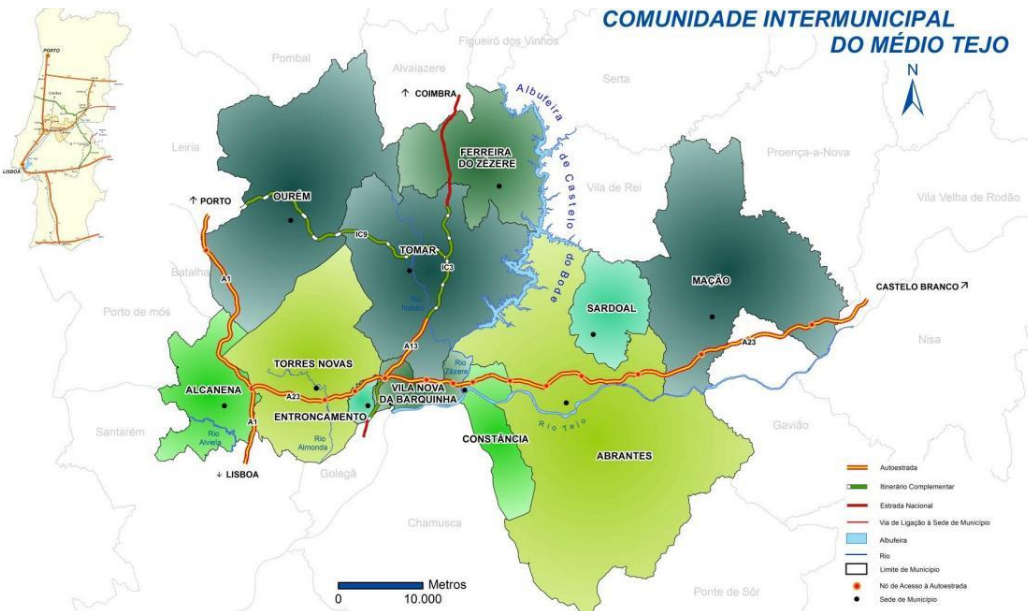

Figure 4.12: Territory of the *Comunidade Intermunicipal do Medio Tejo*.
Source: /www.mediotejodigital.pt/pt/conteudos/comunidade+intermunicipal+do+medio+tejo/municipios+associados/, accessed 2014, January 15th

In this context, the Intermunicipal Community promoted the quality assessment of its cultural heritage management. The four "pilot sites" certificated by the HERITY GES in 2010 were:

1. *Biblioteca de Abrantes*;
2. *Castelo de Abrantes*;
3. *Museu de Mação*;
4. *Centro Cultural de Vila Nova da Barquinha*;
5. *Centro de Interpretação de Arqueologia do Alto Ribatejo* in *Vila Nova da Barquinha*.

To these sites they added, in 2014, 25 new places (and renueved the certification of the *Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo* in Mação) as part of the project of "Territorial Affirmation of Middle Tagus".

Table 4.9: List of the 26 sites and museums certified in Portugal by HERITY in 2014

Municipalities of "Médio Tejo"	Proposed sites for HERITY certification
Abrantes	1. Igreja de São Vicente 2. Cine Teatro São Pedro
Alcanena	3. Museu de Aguarela Roque Gameiro 4. Centro Ciência Viva do Alviela – Carsoscópio
Constância	5. Museu dos Rios e das Artes Marítimas 6. Jardim Horto Camoniano
Entroncamento	7. Museu Nacional Ferroviário 8. Igreja da Sagrada Família
Ferreira do Zêzere	9. Igreja de Nossa Senhora da Graça 10. Torre de Dornes
Mação	11. Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo 12. Igreja Matriz de Nossa Senhora da Conceição
Ourém	13. Castelo 14. Museu de Arte Sacra e Etnologia de Fátima
Sardoal	15. Centro Cultural Gil Vicente 16. Igreja de São Tiago e de São Mateus
Sertã	17. Seminário das Missões Ultramarinas 18. Estações de Arte Rupestre da Lajeira e da Fechadura
Tomar	19. Sinagoga 20. Núcleo de Arte Contemporânea
Torres Novas	21. Castelo 22. Vila Cardílio
Vila de Rei	23. Museu Municipal 24. Museu da Geodesia
Vila Nova da Barquinha	25. Castelo de Almourol 26. Igreja da Atalaia

Table 4.10: List of the sites and museums certified by HERITY in the *Medio Tejo* region (Portugal)

Municipalities of "Médio Tejo"	Sites and Museums assessed by HGES
Abrantes	1. Igreja de São Vicente 2. Cine Teatro São Pedro 3. Castelo
Alcanena	4. Museu de Aguarela Roque Gameiro 5. Centro Ciência Viva do Alviela – Carsoscópio
Constância	6. Museu dos Rios e das Artes Marítimas 7. Jardim Horto Camoniano
Entroncamento	8. Museu Nacional Ferroviário 9. Igreja da Sagrada Família
Ferreira do Zêzere	10. Igreja de Nossa Senhora da Graça 11. Torre de Dornes
Mação	12. Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo 13. Igreja Matriz de Nossa Senhora da Conceição
Ourém	14. Castelo 15. Museu de Arte Sacra e Etnologia de Fátima
Sardoal	16. Centro Cultural Gil Vicente 17. Igreja de São Tiago e de São Mateus
Sertã	18. Seminário das Missões Ultramarinas 19. Estações de Arte Rupestre da Lajeira e da Fechadura
Tomar	20. Sinagoga 21. Núcleo de Arte Contemporânea
Torres Novas	22. Castelo 23. Vila Cardílio
Vila de Rei	24. Museu Municipal 25. Museu da Geodesia
Vila Nova da Barquinha	26. Castelo de Almourol 27. Igreja da Atalaia 28. Centro Cultural de Vila Nova da Barquinha; 29. Centro de Interpretação de Arqueologia do Alto Ribatejo em V. N. da Barquinha

Source: Adapted from http://www.mediotejodigital.pt/

Among these 29 certified places, we have extracted the archaeological museums and archaeological sites. The latters represent our sample frame. The number of places that compose the universe to be analyzed was therefore narrowed down to nine certified sites (table 4.11). Thus, once selected the archaeological places between the 26 certified places, it was necessary to create a *sample frame* and proceed to the sampling process, due to the amplitude of the population.

Table 4.11: Portuguese sample frame

Municipalities of "Médio Tejo"	Archaeological Sites and Museums assessed by HGES
Abrantes	1. Castelo
Ferreira do Zêzere	2. Torre de Dornes
Mação	3. Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo
Ourém	4. Castelo
Sertã	5. Estações de Arte Rupestre da Lajeira e da Fechadura
Tomar	6. Sinagoga
Torres Novas	7. Castelo
Vila Nova da Barquinha	8. Castelo de Almourol 9. Centro de Interpretação de Arqueologia do Alto Ribatejo em V. N. da Barquinha

We chose to proceed through a ***non-probability, convenience sampling*** according to which our samples were composed by the following certified places:

1. Synagogue, Jewish Museum Abraham Zacuto, Tomar;
2. *Centro de Interpretação de Arqueologia do Alto Ribatejo* (CIAAR), Vila Nova da Barquinha;
3. *Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo*, Mação;
4. Castle of Abrantes, Abrantes.

The Synagogue, Jewish Museum Abraham Zacuto (Tomar) was chosen not only for its archaeological interest (the site was used as a warehouse when in the first half of the twentieth century has been recognised by archaeologists), but also by the fact that it is still a powerful symbol of the presence of Jewish culture in the area, and since our study is linked to the promotion of intercultural dialogue as a dimension of cultural heritage quality management. Therefore, it seemed appropriate to select this place as a case study.

As regards to the other cases, these are affected by more time in the process of implementation of quality management and its certification. This was the motivation according to which they were selected, as this common feature would guarantee a more clear understanding of the studied phenomenon.

4.7.4.3 Italy

The non-probability, convenience sampling has been used for the Italian cases, also. For logistical reasons and due to the strong limitations in the availability of financial resources, we have limited the geographical area of research to Rome and its province. In Rome we chose two certified archaeological museums from those which belong to the "Municipal Network of Museums" (Table 4.12).

Table 4.12: List of the Museums belonging to the Museum System of the Municipality of Rome

Municipal Network of Museums, Rome	
1	*Musei Capitolini*
2	*Centrale Montemartini*
3	*Mercati di Traiano*
4	*Museo dell'Ara Pacis*
5	*Museo di Scultura Antica Giovanni Barracco*
6	*Museo della Civiltà Romana*
7	*Museo delle Mura*
8	*Villa di Massenzio*
9	*Museo della Repubblica Romana e della memoria garibaldina*
10	*Museo di Roma*
11	*Museo Napoleonico*
12	*Casa Museo Alberto Moravia*
13	*Galleria d'Arte Moderna*
14	*MACRO*
15	*Museo Carlo Bilotti*
16	*Museo Pietro Canonica*
17	*Museo di Roma in Trastevere*
18	*Musei di Villa Torlonia*
19	*Planetario e Museo Astronomico*
20	*Museo Civico di Zoologia*
21	*Musei Capitolini*

Source: www.museiincomuneroma.it

Among these, the museums and archaeological areas chosen were:

1. Museum of Roman Civilisation and
2. *Mercati di Traiano e Museo dei Fori Imperiali*.

These sites were selected due to their importance and cultural and historical simbolism in the city, and also due to the abundant sources of secondary data. The third case selected was the *Museo Del Mare e Della Navigazione Antica* in Santa Severa (Rome).

We decide to include this museum due to its interest regarding the involvement of the local population (one of our specific focus of the research) and due to the conviction that this option would contribute positively in the phase of the cross cases analysis, because it is a museum with different dimensions (in terms of number of visitors and physical dimensions) and different territorial context. Although on the one hand we found big difficulties in accessing the largest museums in Rome to analyse them, on the other hand they represent a reality that was quite different from the one of the small archaeological museum, so we have decided to balance the choice made on the Italian territory. Our Italian sample was thus constituted by the following archaeological museums:

1. *Mercati e Foro di Traiano*, Rome;
2. *Museo della Civiltà Romana*, Rome;
3. *Museo del Mare e della Navigazione Antica*, Santa Mainella (Rome).

4.7.5 General overview on the empirical work

The definitive list of the analysed cases is presented in the Table 4.13.

Table 4.13: List of analysed cases

LIST OF ANALYSED CASES		
(Spain)	**(Portugal)**	**(Italy)**
(Case Study #1) *Ruta Caesaraugusta, Zaragoza*	(Case Study #2) Interpretation Centre of Archaeology, Vila Nova da Barquinha	*(Case Study #6)* *Museo della Civiltà Romana*, Rome
Caesarugusta Forum Museum, Zaragoza *Caesarugusta* River Port Museum, Zaragoza *Caesarugusta* Public Baths Museum, Zaragoza *Caesarugusta* Theatre Museum, Zaragoza	(Case Study #3) Synagogue, Jewish Museum Abraham Zacuto, Tomar	*(Case Study #7)* *Mercati di Traiano e Museo dei Fori Imperiali*, Rome
	(Case Study #4) Museum of Prehistoric Art and Sacred Valley of the Tagus, Mação	*(Case Study #8)* *Museo del Mare e della Navigazione Antica*, Santa Mainella (Rome)
	(Case Study #5) Castle of Abrantes, Abrantes	- -
Subtotal (Spain): 1	**Subtotal (Portugal): 4**	**Subtotal (Italy): 3**
		Total: 8

The interviews with specialists and main directors have provided us the crucial evidences to interpret the perception of the concept of Quality by the cultural heritage managers, especially from the perspective of our research question. With regard to the number of our interviews, it is important to specify that it is directly dependent on methodological conclusions reached by previous authors, concerning the “theoretical saturation” (Punch, 2005: 214-215) and “qualitative isomorphism” (Ford, 1975). In fact, questioning on the extension of data collection phase through interviews, Gayle Jennings (2010: 148-149) summarized and articulated the methodological “suggestion” of authors such as Ford (1975) Lincoln and Guba (1985) and Punch (2005) as: empirical materials should be collected until a "redundancy with respect to the information" (qualitative informational isomorph) occurs (Lincoln & Guba, 1985: 233-234). That is, the data collection continues until no new insights are gained, but only confirmation of previous "theories" (Punch, 2005: 214-215).

Moreover, we must not forget that, as also Parker (2004: 162) highlights, our communication with actors was not confined to formal interview setting but it involved considerable informal conversations that have represented valuable sources of rich data. Many evidences were gathered indeed during informal conversations with specific stakeholders and transcribed in the Research Diary as “field notes” (rather than transcribed as formal interviews). For the above reason, our data analysis took into account both the exploratory interviews as well as those conducted during the data collection, for a total of eighteen interviews (Table 4.14a and 4.14b).

Table 4.14a: List of the interviews conducted during empirical phase

LIST OF INTERVIEWEES					
Country	**Organisation**		**Informant**	**Date Of Interview**	**(Coding)**
SPAIN	*Caesarugusta* Forum Museum, Zaragoza		1 - Chef of the Departments of Museums and Expositions, *Ayuntamiento de Zaragoza*	15/03/2013	ES-INT-1
	Caesarugusta River Port Museum, Zaragoza		2 - Officer of the Services of Culture, *Ayuntamiento de Zaragoza*	15/03/2013	ES-INT-2
	Caesarugusta Public Baths Museum, Zaragoza		3 - Archaeologist of the *Ayuntamento de Zaragoza*	15/03/2013	ES-INT-3
	Caesarugusta Theatre Museum, Zaragoza				
PORTUGAL	Interpretation Centre of Archaeology, Vila Nova da Barquinha		4 - Museum Director	19/11/2013	PT-INT-1
			5 - Founding member and officer	19/11/2013	PT-INT-2
	Synagogue, Jewish Museum Abraham Zacuto, Tomar		6 - Office of Planning and Strategic Development of the *Comunidade Intermunicipal do Médio Tejo*	19/12/2013	PT-INT-3
	Museum of Prehistoric Art and Sacred Valley of the Tagus, Mação		7 - Museum Director	17/12/2013	PT-INT-4
	Castle of Abrantes, Abrantes		8 - Mayor of Abrantes and President of the *Comunidade Intermunicipal do Médio Tejo*	19/11/2013	PT-INT-5
ITALY	*Mercati di Traiano e Fori Imperiali*, Rome		---	---	---
	Museo della Civiltà Romana, Rome		9 - Museum Director	01/07/2013	IT-INT-1.BIS
	Museo del Mare e della Navigazione Antica, Santa Mainella (Rome)		10 - Museum Director	31/07/2013	IT-INT-3
	Other stakeholders	*Herity*	11 - HERITY Secretary-General	07/02/2014	IT-INT-4
		Zétema	12 - Responsible of "customer care and quality" for Zètema	14/02/2014	IT-INT-5
		ANGT – Associazione Nazionale Guide Turistiche	13 - ANGT President	5/08/2014	IT-INT-6
					Total interviews: 13

Table 4.14b: List of the exploratory interviews

LIST OF INTERVIEWEES				
Country	**Organisation**	**Informant**	**Date Of Interview**	**(Coding)**
ITALY	*Museo Napoleonico,* Rome	14- Museum Curator	15/12/2011	IT-INT-10
	Museo della Civiltà Romana, Rome	15- Museum Director	16/12/2011	IT-INT-1
		16- Museum Curator	16/12/2011	IT-INT-2
	Planetario e Museo Astronomico, Rome	17- Museum Responsible	15/12/2011	IT-INT-9
	Museo della Casina delle Civette, Rome	18- Museum Director	14/12/2011	IT-INT-7
				Total interviews: 5

In order to further deepen our knowledge and understanding of the phenomenon, we have spent several periods of time at the head quarter of HERITY - World Organisation for the Certification of Quality Management of Cultural Heritage, in Rome, between 2011 and 2014.

4.8 Making sense of qualitative data: managing and analysing sources and evidences

4.8.1 Coding procedures

Once the operational plan for the empirical study has been presented, before moving on to the analysis of the collected data (Chapter 5), it is necessary to consider the procedure that creates the bridge between two phases of data collection and data analysis, namely, the coding process. Most of the data used in qualitative research are textual, derived form fieldnotes, transcribed interviews, transcriptions of naturally occurring action, documents, ect (Coffey & Atkinson, 1996: 168), and our research is not an exception. The nature of qualitative data, which escapes the order of the numbers, imposes a rigorous organisation of the data to the researcher; otherwise it would give rise to nothing but chaos. Content analysis involves identifying, coding, categorizing, classifying and labelling the primary patterns in the data, and this essentially means analysing the core content of interviews and observations to determine what is significant (Patton, 2002: 463).

We have begun by reading through all our field notes and transcripting the interviews integrally. Afterward, we wrote comments in the margins, containing some reflections, some points to deepen or even some suggestions for the posterior use of those data. Apart from interviews and field observations, a large number of documents were collected and analyzed. The sources and the evidences that we considered most relevant to the study, have been therefore selected and we have gave them a "code" (the complete “codebook” is attached). A new analysis of data has been conducted, in order to find *recurring regularities* (Patton, 2002) which could reveal patterns that can be sorted into several “categories”. This classification of the evidence collected through interviews, observation and document analysis, was actually done according to the dimensions predefined in the theoretical model (see, in this chapter, subsections 4.6.1 to 4.6.6). The latter was used as a grid to *fit* the salient passages and the evidences of the empirical investigation, and it will be according to these predefined categories that, in the first part of the next chapter, the data collected will be presented and analysed.

Meanwhile also new categories were further created from the analysis of the data: these joints of new categories, together with those pre-defined in the theoretical model, constitute finally the empirical model. Finally, the discussion of these findings will lead us again to the *theoretical domain*.

4.8.2 Our round trip from the theoretical domain to the empirical work

Thus, also inspired from the allegory of Agnew and Pyke (1969) (Figure 4.13) opportunely retrieved by Collis and Hussey (2009: 13), we can say that the structure of our research could be metaphorically compared to a journey that has as its starting point and main goal the same place: the theory. In the beginning, theory provides the means to go along the path that brings us to the fieldwork (empirical research), conducting us to a moment of reflection, analysis and comparison. Our findings, then, will be the vehicle which conducts us back to theory.

Figure 4.13: “The Island of Research”, an allegory of the research process.
Source: Agnew and Pyke (1969: frontspiece)

4.9 Further Considerations

4.9.1 Internal Validity

In order to constantly verify the consistency and coherence of the data as well the general efficiency of our research design (internal validity) several strategies were implemented:

1) Triangulation of data (different sources of information: interviews, direct observation and content analysis);
2) Continuous contact with informants in order to verify our interpretations of the interviews during the process of data analysing;
3) Repeated observations along the time;;
4) “Participatory modes of research” (Creswell, 2014: 210), that is, taking into account the opinion and the feedback of the informants also after the interviews, in order to involve them in the whole process of (see subsection 4.7.2).

In order to increases the reliability of data, a process of “coding” was implemented, that is, an analytical procedure in which data are categorised to facilitate analysis. The qualitative software packages NVivo was used for this process.

4.9.2 Limitations of the research design

We recognise in our research design two main weaknesses related to methodological choices: firstly, the non-probability, convenience sample (used for Italian population) reduces the possibility of generalizing the conclusions (Beeton, 2005: 38-39). The best choice would be that of a systematic sampling, which ideally would have a better external validity. Our choice, then, weakens the external validity of the study, that is, the results of the study cannot be generalized to population. Anyway, the loss has been estimated acceptable.

Another limitation could be the selection of the interviewees involved as informants: in future works the resident population, as well as tourists, should be involved as a source of primary data. Finally, the studied population could have included those heritage sites which are not certified: it could provide interesting findings, namely by the comparison of data collected within certified institutions versus data collected within non-certified institutions. Anyway, the idea of further research in this direction remains for future works.

Conclusion

This chapter has been devoted to methodological matter. The first part is an introduction to the presentation of our research design. In first sections the key issues in terms of research approach are exposed: the theory of knowledge, paradigms and their evolution and the epistemological questions. Particular attention has been given to the overcoming of positivism: we placed our study in the middle of this "scientific revolution", analysing the pros and cons of such positioning. After analysing the evolution of scientific paradigms, we could conclude that, probably, the new post-positivist approach better emphasizes the instinctiveness of the profession of researcher: despite the need for a systematic and scientific approach within the construction and implementation of the research design, we consider that at the basis of every research there is an intuition, a strong curiosity and an inherent creativity. The latter, which we might call "scientific creativity", represents an element that contributes - in our opinion - as much as others in the success of the research, and that perhaps was limited in the past by the restrictions of the positivist approach.

In the Sub section 4.2.6, we also highlighted pros and cons of all those studies placed in a period which do not belong - according to the vision of Kuhn – to a "Normal Science" period. The lack of epistemological or even ontological consensus could lead, *a priori*, to a rugged refutation of the research from part of the scientific community. Anyway, we can conclude in this regard that there are no *correct* or *incorrect* choices: there are "just" choices, and one must to justify them properly, conferring validity to the research.

In the second part of the chapter we systematically present our study. We start outlining the core domains of the study and then identify the research problem (Section 4.3). Given the complexity of the phenomenon approached, it seemed appropriate to report also the process of familiarisation with the main concepts from the theoretical and sectorial point of view (Sub section 4.3.2). As a result of this first, theoretical approach to the phenomenon, we developed a conceptual proposal which is presented in Section 4.5. The "Paideia Approach to Heritage Management" represents our main theoretical contribution: a conceptual, ideal model arisen from the philosophical speculation elaborated during the first part of the research.

Our philosophical assumption about the purpose of managing the cultural heritage as a basis for launching intercultural dialogue through tourism is represented by combining the result of a series of considerations with the ancient, Socratic philosophical ideal of *Paideia*. We reflected on the role of cultural heritage, local communities and tourism in the process of socio-economic development, and we metaphorically equated to the Socratic ideal of Paideia, summarized by the Greek aphorism "Know Yourself" (γνῶθι σεαυτόν). As Socrates identifies two phases in the process of Man's development:

1) The construction of the "self", through the knowledge of its origins and values;
2) The encounter with "the other", to which he can communicate the contents of his authentic essence.

In the same way, in the context of socio-economic development of a territory, the heritage should be managed in order to:

1) Communicate the contents of cultural heritage to local communities, emancipating them through the reinforcement of their cultural identity;
2) Be accessible to tourists, and also represent a meeting point with the local population.

The "Paideia approach to heritage management" would provide a greater involvement of the resident population and, consequently, a greater self-awareness and greater self-esteem. Therefore, the destination would have to be more prepared to an encounter with "the other", namely, the tourist, and provide an intercultural encounter that promotes growth and greater understanding between different cultures. Finally, in terms of tourism development, this model would provide a more authentic experience for the visitors during their stay in the destination, which results in an improvement regarding tourist perception of the place and, thus, in terms of competitiveness.

In the Section 4.6, we presented the empirical phase of the work, which includes the formulation of the research question, the definition of our approach and the theoretical model. This part of the chapter is complemented by the annex "Study Protocol". Having to establish what is the effect of the application of quality management of the archaeological heritage, we have considered primordial to interpret what is the perception of quality by operators, their opinions, their beliefs , in a sort of a study of organisational ethnography, that is, an analysis in which the object of study is the culture of the organisation (tacit knowledge, the reference models, the written and unwritten rules that guide the action) and the ways in which this culture is expressed in their product and social interaction. The general purpose of this study is to explore the issue of archaeological heritage management, placing this issue in the broader context of the new paradigms of development. This objective reflects the belief that the archaeological heritage can and should be used as a local resource that can contribute to the economic, social and cultural development of an area. In this context, tourism plays an important role. On the one hand, the involvement of the population strengthens the identity of the destination and, consequently, the authenticity of the tourist experience. On the other hand, the presence of tourists in the territory could be used as a vehicle for intercultural dialogue between residents and visitors.

The Sub section 4.6.1 presents our paradigmatic approach: our study is based on a post-positivist, interpretivist paradigm, which leaded us to a qualitative approach and to the choice of the method: a multiple transdisciplinary, explorative and illustrative case study (Sub section 4.6.2). The techniques adopted for the collection of data were:

- Direct observation;
- Interview with key agents;
- Document analysis.

The importance of data triangulation was also justified in the Sub section 4.6.3, as well as the choice of the sample to be studied. Section 4.7 offers a general overview of the considered cases and informants involved. Crucial data arose from the five exploratory interviews as well as from the thirteen interviews conducted during the empirical phase, for a total of eighteen interviews considered. These data were complemented by the results of direct observation and document analysis. Subsequently, the Section 4.8 explains the procedures adopted for the management and data processing, retracing the "scientific journey" that led us from the theory to the empirical results and from those brought us back again to the theoretical field.

The expected contributions of the study are sectorials and theoretical. Regarding the firsts, we expect:

1) The improvement of current management policies;
2) Providing empirical data about the real effects of the application of quality systems to heritage management, in particular regarding the involvement of local people and tourists.

We also expect an important contribution to improve the destination development policies in order to:

1) Maximize the tourist experience as a satisfactory intercultural experience, based on the theory of the *ipertourism* (see Chapter 2);
2) Decrease of the negative social impacts of tourism on local communities;
3) Provide a more authentic tourist experience, contributing to the competitiveness of the destination.

Still, the transdisciplinary approach we adopt for the present study actually allows us to increase the awareness of managers and operators of both areas - of heritage management and tourism development – who can use the knowledge created through this study. In theoretical terms, the contribution of this research is given by the adoption of the full constructionist interpretative paradigm, denying the validity of the positivist reductionism for this type of research in the social sciences. Our "non-separation" from the reality investigated, the empathy and the total acceptance of the "challenge of complexity" represent essential characteristics of this work and underlie the architecture of the entire research project.

Chapter 5

Data Analysis and Findings

Introduction

In this chapter we present the data and evidence gathered during the empirical phase of our research. The study includes the analysis of eight case studies. In the next sections, the presentation and analysis will follow the same structure for all the cases studied: to each case is dedicated one or more subsections which set out the information for a general description for the contextualisation and presentation of the places. This presentation also will contain the results of the certification HERITY. Then, evidence and findings will be analyzed according to the proposed theoretical model and its seven dimensions shown in the previous chapter. The main objective is to define an empirical model from the data analyzed and compare it with the theoretical model.

According to this architecture, in Sections 5.1 e 5.2 (and related Sub-sections) are presented the four museums belonging to the *Ruta Caesaraugusta* of Zaragoza (Case Study 1); the *Museo della Civiltá Romana* (Case Study 2) are presented and analysed in Sections 5.3 and 5.4; the analysis of the Mercati *di Traiano e Museo dei Fori Imperiali* (Case Study 3) is exposed in Sections 5.5 and 5.6. Case Study 4, the *Museo del Mare e della Navigazione Antica* is presented and analysed in Sections 5.7 and 5.8. The last sections are dedicated to the four Portuguese case studies: the Interpretation Centre of Archaeology, Vila Nova da Barquinha, the Synagogue, Jewish Museum Abraham Zacuto and Tomar; the Museum of Prehistoric Art and Sacred of the Tagus Valley, Mação.

We have assigned a code to all the data which have been collected in this study, as it is typical for data management in qualitative studies. In the next sections, therefore, all data presented will be labeled with their own code. The "codebook" can be found in the Annex. The empirical study is being undertaken in three different European countries, and we chose to report the contributions of the informants and the names of the institutions original language, with English translation.

5.1 Case 1: *Ruta Caesaraugusta*[13], Zaragoza, Spain. Data analysis and findings

5.1.1 Broad analysis

5.1.1The city of *Caesaraugusta* (from the name of its founder, *Caesar Augustus*) was founded in 14 BC, receiving the status of tribute-exempt colony of Roman citizens. Some monumental remains of the ancient Roman town, situated in the heart of the city, were studied and then enhanced through the creation of four "on-site museums":

1) *Museo Del Teatro De Caesaraugusta*[14];

2) *Museo Del Puerto Fluvial De Caesaraugusta*[15];

3) *Museo De Las Termas Públicas De Caesaraugusta*[16];

4) *Museo Del Foro Caesaraugusta*.[17]

These museums form the "*Caesaraugusta Route*", an itinerary that is both a tourist product of great value, as well as a successful example of public cultural infrastructure for the awareness and education of the local population about local archaeology and cultural heritage (S. García, Castells Vela, & Erice Lacabe, 2007). The four museums are managed by the *Unidad de Museos y Exposiciones* of the *Ayuntamiento de Zaragoza*: we found the same approach of management, same strategies of communication and dissemination to the public, same use on behalf of local population, same services (according with the logistic possibilities) provided to tourists. They are however, very specific museums, due to the differences of their contents, so we present them individually, below (subsections 5.1.1, 5.1.2, 5.1.3, 5.1.4) and then we analyse the management policy and quality perception of the *Ruta* in its whole. HERITY reports were considered as source of data, and referred within the description of the museums and their analysis.

[13] Caesaraugusta Route.
[14] Museum of the Theatre of Caesaraugusta.
[15] Museum of the River Port of Caesaraugusta.
[16] Museum of the Public Bath of Caesaraugusta.
[17] Museum of the Forum of Caesaraugusta.

Museo del Teatro de Caesaraugusta

The Roman Theatre (I century AD) was discovered by chance in 1972 when work was begun on the construction of a new building in Zaragoza's *Calle Verónica*. Today, the museum is the result of an integrated effort architectural, educational, communicative and aesthetic. The interior is arranged over three floors (ground floor, basement and first floor) with architectural solutions of considerable aesthetic value (Figure 5.1, Code ES-PIC-1). In the hall, at the ground floor, one finds interactive information points about the "Caesaraugusta Route", as well as access to other services of the museum, like the bar.

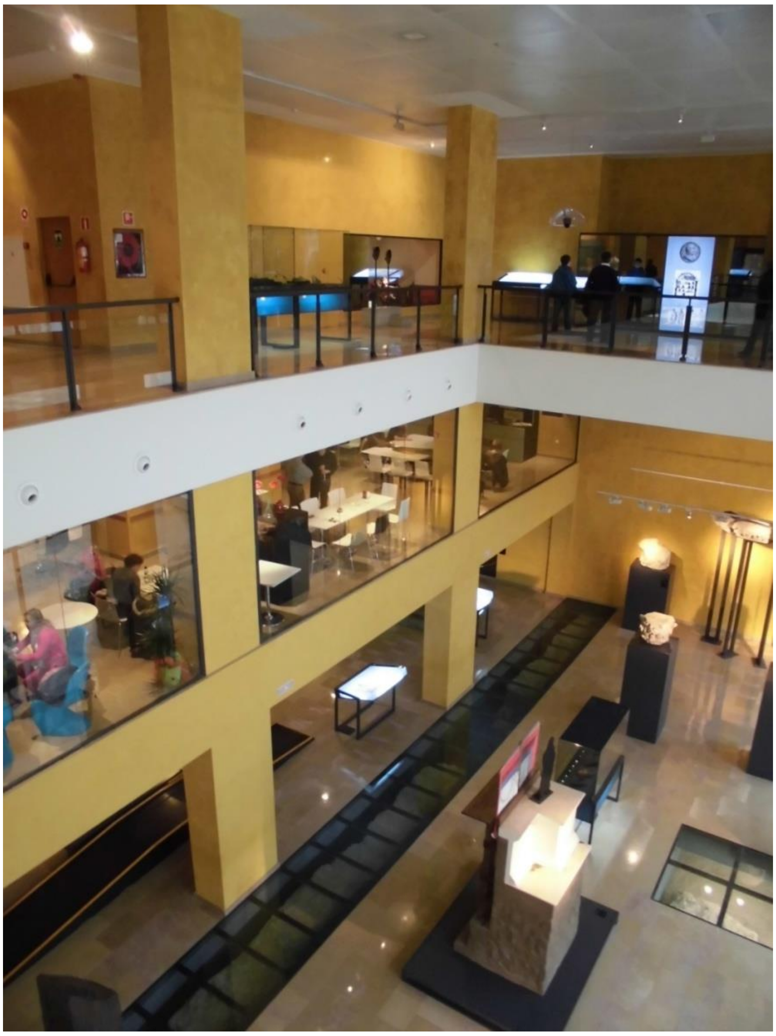

Figure: 5.1: The interior of the museum. Picture taken during the direct observation (17/03/2013)

The tour starts with a graphic and documental overview of the history of archaeological excavations over thirty years and seven panoramic views illustrating the intense occupation of the site of the theatre and its historical evolution. Downstairs, in the basement, a large-scale model and three-dimensional recreation gives us an initial idea of the theatre as a building (Figure 5.2, Code ES-PIC-2).

Figure 5.2: Model of the Roman theatre inside the museum. Picture taken during the direct observation (17/03/2013)

Three-dimensional reconstructions help the visitor to interpret the visible remains of the theatre and to place himself correctly in the space of the old infrastructure (Figure 5.3, Code ES-PIC-3), and an audio-visual presentation shows the theatre going back from its discovery (1972) to the Roman era.

Figure 5.3: One of the main halls of the museum. Picture taken during the direct observation (17/03/2013)

The itinerary leads the visitor outside to visit the monumental remains of the theatre. Here, there are two itineraries: the first is the *crypta* (gallery) and the other, the stage platform from which the building can be appreciated in all of its grandiosity (Figure 5.4, Code ES-PIC-4). Along the path of the *crypta*, visitors find tables containing three-dimensional graphic reconstructions which help them to imagine the ancient infrastructure and to place themselves in the different areas of the theatre (Figure 5.5, Code ES-PIC-5).

Figure 5.4: Outside the museum, the Roman theatre. Picture taken during the direct observation (17/03/2013)

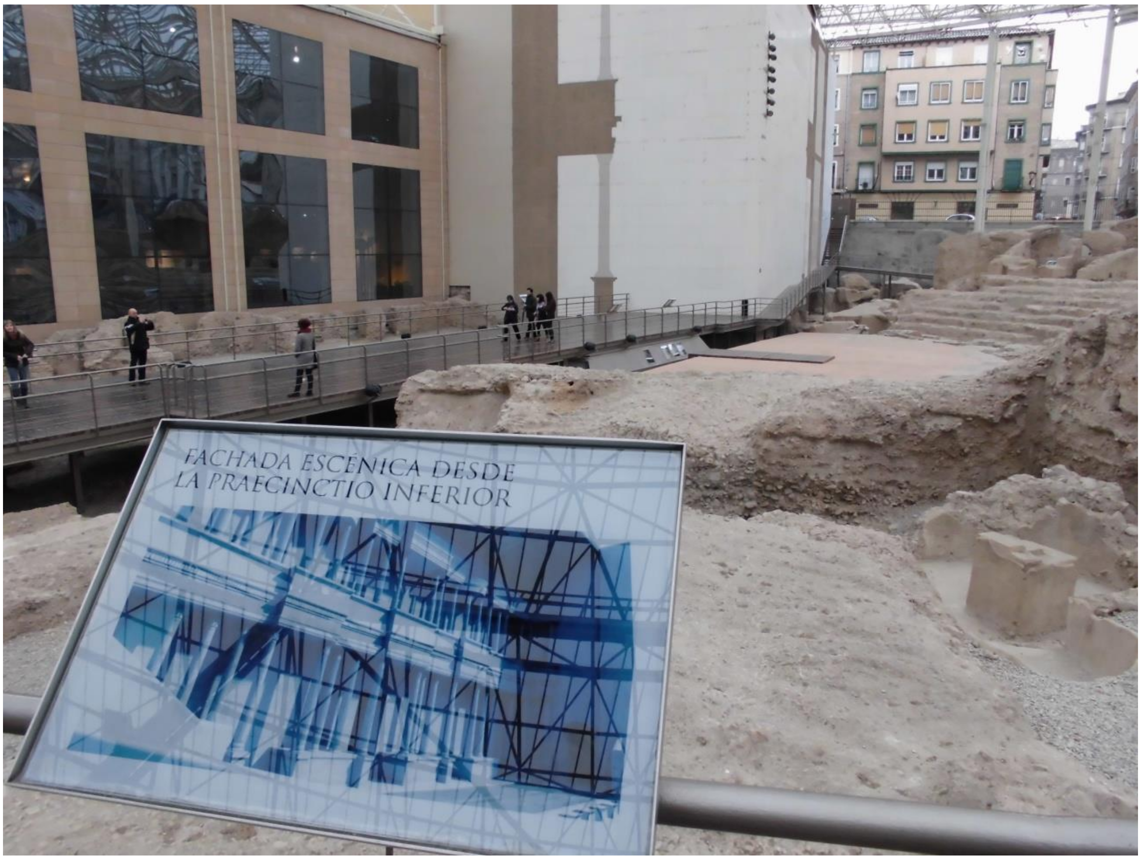

Figure 5.5: Panel used along the Roman theatre. Picture taken during the direct observation (17/03/2013)

We found a reference in the HERITY report to architectural significance of the structure covering the theatre (Code ES-DOC-2).

> *Desde el punto de vista arquitectónico hay que anotarlo como uno de los raros ejemplos de cobertura moderna de un teatro antiguo.*
>
> (From the architectural point of view should be recorded as one of the rare examples of modern coverage of an ancient theatre)

Finally, on the first floor, a virtual theatre shows spectators the kind of different performances that may have been staged in a city of the Roman Empire. The theatre, as a cultural fact is analysed through drama genres, playwrights, actors and the participation of the general public and the social and political life of the time (Figure 5.6, Code ES-PIC-6).

Figure 5.6: One of the showcases of the museum with replicas of objects related to daily life in the theatre. Picture taken during the direct observation (17/03/2013)

The visit continues with the development of the history of the site from the time when its theatrical activity ceased to the present day. Scenes of different domestic settings from Muslim, Jewish and Christian epochs are presented giving visitors a good idea of the aspects that these cultures (Figure 5.7, Code ES-PIC-7), which occupied the site of the Roman theatre, had in common and those which differentiated them.

Figure 5.7: One of the showcases of the museum with replicas of objects related to the daily life of the Jews. Picture taken during the direct observation (17/03/2013)

The particular attention given by the museum to the transmission of the human dimension and daily life of the ancient inhabitants of Zaragoza is also mentioned in the quality report HERITY (Code ES-DOC-1), in the section about the dimension of the monument’s VALUE:

El barrio romano y sucesivamente hebreo, musulmán y cristiano dejó trazas materiales de culturas muy diferentes que son representadas en el museo con una visión que destaca sobre todo los aspectos de la vida cotidiana.

(The Roman neighbourhood, successively Hebrew, Muslim and Christian leave material traces of different cultures that are represented in the museum with a vision that stands out above all the aspects of daily life)

The quantitative outcome of the certification HERITY, on a scale from one to five, was as follows (Table 5.1):

Table 5.1: Quantitative outcome (on a scale from one to five) of the evaluation HERITY

Museo del Teatro de Caesaraugusta		
Dimension	**Assessment 2012-2014**	**Assessment 2009-2011**
Value	3,60	4,00
Conservation	3,80	4,20
Communication	3,00	3,75
Services	3,25	3,75

Source: *Zaragoza. Ruta de Caesaraugusta. Informe definitive 2009-2011* and *Zaragoza. Ruta de Caesaraugusta Informe definitive 2012-2014* (ES-DOC-1 and ES-DOC-2)

These values are reported in the target HERITY, delivered to the museum at the end of the process and exposed the entrance to make it visible to the public (Figure 5.8, Code ES-PIC-24).

Figure 5.8: Graphic rendering (The "target") of the HGES assessment of the *Museo del Teatro*.
Source: Courtesy of the *Ayuntamiento de Zaragoza*.

Museo de las Termas Públicas De Caesaraugusta

The Museum of the Public Baths was created in order to enhance the roman infrastructure used from the first century B.C. until the beginning of the fourth century A.C. It is a small space but rich in contents (Figure 5.10, Code ES-PIC-8). The visit begins with the projection of a video on a screen descending on the main pool while the room is obscured. The video represents a citizen of *Caesaraugusta,* a municipal *aedile,* who writes a letter to a friend in the library at the public baths: in this way, through the video are transmitted not only a series of technical information, but also the human dimension of the people of *Caesaraugusta*, involving particularly the visitors.

Figure 5.9: Interior of the site/museum, where also the video is played
Picture taken during the direct observation (16/03/2013)

In the hall one can find three dioramas with virtual reconstructions of the architectural remains (Figures 5.10a and 5.10b, Codes ES-PIC-9 and ES-PIC-10).

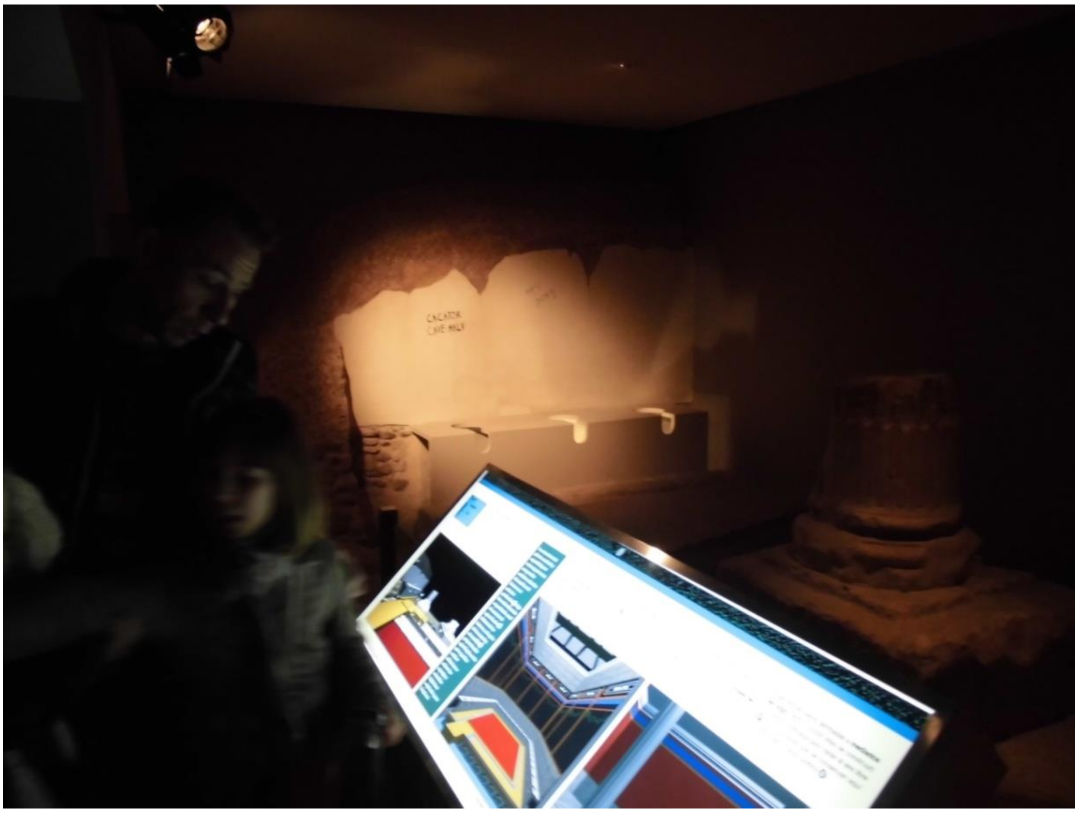

Figure 5.10a: Diorama with virtual reconstructions of the architectural remains
Picture taken during the direct observation (16/03/2013)

Figure 5.10b: Diorama with virtual reconstructions of the architectural remains (detail)
Picture taken during the direct observation (16/03/2013)

There is also a showcase which contains reproductions of instruments and tools (Figure 5.11, Code ES-PIC-11) used by the ancient users of the baths (towels, sponges, *strigilis*, etc.) together with several marble blocks that decorated the portico of the swimming pool.

Figure 5.11: Showcase containing reproductions of instruments and tools used by the ancient users of the baths
Picture taken during the direct observation (17/03/2013)

It is particularly impressive the integrated use of so many interpretative solutions in this relatively small space. We read in the last HERITY report (Code ES-DOC-2):

> *Estos elementos, ubicados en un único ambiente de 175 m2 se muestran explicados por diferentes medios que facilitan su comprensión y amenizan la visita.*
>
> (These elements, located in a single room of 175 m2, are explained by various kinds of media to facilitate their understanding and enliven the visit)

Regarding the results of the evaluation carried out on the basis HERITY GLOBAL EVALUATION SYSTEM, the values are given in the Table 5.2, and graphically reported in the target (Figures 5.12 and 5.13, Codes ES-PIC-25 and ES-PIC-12).

Table 5.2: Quantitative outcome (on a scale from one to five) of the evaluation HERITY

Museo de las Termas Públicas De Caesaraugusta		
Dimension	**Assessment 2012-2014**	**Assessment 2009-2011**
Value	3,40	3,00
Conservation	3,50	3,80
Communication	2,75	3,00
Services	2,25	2,75

Source: *Zaragoza. Ruta de Caesaraugusta. Informe definitive 2009-2011* and *Zaragoza. Ruta de Caesaraugusta Informe definitive 2012-2014* (ES-DOC-1 and ES-DOC-2)

Figure 5.12: Graphic rendering (The “target”) of the HGES assessment of the *Museo de la Termas Publicas.*

Source: Courtesy of the *Ayuntamiento de Zaragoza*

Figure 5.13: Certification and assessment HERITY exhibited at the entrance of the site / museum
Picture taken during the direct observation (16/03/2013)

Museo del Puerto Fluvial de Caesaraugusta

The visit begins with an audio-visual projection about the Ebro River since ancient times, explaining aspects of river navigation as well as some particularity of the river port of *Caesargusta* (Otal & Erice, 2008). Visitors then go on to see several displays that explain the architecture of the remains preserved *in situ*. There is a showcase with different examples of *amphorae*, the main container used in the food trade in Roman times as well as a model of a riverboat. Another model, with audio information, provides an accurate representation of the building through which in Roman times they had access from the port of *Caesaraugusta* to the city´s Forum (1st century A.D.).

We found particularly important and worthy of note the enthusiasm and dedication with which operators and managers have prepared educational material on the contents of the museum (Figure 5.15) and equipped a room with a proper scenography, in which activities are carried out by a group of archaeologists and theatre actors, for the scientific dissemination to children and their families (Figure 5.15 and 5.16, Codes ES-PIC-13 and ES-PIC-14). The interviews (Codes ES-INT-1, ES-INT-2 and ES-INT-3) revealed that all the material available, has not been bought, but prepared on purpose by the director of the museum.

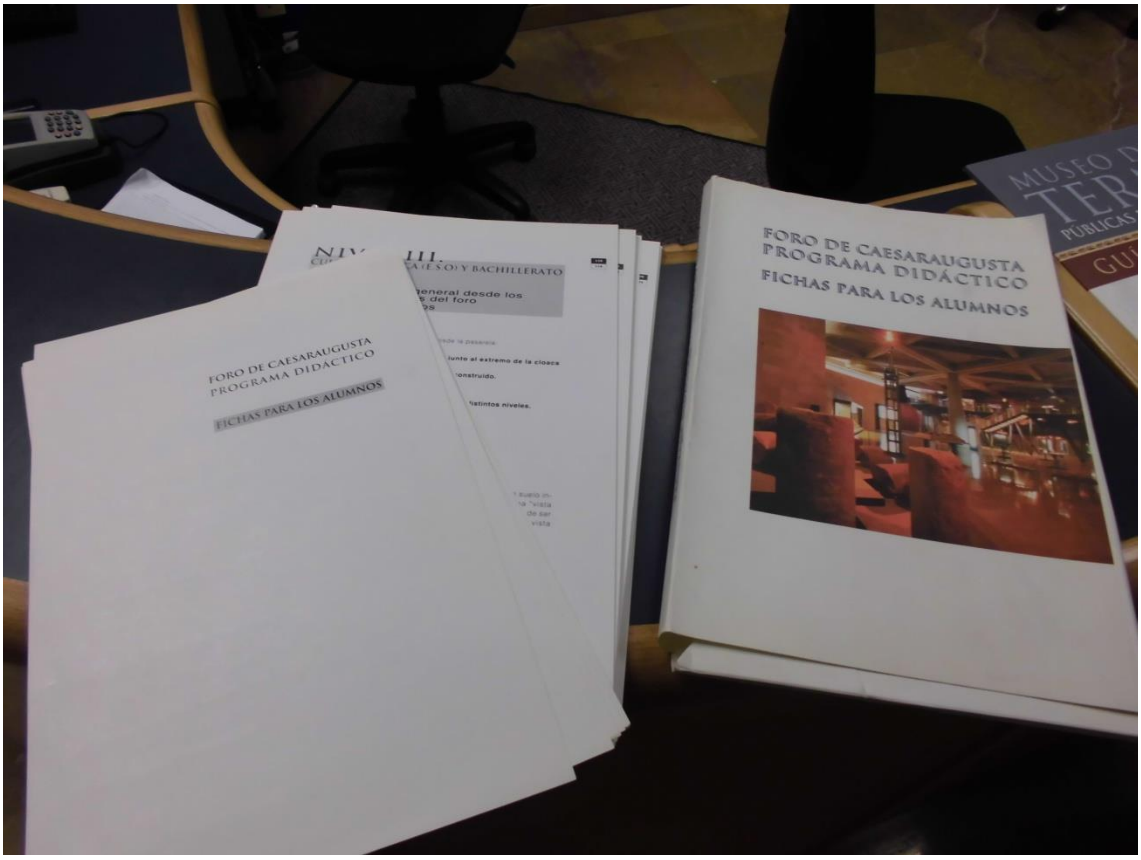

Figure 5.14: The educational material delivered to children and students for the activities of scientific dissemination about Romans and the ancient navigation. Picture taken during the direct observation (16/03/2013)

Figure 5.15: *AULA DIDÁCTICA*, the didactic room. Picture taken during the direct observation (16/03/2013)

Also in the case of the museum's river port, the analysis of the quantitative results of the certification HERITY (Table 5.3, Codes ES-DOC-1 and ES-DOC-2) demonstrates an unexpected phenomenon, the loss of score from the first to the second evaluation (on the opposite, ideally should be the opposite).

Table 5.3: Quantitative outcome (on a scale from one to five) of the evaluation HERITY

Museo del Puerto Fluvial de Caesaraugusta		
Dimension	**Assessment 2012-2014**	**Assessment 2009-2011**
Value	3,20	3,40
Conservation	3,50	3,80
Communication	2,75	3,25
Services	2,50	3,25

Source: *Zaragoza. Ruta de Caesaraugusta. Informe definitive 2009-2011* and *Zaragoza. Ruta de Caesaraugusta. Informe definitive 2012-2014*

The output of these results are reported in the target HERITY (Figure 5.16, Code ES-PIC-26) and made visible to the public (Figure 5.17, Code ES-PIC-15).

Figure 5.16: Graphic rendering (The “target”) of the HGES assessment of the *Museo del Puerto Fluvial*

Source: Courtesy of the Ayuntamiento de Zaragoza

Figure 5.17: The target HERITY exposed at the entrance of the museum

Picture taken during the direct observation (16/03/2013)

Museo Del Foro De Caesaraugusta

In a Roman city, the Forum was the centre of religious, civil, economic and political life as well as municipal administration. Its location in the urban organisation was usually at the intersection of the city´s main road axes (*Cardus* and *Decumanus*). In *Caesaraugusta* it was given a different location to the forum. The latter was situated nearer to the Ebro River, surely due to the trade activity in this area, which was the centre for the reception and distribution of different goods.

The street level in Roman times was evidently lowest compared to the modern one. In addition, the archaeological remains of the Forum - discovered during excavations carried out between 1988 and 1991 – they are actually its foundations, and not the elevated structures, that have disappeared. The Museum of the Forum (Figure 5.18, Code ES-PIC-17) is therefore the opportunity to visit these ruins, leaving very clear to the visitor that what you are observing was not visible to the citizens of *Caesaraugusta*, because they are the foundations of the buildings of the Forum.

Figure 5.18: Exterior view of the Museum of the Forum. Picture taken during the direct observation (16/03/2013)

Also in this museum Ruta Caesaraugusta the main protagonist is the ability had by museum professionals to integrate illustrative methods to maximize the capacity of interpretation for visitors.

> *(...) se albergan y muestran aquellos vestigios del foro documentados en las excavaciones arqueológicas realizadas en 1988 y conservados en su localización original, entre 2,30m a 8m. de profundidad respecto al actual nivel de la plaza, acompañados de diversos elementos y medios ilustrativos que permiten al público aproximarse a la vida cotidiana en la ciudad romana.*
>
> (They are hosted and shown those vestiges of the forum documented in archaeological excavations in 1988 and preserved in its original location, between 2.30m to 8m. depth from the current level of the square, accompanied by various elements and illustrative media allowing people to approach everyday life in the Roman city)

Inside, the museum is divided into two areas: the first level encloses the architectural remains of the market, from the epoch of Augustus and the forum dating from the time of the Emperor Tiberius. The second level structures the remains themselves with a permanent exhibition area and audio-visual projections. They are visible the archaeological remains of the Market and Forum of *Caesaraugusta*, still preserved *in situ*.

As well as it occurs in the other three museums that are part of the *Ruta Caesaraugusta*, also in the Museum of the Forum the visit begins with an audio-visual presentation. A giant screen "wraps" the viewer. Here, the protagonist and narrator of the story is the Ebro River itself, as the main witness of the historical events on this site. In the end of the presentation, a citizen of *Caesaraugusta* comes back to life for a few minutes, to narrate his childhood experiences and his youth in the city forum. The idea is quite original and the experience is particularly suggestive, because a talking face is projected on the head of a marble statue, which "comes to life". In addition, the action takes place behind the spectators - who until that time were looking at the video in the screen – which are forced to turn around, implying their physical involvement in the action, resulting in a very dynamic experience.

The room has several showcases in which, through an effective combination of archaeological remains and drawings, is given information about daily life, social organisation, construction techniques, and religious rites in Roman times (Figure 5.19, Code ES-PIC-18).

Figure 5.19: Showcases containing, through an effective combination of archaeological remains and drawings information religious rites in Roman times. Picture taken during the direct observation (16/03/2013)

Visitors also find several models, including a model recreating the forum porticoes and the adjoining commercial establishments (Figure 5.20, Code ES-PIC-19) as well as a model with audio information that recreates the market in the time of Augustus (Figure 5.21, Code ES-PIC-20).

Figure 5.20: Model recreating the forum porticoes and the adjoining commercial establishments
Picture taken during the direct observation (16/03/2013)

Figure 5.21: Model with audio information that recreates the market in the time of Augustus
Picture taken during the direct observation (16/03/2013)

The visit to the museum of the forum does not impress for the artistic os monumental value of the archaeological remains. However, as shown by some communication solutions (Figure 5.22, Code ES-PIC-21), the historical value and the ability to transmit social and historic archaeological contents give this place a high value and dignity.

Figure 5.22: Graphical solution used to explain to the visitor where the walking surface was in Roman times
Picture taken during the direct observation (16/03/2013)

As HERITY notes in its report 2012-2014 (Code: ES-DOC-2):

> *Los vestigios del conjunto foral no resultan sobresalientes por su vistosidad, o grandiosos por su envergadura, por lo que no alcanzan un alto valor artístico o estético. Tampoco sobresale por su originalidad o rareza más allá de su situación al lado del río y no en el cruce de las principales vías como es habitual. No obstante, el conjunto visitable alberga otra serie de valores que es preciso señalar. (...) A éste valor histórico inicial debe añadírsele un valor social, derivado fundamentalmente de la circunstancia de su buena presentación y exposición al público que además, le proporciona un alto valor didáctico.*
>
> (The remains of the *forum* are not outstanding for its striking, or great for its size, so it does not reach a high artistic or aesthetic value. Neither stands out for its originality and rarity, beyond its location beside the river and not at the junction of the main roads, as usual. However, the area holds a set of other values that should be noted. (...) To the historical value must be added the social value, mainly due to their good presentation and public exhibition that provide also a high educational value)

Even in the case of the Museum of the Forum we found an unexpected phenomenon: the values of the last assessment fall, rather than rise (Table 5.4).

Table 5.4: Quantitative outcome (on a scale from one to five) of the evaluation HERITY

Museo Del Foro De Caesaraugusta		
Dimension	**Assessment 2012-2014**	**Assessment 2009-2011**
Value	3,80	3,80
Conservation	3,80	3,40
Communication	3,25	3,25
Services	3,00	3,50

Source: Zaragoza. Ruta de Caesaraugusta. Informe definitive 2009-2011 and Zaragoza. Ruta de Caesaraugusta. Informe definitive 2012-2014 (ES-DOC-1 and ES-DOC-2)

The Figure 5.23 (Code ES-PIC-27) shows the result of the last HGES assessment, which is permanently available to the public at the door of the museum (Figure 5.24, Code ES-PIC-22).

Figure 5.23: Graphic rendering (The "target") of the HGES assessment of the *Museo del Foro*

Source: Courtesy of the *Ayuntamiento de Zaragoza*

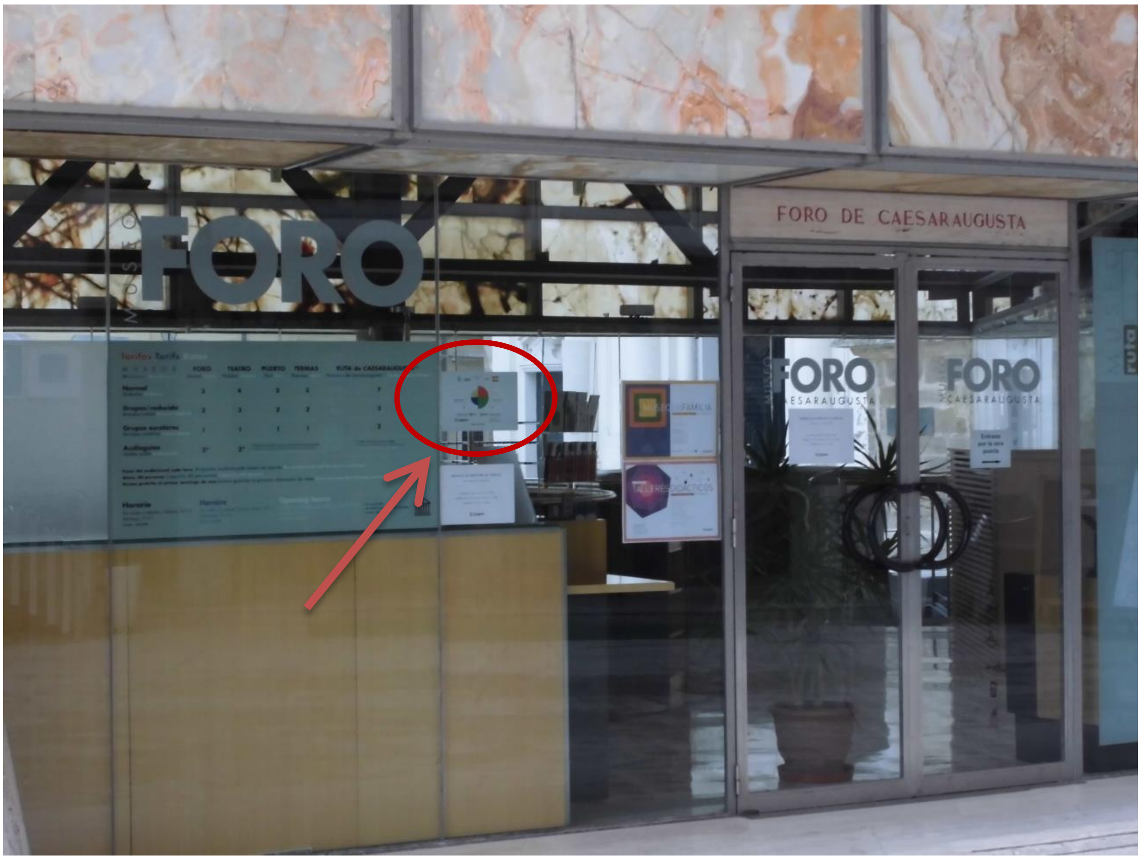

Figure 5.24: The plaque HERITY exhibited at the entrance of the Museum of the Forum of *Caesaraugusta*
Picture taken during the direct observation (16/03/2013)

5.1.2 Dimension I - Quality within heritage organisation

The case-study of the *Ruta Caesaraugusta* led us to discover the socioeconomic and political context of the city of Zaragoza, in which cultural policies are a constant concern. The city has an Observatory of Culture (*observatorio de cultura*), a public service which works for the Administration, professionals and citizens in general. Its goal is to facilitate decision-making in the Municipal Administration, help and guide the implementation of cultural works by professionals, and inform and contribute to the participation of the citizens. In brief, the main aim of the Observatory is to facilitate and guide the design of cultural policies (through the analysis of the cultural variables of Zaragoza, as starting point for decision-making) as well as boosts the cultural development of the city (cf. http://www.zaragoza.es/ciudad/cultura/observatorio/).

From the document analysis and through the interviews, it was possible to trace the path toward "quality". One of the informants told us about their institutional process in search for a reliable quality system to adopt (Code ES-INT-3):

> *Primero fue el proyecto "C de Calidad", una certificación de calidad del Comité de Calidad del "ICTE - Instituto para la Calidad Turística Española" Pero eso lo pueden dar a un museo, como a un taxi o a un bar. Es una certificación de calidad del turismo.*
>
> (In the beginning was the *C de Calidad* project, a quality certification by the Quality Committee "ICTE - Spanish Institute for Quality Tourism". But this could be given to a museum, as well to a Taxi or a bar. It is a certification of quality of the tourism)

Apparently, these managers were already aware of the importance of the application of the principles and standards of quality in the management of the assets. However, the feeling of frustration toward a quality system that is perceived as "unsuitable" or "not satisfactory" was clear and was reflected in the goals and mission of the museum. Another interviewee added (Code ES-INT-2):

> *En el 2004 nos eligieran para formar parte de un estudio. El grupo de APPEAR hiciera un estudio sobre tres lugares: en Londres, Zaragoza y el Museu de Vesunna en Périguex (Francia). Este proyecto estaba abajo del patrocinio del Parlamento Europeo. El objetivo era crear un conjunto de parámetros que sirven de apoyo a la decisión en cuanto a la preservación de restos arqueológicos en el contexto urbano, una herramienta técnica, independientemente de las orientaciones políticas. Las dimensiones consideradas fueron: la importancia de los restos, la opinión de los especialistas, las soluciones arquitectónicas adoptadas, pero también la satisfacción del público.*
>
> (In 2004 we were selected to be part of a study. The APPEAR group analysed three locations: London, Zaragoza and the museum of *Vesunna* in Periguex (France). This project was supported by the European Parliament. The goal was to create a set of parameters to support the decision regarding the preservation of archaeological remains in urban context. A technical tool not linked to any political group. The dimensions considered were: the importance of the remains, the opinion of specialists, architectural settlements but also the satisfaction of the public)

In this contribution we can see that the term *research* of the dimensions and *parameters* to determine the quality has a special weight. The working group seems to be aware about their path towards the definition of the dimensions of quality within heritage management, or at least about the importance of defining useful tools for the quality management of the assets. One of the informants affirms (Code ES-INT-3)

> *En 2006 Maurizio Quagliuolo, Secretary-General HERITY INTERNATIONAL, vino a España y monto una reunión para toda a España en Santiago de Compostela. Yo acudí a esa reunión, y me pareció muy interesante HERITY. (...) Me parecía muy interesante HERITY porque es exclusiva, mientras todas las demás que teníamos se podían aplicar a otros estabelecimientos que no tenían nada a ver con los museos.*
>
> (In 2006 Maurizio - Maurizio Quagliuolo, Secretary-General HERITY INTERNATIONAL, A / N - came to Spain and made a meeting in Santiago de Compostela. I went to that meeting, and I found HERITY very interesting HERITY. (...) HERITY seemed very interesting to me because it is exclusive, while all the others systems one could apply to other places and services that had nothing to do with museums)

Within the organisation, it seems to be a widespread opinion among operators and managers that HERITY Global Evaluation System is the most appropriate quality system, fitting perfectly with the objectives of local cultural policy. At this point it would be interesting to understand the perception of Quality within cultural heritage management, by the operators of the *Ruta Caesaraugusta*.

The operators of the *Ayuntamiento de Zaragoza* which are responsible for the management and enhancement of the *Ruta Caesaraugusta* have been seeking their own "path of quality" for years, possibly to be shared at the international level, as evidenced by participation in the APPEAR project. The flexible organisational culture and a strong enthusiasm - which is also emphasized in the HERITY reports (Codes ES-DOC-1 and ES-DOC-2) - represent a fertile environment for this type of research. We have written in our Research Diary (Code RD):

Per quanto riguarda invece l'incontro con i funzionari e gestori della Ruta Caesaraugusta, la direttrice Carmen Aguarod Otal, il capo della sezione musei, Romana Eric Lacabe, e la tecnica ausiliaria Dora Gabás Faure, nonché tutti i tecnici con cui sono venuto a contatto, la professionalità, motivazione, entusiasmo e disponibilità sono stati la prima caratteristica che mi ha particolarmente e positivamente colpito. Il clima era molto disteso, ma allo stesso tempo molto efficiente (Zaragoza, 16.03.2013)

(As regard to the meeting with the officials and managers of the *Caesaraugusta* Route, the director Carmen Aguarod Otal; the head of the museums, Romana Eric Lacabe, and the auxiliary technician Dora Gabás Faure, as well as all the operators with whom I came in contact, professionalism, motivation, enthusiasm and availability were the first feature which I was particularly impressed of. The atmosphere was very relaxed, but at the same time very efficient)

Another important finding is the reasons which leaded the public heritage managers in Zaragoza to the search and definition of Quality standards and principles. Quality within heritage preservation and management is perceived not as a sterile intellectual exercise, but as a potential instrument of action and autonomy from external interference on the management of the assets. This position arises by the story told during one of the interviews (Code ES-INT-2):

Ya en el pasado, la directora Carmen Otal tuvo que decidir sobre el destino de restos islámicos que se habían encontrado exactamente en el centro de la ciudad. Entonces estaba particularmente interesada en el establecimiento de unos parámetros a seguir en el proceso de toma de decisiones, y que los políticos reconociesen y respectasen! Aquí en Zaragoza, un alcalde destruyó un templo romano para crear un aparcamiento subterráneo: él dijo que esto tendría permitido lograr más votos!!! Nuestra sensibilidad hacia la calidad ha sido un largo proceso que se inició a partir de aquí...

(In the past, the director Carmen Otal had to decide about the destiny of Islamic remains who had found exactly in the centre of the city. So we was particularly interested in establishing parameters to be followed in the decision making process, and that politicians would recognize and respect! Here in Zaragoza, a mayor destroyed a temple to build an underground car park: he said that this would be allowed to do more votes!!! Our sensitivity to quality has been a long process that started from here ...

We also tried to understand who, according to managers, is considered the “customer”. As we see in Chapter 3, Juran divides the “customers” to *external* and *internal*. In this regard, one of the interviewee affirmed (Code ES-INT-2):

> *No nos gusta la definición de “clientes” (...) Simplemente nos ayudamos unos a otros, y no sabemos cómo responder a esta pregunta.*
>
> (We do not like the definition of "customer" (...) We just help each other, and do not know how to answer this question)

The managers of the *Ruta Caesaraugusta* refuse categorically to see their own work in this perspective. Even if in the context of “Quality” defining the recipients (customers) of the organisation’s efforts is necessary, the perception of the managers towards this concept seems to be very negative. In this case, the word “customer” is the one that has particularly disappointed the intervieewees, a signal of their perception fundamentally linked to the tradition of the cultural management, categorically rejecting definitions and perspectives of the productive or private sector. As we will see and discuss in the following subsections, the rejection of this terminology more typical of the productive sector is a common atiutude among the operators of the cultural sector (particularly emblematic in this sense, the position of the Minister of Heritage, Culture and Tourism in Italy).

5.1.3 Dimension II - General impact of Quality System within heritage management

The common dimension associated to quality in heritage management is the "Conservation" of the assets. The latter should have the greatest benefits from the implementation of a quality system, then. Actually, other dimensions should be contemplated: the HERITY GES, for example, takes into account the Perceived Value, the ability to communicate on the part museum institution and the services offered to visitors. This led to the development/improvement of these aspects. It is important determine whether these priorities correspond to those of heritage managers.

Namely, where are the expected and effective improvements? In this regard, one of the interviewees affirmed (Code ES-INT-2):

> *La conservación, primero de todo! Luego la comunicación, la investigación científica, las actividades de enseñanza, las conferencias dadas en todo el mundo para dar a conocer este lugar. Diferentes enfoques de la divulgación, de acuerdo con los diferentes tipos de audiencia (...). La accesibilidad a la información es nuestra prioridad.*
>
> (Conservation, first of all! Then, communication; scientific research; teaching: lectures given around the world to raise awareness of this place. Different approaches to disclosure, according to the different types of audience (...). Accessibility to information is our priority)

The initial concern towards the quality arises therefore from a practical necessity, and evolves over time, including other dimensions as that of communication, only to be completed through the experience of certification HERITY. The latter was helpful to "systematize" concepts, priorities and objectives:

> *Hemos incluido una serie de nuevas dimensiones en la evaluación de la calidad, debido al enfoque multidisciplinar de HERITY. Esto nos ha permitido ordenar y completar nuestro trabajo así como el concepto de calidad que teníamos.*
>
> (We have included a number of new dimensions in quality assessment due to the multidisciplinary approach HERITY. This has allowed us to order and complete our work as well as the concept of quality we had)

We can therefore say that, regarding the effects recognised by heritage managers in Zaragoza, the experience with HERITY:

1. brings an element of innovation in the perception of quality and
2. helps in the organisation of the work.

Anther evidence is given by the following contribution (Code ES-INT-3):

> *No hay mejoras concretas en materia de conservación, porque seguimos haciendo lo que hemos hecho! La comunicación es donde hay más mejoras.*
>
> (There are no specific improvements in conservation, because we keep doing what we've done! Communication is where there are more improvements)

We therefore interpret this phenomenon as follows: since the preservation of the remains is the more traditional concerns for managers, the implementation of a quality system does not significantly alter the condition of a dimension that was already sufficiently cured. On the contrary, aspects such as that of "communication", show improvement as a direct consequence of the new awareness.

Nevertheless, the strong conviction on the utilities of total quality applied to the management of cultural heritage makes the operators very motivated, and it is demonstrated by the fact that museums of the *Ruta Caesaraugusta* are among those who have renewed their certification. The benefits perceived by managers mainly concern the "integrated approach" that provides the HERITY GES, and they are conscious that the direct beneficiaries are the operators, not the public. Nonetheless, at the beginning there have been, as in other sectors, some resistance to the implementation of the quality system and assessment, as evidenced by some of the respondents (Codes ES-INT-2 and ES-INT-3):

> *Al principio todo el proceso parecía dramáticamente burocrático y pesado. Sin embargo pronto nos dimos cuenta de que no era el caso.*
>
> (At first, everything about the process seemed dramatically bureaucratic and heavy. However we soon realized that was not the case to be worry)

Me ha servido mucho! No ha sido difícil de implementar este proceso, pero la gente ha comprendido la necesidad de iniciarlo.

(It has helped me a lot! It was not easy to implement this process, but people have realized the need to start it)

The cultural level of the people involved, and their specific training, seems to be a guarantee for those responsible. One of these states (Code ES-INT-2):

También porque la mayoría de los participantes eran arqueólogos o, en todo caso, graduados.

(Also because most of the participants were archaeologists or, in any case, graduates)

And the answers to the question regarding the efforts for promoting a culture of quality within the organisation, confirmed this position (Code ES-INT-2 and ES-INT-3):

(...) no ha habido una formación específica! Todos eran jóvenes licenciados y entendieron muy bien la necesidad del proceso de certificación de calidad.

(There has been no specific training! They were all young graduates and they understood very well the need for quality certification process)

Hay un diálogo interno, pero no hay actividades sistemáticas con este objetivo. Sin embargo, hay un fuerte acompañamiento del trabajo de los funcionarios por parte de los responsables de alto nivel.

(There is an internal dialogue, but no systematic activities for this purpose. However, there is a strong support of the work of staff by senior managers)

Although internally the organisation does not provide for special meetings dedicated to the dissemination of the culture of quality, however, is perceived by managers the necessity to involve locally other areas, in particular that of tourism, for the optimisation of the improvement process driven by the principles of quality. In the interview ES-INT-2, we read:

Hemos invitado a los funcionarios de las oficinas de turismo para visitar los museos y hemos hecho una actividad con ellos. Antes, la ciudad era conocida, culturalmente, solo para la iglesia, que es un hogar de peregrinación, la Virgem del Pilar. Hoy en día, el conocimiento de los restos de varios periodos históricos diferentes es parte del esfuerzo que estamos haciendo como responsables de la herencia cultural y las personas están familiarizadas con las distintas zonas culturales.

(We invited tourism officials to visit the museums and we did an activity with them. Previously, the city was known, culturally, just because of the church, *Virgem del Pilar*, which is a place of pilgrimage. Today, the knowledge of the remains of several different historical periods is part of the effort we are making as responsible for cultural heritage and people are familiar with the various cultural areas)

Regarding the benefits took by the HERITY GES and the use of this framework, we have reflected about the following evidence: comparing the results of the first assessment with those of the second one, we notice that some values of the certification decreased in the last assessment, instead of increasing (as the implementation of quality should lead to improvements!). We recorded in our diary (Code RD) the opinion of the museum staff and managers about these results: they impute this result to the economic restrictions that the museum faces because of the reductions in public funding.

In addition, the dramatic decrease of the visitors to the museums of the *Ruta* (as shown forward, Figure 5.25a) may have contributed to these negative results. The use of certification, then, becomes a systematic witness on the overall condition of the place and the efficiency of its management, also in relation to public policies implemented in the region in support of culture. It becomes, potentially, a political tool for the application or request of public funds.

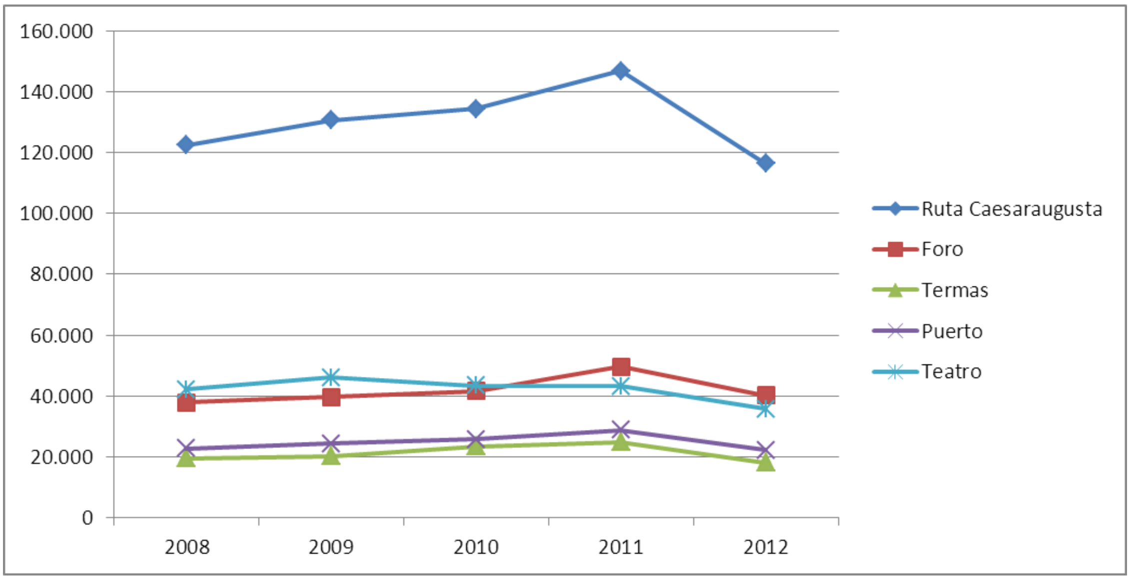

Figure 5.25a: Public attendance (number of visitors) within the museums of the *Ruta Caesaraugusta* (Zaragoza, Spain) between 2008 and 2012

Source: *Estudios Y Estadísticas Sectoriales, Observatorio de Cultura Ayuntamiento de Zaragoza* (Code ES-WEB-2)

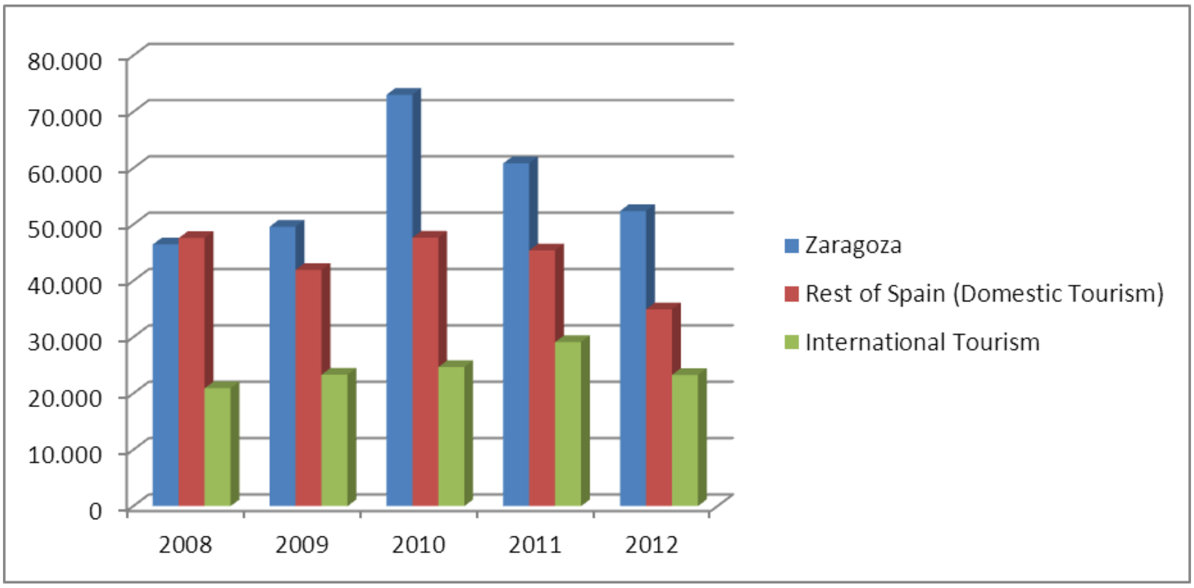

Figure 5.25b: Public attendance (number of visitors) within the museums of the *Ruta Caesaraugusta* (Zaragoza, Spain) between 2008 and 2012

Source: *Estudios Y Estadísticas Sectoriales, Observatorio de Cultura Ayuntamiento de Zaragoza* (Code ES-WEB-2)

This “political use” of the certification HGES is a phenomenon we found in several cases during our work, as we will see in next sections.

5.1.4 Dimension III - Impact of Quality Management on local communities' involvement

The involvement of the resident population in the management and promotion of cultural heritage can be done in numerous ways. In the case of the museums of the *Caesaraugusta* Route, it is important to note that the natural vocation of some of them, such as the theatre, also due to its good state of preservation, allow the realisation of performances (Code ES-ART-2). In this case, in fact, the monument is not only a tourist attraction but also an effective cultural space for the local population, as demonstrated by several evidences (Codes ES-PIC-23 and ES-ART-2).

The interviewees considered it appropriate to recall that the free entrance to Zaragoza's museums once a month and during the World Day of Museums is one of the modality to make more accessible museums to local communities. They referred also the events organised - especially at the Roman Theatre – with the same purpose. In order to verify this information, the archive of hundreds of newspaper articles and activity reports published since the 2012 (Codes ES-DOC-3; ES-DOC-4; ES-DOC-5; ES-DOC-5; ES-DOC-6; ES-DOC-7) they have been analysed during the investigation. From this analysis, the evidence has emerged of the intensive use of the museums of the *Ruta Caesaraugusta* as location of cultural events (Figure 5.26, Code ES-PIC-23).

Figure 5.26: Poster of the Evening Show: "The theatre of Caesaraugusta. 20 centuries of history" (July and August 2012)
Source: Courtesy of the *Ayuntamiento de Zaragoza*

However, during the period spent in Zaragoza for the collection of data, our proximity with the resident community has allowed us to perceive and record, on the contrary, a certain lack of interest towards the archaeological museums of Zaragoza, especially on the part of young people. By the way, the importance of the museum as a centre of great cultural importance to the city, for its dynamism and for its contents, is also reported by HERITY (Code ES-DOC-2):

> *Para la ciudad de Zaragoza, que ha vivido estratificaciones urbanísticas muy traumáticas, el Teatro de Caesaraugusta representa una profunda raíz cultural.*
>
> (For the city of Zaragoza, who has lived very traumatic urban stratifications, the Theatre of *Caesaraugusta* represents a deep cultural root)

Managers seem being conscious about the positive effects of the involvement of the population, like the increased interest towards the archaeological and cultural heritage in the city (Code ES-INT-1).

> *El trabajo de comunicación influye indirectamente sobre el nivel de participación de la comunidad local. Por ejemplo, empiezan a aparecer asociaciones que quieren colabora con el trabajo en el museo.*
>
> (The work of communication directly influences the level of participation of the local community. For example, it is appearing associations which want to work in the museum)

The effects of these efforts on the perception of residents about the importance of archaeological work and heritage seem obvious to the director of the *Ruta Caesaraugusta*, who affirmed (Code ES-INT-1):

En el principio, la comunidad se mostraba aburrida por los trabajos arqueológicos en la calle. Hoy en día las personas se identifican con los restos arqueológicos y reconocen su legado de identidad. (...) un jugador de baloncesto eligió el museo como la "location" donde realizar una entrevista que dio en la televisión!

(In the beginning, the community was bored by the archaeological work on the street. Today people identify with archaeological remains and recognize its legacy of identity. (...) A basketball player chose the museum as the "location" where he gave an TV interview!)

The general model followed by the managers of the Ruta Caesaraugusta it seems to be the one exposed in Figure 5.27:

Figure 5.27: The model of cultural heritage management applied for the *Ruta Caesaraugusta*

The knowledge, shared and disseminated within resident communities, reinforces identity and auto-esteem (the choice of the museum by the basketball player, as a location for his interview it is a clear and tangible demonstration). But the commitment of the heritage manager seems to be perceived in a more integrated and comprehensive way, involving the positive contribution to the quality of life of local residents through the valorisation of cultural heritage. The main manager of the *Ruta Caesaraugusta* reinforces this idea (Code ES-INT-1):

Ahora, para la comunidad los restos arqueológicos forman parte de su paisaje, de su vida cotidiana y están orgullosos de ellos. Creo que esto también se debe al hecho de que no tenemos restos particularmente monumentales, sin embargo compensamos con la cantidad de información que se ofrece. A diferencia de Roma, por ejemplo, donde hay una gran cantidad de restos monumentales pero poca información! (...)Cuando empezamos con el primer museo, el Foro Romano, existían problemas que ya no existen: la exclusión social, las drogas, la incuria, la suciedad, la falta de seguridad .... En esos dieciocho años se ha producido una regeneración del centro histórico, donde definitivamente hemos tenido una contribución positiva.

(Now, for the archaeological remains is part of the landscape and daily life of the local community, and they are proud of them. I think this is also due to the fact that we haven't particularly monumental remains, but we there is a great amount of information provided. Unlike Rome, for example, where there are a lot of monumental remains but little information! (...) When we started the first museum, the Roman Forum, there were problems that no longer exist: social exclusion, drugs, neglect, filth, lack of security... In those eighteen years there has been a regeneration of the historic centre, where we have definitely made a positive contribution)

5.1.5 Dimension IV - Quality Management and local communities' encounter with tourists

According to statistics collected by the archaeological museums of Zaragoza during the past few years - which we have considered as a secondary source of information for our study (Code ES-WEB-2) - the ratio between local visitors and tourists (international or domestic) is fairly balanced (Figure 5.28).

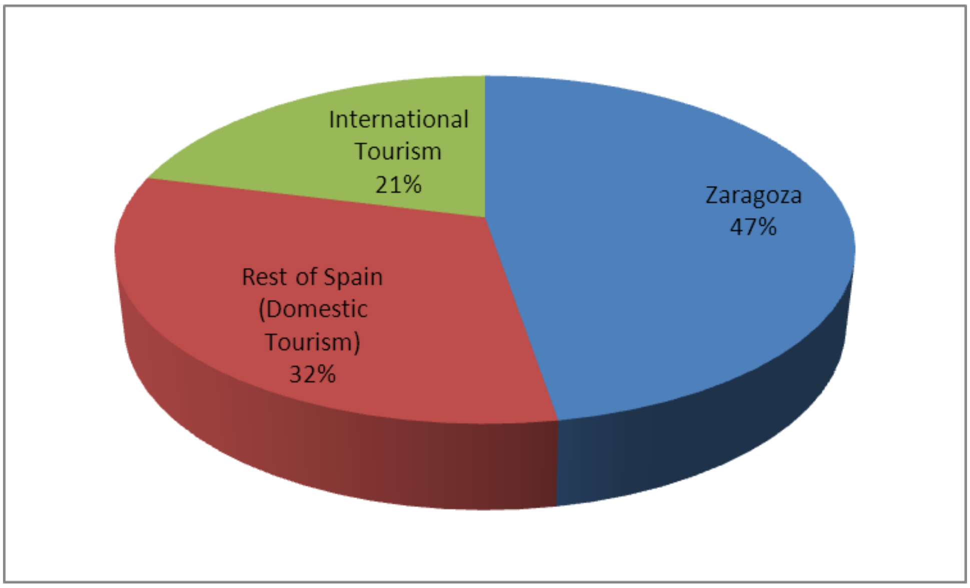

Figure 5.28: Ratio between local visitors and international/domestic tourists
Source: *Estudios Y Estadísticas Sectoriales, Observatorio de Cultura Ayuntamiento de Zaragoza* (Code ES-WEB-2)

The possibility of using the museum as a place of intercultural dialogue, however, is not taken into account. But this time the reason does not concern the perception but the obstacle created by the lack of funds to pursue certain projects. If, in fact, on the one hand, one of the informants (Code ES-INT-2) highlights the work done towards what we would call the "construction of the Ambassador of destination" (see Chapter 2):

> *Ha habido un fuerte trabajo de divulgación con el fin de dar a conocer a la comunidad residente - para que, por su vez, los pudiera transmitir – los contenidos del patrimonio arqueológico.*
>
> (There has been a strong effort in order to inform and raise awareness among the resident community about the contents of the archaeological heritage, so that - in turn, he might share these contents)

The same informant told us about the efforts of the museum to become a promoter of intercultural dialogue between residents and tourists:

> *La única cosa que podemos hacer es difundir el contenido, informar. Pero nada concreto. Una vez intentamos involucrar la gente de Zaragoza, pero fue un desastre porque estaban más interesados en aprender que transmitir. Aunque esto ha sido una experiencia limitada, no hemos repetido. En la semana del Día Internacional de los Museos, se produjo una interesante iniciativa que tenía como objetivo la utilización del patrimonio como un puente entre culturas. Fue muy interesante, pero incluso esto ha sido una experiencia aislada. De una manera general, tratamos de ser muy abierto y disponible para asociaciones y colectivos.*
>
> (The only thing we can do is spread the contents, inform. But nothing concrete. We tried to involve the people of Zaragoza, but it was a disaster because they were more interested in learning than in sharing. This has been a limited experience, we have not repeated. In the week of the International Museum Day, there was an interesting initiative that aimed using heritage as a bridge between cultures. It was very interesting, but even this has been an isolated experience. In a general way, we try to be very open and available for associations and groups)

The museum's failed attempt to prepare the residents for them to become the guides for tourists seems to have left a strong feeling of frustration, so the attempt was not repeated, just leaving a space for the free initiative of local cultural associations. But the next contribution, given from other informant (Code ES-INT-3), gives us a more pragmatic explanation for the abandonment of these attempts:

El problema es siempre el de los recursos: estamos trabajando en esta dirección, pero necesitaríamos más recursos, más gente que se pudiera dedicar a este trabajo con la comunidad local.

(The problem is always that of resources: we are working in this direction, but we would need more resources, more persons to whom assigned this task to work with the local community)

The use of heritage as a meeting point between tourist and resident, for the promotion of intercultural dialogue and the provision of a tourist experience more complete and authentic, is probably perceived by managers as an element of quality within heritage management, although not in a strong way. Anyway, there is a contingent obstacle that is the lack of financial capacity to invest in this area.

5.1.6 Dimension V – Quality and Economic impacts

From the point of view of the economic impacts given by the archaeological heritage enhancement, one of the informants (Code ES-INT-2) is very confident in saying that:

El beneficio de los bares, los restaurantes, es incuestionable! Hasta que ha sido una simple excavación arqueológica, este proceso no se activó, pero con el proceso de valoración, entonces sí que tuvieran beneficios!

(The benefit of the bars, the restaurants, is unquestionable! Until it has been a simple archaeological dig, this process was not activated, but the valuation process created many *(economic)* benefits!)

The same informant cites some examples:

> *En mayo, tenemos una serie de actividades con comerciantes de los barrios cerca de los museos, como la de las "Tapas Romanas" en los bares al lado del museo.*
>
> (In May, we have a series of activities with the shopkeepers in the surrounding area, such as the "*Tapas Romanas*" in the bar next to the museum)

Another interviewee (Code ES-INT-3), however, admits a less positive situation:

> *Hay algunos proyectos aislados, pero nada más. Los restaurantes, bares, hoteles tienen un beneficio de nuestra presencia, pero estos no es una situación estable, y no hay vínculo entre la artesanía y la arqueología.*
>
> (There are some isolated projects, but nothing else. The restaurants, bars, hotels have a benefit from our presence but these are not a stable situation, and there is no connections between craftsmanship and archaeology)

Indeed, the latter situation corresponds more to what was found during our direct observation: it has not been found the presence of any craft store or any other economic activities directly linked to the presence of the museum and that which it historically and culturally represents. Unquestionably there is an indirect benefit for commercial activities, especially related to tourism, but our goal is to identify the existence of more direct connections to the existence of archaeological sites and museums.

5.1.7 Dimension VI - Destination Branding, Heritage and Authenticity

Heritage managers of Zaragoza have a widespread awareness about the fact that HERITY doesn't provide – at least in a direct way - an added value for tourist attractiveness. When it is asked to identify the beneficiaries of the quality system informants answered categorically that the public had no direct benefits from certification. The latter does not confer an immediate or direct added value to the brand of the cultural product, and certainly does not affect critically the number of visitors to museums. Evidence is given by one of the informants (Code ES-INT-2):

> *¡No! Al principio, con la divulgación de los medios de comunicación, se ha producido una fuerte respuesta del público, ya que fue muy divulgada la noticia de la certificación a nivel regional. Pero después la situación ha vuelto a la normalidad.*
>
> (No, at all! At first, with the coverage of the media, there has been a strong response from the public, since it was highly publicized the information of the regional certification. But after this, the situation has returned to normal)

The reduced importance of HERITY, as a direct cause of an increase in the number of visitors or improvement of the tourist experience is explained by the managers also due to other reasons (Codes ES-INT-2 and ES-INT-3):

> *En primer lugar hay que decir que el HERITY es muy poco conocido en España!*
>
> (First of all, I must say that the HERITY is not so much known in Spain!)

> *Nadie pide una explicación sobre HERITY. También depende de la posición tiene la placa... Pero, en general, las personas no se identifican con este símbolo.*
>
> (No one asks for an explanation about HERITY. It also depends on the position that the plaque has... But in general, people do not recognize this symbol)

The HERITY "Target" (the element of the whole process which is more evident to the public) is relatively unknown compared to other quality's logos. As we also have obsered in our Research Diary (Code RD), according to our direct observation:

> *Per quanto riguarda la percezione della placca della certificazione di qualità, in effetti nessuno si sofferma per interpretarla e - a detta dei funzionari presso la biglietteria - nessuno chiede spiegazioni o informazioni a riguardo (Zaragoza, 16.03.2013)*
>
> (Regarding the perception of the plaque of HERITY certification (...) no one stop to look at it and - according to the workers at the box office - no one asks for an explanation or information)

So, it has no direct influence on the choice and the visitor experience, and certainly does not provide, *per se*, a greater attractiveness to the monument/museum. On the other hand, managers recognise the indirect benefits brought to tourist experience by the implementation of the quality system. An informant (Code ES-INT-2) admits that the "perceived value" of an asset may grow, indirectly, contributing to the personality of the destination.

> *Creo que sí, porque - por ejemplo - con la ampliación de las indicaciones y señales, aumenta automáticamente la percepción positiva del patrimonio por parte de la gente! Siempre damos más valor al monumento a través de la comunicación al público. Se ha hecho un gran trabajo para traducir el trabajo científico y los resultados obtenidos, en el contenido que hoy se transmite al público.*
>
> (I think so, because - for example - the improvement of indications and signals automatically increases the positive perception of the heritage on the side of the people! We always value the monument through public communication. It has done a great job translating the scientific work and the results obtained in the content that is transmitted to the public today)

> *Hoy en día si hablar de Zaragoza también es hablar de los restos arqueológicos: un jugador de baloncesto eligió el museo como la "location" donde realizar una entrevista que dio en la televisión! También gracias a "Ryan Air", hoy, hay muchos turistas, y todo el mundo se da cuenta de la importancia de las excavaciones.*
>
> (Today, talking of Zaragoza means talking about archaeological remains: a basketball player chose the museum as the "location" where he gave an interview on TV! Also thanks to "Ryan Air", today, there are many tourists, and everyone realizes the importance of the excavations)

Finally, regarding the possibility of providing visitors a direct contact with archaeologists, officials interviewed admit that it is not practices that take into account (as also confirmed by direct observation). The question itself affects in some way the respondents, which react with surprise to this topic. Apparently they do not perceive as a dimension of quality. One of the interviewees affirms (Code ES-INT-2).

> *El público no tiene acceso a los laboratorios y al trabajo de los arqueólogos. Hay un laboratorio de restauración, pero la gente no lo sabe. Pero es cierto, sería muy interesante, ya que esta es una forma de participación.*
>
> (The public does not have access to laboratories and to the work of archaeologists. There is a restoration laboratory, but people are not allowed to visit it. But it's true, it would be very interesting, as this is a form of participation)

5.2 Case 2: *Museo della Civiltá Romana*[18], Rome, Italy

Data analysis and findings

5.2.1 Broad analysis

The Museum of the Roman Civilisation belongs to the "Roman's Network of Civic Museums" (*Musei in Comune*, Figure 5.30a) created by *Roma Capitale*[19]. The network is under the responsibility of the Municipal Superintendence (Figure 5.29b) with the participation of the Managing Company *Zètema Progetto Cultura S.r.l.* (ZÈTEMA). The latter is a municipal society entirely owned by the *Roma Capitale* and it is responsible for the design, maintenance and preservation services, as well as for the classification (on behalf of the Municipal Superintendence). It is also in charge for the management of the Civic Museums Network and it is responsible for the bridge between "tourism" and "culture" as part of the strategy of the territorial marketing (retrieved January 11, 2014 from http://www.zetema.it/). The Museum of the Roman Civilisation, like any other

[18] Museum of the Roman Civilisation.

[19] Administrative entity which substitutes the former Municipality of Rome since 2010 (*Decreto legislativo 17 settembre 2010, n. 156*).

museums belonging to the *Musei in Comune* network, has thus a system of shared management between the direction of the museum itself and ZÈTEMA.

Figure 5.29a: Logo of the Municipal Network of Museums
Source: www.museiincomuneroma.it

Figure 5.29b: Logo of the Municipal Superintendence
Source: www.museiincomuneroma.it

The collection of the Museum of the Roman Civilisation is divided into 59 sections, with two itineraries for the visit:

- The first one follows a chronological order, by providing an historical overview of Rome from its origins to the late empire;
- The second is "thematic", as it illustrates Roman civilisation in its various aspects: public life, private and everyday life, as well as housing, family life, school, games for children, food, spectacles and entertainment.

There is a particular attention in presenting to visitors essential aspects of the complex society of ancient Rome, such as agriculture and pastoralism, handicrafts, medicine, music, art, religion, through the combination of models and copies in gesso of original Roman sculptures conserved in museums worldwide. Indeed, the museum was inaugurated in 1955 but it had existed for a long time previously (D'Amato, Di Tanna, & Liberati, 2008): the initial feature of the museum - which brought together an extraordinary collection of reproductions - seems to be the main strength of the present exhibition. Several reproductions, reconstruction models of the monuments and architectural complexes of Rome and the provinces of the Roman Empire, reconstructions of situations and instruments of every type: the possibility of seeing gathered a number of ancient works of art (actually, their reproductions) that are scattered to different museums in the world, or even disappeared, it is an educational opportunity rather unusual and very impressive.

Between 2011 and 2012 has been achieved the certification process of quality management (HERITY). Zètema, anyway, had previously implemented a quality control system, based on the creation of a "Services Charter" and on the care of "Customer Satisfaction". Regarding the latter, in October 2011 they completed a customer satisfaction survey, and the results obtained are presented in Table 5.5 (note that the numeric value is ranging from 3, *very satisfied*, to 0, *not satisfied at all*, and the minimum standard required is 2.10).

Table 5.5: Results of the "customer satisfaction survey"

Outdoor Signs	2,58
Opening Hours	2,82
Staff at the ticket office	2,91
Informations at the Ticket office	2,56
Wardrobe	2,89
Staff in room	2,83
Interior Signs	2,38
Audio guide	2,49
Information available	2,56
Digital Media	2,60
Cleanliness of artefacts	2,88
Cleaning of toilets	2,80
Library - diversity of the offer	2,72
Library – gadgets	2,69
Coffee Shop – products	2,82
Cafeteria – staff	2,80
Maintenance outdoor area	2,84
General experience	2,77
Average values	2,69

Source: ZÈTEMA *Indagini di "Customer Satisfaction"*
Mercati di Traiano – Museo dei Fori Imperiali (16 – 21 Ottobre 2012)

The "Service Charter" provided by ZÈTEMA is inspired by the Statutes of ICOM (2007), and it is based on the assumption that a "non-profit, permanent institution at the service of society and its development. It is open to the public, being able to acquire, conserve, research, communicate and exhibit material evidence of people and their environment for purposes of study, education and enjoyment". International Charts clearly place society and its members at the centre of a museum's functions and responsibilities, indeed (and as we see in the first chapter of this study): however, in analysing the "Services Charter" of ZÈTEMA, we note that there are no references to the social function of the museum within the "General Principles" (ZÈTEMA, 2012: 12), but "defines the responsibilities of the Managing Company, describes the rights of users and identifies key quality control indicators" (retrieved January 12, 2014 from http://en.museociviltaromana.it/il_museo/carta_dei_servizi).

Finally, with the certification process, HERITY evaluated globally the quality of management of this important cultural infrastructure and tourist attraction. The target HERITY, which graphically summarises the results of the assessment in the considered four dimensions, is shown in the figure 5.30. The certification, expired in 2013, has not been renewed.

Figure 5.30: Graphic rendering (The "target") of the HGES assessment of the Museo della Civiltá Romana
Source: http://www.museociviltaromana.it/dicono_di_noi/certificazione_herity

During the empirical study in the Museum of Roman Civilisation were collected interesting evidences about the managers' perception about Quality. The director of the Museum has been interviewed twice, as she was one of the informants who collaborated in the exploratory phase, already participating in the pilot interviews and then again in the final interview, during the data collection. The data collected in the two different moments (the first in the year 2011 and the second in 2012) are coherent with each other, providing consistency to our interpretation, as we will see in the next subsections.

The study of this museum has been very peculiar, especially with regard to data collection through the interviews. The director and the curator of the museum showed a great hesitancy and some worries in talking openly about the management system of the museum: both have asked immediately that the tape recorder was turned off, as we have recorded in our Research Diary:

> *L'intervista non é stata registrata perché non sono stato autorizzato. Anzi, la sola vista del registratore pare abbia messo a diagio le intervistate. (...) Entrambe hanno mostrato (...) grande reticenza. (Roma, 15.12.2011)*
>
> (The interviews have not been registered because they have not been authorized by the interviewees. Indeed, as they have seen the recorder they have shown a clear discomfort (...). Both of the interviewees have showed (...) great reluctance)

5.2.2 Dimension I. Culture of Quality within Heritage Organisation

During the interview, the Director of the museum has talked about the experience that led her to the actual perception of Quality:

Cominciai a lavorare con il Centro di Didattica Museale, dove si parlava appunto di esperimenti, di esperienze che poi dovevano essere validate seguendo dunque determinati standard e criteri, in quel contesto ho allora cominciato a sentir parlare di qualità anche con dei riferimenti "scientifici".

(I started working with the Centre for Museum Didactics, where they were speaking precisely of experiments, experiences that had to be validated by following certain standards and criteria. In that context, I then began to hear about Quality, also with scientific references)

But she has highlighted:

Peró come carattere sono una persona che é sempre andata alla ricerca della qualità quindi in un senso molto piú lato: ho sempre notato dove c'é la qualità, cos'é la qualitá, cosa bisognerebbe fare per ottenere la qualità e cosa non si riesce a fare, quindi questa é la prima cosa.

(Anyway I am a person who is always looking for *quality*, in general: I have always noticed *where* the quality is, *what* the quality is, what should be done to get the quality and what you can not to do! This is the first condition)

One could interpret the statement of the director as the belief that, more than the result of a system or a shared culture of quality, it is essential the individual sensitivity. This perception comes back clear several times, even when the director talks about her future replacement:

Non a caso io ho fatto rifare tutta la pannellistica: il pannello introduttivo sul Museo della Civiltà Romana, la parte storica e la parte tematica. Io ho cercato di fare proprio questo: tanti pannelli, in modo da lasciare, anche quando andrò via, una base "di qualità", dove c'è tutta la mia esperienza, la mia conoscenza del mondo Romano.

(It is not a coincidence if I wanted to take care about the renewal of whole panelling: the introductory panel on the Museum of Roman Civilization, the historical part and the thematic parts. This is what I have tried to do, many panels also in order to leave, when I will go away, a basic "quality", where there is all my experience, my knowledge about the Roman world)

In her discussion about management, the director always refers to the work she has done regarding the care of the scientific contents and their transmission, but never mentions other interventions, except those related to social causes, as we shall see further ahead. The environment very rigid and conservative was also confirmed by direct observation. And it is reflected also on the general perception of Quality within the organisation: it is very indicative the attitude of the Director during the second meeting. We have written in our Reseach Diary:

> *Durante il secondo sopralluogo, la Direttrice si é alzata dalla sua scrivania e mi ha mostrato il rapporto HERITY, sotto una pila di altri fogli, e in modo molto ironico ha affermato: "Ecco, l'abbiamo qui ma praticamente l'abbiamo dimenticato! (Roma, 10.07.2013)*
>
> (During the second visit, the Director herself has risen from her desk and showed me the report HERITY, under a pile of other papers, and ironically said, "Here we have! We keep it here but basically we have forgotten about it!)

The attitude demonstrated, once again, is that of mistrust towards the tools of quality management, preferring a style of management more based on her personal views and experience, in this case particularly oriented towards a more traditional vision of heritage management, albeit with a great sense of social responsibility. Our interpretation is confirmed by an affirmation of the responsible ZETEMA for the customer care, about this attitude of heritage managers towards quality:

> *La qualità non interessa affatto. Alcuni sono abbastanza aperti, ma altri hanno altre priorità... Però, in linea generale, non é affatto nella loro costituzione!*
>
> (Quality does not interest at all! Some are quite open, but others have other priorities ... But, in general, it is not at all in their constitution!)

She tried also to provide an explanation, affirming:

> *Il linguaggio della qualità non é nella loro mentalità né formazione, e il problema é che nessuno glielo chiede!*
>
> (The language of quality is not in their mentality. They do not have this training! And the problem is that no one asks them about it!)

In other words, at least regarding the Case 2, the whole process of evaluation of the quality seems to be perceived as useless. It is also important to note the lack of interest in the renewal of the certification.

5.2.3 Dimension II. General impacts of quality system on heritage management

During the interviews with the two representatives of the museum, has been exposed fairly clear their perception about the benefits that the HERITY GES led to the organisation. Very indicative, in this sense, the contribution of the director, which states:

> *Diciamo che l'esperienza della certificazione HERITY mi ha aiutato a schematizzare meglio le cose... A puntualizzarle meglio, sicuramente! Ora non ricordo bene nei dettagli, però tutti i quesiti che ci ponevano... quello che ci sottoponevano.... tutto ciò ci orientava meglio nell'ambito della qualità.*
>
> (Let's say that the experience of certification HERITY helped me to outline better things ... A to point better, definitely! Now I do not remember the details, but all the questions that they have posed ... the whole process ... everything was useful for us to be better oriented towards Quality)

But when operators were questioned about the improvements provided by HERITY within the considered dimensions, they confirmed the scepticism towards the certification process. There is a deep-seated conviction that there are no tangible improvements with regard to the services, conservation and preservation of artefacts or Communication. Again, the common attitude is that of diffidence regarding the utility of the certification. Regarding the dimension of "communication", for example, the director reminds:

Quello della divulgazione é un settore della "comunicazione". Ma la comunicazione un museo se la porta dentro di se. Sempre in base alle risorse disponibili, la comunicazione é stata sempre fatta!

(That of the dissemination is an area of "communication". But a museum has in itself the sense of communication. According to the available resources, here we have always cared about the communication!)

Both interviewees have claimed predisposition that is not dependent on any "imposed" quality system, towards issues relating to the improvement of the service offered to the public. The main Director proudly said:

Questo museo é stato uno dei primi ad abbattere le barriere architettoniche. (...) Questo dimostra quanto ci si sia posto il problema dell'accessibilità, non solo fisica ma anche anche dal punto di vista dei contenuti. Infatti, si é sempre cercato di avvicinare differenti pubblici, con particolare riguardo verso quelli svantaggiati.

(This museum was one of the first to eliminate architectural barriers. (...) This is the demonstration about our concern on accessibility, and not only the physical one but also from the point of view of contents. In fact, we have always tried to approach different audiences, with particular emphasis on those who are disadvantaged)

We found this perception also in other interviewee, who does not agree with the proposal of HERITY about the possibility of a co-management (through its system) that involves the visitor, even about issues considered less "intellectuals":

Io non penso che alcune domande di HERITY siano pertinenti, come quello sulla presenza di "muffa sulle pareti! Se c'é la muffa credo che me ne accorgo prima io che il pubblico!

(I do not think that some of HERITY questions are relevant, such as that they make to visitors about the "presence of mood on the walls"! I mean, if there is mood on the walls, I think I realize it before the public!)

5.2.4 Dimension III. Impact on local communities' involvement

Firstly, it important to mention that among the activities offered by the museum there are didactic workshops and educational visits, as well as meeting with teachers. The museum has a particularly accurate website, available in four different languages, which contains information and photographs, as well as the possibility to prepare the visit (http://www.museociviltaromana.it/). In addition to the institutional website, then, the museum is present in social networks ("Facebook", "Twitter"), in the online community "Flickr" and in "YouTube".

Nonetheless, the findings presented for the previous dimensions, in this Case, are coherent with the ones presented in this subsection: the study carried out has shown great enthusiasm and a sense of social responsibility within the museum structure, even if this is completely independent from the perception of Quality. The social concern seems to represent a feature that is perceived as "obvious" to the operators. During the interview, the curator says:

> *Il museo é di per se un'attivitá sociale, o almeno dovrebbe esserlo!*
>
> (The museum is in itself a business office, or at least it should be!)

This statement denotes also a social vocation of the main responsible. An inclination and a sensitivity which is also demonstrated by the environmental analysis, as we wrote down in the Research Diary:

Ho rilevato un interesse particolare, credo alimentato direttamente dalla Direttrice, verso il coinvolgimento di fasce sociali piú fragili ed emarginate, come anziani e reclusi. (...) La Direttrice mostra una sensibilità particolare in questo senso, dimostrata anche dai poster e i disegni che tiene nella sua bacheca. Numerosi i disegni di bambini e depliant di associazioni solidali e organizzazioni umanitarie. Tuttavia non sembra che leghi questa sua sensibilitá ad un modo sistematico di lavorare, e ancor meno come indicatore di qualitá. Sembra quasi che lo faccia come "missione personale" (Roma, 14.09.2013)

(I have noticed a special interest, maybe promoted directly by the Director, to the involvement of the most vulnerable and marginalized social groups, such as the elderly and prisoners. (...) The director shows a particular sensitivity in this sense, which is also demonstrated by the posters and drawings that she holds in her wall: several children's drawings and brochures of solidarity associations and humanitarian organizations. However, she does not seem to bind this sensitivity to a systematic way of working, and definitively this is not perceived as an indicator of quality. She almost seems to do it as a "personal mission")

By the analysis of the official documents of the institution, it has emerged that it was publicly presented, on February 7th 2012, the project Pica (*Percorsi Cittadinanza Attiva*), whose aim was to encourage the local population, especially that of marginalized groups, to visit the museum. This project was possible thanks to the collaboration of the Museum of Roman Civilisation and some of the young trainees of the project "*Percosi di Cittadinanza Attiva*". The director also talked about another experience, that we have related as follows:

Si é realizzato il progetto della ricreazione del giardino dell'antica Roma, al quale hanno lavorato i minori reclusi messi alla prova dal Tribunale dei Minori. Praticamente, invece di fargli fare l'apprendista ciabattino, loro son venuti qui con una cooperativa che ha presentato un progetto per ricostruire un nostro cortile adibendolo ad antico giardino romano di stile pompeiano. (...) Cosí, questi ragazzi (...)hanno fatto questa bella esperienza che é durata alcuni anni, cominciata nel 2000 e terminata, dal punto di vista della realizzazione, nel 2004, ma che continua con la manutenzione. Ogni anno cerchiamo disperatamente dei fondi da dare a questa cooperativa perché si possa continuare il progetto (Roma, 13.09.2013)

(We had a project of the recreation of a typical garden of ancient Rome, in which worked juvenile prisoners by court order. Basically, instead of making them work as artisans, they came here with a cooperative that has submitted a project to rebuild a courtyard in a Pompeian style. (...) So, these guys (...) have made this beautiful experience that has lasted a few years, it has begun in 2000 until 2004, even if it continues with the activities of maintenance. Every year we try desperately to find the funds so that we can continue the project)

Again, it seems that these concerns are not perceived as directly related to the concept of quality within cultural heritage management: these activities seem to represent more a personal concern of the director. Finally, with regard to the efforts made by the museum for the involvement of local population, it is important to point out all the projects carried out by the museum and that have as main target the most disadvantaged social ranges. Direct observation and analysis of the site and the interviews, however, led us to the conclusion that this commitment should not be directly linked to the awareness of the importance of the local communities' involvement, in general, as duty of heritage managers, but rather to use heritage as a vehicle for assistance for disadvantaged social groups. Consequently, also the encounter between tourists and residents is not among the priority perceived by the managers of the museum.

5.2.5 Dimension IV. Relationship between local communities and tourists

As regards the contact between tourists and local population, during the interviews has not been detected particular attention to this issue on the part of the interviewees. Direct observation confirmed that the museum does not exist in the museum any reference to multicultural topics, even if, during the interview, the curator of the museum explains that she was responsible for an exhibition on the cultures of Eastern Europe. Other evidence has been collected in analysing the '2012 Customer Satisfaction Surveys" of the museum, prepared by Zètema, the company that manages the municipal museums of Rome. Even if one of the results of this survey shows that the 7% of the foreign tourists visit the museum three times, there are no references to their satisfaction regarding the the encounter with the local community. Indeed, the responsibility for customer care admits:

> *Non ho facilità a capire quale possa essere il rapporto tra cittadino e turista...!*
>
> (I cannot easily understand what should be the relation between citizen and tourist...!)

5.2.6 Dimension V. Impact of the implementation of quality system on Local Economy

Regarding this dimension, no evidence worthy of note has been found. There is no reference to the integration of the museum into the process of economic development (traditional and non-traditional economic activities), and the quality is perceived as a vehicle for economic benefits just for the improvement indirectly provided in terms of revenue coming from paid visits.

5.2.7 Dimnsion VI. Destination Branding, Heritage and Authenticity

Despite it seems that a particular attention towards the contact between residents and tourists, then it is not definitively considered a quality issue of heritage management, the ZÈTEMA representative recognises during the interview:

> *"Penso che in effetti sarebbe un bene per noi promuovere questo contatto, per esempio attraverso corsi di lingua agli operatori. Però il Comune non accetta questo stimolo da parte nostra, perché ci reputa subordinati, e non accetta questo tipo di propositività"*
>
> (Actually I think that it would be good for us to promote this contact, for example through language courses for operators. But the Municipality does not accept this input from us, because they see us as subordinates, and does not accept this proactive attitude)

Our overall impression, from this point of view, has been that the perception of the quality on the part of the responsible for the management of the museum is very traditional and conservative, and the effect of this perception is a special care towards the preservation of the collection and the satisfaction of visitors regarding the services provided. The possibility of being able to establish contact between tourists and residents, it is not contemplated at all.

5.2.8 The interdiction of the museum during the course of the case study

During the observation period, few months after the second interview with the director of the museum, the latter was closed by the inspectors of the Italian Ministry of Labour due to the "violation of safety standards" (Figure 5.31). This event has had a critical impact on our investigation, leading us to some reflections and considerations: the HERITY report, three years before, had highlighted the structural weaknesses which motivated the current decision to forcefully prohibit the access to the museum. In the HERITY report we read:

> *Da un punto di vista della sostenibilitá, appare necessario e urgente utilizzare i fondi giá previsti e finanziati (...) relativi alla messa a norma ed alla riqualificazione del museo, anche in funzione della protezione della collezione, particolarmente urgenti rispetto all'immobile (...).*
>
> (From the point of view of sustainability, it is necessary and urgent to use the funds already foreseen and financed (...) related to the adaptation of the spaces to the legal standards and the museum requalification, also in relation to the protection of the collection, particularly urgent with respect to the bulding)

The quality assessment process has not been seriously taken into account - as demonstrated by the evidences exposed in previous subsections - as a tool for management and continuous improvement and, in the specific case, to justify a request of funds for the repair of unsafe structures. We consider the particular behaviour and attitude of the some heritage managers towards quality similar to the approach of the industrial sectors in the first half of the nineteenth century: they believed that the costs of quality were too high to be supported and taken seriously into account. Empirical evidence has easily turned this erroneous belief and today the usefulness of quality and certification for industrial sector is widely recognised, even from an economic point of view (the cost of non-quality is higher than the cost of quality). In the context of the cultural heritage, circumstances like the one occurred in the Museum of Roman

Civilisation, it should lead to the same awareness about the absolute necessity to consider the issues of "total quality management" and its certification as a priority, also in order to avoid additional (public) costs. The latter, in the case of cultural heritage management, must also be measured at the social level, based on the social obligation of the museum to be opened to public use. We will deeply discuss this matter in next chapter.

Figure 5.31: Announcement of the closure of the Museum of Roman Civilisation
Source: retrieved from the institutional webpage (accessed in 31/01/2014)

5.3 Case 3: *Mercati di Traiano e Museo dei Fori Imperiali*[20], Rome (Italy). Data analysis and findings

5.3.1 Broad analysis

In the centre of Rome, the five monumental complexes named the “Imperial Forums” were constructed between 46 B.C. and 113 A.D. in topographic continuity with the old Roman Forums (built and expanded into several phases from the sixth century BC). In chronological order, the forums built were: the Forum of Caesar (46 BC), the Forum of Augustus (2 BC), The Temple of Peace or *Templum Pacis* (75 AD), Forum of Nerva or *Forum Transitorium* (97AD) and the Forum of Trajan (112 and 113 AD). During the

[20] Trajan Markets and the Museum of the Imperial Forums.

opening of the later a restored Forum of Caesar was also inaugurated as was the complex of buildings today known as the Markets of Trajan. The forum complexes were built with the wealth accumulated during wars. They had a celebratory and auto-representative character for their clients, whose empire guaranteed peace in Rome.

Today, the Markets of Trajan are an archaeological complex representing an area that has experienced the evolution of the city from the imperial age to today. It is easy enough, already at a first analysis of the complex, understand that subsequent occupation and use of the structure. Inside, has been created a museum with the main aim to allow visitors to understand the structural, architectural and decorative aspects of ancient buildings.

The importance of the museum lies in the fact that, even if it is very suggestive to go through the great archaeological areas of the Roman and Imperial Forums, is particularly difficult for visitors to interpret and grasp a real vision of the ancient area. The responsible wrote (Lucrezia Ungaro, 2006) :

> *Incredibilmente, Roma, così ricca di monumenti e Musei, non ha avuto finora un centro dedicato all'architettura antica che permetta di comprenderne l'aspetto strutturale e quello architettonico e decorativo (Lucrezia Ungaro, 2006).*
>
> (Rome, incredibly, so full of monuments and museums, has not yet had a center dedicated to ancient architecture that allows you to understand the structural aspect and the architectural and decorative.

The location of the museum, its preparation and its use also allow the possibility of a successful combination between antique and modern, culture, urbanism and art. This dimension is further enhanced by the numerous art exhibitions that the museum holds. The visitor feels totally involved in this journey through the architecture and the ancient structures, and the experience is even more fascinating due to the beautiful view of the Roman Forum from a balcony and several big windows. During the direct observation we could actually perceive the immeasurable aesthetic value of the place. However, it remains difficult to interpret, despite the efforts made by operators. It is confirmed by the analyses of some surveys' results, that we found contradictory, in some way.

On the one hand, the surveys elaborated by the staff of the museum show that visitors are satisfied with the instruments of interpretation provided for the visit. On the other hand, the assessment HERITY has evaluated "not excellent" the capacity of communication, as we shall see further ahead.

There is a permanent exhibition dedicated to the Imperial Forums, which allows understanding of the different life stages of these places in antiquity and then in the course of the following centuries. Not only one form of media is used, in order to address several audiences (Italian and foreign tourists, university student groups, school children, scholars from various sectors to cultural, and the resident population). The enhancement of this place for tourists and residents also is given by the presence of website (www.mercatiditraiano.it), available in four different languages (Italian, English, French and Spanish). It represents a vehicle of primary Importance to approach the archaeological area and the museum. Finally, the museum also has a bookshop where one you can acquire not only several gadgets, but also multimedia products: CDs and DVDs sit alongside traditional media (guides in several languages, catalogues, etc.).

Figure 5.32: Graphic rendering (The "target") of the HGES assessment of the *Museo dei Fori Imperiali e Mercati di Traiano*
Source: http://www.mercatiditraiano.it/dicono_di_noi/certificazione_herity

During the visits undertaken in the course of the field research, we immediately comprehended the operators' effort to enhance the importance of the aesthetic and cultural values of the place. Therefore, some of the most recent and innovative communication systems were implemented. In this regard, we found in the institutional site of the museum the following affimration of the Director, Lucrezia Ungaro:

> *(...) rispettando il rigore scientifico delle ricostruzioni, proponiamo di utilizzare le migliori tecnologie oggi a disposizione: dalla grafica alla multimedialità, non volendo utilizzare solo un metodo di espressione, ma scegliendo quello più duttile a seconda delle esigenze di comunicazione.*
>
> (In accordance with the scientific rigor of any reconstruction, we propose to use the best technologies available today: from graphics to multimedia, we don't want only use one method of expression, but choosing the most flexible depending on the needs of communication)

The pictures collected during our direct observation corroborate this commitment (Figures 5.33 to 5.35).

Figure 5.33: Room of the Museum of Imperial Forums dedicated to the explication of the Forum of Augustus. Picture taken during the direct observation (16/03/2013)

Figure 5.34: Graphic Reconstruction of the Forum of Caesar during the Trajan era (Museum of the Imperial Forums) Source: Retrieved from http://en.mercatiditraiano.it/sede/area_archeologica/foro_di_cesare#c

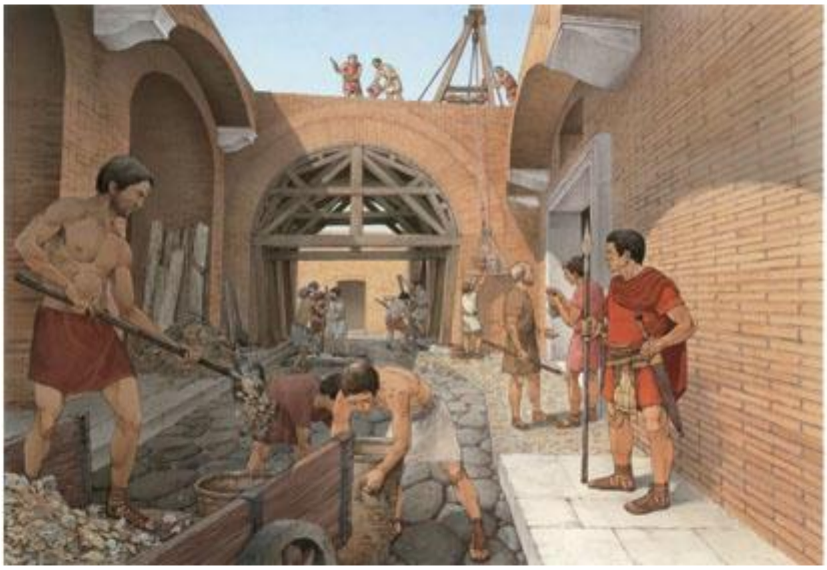

Figure 5.35: Graphic reconstruction of the *Via Biberatica* the Trajan Markets (Museum of the Imperial Forums)
Source: Retrieved from http://en.mercatiditraiano.it/sede/area_archeologica/foro_di_cesare#c

The system of communication used by the museum was actually one of the most impressive features during our visit. They use traditional “panels” as well as a rich multimedia system: it is a "mixed system" composed by contemporary photos, old pictures, and archaeological reconstructions in watercolours, 3D models.

Apparently there is a central concern towards the capacity to communicate. The museum is a good example of coexistence of didactic panels and multimedia products. The principal promoter of this matter seems to be precisely the director of the museum, judging also by what she wrote in several articles. Indeed, in order to overcome the lack of a personal meeting with the director, we have examined her most recent scientific and technical contributions in the field of cultural heritage management, in order to understand her perception of quality within heritage management in an indirect way.

5.3.2 Dimension I - Culture of Quality within Heritage Organisation

A certain attention towards the quality control seems to be present between the managers of the museum, and this is demonstrated by some of the practices implemented for this purpose. For example, the satisfaction of the visitors about the “mixed system” of communication is constantly measured. During a survey conducted by the museum, visitors were interrogated on the effectiveness and the usefulness of the multimedia installations. The quantitative results of this survey are summarized in the pie chart in Figure 5.36.

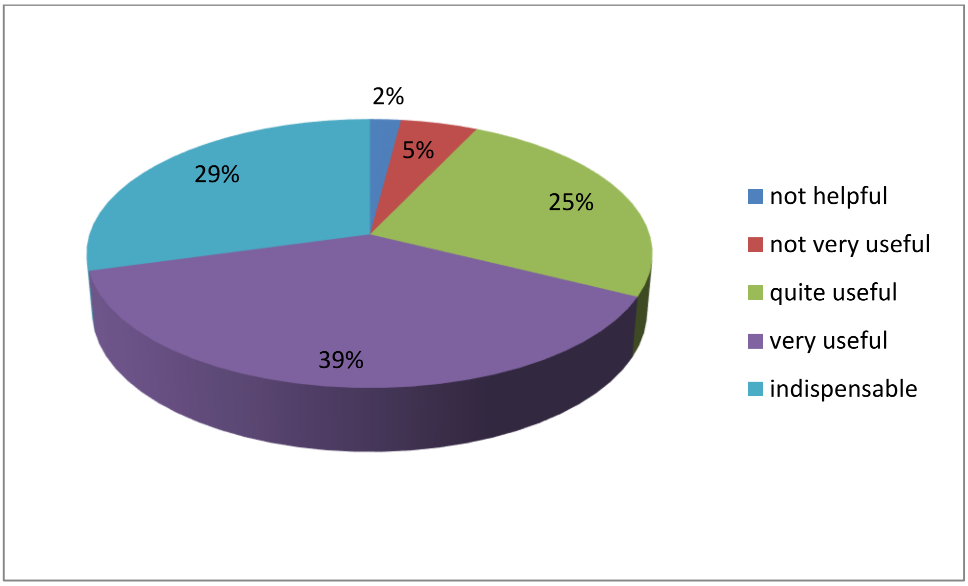

Figure 5.36: Results of the monitoring carried in 2008 on the visitors' perception of the usefulness of multimedia installations in the Museum of the Imperial Forums
Source: adapted from Sartini and Vigliarolo (2010: 15)

Once again, the matter focused is the assessment of the communicative capacity, and the way to approach the topic recalls that of Customer Satisfaction. The direct observation, the interview with the representative of ZÈTEMA and the analysis of the document (in particular the report HERITY) lead us to consider that, along with conservation, communication seems to be the most important factor of quality for the managers of this museum.

Other evidence is provided by the analysis of the survey about customer satisfaction 2012, conducted by ZÈTEMA for this museum: visitors are asked to evaluate, generally, a number of services offered by the museum (wardrobe, sympathy of the operators, interior and exterior signals, etc.). We consider these concerns being representative of the perception that managers has about Quality.

5.3.3 Dimension II - General impacts of quality system on heritage management

During the interview, the representative of ZÈTEMA said:

> *Secondo me manca una missione museale. Nessun museo ha scritto mai una sua missione (...) Non essendoci una missione, non si può creare una linea di marketing o stabilire dei destinatari, o una certa coerenza del museo. Io ci ho messo quattro o cinque anni a far approvare la Carta dei Servizi.*
>
> (I consider that our museums have not a defined mission. No museum has written a mission. If you do not have a mission, then you cannot create or establish a line of marketing, cannot define your recipients, or certain uniformity of the museum. It took four or five years to me to launch the Service Charter)

We have analysed this Service Chart, and added it to our source of evidences. In fact, the contents of this document confirm our previous perception: the efforts related with Quality are associated to the customer satisfaction, and related to basic services offered by the museum. Moreover, the result of the general observation of the site coincides with the affirmation of the executive: during our visits and our informal conversations with employees of the museum, we did not perceive the presence of a shared culture of quality within the organisation. On the contrary, the satisfaction and motivation of the employees seems to be low, and the term *quality* is perceived as synonymous of *control*, something that weighs down their work without a concrete positive impact.

5.3.4 Dimension III - Impact on local communities' involvement

If, on the one hand, the involvement of the population, especially of specific groups such as students, seems to be one of the priorities of the museum: the site of the museum announces that the guided tours are free of charge only for the schools of Rome and Province of Rome. But on the other hand during the study we have found contradictory evidences. First of all, the museum does is not regularly frequented by the citizens of Rome. The document published by ZÈTEMA (*Indagine customer satisfaction Mercati di Traiano – Museo dei Fori Imperiali 2012*) shows the socio-demographic characteristics of museum visitors in 2012: only 17% of the public are Roman citizens (28% in 2011, as reported in the same document) while 77% (59% in the previous year) are international tourists.

5.3.5 Dimension IV - Relationship between local communities and tourists

The forum of Trajan is an archaeological area with a great symbolic value from the point of view of the intercultural dialogue: historically, the politics of Emperor Trajan was tolerant and open towards other cultures of the empire. Trajan was the last “emperor-conqueror” who aspired to the creation of a great comprehensive community within the Roman Empire, transmitting to posterity the example that from the exchange between cultures emerges an identity always new. This strong cultural and historical value could be largely enhanced and optimized with the aim to promote the archaeological area and the museum as a meeting place for the local community and tourists. According to the director, the arrangement of the museum itself and the services offered are the starting point for international cultural exchanges.

> *L’apparato multimediale (hardware e software), la ricerca scientifica e l’elaborazione grafica, l’allestimento specifico per la comunicazione, i laboratori per i vari target di pubblico, le attività collaterali, come conferenze e convegni internazionali, esposizioni periodiche, affiancano la collezione permanente e incrementano scambi culturali con altri Paesi e con l’Italia stessa.*
>
> (The multimedia system (hardware and software), scientific research and graphic design, as well as the specific communication setting and the workshop for various target audiences, together with other activities, such as meetings, international conferences and temporary exhibitions, combined with the permanent collection they increase cultural exchanges with other countries and with Italy itself)

According to the approach of the director, the opportunity of exchange is given, then, by specific events or specific projects. But there is no mention of the involvement of the local community in this process of cultural exchange, and it doesn’t represent, apparently, an element of Quality, as it is not a constant practice and there is no reference to the promotion of this encounter by the managers. No evidences were founds indeed, during our direct observation that demonstrate efforts related with the encounter between local population and tourists.

An analysis carried out has shown that as soon as a project has been realized in 2009 (01/10/2009 to 31/03/2010) on this subject: *Progetto didattico Exemplum - Un ponte tra i popoli* (Didactic Project EXEMPLUM – a bridge between populations). The Director affirms:

> *In quest'ottica di diffusione del patrimonio non vanno trascurati gli ambiti di cooperazione e scambio internazionali, sia finalizzati alla compatibilitá dello sviluppo sostenibile con la tutela e la valorizzazione del patrimonio culturale, sia la formazione di reti di scambio interattive per la formazione di banche dati dialoganti comuni e l'accesso diffuso al patrimonio comune (Lucrezia Ungaro, 2010: 6).*
>
> (Within the several effort for the diffusion of the heritage should not be overlooked the cooperation and international exchange towards the sustainable development and the protection of cultural heritage, as well as the creation of networks, interactive databases and a widespread access to the common heritage)

We found interesting, and in a certain way we can interpret it like a sort of communication between the tourist and the city, the attempt to insert the area in the urban context. The word "innovation" seems often synonymous with "new technologies applied to communications". In the case the relationship "monument-city" represents one of the big innovations. The monument is not limited to itself, but it is extended over the city and the surrounding archaeological remains. The visit route leads to large windows overlooking the archaeological remains of the Roman Forum, or on balconies equipped with "interpretive panels" that prolong ideally the visit over the wonderful landscape which opens in front of the visitor. According to a statement of the Director Lucrezia Ungaro (2010: 5):

> *(...) l'interazione osmotica con la cittá che puó essere distraente, ma al tempo stesso coinvolgente e affascinante, costituisce un elemento fondamentalenello studio dei percorsi di visita, della dislocazione degli spettacoli, dei punti di sosta che permettono di riposare ma anche di riflettere su quanto si sta visitando (...)*
>
> (The osmotic interaction with the city that can be distracting, but at the same time it engages and captivates. This is a key element in the study of the itineraries, location of the shows and stopping points along the museum, that allow you to relax but also to reflect on what you are visiting)

5.3.6 Dimension V - Impact of the implementation of quality system on Local Economy

From the point of view of the impact on local economy, we found very interesting a statement of the director:

> *Attenzione alla pura mercificazione dei* luoghi, *perché da risultati a breve ma non su tempi lunghi, non consolidail fatturato* (...). *In altre parole, non parlano solamente i flussi di visitatori* (...) *ma la qualitá dell'offerta culturale (mostre, spettacoli), la comunicazione innovativa gradita al pubblico, il ritorno dei visitatori (Lucrezia Ungaro, 2010: 9).*
>
> (But we have to be careful with the pure commodification of places, because it provides short-term results but not on a long term, it does not improve the incoming (...). In other words, we cannot speak only about visitors' flow, but also about the quality of cultural events (exhibitions, performances), an innovative communication satisfactory to the public, the return of visitors.

In this case, some of the beliefs of the director are quite clear: the director is well aware of the necessary precautions to avoid a mere "commodify" of culture. Quality is not perceived as measurable based on the number of visitors. With regard to the influence on traditional economies, we have not detected any specific project, evidence that we interpret as a lack of attention to this dimension, in favor of others, as, once again, communication and heritage conservation *in situ*.

5.3.7 Dimension VI - Destination Branding, Heritage and Authenticity

According to the director, there is a fundamental error in the heritage management models traditionally proposed: the concept of heritage management for educational porpoises or/and tourism is often opposed to the necessity of conservation. But she perceives it as a false problem, which seriously compromises the positive contribution that heritage should give to overall development through its enhancement on behalf of residents and tourists.

She affirms:

> *Il dibattito "integralista" tra i sostenitori della valorizzazione, contrapposti ai difensori ad oltranza della conservazione e della tutela, non giova di certo al patrimonio culturale, come non giova allo sviluppo sociale ed economico, al processo di integrazione culturale, alla formazione di una corretta identità transnazionale, nazionale e locale attraverso il patrimonio stesso. L'errore è alla base nel considerare le due sfere scisse, mentre la conoscenza è alla base della tutela e la valorizzazione ne discende (Lucrezia Ungaro, 2010: 3).*
>
> (The "fundamentalist" debate between enthusiasts of heritage valorisation, opposed to the supporters of the preservation, certainly does not benefit cultural heritage, as does not benefit the social and economic development, the process of cultural integration, the formation of a correct national, transnational and local identity through the heritage itself. The error is to consider these two domains as separated, while *knowledge* is the basis for the *protection* and, after this, comes the *valorisation*)

5.4 Case 4: *Museo del Mare e della Navigazione Antica*[21], Santa Marinella (Rome), Italy. Data analysis and findings

5.4.1 Broad analysis

The Museum of Santa Marinella "Museo del Mare e della Navigazione Antica" (Museum of the Sea and Ancient Navigation) is located within the extraordinary archaeological area of Etruscan Pyrgi, and into "Castle of Santa Severa". Next to the museum is also a coastal environment of considerable charm. "Pyrgi" was an Etruscan town (V century B. C.), one of the oldest port calls of the Tyrrhenian Sea, an important place of worship, later occupied by the Romans. In medieval times it was built here the "Castle of Santa Severa". Today this area is part of the municipality of Santa Marinella (Rome), and it is particularly important from the point of view of archaeological findings (Enei, 2011; Schmitz, 1995) .

[21] Maritime and Ancient Navigation Museum.

In 2011, almost twenty years after its establishment (1993), the Museum has been renewed and enriched with respect to the exhibition space, organisation and contents, as explained by Enei (2011). Through the exhibition of hundreds of archaeological remains and the use of models and reconstructions organised within seven "exhibition rooms", visitors are introduced to the issues of underwater archaeology and ancient navigation. The museum has a very distinctive educational approach, which can stimulate the interest and curiosity towards the nautical world of the ancient Mediterranean. The seven thematic rooms that compose the “exhibition route” are:

- Room I: the history of man from the depths of the sea;
- Room II: Ancient travellers at sea;
- Room III: Archaic navigation;
- Room IV: hydraulics and navigation;
- Room V: In ports and on sailing ships;
- Room VI: Ancient life “on the sea for the sea”;
- Room VII: Submerged “Pyrgi”.

The “Room I” (Figure 5.37) has particularly attracted my attention, during the observation, since it is not dedicated to the heritage itself, but to the profession and to archaeological research.

Figure 5.37: The reconstruction (1:1 scale) of an underwater archaeological excavation site on the wreck of a Roman cargo ship. *Museo del Mare e della Navigazione Antica* (Room I), Santa Marinella, (Rome)
Source: Enei (2011: 5)

From this point of view, important to report that, at the moment of the activities of direct observation, there was also a DVD on sale at the book-shop of the museum, entitled: "Santa Severa tra leggenda e realtá storica". Having taken note of this DVD, I found that it contains a documentary that accompanies one of the most important archaeological excavations in the castle of Santa Severa, showing in a simple and interesting way the steps of an excavation and archaeological research.

Another room particularly attractive and fascinating for the use of a full-scale reconstruction is the “Room VI”, where we find the reconstruction of the hold of a roman ship (Figure 5.38).

Figure 5.38: Reconstruction (1:1 scale) of the hold of a roman ship in the Room VI of the *Museo del Mare e della Navigazione Antica*, Santa Marinella, (Rome)
Source: Enei (2011: 15)

With regard to the services provided to the public, there is a great variety of offer:

- Guided tours (museum - castle of Santa Severa - archaeological area of Pyrgi);
- Educational workshops (for schools of all levels and organised groups);
- School camps (for schools of all levels);
- Visits to the underwater route "Pyrgi Sommersa" (for holders of patent sub);
- Art Workshops (Courses of the “Accademia delle Arti di Pyrgi”);

- Courses and dissemination conferences.

The museum presents quite clearly a special attention the world of education to which dedicates a rich and varied range of theoretical and practical workshops, designed to arouse the interest of young people in relation to the historical and archaeological heritage and natural environment. The communication to the public and the disclosure of the museum looks very accurate: there is also an institutional website (http://www.museosantasevera.org/) constantly updated and user friendly, allowing visitors to plan and "start" their visit even before they arrive.

The entrance tickets to the museum can be purchased at the Info point, near the main entrance of the museum, where one can also book tour packages that cover the whole territory of the 'Southern Etruria" (Tarquinia, Bracciano, Cerveteri, Rome, Vulci, Tolfa-Allumiere and others). The same space hosts the Bookshop, where visitors can acquire the publications and gadgets of the museum together with guides, maps and crafts relating to the ancient world such as pottery, gold and silver produced by local craftsmen and artists. From here begins also the multimedia exhibition on the Etruscans ("Gli Etruschi in 3D", Figure 5.39)

From a scientific point of view, the museum is also very active with regard to the activities of research, in collaboration with national and international institutions and universities (Enei, 2011: 31).

Figure 5.39: The flyer / invitation to the multimedia exhibition "The Etruscans in 3D"
Source: Courtesy of the Director of the "Museo del Mare e della Navigazione Antica"

The museum has been certified for the 2009-2011 period, and did not renew the certification. The latter, especially highlights the results achieved by the museum as part of the services (Figure 5.40).

Figure 5.40: Graphic rendering (The "target") of the HGES assessment of the *Museo del Mare e della Navigazione Antica*

Source: http://www.santamarinella.rm.gov.it/, accessed 2014, January 15th

Figure 5.41a: The Director of the Museum (on the left) and the Mayor of Santa Marinella (in the middle) received the certification by HERITY General Secretary (on the right). May 21th, 2011
Source: http://www.vivereilmare.it/museidelmare/foto/mm08.html, retrieved 2014, January 15th

Figure 5.41b: The "target" exhibited by Maurizio Quagliuolo during the ceremony, may 21th, 2011
Source: http://www.vivereilmare.it/museidelmare/foto/mm09.html, retrieved 2014, January 15th

5.4.2 Dimension I - Culture of Quality within Heritage Organisation

Through the various informal meetings with the director of the museum, Flavio Enei, also resonsible for the surrounding archaeological area, and during our interview (31/07/2013), we found that the implementation of the HGES has occurred after an initial contact made by HERITY. The museum did not adopt any quality system before that, despite they had a regional quality accreditation. It was indeed conferred Regional Quality Award in 2005, as a museum of significant scientific and cultural important on the coast north of Rome. The informant categorically denies the existence of a heritage quality management system before HERITY, and defines as "generic" the regional quality quality control system:

> *No, non c'era alcun sistema di gestione di qualitá del patrimonio! A livello regionale c'era un controllo generico.*
>
> (No, there was no heritage quality management system! At regional level, there was just a general control)

The evidence leads us to interpret the observed case in Santa Severa as "paradigmatic" from the point of view of the influence of the implementation dell'HGES on the development of a culture of quality at the organisational level. The director emphasizes - with a certain pride - the scientificity with which the museum has been prepared:

> *Noi abbiamo avuto un discreto successo con le pompe idrauliche, che é un unicum, le abbiamo solo noi e sono venuti anche da Pechino a vedere questa ricostruzione perché vogliono creare anche loro un museo del mare. Anche lo scafo cucito e la stiva della nave sono copie fedeli fatte con sistemi di archeologia sperimentale (...) che non sono Disneyland, che abbiamo ricostruito, non é Disneyland, ma cose filologicamente corrette, ricostruzioni di relitti veri, create a scopo didattico. Ecco queste sono piccole cose ma di grande successo che abbiamo solo noi!*
>
> (We have had some success with the reconstruction of the hydraulic pumps, which is unique. We are the only ones to have these reconstructions and they came from Beijing to see them, because they also wanted to create a Museum of the Sea. Also the ship's hold is a faithful reproduction made with systems of experimental archeology. It is not Disneyland, we have rebuilt! It is not Disneyland! We talk about philologically correct reconstructions of real wrecks, created for educational purposes. Here these are small things but very successful, which are only here!)

The focus of this museum, as is common also in other cases, it was on conservation. But unlike other places, here there is a particular attention towards the practice of experimental archeology. The latter is a priority which, according to the evidences, was complemented by a culture of quality only with the advent of HGES.

5.4.3 Dimension II - General impacts of quality system on heritage management

The improvement within the organisation leads to greater overall capacity to transmit the cultural and historical contents and to contribute to greater visitor satisfaction. It is important, however, to keep in mind the awareness of the operators of the fact that the certification, *per se*, does not attract a greater number of visitors. We asked in a direct way to the Director of the *Museo del Mare e della Navigazione Antica* which was his idea of quality applied to cultural heritage. The response has been articulated:

> *Un risultato di alta qualitá é dato dall'allestimento museale; dalla capacitá di comunicazione con il pubblico, sia attraverso l'allestimento stesso che attraverso il personale addetto al museo; dal materiale a disposizione; dai servizi; dall'organizzazione stessa del personale, quindi dalla presenza di una o piú figure direttive affiancate da operatori e personale qualificato per poter garantire servizi di qualità; c'é bisogno di un ambiente di qualità, anche con accessi facilitati per disabili; ma anche un registro inventariale, così come la presenza di una biblioteca utilizzabile dal pubblico. Tutto questo nel loro insieme forma una proposta qualitativamente accettabile.*
>
> (The high quality is given by the set up of the museum, as well as by the ability to communicate with the public, through the technical instruments but also through the staff; the material available; services; by the organization's staff, and by the presence of one or more leaders supported by operators and qualified personnel to ensure quality services; there is need of a quality environment, with facilitated access for the disabled; but also a record of the inventory, as well as the presence of a library usable by the public. All these are elements of a good quality offer)

The perception of the manager, surely influenced by the experience HERITY, as seen previously, is clear enough and complex. The changes introduced by the quality certification are clear for the museum's director and responsible for the archaeological area, which states:

Sostanzialmente é stata messa l'attenzione sul rapporto con il pubblico, sull'avere un resoconto quanto piú preciso possibile da parte del visitatore su ció che era stata la sua impressione riguardo la visita, quindi l'organizzazione della didattica e dell'allestimento museale stesso. É stata una riflessione che ci ha spinto a approfondire determinate tematiche che prima erano fatte in modo piú spontaneo.

(Substantially has been putting the focus on the relationship with the public. We want to have a report by the visitor on that which has been your impression about the visit, about the organization of teaching and museum exhibition. It was a reflection that led us to deepen certain issues that we made a spontaneous way)

Also in this case, as found in other cases, the HGES has had its influence on the heritage managers from the point of view of a reorganisation of their activities and efforts aimed at the improvement of the offer to visitors. However, we perceived a lack of confidence on the part the informant, and based on the findings during our direct observation. During our conversation about the value of quality, the informant says:

Sinceramente, c'é altro a cui pensare! La Regione ha incentivato la certificazione, tempo fa, ma una volta venuta meno la spinta della Regione, tutti qui nel Lazio abbiamo abbandonato.
Anche perché non esistono fondi.

(Honestly, there are more important things to think about! The Region has facilitated the certification, some time ago, but once they have stop this input, everybody here in Lazio region has abandoned this goal. And the reason is also the luck of funds)

The Director has reported several times the problem of the lack of sufficient public funding for a proper heritage management. He has shown himself very critical towards the socio-economic and political environment in which they are operating:

Parlare di queste cose in presenza di una politica che non destina nulla alla cultura e ai musei regionali é veramente difficile! É tutto fatto in base alla passione delle persone che operano in questi luoghi, dei direttori e dei volontari che ci danno una mano.

(It is very difficoult to talk about these things in the presence of a policy that devotes nothing to culture and regional museums! It's all done according to the passion of the people working in these places, directors and the volunteers that use to help us)

The Director shows a lack of confidence about the effects of Quality and its importance. This mistrust seems to be intimately linked to the political context that defines the policies for Cultural sector and allocates public funds to this. With regard to the internal culture of the organisation and the improvement process, the informant is more positive:

> *Abbiamo fatto dei corsi d'aggiornamento per il contatto con il pubblico, per la didattica. Tutto sommato é stato positivo. Loro capiscono che piú il lavoro é di qualitá e piú il museo ha successo!*
>
> (We have promoted some training courses for our staff to enable them to better contact and communication with public. By the way, it was positive. They understand that the higher the quality of the offer the higher the success of the museum!)

The Director has a big proximity with the museum staff, and he trusts them. On the other hand, the direct observation, namely the informal conversation with the staff) has also highlighted the esteem and respect of the operators towards the Director, also due to his scientific effort devoted to the locality. Ultimately, in this case the quality is not formally defined but is based on not formalized dynamics that are highly dependent on the figure of the director and his leadership.

5.4.4 Dimension III - Impact on local communities' involvement

The direct observation and document analysis have shown the intense activity carried out with the schools and - at different levels - with the local population. The museum presents quite clearly a special attention the world of education to which dedicates a rich and varied range of theoretical and practical workshops, designed to arouse the interest of young people in relation to the historical and archaeological heritage and natural environment. The communication to the public and the disclosure of the museum looks very accurate: there is also an institutional website (Code IT-WEB-3) from which we have extracted several evidences for our study. It is constantly updated and user friendly, allowing visitors to plan and "start" their visit even before they arrive.

And maybe that's why he once again talks about the teaching and communication, when questioned about the main recipients of the quality:

Innanzi tutto, il destinatario della qualitá é l'istituzione museale in quanto tale: il fatto che si tengano bene in vista determinati parametri consente al museo ad uno sviluppo positivo e intelligente. Ció porta attarverso la qualitá ad una maggiore comprensione del pubblico di ció che si vuole comunicare e ad una maggiore soddisfazione da parte dell'utente.

(First of all, the main recipient of Quality is the museum itself: the fact that one keeps in mind certain parameters, it enables the museum to a positive and smart development. It brings to a greater public understanding through Quality and a greater satisfaction of the users)

However, the pursuit of quality has, in this case, a secondary place. The director explains the reasons for his interest in the active involvement of the population: this is not only an ethical commitment, but it is also strategic from the political point of view:

Creare la sensibilità, sul campo, dei cittadini é un ruolo importante del museo: avere un'associazione all'interno del museo vuol dire dare un po' piú di forza all' istituzione stessa. (...)Diventa un fatto politico: é come avere una specie di "partito dei beni culturali" all'interno del museo, e a quel punto non sei piú solo. Perché un archeologo, per quanto bravo possa essere, non é nessuno! Puoi avere tre lauree, specializzazioni, ma in realtà sono i politici che gestiscono queste cose, e tu non sei niente: sei qualcuno se dietro hai il popolo, nel senso, la gente, le associazioni! E questo lo so per esperienza: quando abbiamo avuto problemi, l'associazione ci ha salvato! Oltre ad avere un ruolo importante nella ricerca, tutela e valorizzazione, l'associazionismo é fondamentale, e questo dovrebbe essere un parametro presente nelle valutazioni dell'HERITY.

(Create awareness within the citizens, on the field, is an important commitment of the museum. Having an association inside the museum means to give a little 'more power" to the institution itself. (...) It becomes a political fact: it's like having a sort of "party of the Cultural Heritage" within the museum, and at that point you're not alone anymore. An archaeologist, no matter how good he is, is nobody! You can have three bachelor degrees, but actually politicians are who manage these things, and you are nothing! You become "someone" if you have people behind you the, an associations! And I know this from experience: when we had problems, the association has saved us! Associations have an important role in the research, protection and enhancement: they are fundamental and this should be a parameter within the HERITY assesment)

When we propose, during the interview, a link between this practice (the involvement of community resident) and the degree of quality management, the director reflects:

Oltre ad avere un ruolo importante nella ricerca, tutela e valorizzazione, l'associazionismo é fondamentale, e questo dovrebbe essere un parametro presente nelle valutazioni dell'HERITY.

(In addition to having an important role in the research, protection and enhancement of the association is fundamental, and this should be a parameter present in the HERITY assesment)

We conclude that the Director considers that this element is not considered an indicator of quality, and is not taken into account dall'HGES. Therefore, the quality is in this case completely dissociated from the practice of the involvement of the local community.

5.4.5 Dimension IV - Relationship between local communities and tourists

Santa Marinella cannot be considered an international tourist destination. According to our direct observation, the territory is interested by second-home tourism, especially during the summer. The main targets of the efforts for the enhancement of the archaeological heritage are the young people and schools. This is confirmed by the words of the Director:

Il grosso del nostro lavoro sono i giovani, le scuole, per cercare di trasmettere i valori e la passione per questi temi.

(The majority of our work is directed to young people and schools, trying to transmit the values and passion for these topics)

Somehow, this commitment also compensates the lack of international tourists. In fact, scientific protocols of the museum with international universities guarantee the presence of foreign students who participate in archaeological works in the area of Santa Marinella. The Director comments this phenomenom as:

> *La percentuale di (turisti) stranieri qui é bassa. La nostra responsabilità é limitata alle attivitá del museo. Per esempio, il fatto che vengano ogni anno 15 o 20 studenti francesi e relativi professori a scavare a Castrum Novum, fa in modo che questi ragazzi si incontrino con quelli locali. (...) L'impatto comunque non é fortissimo, ma é legato a queste attivitá, o anche alle conferenze, che sono molto seguite.*
>
> (The proportion of foreigners (tourists) here is low. Our responsibility is limited to the activities of the museum. For example, the fact that each year there are 15 or 20 French students and their professors on the dig of *Castrum Novum*, makes it possible that these students meet with the local ones. (...) The impact, however, is not very strong, but is linked to these activities, or even conferences, which are very well attended)

Such practices can be considered a good examples of how, even without a strong presence of foreign tourists, the archaeological heritage and the scientific activities involved can be a fulcrum of aggregation, at different levels and in different modalities. Once again, however, in the perception of the informant, this concern goes beyond the dimensions of qualities proposed by HGES. In fact, the museum's director firmly denies that the HERITY has brought improvements that go beyond greater internal organisation:

> *No! L'HERITY é servita a noi per mettere a fuoco le problematiche relative ai quattro settori considerati.*
>
> (No! HERITY helps us to focus on issues related to the four areas considered)

The informant is very clear in stating his perception about the usefulness of HERITY has been to focus on the four areas examined (perception of the monument, preservation, communication and services), in which he does not find links to the aspect of involvement of the population or the meeting between residents and tourists. He adds, pragmatic:

> *Per noi l'HERITY in realtá é un riconoscimento che ci serve sul piano politico, e in questo senso é "spendibile", é un riconoscimento importante di un lavoro molto esteso che si é fatto per tanti anni e si continua a fare; ci da gli indirizzi verso i quali muoverci, ci indica la strada giusta...*
>
> (For us, HERITY is actually a recognition that we need at political level, and in this sense is "expendable". It is an important recognition for a very extensive work that was done for many years and continues to be done; it gives us the orientation to move, indicating the right way...)

The political use of HGES and its quality certification has been detected several times during this study, as we shall see in subsection dedicated to the cross cases analysis.

5.4.6 Dimension V - Impact of the implementation of quality system on Local Economy

If, on the one hand, the director affirms that the presence of the museums provides a strong positive influence on local economic development (perception which could also be interpreted as a result of the visits and the presence of foreign students, as seen in the previous subsection), on the other hand, based on our directobservation the direct link between the local economy (traditional and non-traditional) and the existence of the museum is almost inexistent. The geographic location, the dimensions of the museum and its number of visitors could represent a major obstacle in this regard. However, there seems not to be a priority concern for the managers of the organisation, or represent an indicator of quality.

5.4.7 Dimension VI - Destination Branding, Heritage and Authenticity

The work carried out by the museum to create a network of local (associations, schools), national and international (foreign universities) bodies, seems to have had a significant effect. As already indicated, the place analyzed is not an international tourist destination, so it becomes difficult to analyse the degree and the modalities of contact between international tourists (and even domestic tourists) and residents. However, the remarkable reasoning by the Director (Sub-Section 5.6.4) regarding the ability to attract tourist flows through international archaeological camps or events related with the archaeological research, as well as the promotion of exchanges with foreign universities. In these occasions, based on what affirmed by the informant, the cultural exchange seems to be quite successful, because the participants have an intense contact with the residents.

5.5 Case 5. *Sinagoga*, Tomar. Data analysis and findings

5.5.1 Broad analysis

The Synagogue of Tomar is a building of Jewish cult very well preserved which is in the old Jewish quarter in the historic centre of Tomar. The visits along the data collection made possible an interpretation of the place, culturally and historically but also social. Firstly, it is necessary to say that this ancient place of cult is hard to find in the labyrinth of streets of the historic centre of Tomar. But the perception that we had, was that this characteristic, in the background, gives even more fascination to the site. Important to note that during the first visit to the site were taken by an operator of the Intermunicipal Community, which also had some difficulty in orienting themselves in the middle of the streets.

This ancient site currently hosts the “Luso-Hebrew Museum *Abraham Zacuto*”, where it is exposed a wide selection of gravestones, stone carvings, pottery and other objects. The exhibition is arranged so that the items might serve to explain Jewish customs and traditions. Previous experience with the Jewish community and places of worship recovered (experiences related enhancement projects in which we participated, specifically at the synagogue of Faro, with the Jewish community in the Algarve, Portugal) show us that it is quite common among the Jewish community at the international level, have strong connections that also consist in the exchange and supply of traditional objects, and the case of the synagogue of Tomar is not an exception: in the latter, indeed, the exposed objects have been donated by individuals as well as Jewish institutions around the world. During the inspection, we had the feeling of immersion in a place full of cultural and religious meaning. This perception has been subsequently confirmed during the reading of the report HERITY. The latter takes into particular consideration the uniqueness of the place, for its cultural charge, the archaeological importance and the social memory that the site represents. We read in the HERITY report.

Vestigios arqueológicos, raridade e importacnia religiosa referem-se ao valor da Sinagoga.

(Archaeological traces, rarity and religious importance refers to the value of the Synagogue)

The synagogue has been certified by HERITY, after a period of assessment, as part of the project of development of the territory of the Medio Tejo. An important data emerges from the analysis of the results of the HERITY assessment: a large discrepancy between the high perceived value and the condition of the place. This discrepancy is quite clear already in HERITY quadrant. (Figure 5.42).

Figure 5.42: Graphic rendering (The “target”) of the HGES assessment of the Sinagoga de Tomar
Source: http://www.herity.pt/siti/Tomar%20Sinagoga.html, accessed 2014, October 19th

In this aspect, the HERITY evaluation report is very clear:

> *O problema grave deste lugar é a precariedade em que se encontra todo o edifício (...) se não for providenciada rapidamente a recuperação de toda a construção, será quase impossível evitar que chegue ao estado de ruína.*
>
> (The major problem of this place is the precariousness of the entire building (...) If it will not provide quickly a recovering of all the construction, it will be almost impossible to avoid the ruin of the place)

5.5.2 Dimension I - Culture of Quality within Heritage Organisation

The experience of visitor/observer has been particularly useful, and has been recorded in the field diary.

> *All'ingresso mi ha accolto una signora anziana che dava informazioni generiche, in portoghese. Ho fatto domande sulla certificazione, alle quali non ha saputo rispondere. In questo luogo non ho comunque colto né una "cultura di qualità", né apertura particolare al pubblico e alla comunità.*
>
> (At the entrance I was received by an elderly lady who gave general information, in Portuguese, but when I made some questions about the certification, she has not been able to answer. In this place I have not felt a "culture of quality", nor particularly openness to the public and to the community)

The worker (an ancient lady) who greeted us at the entrance of the synagogue, who serves as a guardian and guide, despite being very kind and hospitable, had never heard of neither quality nor HERITY certification. This data that we have collected, on the one hand surprised us in an enthusiastic way due to the unexpected genuineness we perceived along the conversation with this lady, but on the other hand, it reflected the lack of a widespread culture of quality.

And with regards to the designation of "internal" and "external" customers within the definition of quality of cultural heritage management, the operator's answer is particularly in line with our hypothesis and theoretical model:

Internos serão os residentes, as pessoas que estão a viver no território: este tipo de gestão de qualidade é feito primeiramente para todos eles! Externos são visitantes e turistas.

(Internal will be the residents, the people who are living in the territory: they are the first recipient of this type of quality management! Tourists are external customers)

5.5.3 Dimension II - General impacts of quality system on heritage management

With regard to the quality and certification, the operator interviewed is a member of the intermunicipal entity. She told us that neither in the synagogue nor in other museums of the region there was a codified system for the quality of management, apart from the subjective conceptions of the operators of the different museums. She added that she perceived it as one of the main benefits of the HERITY Global Evaluation System: to standardize and systematize the practices of management through the process of assessment.

Certamente todos os museus têm a sua ideia sobre qualidade. Mas o HERITY trouxe aquele cariz mais técnico a esta questão. Não existia, de todas as formas, um sistema de qualidade formalizado.

(Certainly all museums have their own idea about quality. But HERITY provided us a more technical approach to this argument. We had not, anyway, a formalized quality system)

The operator shows sensitivity to the importance of applying a system of quality management within cultural heritage, and says:

Tal como temos qualidade em outras áreas, como na área alimentar e de bens que consumimos, também o património é um bem que consumimos, pelo que é essencial que não se faça apenas uma gestão "boa", mas também que obedeçam a "critérios predefinidos": a conservação e salvaguarda, os serviços e a maneira como são comunicados os bens. Neste aspeto, posso até ver um monumento e achar que é mito bonito, mas se não sei o que realmente estou a ver, a história e como se insere no território, o trabalho não resulta bem feito, a meu ver.

(As we have quality in other areas - such as food and other goods that we consume – as we also have to consider cultural heritage as a consumer goods, it is essential not only a "good" management, but also to meet "defined criteria" for management: the conservation and protection, the services and how contents are communicated. In this aspect, I can see a monument and find it attractive, but if I do not actually know what I'm seeing, its history and how it is inserted in the territory, it is not a good work, from my point of view)

5.5.4 Dimension III - Impact on local communities' involvement

And then, along our direct observation, we noticed also another aspect:

Sicuramente la sinagoga si mantiene peró centro culturale della comunità ebraica, perché ho notato che diverse persone accedevano al monumento non per visitarlo, bensí come punto di incontro.

(Definitely synagogue is still the cultural center of the Jewish community, because I noticed that several people accessed the monument not to visit, but rather as a meeting point)

It can therefore be said that the place still plays a central social role in the life of the community that is more directly linked to it. Our research has also revealed the existence of an association (*Associação dos Amigos da Sinagoga de Tomar*), which has been established on 28 June 2011 and that develops activities into the museum and maintains institutional relations at the local and international level (Municipality of Tomar, *Entidade Regional de Turismo de Lisboa e Vale do Tejo*, Polytechnic Institute of Tomar). In the association's website (http://www.sinagoga-tomar.org/), they announce the will to candidate the site to the list of UNESCO World Heritage Sites. However, the most recent news reported in the webpage dates back to 2012, and in the "Agenda" there is no kind of activity planned. We contacted the association via e-mail, but we had no answer. On the other hand, the operator is critical on a particular point, which is important for our study:

Acho que a educação do público é um fator de qualidade. A HERITY avaliou a capacidade de comunicação com base nos meios utilizados, mas penso que se tenha que ir mais longe: a função pedagógica e a educação patrimonial para turistas e residentes, teria que ser uma dimensão mais explorada.

(I think public education is a quality factor. The HERITY assessed the effectiveness of communication based on the media used, but I think it has to go further: a pedagogic function and education for tourists and residents would have to be a dimension more explored)

The informant thus believes that the involvement of the population and the educational aspect should be taken into account within the criteria for assessing the quality of heritage management, but – in her perception - it is not. Nonetheless, our direct observation produced data that are in contradiction with this statement, and this contradiction was confirmed also by the analysis of the outcome of the HERITY evaluation, which sums up the situation this way:

Não são organizadas atividades didáticas específicas, nem eventos especiais, excepção feita a adesão a jornadas internacionais.

(No specific educational activities are organized or special events, except adherence to international days)

The same informant, questioned about the modality of dissemination towards local community about the HERITY GES process, she says again:

Foram envolvidas apenas as partes diretamente interessadas no processo de certificação. Pelo resto, não houve ações destinadas à população, a não ser a conferência de imprensa e a cerimónia de entrega das placas HERITY. Digamos que poderia ter havido esta preocupação, mas na realidade não houve, e é nesse sentido que teremos que trabalhar.

(Only the groups directly interested in the certification process were involved. For the rest, there were no public events, unless the press conference and the ceremony. Let's say that there could have been this concern. but in realitv there was not. and we have to work on it)

However, crossing data with other sources of information, we can say that the news of quality certification has been (at least at the time of the process), fairly disclosed. *Radio Cidade Tomar*, for example, has disclosed the information in December 18, 2012 in the following way (source: http://radio.cidadetomar.pt/noticia.php?id=13605, retrieved 10/09/2014).

5.5.5 Dimension IV - Relationship between local communities and tourists

In general, our perception about the global management of the place is reflected in this excerpt from our field diary:

Proprio perché in questo monumento si percepisce molta tensione culturale, esso potrebbe in effetti essere valorizzato come punto di eventi per la promozione del dialogo interculturale, ma non mi sembra lo sia. Al contrario, la sensazione che mi ha dato é di essere un luogo chiuso su se stesso. La riunione con la funzionaria ha rivelato che molte cose si stanno facendo, comunque, per poter migliorare la situazione (Tomar, 19/12/2013)

(Since this monument has a great cultural charge and symbolic, it could in fact be enhanced as a point of events for the promotion of intercultural dialogue, but it doesn't seem they do it. On the contrary, it seems that this place is closed in itself. The meeting with the responsible revealed that many things are being made, however, in order to improve the situation)

5.5.6 Dimension V - Impact of the implementation of quality system on Local Economy

In the sphere of economic development related to the management of cultural heritage, we found also a particular awareness on the part of the operator interviewed, about the fact that they should strategically intensify their efforts. When we asked if the institution was promoting courses and training to promote entrepreneurship related to cultural heritage, there has been responded:

> *Não existem cursos nem formações que fomentem estas atividades, mas tenho consciência que teria que existir! De todas as formas, cada munícipe tem algum projeto nesta direção. Estamos a achar importante criar um mapa regional de produtos de excelência, de qualidade, para criar uma marca-chapéu que recolha todas as excelências. A Tagus, uma associação de desenvolvimento local, já faz alguma valorização dos produtos gastronómicos e artesanais. Nos iremos preocupar disto no futuro. Vemos o património como aposta estratégica.*
>
> (There are no courses or training that encouraging these activities, but I realize that they would have to exist! Anyway, each municipality has some project in this direction. We find important to create a regional map excellent products, having quality, in order to create a general brand which collect all the excellences. The *Tagus*, an association of local development, it already promotes some action to enhance gourmet and artisan products. We will work on this in the future. We see heritage as strategic)

Indeed, this information and the data provided by the informant is consistent with the information contained in the report HERITY, representing an important confirmation of this data. They wrote in the report:

> *Apreciavel o lançamento, estimulado pelas entidades públicas, de uma atividade comercial praticamente em frente à Sinagoga, que vende produtos* kasher *e objetos ligados ao lugar.*
>
> (It is appreciable the launch, stimulated by public entities, of a commercial activity practically in front of the Synagogue,which sells *kosher* products and objects related to the place)

Again according to the analysis performed by HERITY, one visitor in each three buys something in this shop, providing the guarantee of its self-sustainability.

5.5.7 Dimension VI - Destination Branding, Heritage and Authenticity

The certification HERITY is strongly perceived here, as a vehicle for internationalisation, and it is then inserted into the territorial marketing strategy. The operator affirms:

> *Seria necessário haver mais debate sobre como otimizar a utilização desta que acaba por ser uma marca atribuída à região, e sensibilizar acerca da rede internacional na qual estamos envolvidos através da certificação.*
>
> (It would be necessary more debate on the use of this recognition which, after all, is a brand assigned to the region, and it wold be necessary to raise awareness about international network in which we are involved through certification)

And still, in the context of tourism planning and development:

> *A nível de turismo, a ideia é acima de tudo o reforço da imagem a nível regional. Depois cada município tem os seus projetos para residentes e para turistas. Enquanto "consumidora" acho sinceramente que há ainda muito caminho a fazer! Penso que a região tenha um problema de identidade: ainda não temos, enquanto território, uma imagem e uma identidade bem definida. Eu acho que cada município tem que trabalhar com os seus residentes, mas no âmbito do turismo tem que se trabalhar ao nível regional.*
>
> (In terms of tourism, the idea is, above all, to strengthen the regional image. After this, each municipality has its own project for residents and tourists. As a "consumer" I sincerely think that there is still a lot of work to do! I think the region has a problem of identity: we do not have, as a territory, an image and a well-defined identity. I think each city has to work with their residents, but in the context of tourism has to work at the regional level)

5.6 Case 6. *Castelo de Abrantes*[22]Sinagoga, Tomar. Data analysis and findings

5.6.1 Broad analysis

The Abrantes Castle is an important monument from the historical point of view, since it dates back to the twelfth century, but also from the point of view of tourism and landscape. The castle and its surrounding territory, on the top of a hill, they have a view over the valley of the River Tagus. The mayor of Abrantes, interviewed during the data collection phase, it is another to the president of the intermunicipal which has promoted the certification of cultural heritage in Medio Tejo.

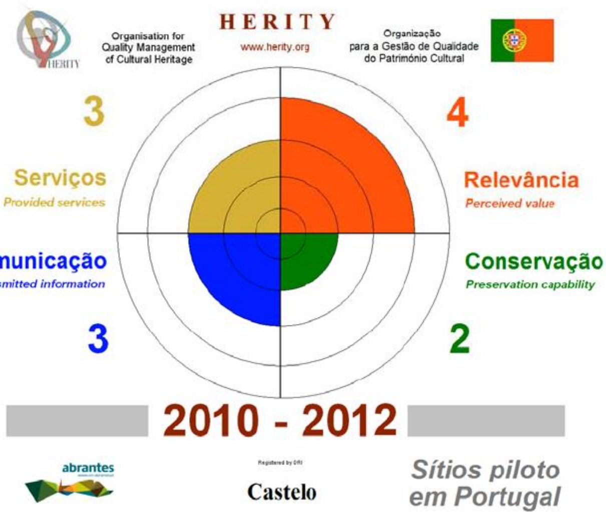

Figure 5.43: Graphic rendering (The “target”) of the HGES assessment of the Castle of Abrantes (Portugal)
Source: http://www.herity.pt/siti/Abrantes%20Castelo.html, accessed 2014, October 19th

5.6.2 Dimension I - Culture of Quality within Heritage Organisation

The meeting with the mayor of Abrantes has produced important results. Her political commitment fully embraces the principles of traditional quality, even for his basic training very linked to this area.

[22] The Abrantes Castle

Entrei em contato com a qualidade por formação. A minha licenciatura é em bioquímica e fiz formação em qualidade nomeadamente porque trabalhei num laboratório (...), de acordo com norma ISO17.025, e mais tarde porque fiz uma formação específica sobre qualidade alimentar.

(I knew the through a quality education. My degree is in biochemistry, and I did quality training especially because I worked in a laboratory (...), according to standard ISO17.025, and later because I did specific training on food quality)

In this regards, she admits, speaking of her first contact with HERITY:

Antes do HERITY não tinha aplicado os conhecimentos no âmbito da qualidade à gestão do património

(Before HERITY, I had never applied my knowledge about quality to the management of heritage)

The basic knowledge gave her the opportunity to immediately perceive the potentials of HERITY, which is then served as a vehicle to promote the implementation of quality management of cultural heritage. And indeed the mayor shows great enthusiasm in this regard, and she shows it in his words, when in the interview says:

Quem tem o espirito critico, trabalha por objetivos e para a gestão da qualidade, aplica isto a todas as vertentes da nossa vida. E assim foi com as questões ligadas ao património: há objetivos que tem que ser cumpridos e medidos e depois tem que haver instrumentos de medição desta concretização, sejam eles através de inquéritos de consumidores, ou através um conjunto de indicadores que até pode ir variando de acordo com áreas em que estamos a trabalhar, ou na nossa vida pessoal!

(Who has the critical spirit, works with an orientation to the goals and according to the quality management, applying this to all the aspects of his life. And so it was with issues related to heritage: there are objectives that must be met and measured, then we need instruments to measure our success, whether through consumers' surveys or through a set of indicators that can be different according the several areas, or in our personal lives!)

As regards the reaction of the staff to the application of these principles, and to the culture present in the organisation, reports:

> *Inicialmente não acreditaram muito no processo. Acreditaram que fosse mais um assunto para tirar-nos tempo ao trabalho. Desde que entenderam, porem, que HERITY era uma organização seria e com objetivos claros as pessoas empenharam –se para a concretização deste objetivo, a certificação. Sempre com a consciência de que este é um princípio, não é um fim.*
>
> (Initially they did not believe much in the process. They believed it was another useless matter distracting us from our duties. But since they understood that HERITY was a serious organization with clear objectives, people have started to work to achieving this goal: the certification. Always with the awareness that this is a starting point, not an arrival point)

And, in another part of the interview, she adds:

> *Não há uma mentalidade nem as pessoas reconhecem a importância da certificação para os equipamentos. Aliás, na verdade não reconhecem nenhum dos processos de certificação, pois acham que é só mais um conjunto de burocracias que não servem para mais nada a não ser para atrapalhar! Obviamente isto não é verdade, e é preciso desmontar um pouco esta ideia.*
>
> (There is not a proper mindset, and people do not recognize the importance of certification for the cultural infrastructures. Actually, they do not really recognize any processes of certification, because they think it's just another set of bureaucracies that only will create problems! Obviously this is not true, and we need to dismantle this idea)

The link to the traditional concept of quality, the one coming from the productive sector, affects her perception about those that should be considered external customers and internal customers, in the cultural heritage management.

Considero todos os meus "clientes municipais" como "clientes externos", isto é, a minha população e os turistas são clientes externos. O meu cliente interno acaba por ser o Município, isto é, os colaboradores do Município.

(I consider all my "municipal customers" as "external customers", that is, local population and tourists are "external customers". My internal customer is the Municipality, that is, the employees of the Municipality)

The opinion put forward by the mayor reflects her knowledge of the traditional concept of quality (the "internal customers" are the municipal workers, as well as for a company are its employees), which therefore remains unchanged in its perception of "quality applied to the management of cultural heritage". However, she refers a difference related to visitors:

Coloco de todas as formas, em patamares diferentes os que são os clientes externos "locais" e os que são os clientes externos "turistas", pois os objetivos de cada um são diferentes.

(Anyway I put in different levels who are external "local" customers and external "tourists" customers, as their aims are different)

The interviewee argues that she considers two different "levels" of customer. The first is the representative of the local community and the second is the tourist. It is also curious to notice that the operator interviewed in Tomar, who also work in the intermunicipal body, she has not the same opinion about internal and external customers in heritage management. We will address in the cross-cases analysis (section 3 of this chapter) this important finding.

Important evidence arises from the analysis of this case: the educational background and professional of the informant is linked to Quality, and in this detail we found an important point for reflection about the ability of implementing a quality system within heritage management:

L'incontro con il Sindaco ha dimostrato l'importanza della formazione nella capacitá di implementare un sistema di qualitá: una professionista ben preparata sulle pratiche e i principi intrinseci alla qualitá, e coscente degli ostacoli e delle difficoltá che possono sorgere nei processi di miglioramento e certificazione, é sicuramente un valore aggiunto per quanto riguarda la gestione del patrimonio e la sua valorizzazione.

(The meeting with the Mayor has demonstrated the importance of training in the ability to implement a quality system: a professional well-prepared about practices and quality intrinsic principles, which is aware of the obstacles and difficulties that may arise in the process of improvement and certification, is definitely an added value with respect to the management of heritage and its enhancement)

5.6.3 Dimension II - General impacts of quality system on heritage management

In our field diary, we have summarised our impressions of the monument and its management as follows:

La visita ad Abrantes, per il sopralluogo presso il Castello e l'intervista con il Sindaco, ha prodotto una serie di informazioni molto utili, soprattutto per quanto riguarda le politiche di gestione. In effetti, per quanto riguarda il monumento in se, dato anche il suo posizionamento, appare non far parte del vissuto quotidiano anche se numerose sono le attività che vi si svolgono all'interno.

(The analysis in Abrantes, the visit to the Castle and the interview with the Mayor, has produced a series of very useful information, especially with regard to management policies. In fact, with regard to the monument itself, it doesn' seem - given its positioning – to be part of the community's daily life, if many activities are developed inside)

As regards, then, the perception of the beneficiaries of quality and, namely, the certification process, the interviewee has no doubts:

Eu acho que o primeiro beneficiário é a própria organização, porque de alguma maneira tem um conjunto de metodologias que lhe permitem trabalhar, avaliar e chegar às pessoas. Portanto, do ponto de vista da organização interna e da visão que a autarquia tem sobre a sua política de qualidade, é essencial. A partir daí, os utilizadores serão os primeiros a usufruir dos resultados da certificação.

(I think the first beneficiary is the organization itself, because somehow has a set of methodologies that allow you to work, evaluate and get to people. Therefore, from the point of view of internal organization and the vision that the municipality has on their quality policy is essential. After that, visitors will be the first to benefit from the results of the certification)

For the responsible is very clear that the main beneficiary of quality and certification is the organisation itself. This belief has a particular impact on the overall perception of quality, which is an added value for the organisation in the first place, and then (directly and indirectly) for the visitors or - as the informtant defines them – the *users*.

5.6.4 Dimension III - Impact on local communities' involvement

In fact it is the place appeared to have little relationship with the rest of the urban context, however, even if it is necessary to consider the period in which it is carried out direct observation - between the fall and winter 2013 - since it is possible that in less rainy and windy periods, the population can take more advantage of the castle.

From this point of view, our interest has been to understand the perception on the part of the respondent, of the link between the local population and heritage, and then, with the tourists. Understand, also, if the interviewee considers these as components of the quality within cultural heritage management.

Eu gostava que houvesse um maior envolvimento da população. Mas estamos a falar também de pequenos nichos, pequenas elites: estas matérias não são do interesse da população inteira, e ainda bem porque há quem goste mais de cinema, que de teatro, quem de musica sacra e quem de rock'n'roll, portanto somos todos diferentes!

(I wish there was a greater involvement of the population. But we're also talking about small niches, small elites: these topics are not in the interest of the entire population, and it is actually a good thing, as there are people who prefer cinema, theatre, sacred music or rock'n'roll. We are all different!)

The operator says that "just small segments of the society" are interested in culture, and this is very indicative of the approach she has to the democratisation and socialisation of cultural contents. Again, maybe the "traditional" approach influences her vision. This impression we had is confirmed by her next sentence:

Se calhar há gerações que – por assim dizer - "estão perdidas", e às quais é muito difícil chegar por ser já aculturadas e já criaram os próprio gostos e interesses.

(Maybe there are generations –to say so – which are "lost", and which is very difficult to reach because they are already acculturated and have already created their own "tastes" and interests)

However, she recognises her responsibility in spreading within population - especially students - the cultural and historical and archaeological contents:

É importante levar a comunidade a ver as exposições, os achados arqueológicos, levar as escolas aos espaços, levar a arqueologia às escolas, e há uma arqueóloga nossa que faz isso com alguma regularidade.

(It is important presenting exibitions to the population, as well as archeological findings, or taking schools to cultural spaces or bringing archaeology into the schools. There is one of our archaeologists who do it with some regularity)

Moreover, according to the interviewee, this practice entails not only the creation of new publics, but also a solution to the current economic constraints the public sector (to which the school belongs) faces. She affirms:

> *(...) depois das visitas com as escolas, algumas crianças voltam com os pais e os avôs. E as escolas também já se habituaram a olhar para aquilo que nós vamos transformando em exposição, e a tornar compatíveis os seus programas curriculares, de forma a realizar visitas. De facto acontece que como o dinheiro é cada vez menos, as visitas de estudos que antigamente se faziam na Batalha, Porto ou Lisboa, agora já são substitutas por visitas a locais mais próximos e de norma dentro da região. Esta situação fomenta a criação de novos públicos.*
>
> (After the students' visits, some children come back with their parents and grandparents. Schools also have started to make their programs compatible with our expositions, in order to make visits. In fact, as money is less and less, they have substituted the study visits that they made in Batalha, before, Porto or Lisbon, with visits in closer locations, normally inside the region. This promotes the creation of new audiences)

5.6.5 Dimension IV - Relationship between local communities and tourists

Although during our direct observation we did not observe any contact between tourists and heritage operators in the castle or between tourists and population, with respect to the possibility of fostering this contact, the interviewee tells us:

> *Há claramente contato entre os turistas e a população, e temos como projeto uma bolsa de voluntários para este fim, embora não esteja a funcionar neste momento.*
>
> (There is clearly contact between tourists and the population, even because we have a volunteer project for this purpose, even if it is not working right now...)

However, the aspect of intercultural dialogue through contact between with the local population and tourists with technical heritage, in the opinion of the interviewee are not considered in the design of quality management of the assets, either by certification HERITY. She tells us:

Não tenho a perceção de que estas componentes sejam consideradas na qualidade e sua avaliação. Não tenho esta perceção!

(I do not have the perception that these components are considered within Quality and its assessment. I do not have this perception, indeed!)

5.6.6 Dimension V - Impact of the implementation of quality system on Local Economy

Generally, there is the conviction that this approach leads to a positive economic impact and an improvement in the tourist offer. She says:

Se a oferta está organizada e com capacidade de acolher e acolher bem, e seja atrativa, claro que há um fluxo de turistas e visitantes que influencia a economia local.

(If the offer is organized and able to welcome visitors, and if it is attractive, then it is clear that there is a flow of tourists and visitors that influences the local economy)

5.6.7 Dimension VI - Destination Branding, Heritage and Authenticity

Identity issues wihin the construction of the destination image seem pretty clear in the perspectives of the heritage manager we have interviewed. She seems to be particularly aware and she is very clear in this concern:

A nível de turismo, a ideia é acima de tudo o reforço da imagem a nível regional. Depois cada município tem os seus projetos para residentes e para turistas. Enquanto "consumidora" acho sinceramente que há ainda muito caminho a fazer!

Penso que a região tenha um problema de identidade: ainda não temos, enquanto território, uma imagem e uma identidade bem definida. Eu acho que cada município tem que trabalhar com os seus residentes, mas no âmbito do turismo tem que se trabalhar ao nível regional.

(In terms of tourism, the idea is, above all, to strengthen the regional image. After this, each municipality has its own project for residents and tourists. As a "consumer" I sincerely think that there is still a lot of work to do!

I think the region has a problem of identity: we do not have, as a territory, an image and a well-defined identity. I think each city has to work with their residents, but in the context of tourism has to work at the regional level)

And she adds, speaking about the influence of HERITY certification on tourist flows related to the Castle of Abrantes:

Não posso dizer que aumentamos o número de visitantes, pois se manteve, basicamente. Mas isto tem a ver com outras políticas e não com a certificação. Melhoramos do ponto de vista do desempenho e da organização dos serviços que prestamos (...).

(I can not say we increase the number of visitors, since it has remained basically the same. But this has to do with other policies and not with the certification. We have improved in terms of performance and organization of the services we provide)

This statement points out the full consciousness on the part of the operator about the dynamics of quality and its certification in regard to the improvement that they can bring. The interviewee is fully convinced that the benefit for visitors is an indirect consequence of quality and certification process, while the benefit goes directly to the organisation, including with regard to the systematisation of the idea of quality itself.

The effort seems to fit within the implementation of the quality system, and it is recognised by HERITY, which by the way points to the need for greater involvement of local actors beyond the tourists:

> *O Município de Abrantes apoia e encoraja, com força e convicção, o desenvolvimento do território e a promoção do mesmo, através dos seus próprios bens culturais. Próprio por isso, parece importante dedicar mais atenção aos diferentes stakeholders; visitantes, portanto, mas também cidadãos, para além de funcionários responsáveis pelos locais de cultura.*
>
> (The Municipality of Abrantes supports and encourages with strength and conviction, the regional development and its promotion through the enhancement of its cultural heritage. For this reason, it seems important to devote more attention to different stakeholders; visitors, therefore, but also citizens and workers responsibles for the cultural places)

Our informant, the mayor and president of the intermunicipal body who leads the project of certification of cultural heritage in the region, explains what she is expecting from the quality and its certification:

> *Neste momento não vejo que a certificação possa ser uma mais-valia para atrair públicos, a nível de equipamento isolado. A única mais valia será a existência de um conjunto de equipamentos a nível regional, nacional, internacional com esta mesma característica, de maneira a que consigamos a criar uma rota que os turistas reconheçam. Espero contar com a certificação para isto, mas neste momento não sinto que esteja a acontecer. É tudo muito novo.*
>
> (Right now I do not see that certification can be an added value to attract audiences, at the level of single place. The only added value could be given by a network to regional, national and international level with this same feature, so that we can create a route that tourists recognize. I hope I could count on the certification HERITY for this, but now I do not feel that is happening. It's all very new)

It is clear, among other things, the strategic perception of HERITY within the process of internationalisation of the region as a tourist destination. This confirms the perception that we had through our direct observation, namely during our participation in the ceremony of delivery of the 26 certifications, along which many speakers spoke persistently about the process "internationalisation through HERITY certification”.

5.7 Case 7. *Centro de Interpretação de Arqueologia do Alto Ribatejo*[23] *(CIAAR)*, Vila Nova da Barquinha. Data analysis and findings

5.7.1 Broad analysis

The CIAAR was created through a partnership between the Municipality of *Vila Nova da Barquinha* and various no-profit organisations related to heritage and research, in close relationship with the department of archaeology and prehistory of the Polytechnic Institute of Tomar. They created the Centre with the aim of studying, preserving and enhancing the regional archaeological heritage and the also have developed an inventory. The method used for this purpose includes knowledge transfer between operators and between operators and communities as well as the use of technology applied to archaeology (as we can read in the official page of the institute, http://www.i-m.co/CIAAR/CIAAR/ciaar.html).

According to our direct observation and to what has been explained by the informants, among the several research activities they also organise seminars, conferences and training, and develop activities and studies in cooperation with other institutes. From the scientific point of view, the CIAAR has been particularly recognised due to the work done in the Paleolithic archaeological station "Ribeira the Atalaia", as well as due to the creation of an inventory, especially the inventory of archaeological sites of Vila Nova da Barquinha, and due to the actions of conservation and study in cooperation with *ITM - Instituto Terra e Memória.* There also exists a strong action of information and awareness raising, as we will see in the sub-sections 5.7.4. In this regard, one of the most regular and important activity of the centre is represented by the publication of the newspaper "Novo Almoroul", in collaboration with the local schools, public and private local bodies.

The CIAAR was one of the first places in Portugal to be evaluated and to achieve certification by HERITY - World Organisation for the Certification of Quality Management of Cultural Heritage (Figure 5.44).

[23] Interpretation Centre of Archaeology of the *Alto Ribatejo* Region

Figure 5.44: Graphic rendering (The “target”) of the HGES assessment of the *Centro de interpretação de Arqueologia do Alto Ribatejo* (Portugal)
Source: http://www.herity.pt/siti/VN%20Barquinha%20CIAAR.html, accessed 2014, October 19th

Despite the CIAAR has not renewed its certification after the year 2012, it has been however chosen as a case study due to its dynamics, socio-economic context and as it was one of the first places certified through the HERITY-GES in Portugal.

5.7.2 Dimension I - Culture of Quality within Heritage Organisation

We also found discrepancies regarding the definition of the “internal” and “external” customer, especially between the response of the Director and that of the operator. The latter says:

> *Qui non mi pare ci sia un cliente interno o esterno.*
>
> (Here I do not think that there is an internal or external customer)

While the approach of the director is more articulated:

Le scuole sono i grandi "clienti" delle nostre esposizione. (...) Come cliente interno potremmo considerarei funzionari e gli studenti, nostri, che fruiscono del centro di interpretazione e delle biblioteche. Quanti giungono dall'esterno sono il "cliente esterno".

(The schools are the big "customers" of our expositions. (...) We could consider thus our workers and students as internal customer, which benefit from the interpretation center and libraries. Those coming from the outside are the "external customer")

5.7.3 Dimension II - General impacts of quality system on heritage management

The interview with the director *ad interim* and with one of the operators has clarified many aspects of the management and their perception of quality. And he continues explaining the reasons for his lack of confidence in the process of applying the principles of quality:

Noi dirigenti abbiamo ogni anno una formazione, e da sempre accompagniamo i processi abbastanza da vicino. Ma il fatto di avere formazioni e poi applicare i principi é un'altra cosa! In realtá nella nostra riserva non si poteva entrare prima e non si puo entrare ancora! Ci sono degli aspetti che é difficile da rivedere senza i finanziamenti, e comunque non mi interessa investire nella riserva, perché qui investiamo piú sulla ricerca che sulla divulgazione.

(As executives we have an annual training, and we always follow the process quite closely. But having trainings is different from the actual application of those principles! Actually our werehouse were a mess, and it still is! There are some aspects that are difficoult to correct without funding, and anyway I do not care to invest in fixing our werehouse, for example, because here we invest more on research than in dissemination)

The director of the Centre, for example, explains his point of view about the quality and the effectiveness of its application to the management of cultural heritage:

No, non funziona! Perché é ancora incipiente, perché in realtá non é stato ancora "digerito", e ricopre solo una piccola parte del patrimonio. É un concetto nuovo, c'é chi lo accetta e chi ritiene che non sia molto importante.

(No, it does not work! Because it is still incipient, because in reality it is not yet "digested", and covers only a small part of the heritage. It's a new concept; there are those who accept it and those who believe it isnot so much important)

So the reasons for his mistrust are several: on the one side he argues the lack of funding for the effective improvement of conditions, but on the other hand, he confesses that, for example, the dissemination and exploitation of the archaeological heritage is not one of its objectives, so in any case he would not invest in this aspect. Also the operator interviewed reveals a lack of responsiveness to the principles of Quality and to the certification. She admits:

Noi abbiamo fatto questa certificazione, ma poi... non abbiamo fatto molto per migliorare in base all'esito e alla relazione che ci hanno consegnato!

(We have made this certification, but then ... we have not done much to improve based on the report which they have delivered!)

He presents his opinion on the quality and the efforts made to implement and certify it, as follows:

Noi siamo stati uno dei siti-pilota che ha aperto la strada della certificazione in Portogallo. A questo livello ha contribuito allo sviluppo, ma non credo contribuisca per la popolazione locale, né per gli studenti che frequentano il centro.

(We were one of the pilot sites that paved the way for the certification in Portugal. At this level, this has helped to the development, but I do not think it contributes to the local population, nor for students who attend the center)

With this sentence he seems to uphold his mistrust regarding the application of quality to the management of cultural and archaeological heritage. Regarding the perception of the added value that Quality could confer to the cultural place or archaeological site, also as tourist attraction, when we asked to the operator if the symbol of the certification is used in the promotional material of the museum, the answer was:

> *No, ma potremmo iniziare a farlo! Non ci abbiamo mai pensato, ma si potrebbe fare!*
>
> (No, but we might start doing it! We never thought about it, but we could do it!)

In the diary of research we have recorded this response as an indicator of the usefulness of the present research for an immediate improvement in management practices, with regard to the implementation of the principles of quality and their importance.

5.7.4 Dimension III - Impact on local communities' involvement

Our impressions about the Centre were regularly recorded in our Research Diary, where they were summarized as follows, at the end of the observation period:

> *Il centro é un luogo molto discreto dove si conduce soprattutto lavoro di ricerca. Pare esistano contatti con la comunitá locale, soprattutto con le scuole, anche se durante la mia permanenza nel comune, ho notato che le persone con cui conversavo no solo non sapevano indicare la sede del CIAAR, ma alcune avevano anche una posizione critica riguado l'attivitá del centro. Uno, in particolare, un tassista, ha detto: "i miei figli in cinque anni di scuole superiori sono andati a visitare tre volte l' "Oceanario" di Lisbona, ma non hanno mai visitato questo centro!"*
>
> (The center is a very discreet place where they lead especially research work. It seems there is involvement of local community, especially the schools. Nontheless, during my stay in the town, I noticed that the people with whom I conversed not only did not know where it was exactly the CIAAR, and some residents also had a critical position relating to the activities of the center: one, in particular, a taxi driver, said: "My children, over five years of high school, they went to visit three times the "Oceanarium" of Lisbon, but have never visited this center!")

So, despite the purposes of the Centre, the impression that we had during the direct observation has been that of a place isolated from the context in which it is inserted. Crossing or data, we found correspondences with our perception: firstly, the HERITY report states:

> *Apesar do nome, o Centro de Interpretação o CIAAR, é um local de depósito de conspícuas colecções arqueológicas provenientes das escavações e recolhas de superfície efectuadas no território, quase todas de época pré-histórica. Só um 0,1% desses materiais vem exposto, rotativamente de forma didáctica, nas duas salas do rés-do-chão, dedicadas à exposição temporária de longo termo.*
>
> (Despite the name, the Interpretation Centre of the CIAAR, is a deposit of a conspicuous archaeological collections from the excavations and surface surveys made within the territory, most of them from prehistoric times. Just a 0.1% of these findings are rotating exposed in didactic form, in two rooms of the ground floor, within a long-term, temporary exhibition)

Other evidence which confirms this data is provided by the museum director himself, one of our informants. During the interview he states:

> *No, assolutamente no! Non riusciamo ad essere centro di ricerca e di divulgazione allo stesso tempo, perché siamo pochi. Quindi si predilige la ricerca.*
>
> (No, absolutely not! We can not be the center of research and dissemination at the same time, because we are not so much people. Then, we prefer to focus on research)

Through this statement the heritage manager shows that in his perception of heritage management there is a kind of dissociation – in terms of institutional responsibilities - between archaeological research and dissemination. The informant has stated that “an organisation should proceed on the basis of its *vocation*” and that their vocation regards science and research, not dissemination. The latter –he admits – it does not represent a priority at all. More, regarding quality and its assessment by HERITY, the interviewee complains about the “lack of emphasis given to the work of research”:

> *I lavori di ricerca sono sottostimati. Il fatto che noi lavoriamo per la ricerca e sosteniamo la ricerca non é particolarmente considerato! Quante infrastrutture pubbliche sono legate alla ricerca? Questo non mi pare si consideri nella valutazione della qualitá!*
>
> (The research work is underestimated. The fact that we work to support the research is not particularly considered! How many public infrastructures are related to research? I don't think that this matter is not considered within the process of quality assessment!)

This statement is clear evidence about the perception of the process of implementation of the quality system and its certification. We have carefully cross the data, and found that actually in the final HERITY report about CIAAR the research work developed by the centre is widely, positively mentioned within the the definition of the place "value":

> *O valor do sítio, porém, está ligado, mais que aos objectos, ao esforço de transmissão de conhecimentos sobre a arqueologia.*
>
> (The value of the site, however, more than on the objects, is given by the effort of spreading knowledge about archeology)

As well as in the avaliation of the services:

> *Os serviços do Centro estão estritamente ligados à investigação, pesquisa e estudo dos materiais líticos provenientes do território do Alto Ribatejo. A presença constante de investigadores e estudantes, que estão a trabalhar em tal material, assegura a abertura do centro durante o horário de trabalho e a visita à exposição permanente.*
>
> (The Centre's services are closely linked to archaeological investigation, research and study of lithic materials from the territory of the *Alto Ribatejo*. The constant presence of researchers and students who are working on such material, ensures the opening of the centre during the working hours and the visit to the permanent exhibition)

At this point it is thus interesting understand the perception of archaeological and cultural heritage quality management on the part of heritage managers. The answer of the main informant, the Director, was particularly articulated in this regard:

Il patrimonio archeologico ha delle specificitá e particolaritá che altro patrimonio culturale non ha. La qualitá vuol dire avere degli standard minimi con i quali gestire un bene culturale; degli standard accettabili per la gestione del patrimonio in modo che non venga disperso. Nel caso del patrimonio la preoccupazione particolare é quella del suo trattamento in modo da evitare la dispersione del suo valore. (...) Ma anche la conservazione fine a se stessa non é sufficiente, nel senso che la conservazione senza trasmissione della memoria, avrá lo stesso risultato: la perdita del valore.

(The archaeological heritage has specificities and particularities that other tipologies of cultural heritage has not. Quality means having minimum standards with which to manage heritage, that is, acceptable standards for the management of heritage in order to maintain it. In the case of the heritage particular concern is that of its treatment in order to avoid the dispersion of its value. (...) But also the conservation for its own sake is not enough: conservation without transmission of memory will have the same result, that is, the loss of value)

This information comes in apparent contradiction with the remaining statements of the Director and the other informant. However, in order to interpret this data, we have resolved this apparent contradiction as follows: in this case, the heritage manager and his team are actually aware about the necessity of a new approach for a more integrated, complete and effective politics of heritage management. However, they face this need with diffidence towards the role of quality and with a kind of hyper-pragmatism that lead them – in an unquestionable scarcity of resources - to focus on research and to apparently “forget about the social porpouse of science”. In any case, the informants agree in saying that they have acquired a more complete idea of management through the awareness raised from the experience of certification HERITY. However, some skepticism remains in the statements of informants:

Si, la divulgazione é uno degli aspetti importanti della qualitá proprio perché non ci si dovrebbe limitare alla divulgazione scientifica ma alla divulgazione per lo sviluppo della comunitá residente. Questa peró é la teoria, in realtá siamo molto in ritardo.

(Yes, the dissemination is one of the important aspects of quality because it should not be related only to science but being also used for the development of community residents. But this, however, is the theory: in reality we are very late!)

Even if he adds, talking about their efforts to involve local population:

> *Trascuriamo questa dimensione perché non interessa alla direzione! Anche se avessimo piú soldi, faremmo comunque maggiore investimenti negli equipaggiamenti di ricerca!*
>
> (We neglect this dimension because the direction is not interested in it! Actually, even if we had more money, we would anyway make greater investment in equipment research!)

It is important to point out that at the origin of the centre, there were two components in addition to the municipal one: on the one hand, the dimension of the youth associations of heritage, namely the association ArqueoJovem (founder of CIAAR); on the other hand, the dimension of the archaeological investigation, sustained by the Polytechnic Institute of Tomar. The roots of the CIAAR are, therefore, closely linked to civic participation and youth participation within the archaeological heritage enhancement and the production of *popular science* – as it was defined in the work of McRae (1993) – in the field of archaeology and cultural heritage, araising public awareness of these topics through *public history*, according to the definition of De Groot (2009: 15) .

We can still find the reflex of these “social and civic roots” in one of the major efforts of the CIAAR towards the local population: the edition of the newspaper *Novo Almouroul*, focusing local topics, especially related with cultural heritage (Figure 5.46). Also HERITY devotes some paragraphs of its final report about the CIAAR to the activities related to publication of this newspaper, especially as a vehicle of information and public awareness on matters related to local heritage.

Novo Almourol

NA

Mercados Ribeirinhos

No século passado os mercados à beira rio seriam assim, como na foto. Em Vila Nova da Barquinha atraca o último Mercado Ribeirinho do ano, depois de Abrantes e Constância. Em 2014 há cinema, música, gastronomia, desporto ou workshops. Diferente...
p10&11

p04
Reforma do Mapa Judiciário causa revolta no Médio Tejo

p18&19
Reportagem Bons Sons

p10
Somos Turistas?

p06
Constância revê PDM

Iniciada em 2000, a revisão ao Plano Director Municipal foi publicamente apresentada no início de Setembro

Figure 5.45: The newspaper Novo Almoroul, edited by CIAAR

5.7.5 Dimension IV - Relationship between local communities and tourists

In fact, already in 2010 the report HERITY suggested the intensification of efforts for greater tourist attractiveness. Nevertheless, at the time of our research, the approach of the manager and operators towards this issue seems to remain unchanged. In this regards, the Director adds:

Turisti qui in realtá non ne abbiamo. Vengono ricercatori e scuole. Ma non si paga e non ci sono guide! Ma noi in realtá non siamo un museo, bensí un "equipaggiamento culturale misto", abbiamo un piccolo spazio espositivo e il centro di ricerca.

(Actually we have not so much tourists, here. We receive especially researchers and schools. But the entry is free and there are no guides...! Actually we are not a museum, but rather "mixed cultural equipment", we have a small exhibition and research center)

5.7.6 Dimension V - Impact of the implementation of quality system on Local Economy

The investigation has provided a range of evidence, through direct observation and interviews, about the impact of the presence of the centre on the local economy. The isolation of the centre, already noted for the previous dimensions, is also confirmed for in this matter. There are no commercial activities related to the CIAAR, and the informants confirm the data. The latter, however, specifically the Director and the head of the newspaper, provide an interesting point of view in this regard: they consider the sponsorship of local companies in favour of the newspaper as an "important economic activities" linked to the museum. As it was already mentioned, according to the information provided by the Director and our direct observation, the area is not interested by a particularly large tourist flows, and this reduces even more the revenue directly or indirectly related to the activity that takes place in the center.

5.7.7 Dimension VI - Destination Branding, Heritage and Authenticity

Looking at the contribution of the CIAAR with respect to tourism development within the region, the situation described above (lack of effort regarding the heritage enhancement) occurs in this dimension as well. The rich collection of the centre represents a great potential for the characterisation of the territory. This potential remains - by the way - unexplored.

Direct observation, interviews and document analysis leads unequivocally to the conclusion that the centre does not contribute to the tourist attractiveness of the region. In the HERITY report, among other suggestions for improvement, we read:

Oportunidades ofertas por objetos existentes no local poderiam ser melhor valorizadas, numa óptica de procura de outro tipo de público mais "turístico".

(Opportunities offered for existing objects in the centre could be better enhanced, in order to attract another kind of a more "touristic" public)

5.8 *Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo*[24], Mação. Data analysis and findings (Case 8)

5.8.1 Broad analysis

The first certification HERITY was delivered to the museum in 2010 (Figure 5.47a), and has been renewed in 2014 (Figure 5.47b). The continuity of the management policy that invests heavily in Quality is the result of a strong leadership exercised by the director of the museum, sensitive to the issues related to the application of quality's principles to heritage management. Highly motivated and holder of a transversal knowledge, he is also the promoter of several national and international projects in this field, as direct observation showed.

[24] Museum of Prehistoric Art and the Sacred in the Valley of the Tagus

Figure 5.46a: Graphic rendering (The “target”) of the HGES assessment (2010-2012) of *Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo* (Mação, Portugal)

Figure 5.46b: Graphic rendering (The “target”) of the HGES assessment (2014-2016) of Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo (Mação, Portugal)

It is indeed important to note that, we participated in some of these international projects such as the Intensive Programme on Integrated Landscape Management, developed in collaboration with HERITY International. The project had the museum as a place of execution, but also included a number of activities of investigation outside the museum.

This type of projects has direct effects on the territory from the economic point of view, through the presence of numerous researchers and students and also through an indirect action of tourism promotion, as well as in socio-cultural terms, as the local community and institutions are intensely involved.

5.8.2 Dimension I - Culture of Quality within Heritage Organisation

By linking this issue to the perception of quality by the museum's director, he is firmly convinced (and we have collected various evidences to prove it, as we shall see below) that the possibility of promoting intercultural dialogue between locals and visitors on the bases of cultural heritage, should indeed be part of what is the quality applied to the heritage management. For the director, moreover, there is a strong link between the awareness and the dissemination of the "Culture of Quality" among operators, and the experience of the HERITY assessment. He argues that the latter process has made "tangible" the quality for all the operators involved. Our impressions were recorded in the "Research Diary", as follows:

> *Il Direttore del museo é soddisfatto soprattutto del fatto che il processo di certificazione abbia contribuito a sensibilizzare tutti i funzionari sull'importanza della qualitá, facendola tornare "tangibile", usando il termine del Direttore, dando il via alla formazione della "cultura condivisa della qualitá", che fino a quel momento non esisteva perché si riteneva che la qualitá fosse "una paranoia del del Direttore", citando ancora una frase dello stesso.*
>
> (The Director of the museums is especially pleased with the fact that the certification process has helped to raise awareness among the workers on the importance of quality, by turning it into something "tangible" - using the term of the Director – opening the way to the formation of the "shared culture of quality", which did not exist because workers perceived it as a "director's obsession")

In fact, deepening our understanding of the phenomenon through the interview to the director of the museum, we knew that it has already existed a Quality System even before the certification HERITY in the museum of Mação. Still, this system was not totally accepted by technicians and operators, who did not fully understand its usefulness. The certification HERITY, through its systematic approach to assessing management practices, made "the Quality tangible" among the operators, also through its formal, international recognition. And he adds:

Eu já estava no HERITY antes de ser diretor do museu. Quando aqui foi feita a avaliação, a compreensão pela equipa das questões, mudou: o que era uma relação teórica tornou tangível. O processo para nós foi muito útil para isto: houve "tangibilidade".

I already belonged to HERITY before being director of the museum. Here, when the assessment was made the understanding of these matters by the team changed: what was something theoretical, became tangible. The process for us was very helpful for this: there was "tangibility".

Even this use of the museum is not accidental but the result of an ontological reflection on the museum itself: the museum is a place of knowledge production, and all are involved in this production process. The director is very clear about it, and he said during the interview:

No Museu de Mação nós não utilizamos a palavra "público" nem "visitantes". Nós utilizamos a palavra "utilizador": o museu é um espaço utilizado por pessoas, e todos são utilizadores, inclusive quem aí dentro trabalha. Portanto existem níveis diferenciados, mas afinal são todos utilizadores. No fundo o objetivo é o de construir um espaço que que conserve coleções - como precondição por ser um museu - e seja um espaço de construção de conhecimento e de socialização deste conhecimento. Neste âmbito, a qualidade entra como uma preocupação de assegurar as melhores condições possíveis para que os utilizadores se sintam bem. A partir daqui, o raciocínio é o do HERITY.

(At the Museum of Mação we do not use the word *public* or *visitors*. We use the word *user*: the museum is a space *used* by people, and all are users, including those working in there. So there are different levels, but ultimately they are all users. The ultimate goal is to build a space that conserves collections - as a precondition for being a museum - and that ca also be an area of knowledge construction and socialization of this knowledge. In this context, the quality comes as a concern to ensure the best conditions to make users feel good. For the rest, we assume the HERITY method)

Do meu ponto de vista todos os atores da comunidade são internos. Onde fazemos os nossos almoços? No restaurante da aldeia, onde afinal sabemos que estamos em casa. Portanto não o consigo considerar externo, tem a ver de maneira muito estreita com o museu, portanto é interno! A comunidade é sem dúvida um cliente interno!

(From my point of view all the local stakeholders are *internal* customer. Where do we have our lunches? In the restaurant of the town, where we know we are finally home. So I can not consider them *external*, as they are quite connected to the museum, so they are *internal*! The community is undoubtedly an internal customer!)

5.8.3 Dimension II - General impacts of quality system on heritage management

The investigation conducted for the analysis of this museum has – among the main results - the evidence of a strong leadership in the organisation, exercised by the Director (and our informant), who strongly believes in the implementation of quality principles to the management of cultural heritage. The informant and the museum staff, with whom we spent a long time within our direct observation, spoke with very confident and positive approach about the implementation of the quality system.

The latter already existed before the HERITY assessment process, although this process has greatly benefits on the general perception inside the organisation, as the Director explains:

Existia um modelo de gestão anterior à certificação, embora todos os processos eram cumpridos de forma bastante flexível. Esta foi outra mais-valia da certificação HERITY no nosso museu: os funcionários perceberem que estas da qualidade não eram paranoias do diretor!

(There was a management modelbefore the HERITY certification, although all procedures were fulfilled in a very "flexible" way. And actually it was another added value of the HERITY assessment in our museum: staff comprehended that the matter f Quality was not just an obsession of their Director!)

The heritage manager seems to be very conscious about the real benefits of HERITY certification: from the point of view of the regular activities and duties related more closely related to archeology, there were no consistent benefits, as everything already has good standard of quality. From the point of view of the perception and organisation of the management task, on the contrary, the experience with the HERITY GES was very important. Still, another benefit recognised by the Director was the possibility to use the result of the HERITY certification as a reliable diagnostic instrument, through which it is possibly attract EU funds to strategically invest for improvements based on the HERITY evaluation:

> *Do ponto de vista do valor e da relevância do sítio não mudou nada, mas por exemplo do ponto de vista da conservação não nos disse nada de novo mas ajudou na gestão: nós concorremos a financiamentos europeus fundamentando que queríamos melhorar naquelas falhas apontadas pelo HERITY. E conseguimos o financiamento! E, claro, não alterou as nossas políticas de gestão, mas nos deu mais visibilidade. Deu um crédito extra ao museu de Mação sobre a sua capacidade de comunicar com a sociedade!*
>
> (From the point of view of the value and relevance of the site, nothing has changed but, for example, from the point of view of the conservation, it did not add new knowledge, but it has helped a lot in terms of management: we compete for European funding, explaining that we wanted to improve those weaknesses pointed out by HERITY. And we actually got the funding! Of course, it did not change our management policies, but gave us more visibility. It gave an extra credit to the museum of Mação about our ability to communicate with society!)

5.8.4 Dimension III - Impact on local communities' involvement

The social contribution of archeology is a concern particularly present in the work performed at the Museum of Mação, in many aspects aspect. With regard to the involvement of the local population, the Director has a fairly clear idea of the role of archeology and museums within the process of territorial socioeconomic development:

Um museu tem que funcionar como contribuinte para a organização do território, porque outros espaços que cumpriam esta função foram destruídos: as igrejas já não têm este papel, as escolas deveriam ter e não tem, e estão demasiado dependentes do poder central. Os museus – sobretudo os arqueológicos, mas os museus em geral - podem cumprir esta função territorial. E deste ponto de vista tem que ser espaços de encontro das comunidades em que se inserem.

(A museum has to work as a contributor to the organization of the territory, because other spaces that fulfilled this function were destroyed: the churches have no longer this role, schools should have but they don't have, as they are too dependent on the central power. Museums - especially archaeological, but the museums in general - can fulfill this territorial function. And from this point of view they have to be meeting places for the communities in which they operate)

The data that resulted from our direct observation is consistent with what the informant affirmed: the Museum of Mação is in fact one of the main reference points within its territory, and it is recognised by the local community. One example is the permission according to several local associations in order to use some of the museological spaces for their meetings. Associations with different purposes: from bikers to women's associations. During an informal conversation with the director of the museum, talking about the application of heritage quality management as a new approach to heritage management, he expressed a powerful concept, readily recorded in our Diary:

Quando queremos fazer mudanças, essas mudanças devem ser radicais, isto é, reconsiderar as raízes: o museu foi fundado na antiguidade como "casa das musas", um lugar de inspiração, não de mera contemplação!

(When we we want to make changes, these changes must be radical, that is, reconsider the roots: the museum was founded as a house of the muses, a place of inspiration, not mere contemplation!)

This belief seems to pervade and shape the mission itself of this heritage manager, who manages to involve his entire team in a collective effort in order to make archaeological heritage a vehicle of inspiration, ideas, and development. In this context, the museum represents a living space, with historical and, above all, cultural contents, which become part of the daily life of the inhabitants of the territory.

We found another concrete manifestation of this approach in the development of the *Andakatu* project, by the educational services of the Museum of Prehistoric Art of Mação. This project is especially directed to schools. As it is explained in the page of the museum, schools are nowadays transdisciplinary territories, where it is promoted the development of pragmatic and functional knowledge, privileging the project work and providing opportunities for interdisciplinary cooperation, and this is why Andakatu Project is an educational program that aims to be a practical complement to the school syllabus, referring the most varied disciplines, from history to Visual and Technological Education, Earth Sciences, including to ICTs that only apparently have no place in an educational program of a Museum of Archaeology (source: http://pacadnetwork.com/sitemuseu/index.php?option=com_content&view=article&id=120&Itemid=678, retrieved in 26/08/2014).

5.8.5 Dimension IV - Relationship between local communities and tourists

Globally, the museum may say to be handled in a innovative way: the space of the museum itself is not thought - as it traditionally happen - as a place of contemplation, but rather as a place of reflection, education and intercultural dialogue. The latter characterist is supported also by the use of new technologies, as we read in the Research Diary:

> *Il Direttore ha creato una serie di reti, nazionali e internazionali, particolarmente efficienti. Anche all'interno del museo esiste un sistema (il PACAD) che mette in contatto in tempo reale i visitanti del museo con quelli di musei partner sparsi per il mondo.*
>
> (The Director has created a series of networks particularly efficient, at the national and international level. Also inside the museum there is a system (the PACAD) that connects in real time the visitors of the museum of mação with those who are visiting the museums of the network, around the world)

This phenomenon leads to the activation of an intense and constant intercultural dialogue in the region, starting right from the museum. In this regards, another quote form the research from the “Research Diary”:

Il dialogo interculturale, qui a Mação, é una realtà, la quotidianità. La frase piú ricorrente che ho ascoltato – e che mischia ironia a orgoglio - dalle persone con cui ho avuto conversazioni informali a riguardo (sia con gli stranieri che con gli abitanti), é stata: "Mação é il centro del mondo!"

(The intercultural dialogue, here in Mação, is a reality of the everyday life. The most recurring phrase that I heard – which mixed up humor and pride - from the people with whom I had informal conversations about it (both foreigners and inhabitants), has been: "Mação is the center of the world!")

From this point of view, the photo below is one of the several empirical evidences gathered: one of the activities carried out within the direct observation has been that of the participation in some of these international courses. The pictures portrayed the class of the International Programme (IP) on "Integrated Landscape Management for Sustainable Development", including students from every continent.

Figure: 5.47: Partcipants of the International Programme (IP) on "Integrated Landscape Management for Sustainable Development". Museum of Mação (Portugal) 2013

The arrangement of the museum itself is thought according to this dimension. The director of this "place of knowledge creation" informs us about the strategies adopted in order to make the message as much as possible flexible and accessible not only linguistically, but also culturally:

Até as traduções não são literais, mas conceptuais: não existe uma mesma abordagem, porque temos que ter em conta as diferenças culturais, portanto cada tradução é adaptada.

(Even the translations are not literal, but conceptual: there is not a "single approach", because we have to take into account cultural differences, so each translation is adapted)

O mapa do museu, por sua vez, não tem nada a não ser os rios. Também são definidos os contornos da região, depois os dos concelhos, mas duma forma quase impercebível (...). Pois tudo o que pode ser assimilado por qualquer ser humano que visita o museu e que está presente no entendimento cultural de um território em praticamente todas as culturas que conhecemos é a ideia do rio – terra/agua – e a informação sobre as diferenças administrativas. E retiramos todo o resto. (...) Então para mim a qualidade se traduz assim: se eu tivesse mais dinheiro fazia um mapa em suporte digital, que mudava e as pessoas podiam escolher com base nos seus interesses e culturas.

(The maps in the museum, on the other hand, show nothing but rivers. The administrative borders of the region and those of the municipalities are also defined, but in an almost imperceptible way (...). This is because all that can be assimilated by any human is the concept of river (water/land) that is present in the cultural understanding of a territory of all the known cultures. So we removed all the rest. (...) So, for me the quality is operacionalizated as following: if I had more money I would make an interactive, that changed its contents and people could choose based on their interests and its cultures)

5.8.6 Dimension V - Impact of the implementation of quality system on Local Economy

The study conducted in Mação has revealed a large number of evidence also about the influence of the quality management of cultural heritage on the local economy. In general, the presence of a cultural resourse or equipment should also concur with an economic development of its surrounding area. In Mação we have observed this phenomenon and the way in which it is managed and promoted. The results of the direct, participant observation, have given many interesting results. We read in the "Research Diary":

Avendo vissuto per diverse settimane a Mação, ho avuto contatto con la popolazione locale e con gli studenti dei Master e Dottorato in archeologia che - attraverso scambi internazionali con univeristá di tutto il mondo - sono presenti sul territorio tutto l'anno: giovani provenienti da ogni parte del mondo, la cui presenza ha ricadute particolarmente positive sul territorio, sia dal punto di vista socio-culturale, sia dal punto di vista economico (settore immobiliare, trasporti, commercio in genere). La comunitá locale sente forte simpatia per questi giovani, e pare abbia coscienza del valore della loro presenza, tanto quasi da sentire dichiaratamente una forte simpatia e quasi un istinto protettivo nei loro confronti (perché comunque nella maggior parte dei casi si tratta di giovani che vivono per periodi anche particolarmente prolungati lontano dalle proprie famiglie).

(Having lived for several weeks in Mação, I have had contact with the local population and with master and PhD students in archeology, coming from universities worldwide, through international exchanges, living there throughout the year. They are young people from all over the world, and their presence has a particularly positive impact on the territory, both in terms of socio-cultural, both from the economic point of view (real estate, transport, trade in general). The local community feels strong sympathy towards these young people, and seems to have awareness of the value of their presence, so they have a strong empathy towards them (even because in most cases they live for prolonged periods even very far away from their families)

The impetus given by the museum to research attracts scientists, professors and students from different parts of the world. This does not only contribute to the development of an intercultural spirit of the place (ironically based on its historical and cultural identity), but also has an impact on the local economy. The Museum is able to monitor its impact on the territory, in fact the director replied with confidence about the size of the impact of the presence of the museum and its management:

32% da economia local! Nos medimos isso com rigor e contatando as empresas todas, no âmbito do setor dos serviços.

(32% of the local economy! We use to measure it with accuracy, by contacting all the local companies within the service sector)

In the case of Mação, therefore, the presence of the museum and its quality management, contributes (directly or indirectly) for more than one quarter (1/4) of the economic dynamics and regional incomes.

5.8.7 Dimension VI - Destination Branding, Heritage and Authenticity

The archaeological museum in Mação contains findings from surveys and excavations, giving particular emphasis to "rock art" and collections of lithic industries associated with fluvial deposits of the Tagus, as well as isolated findings of the Bronze Age. The museum also has a library and develops a wide range of activities at the international level. The museum drew our attention to the context in which it operates, and the management procedures that an exploratory phase, we discover implement. The analysis of this museum has been a particularly rich and fascinating, as evidenced by the notes in research diary:

> *Il territorio é particolarmente attrattivo dal punto di vista paesaggistico, ma manca di tutte quelle strutture e infrastrutture che comunemente contraddistinguono una destinazione turistica. Anche perché il comune si trova in un territorio interno del Portogallo, ben collegato alla zona costiera da autostrade, tuttavia troppo distante dai grandi centri del Paese. Peró il periodo prolungato trascorso a Mação mi ha dato la possibilità di scoprire che la comunità é particolarmente attiva e la maggior parte delle iniziative (socio-culturali ma anche economiche) ruotano attorno al museo.*
>
> (The area is particularly attractive from the point of view of landscape, but it lacks all the facilities and infrastructure that commonly characterize a tourist destination. Also because the town is located in an internal territory of Portugal which, even if is well connected by highways to the coastal area, it remains too far away from the major cities of the country. But the extended period spent in Mação gave me the opportunity to discover that the community is very active and most of the initiatives (socio-cultural but also economic) are related with the museum)

In the case of Mação, the museum not only contributes to the reinforcement of territorial identity, but it actually represents the brand itself of the territory. Again, this phenomenon is given by a certain approach to heritage management: the archaeological heritage is just the starting point for this process, that is, the museum today does not have this reputation due to its collection, but rather for the approaches to heritage as vehicle of sustainable development: new technologies; the attraction of tourists/researchers for more or less long periods of time in the area; the social awareness of archeology. These are some of the features that today make the museum the image of the territory. This has been well documented during our study, and confirmed by the interview with our informant:

> *A grande imagem de Mação, hoje, é o museu! Existem quatro coisas que funcionam muito bem: escola, os serviços sociais, o sistema de informação geográfica e gestão da floresta, que ganhou um prémio ibérico do Governo espanhol, e por fim o museu! Dos quatro, o que tem mais visibilidade é o museu. A isto é preciso acrescentar que houve a alteração trazida pelo facto que o museu acolhe o mestrado: Mação é uma terra muito conservadora e isolada - por quanto se possa ser isolado hoje em dia - e quando em 2005 se levou o mestrado, o impacto foi muito forte, mas já em 2008 as pessoas eram totalmente acostumadas à presença de estrangeiros, e havia uma integração total. Estas pessoas ganharam, do ponto de vista social e financeiro.*
>
> (The image of Mação today is the museum! There are four things that work very well: school, social services, the geographic information system and management of the forest, which won an award from the Iberian Spanish Government, and finally the museum! Among these four, the one which has more visibility is the museum. To this we must add that the change related with the educational project of the museum: Mação is a very conservative and isolated land – if one could be isolated nowadays - and when in 2005 it took the master, the impact was very strong, but in 2008 people were fully familiar to the presence of foreigners, and had a total integration. These people gain, the socially and financially)

Within the context of this perception and consequent approach, the connection between archeology and tourism is a process that is perceived as complex and non-obvious, in which it is essential to take into account a number of factors from both these fields. The informant explains:

O turismo é uma coisa e a arqueologia é outra coisa. Há que ter em consideração uma coisa: nem toda a materialidade arqueológica pode ser valorizada no turismo, enquanto todo o conhecimento arqueológico pode! A ideia de andar a fazer uma escavação para atrair mais turismo é totalmente errada e enganadora, porque não é verdade que todos os restos arqueológicos possam ser valorizados no âmbito turístico!

(Tourism is one thing and archeology is something else. We must take into consideration one thing: not all the archaeological heritage can be valued in tourism, while all archaeological knowledge can! The idea of attracting tourists simply through any archaeological site is totally wrong and misleading, because it is not true that all archaeological remains can be valued in the tourism sector!)

The statement of this heritage manager contains perhaps one of the most innovative data: the belief that every archaeological finding is worthy of attention from the tourism point of view, is completely overpassed. The archaeological value is finally dissociated from the toursm value that an archaeological finding can have (or not). In terms of enhancement, the focus on the mere *object* is finally overpassed on behalf of the archaeological knowledge and its cultural contents. This new vision has a potential impact in shaping future policies for the archaeological heritage management, where the archaeological knowledge will be an element to enhance as much as the vestiges (and in some cases, even more). Still, it opens concretely the path to a use of archaeological knowledge within the promotion of intercultural dialogue as an added value for the local communities and the tourist experience.

Conclusion

In this chapter were presented the results of a long and complex process of empirical research that has affected eight case studies placed in three European countries: Spain, Italy and Portugal. Each case was generally presented at first and then analysed according to the dimensions of the theoretical model. Section 5.1 and subsections contain the main evidence regarding the *Ruta Caesaraugusta*, in Saragossa (Spain). The route is an archaeological urban itinerary made up of four different museums. The management has appeared particularly dynamic and innovative, and the enthusiasm of the staff, as well as the leadership of the director, makes sure that the quality is perceived as a positive aspect by the heritage managers of the Spanish municipality, in charge for the management of the four museums. The study showed the many positive impacts of the presence of the route and the implementation of the principles of quality in the city and within its process of development.

On the other hand, a phenomenon was observed (which will common for the majority of the cases examined) according to which the managers do not perceive the HERITY certification as an added value for tourism attraction, but as a management tool useful to define objectives and implement continuous improvement. The HERITY certification is also interpreted and used as a "technical framework" that heritage managers can use in order to avoid or oppose eventual wrong political decisions not favourable to the preservation of archaeological and cultural heritage.

Sections 5.2, 5.3 and 5.4 are dedicated to the Italian case studies: Museo della Civiltá Romana (Roma), Museo dei Mercati di Traiano e Fori Imperiali (Roma), Museo del Mare e della Navigazione Antica (Santa Marinella). Despite the differences in dimension and locations of these museums, there were common and recurring data regarding the process of management and the perception of quality on the part of heritage managers. One of these common features found in the managers' perception has been the mistrust toward quality, even if this is manifested in different ways and degrees. In general, however, the goals achieved by the different museums in terms of conservation and study, scientific dissemination and promotion are often dissociated from a structured idea of quality management. The same can be said of the efforts to promote the possibility of an intercultural dialogue between citizens and tourists through heritage: the approach of the heritage managers is very subjective and, consequently, the outputs of the museum reflect more the personal interest and sensitivity of the managers than a result of the implementation of quality management system. In general terms, budget constraints, limitations of available resources and a lack of communication (or even mistrust) between different levels of management, worsen the perception of managers towards quality.

Finally, sections 5.5, 5.6, 5.7 and 5.8 present the results of the investigation conducted in Portugal, namely in the Synagogue of Tomar, Castle of Abrantes, the CIAAR of Vila Nova da barquinha, and *Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo* in Mação. Within the Portuguese experience one of the most central evidence has been that of the role of leadership within the process of implementation of quality. The perception of the latter in not unanimous: we found scepticism, for example, in the case of CIAAR, pragmatism in the case of Abrantes and a great "devotion" to quality principles, in the case of Mação. Anyway, the belief is almost unanimous according to which *Quality*, when applied to heritage management, must inevitably mean *participation of the community* and the *promotion of intercultural dialogue*, as in the case of Macau.

The latter can be defined a paradigmatic case of the shift in the traditional heritage management approach. Socio-economic development of the area relies heavily (and explicitly) on the presence of the museum, which becomes a vehicle for economic development, thanks to the tourist potential but overall - at least up to the date – for the constant presence of national and international academics that come with regularity in this territory due to the activities linked to the museum. The presence of the museum also has a positive impact on the socio-cultural development of the place: local associations are allowed and even encouraged to develop their activities in the museum, which is used as a meeting point for locals. On the other hand, it attracts each year (through the activation of a big networking) many persons from abroad who come in this small town of the Portuguese hinterland and live here for periods of research varying between a few weeks and several months, inverting the trend towards desertification and impoverishment.

Important findings emerged, thus, from the analysis conducted case-by-case. In the next chapter new findings will emerge from a cross-cases analysis, which will open the way for deeper understanding and, finally, to the answer to our research question.

Chapter 6

Cross-cases analysis and discussion

Introduction

The previous section has served to separately analyse the cases considered in the three European countries, Italy, Spain and Portugal. We contextualized the studied locations, from the historical, monumental and institutional point of view. Then, based on the empirical evidences arosed from the study, we analysed implemented management approaches, focusing on the issue of quality, and then tried to understand the perception of the concept of quality by the operators, the difficulty of implementing it, its recipients, and the influence of its certification process.

This chapter continues the data analysis which started from the previous chapter and proceeds with further discussions. Section 6.1 and its six subsections contain the cross-cases analysis, that is, a comparative analysis of the considered case studies. To promote internal validity of the study, the cross analysis is conducted coherently with the study of isolated cases exposed in the previous chapter: we proceeds according to the dimensions considered in the theoretical model. In the second part of the chapter, starting with section 6.2, evidences and findings emerged from the case studies and cross-cases analysis are finally discussed.

We present many results: on the one hand, we answer to the research question and the specific issues (presented in in Chapter 4) related to it, including: 1) How Quality Management is perceived by the heritage operators? (Subsection 6.2.1); 2) What is the impact of the implementation of quality management systems on the level of self-awareness of the local population? (Subsection 6.2.2); 3) How does the implementation of quality management systems for heritage sites play a role to boost the visitors' experience? (Subsection 6.2.3); and 4) To what extent the promotion of intercultural dialogue – namely the encounter between tourists and the local community – is perceived by heritage managers as a dimension of the heritage quality management? (Subsection 6.2.4). The Subsection 6.2.1 is particularly important for the scientific contribution of our work because it presents a proposal of Weberian types of Heritage Managers based on findings of this study, from which we drew and identified recurring behaviours likely to typification.

On the other hand, another result is the creation of an empirical model (subsection 6.2.5), that is, the model obtained by comparing and enriching our theoretical model with the empirical study.

In the course of this chapter (as well as along with the previous one), it is worth noting the interview to the secretary-general of HERITY International, Maurizio Quagliuolo. This interview was specifically conducted on February 2, 2014, in order to increase the external validity of our study, providing further empirical evidence to confirm our inferences. Finally, Section 6.3 is devoted to important considerations raised during the study and based on our findings, about Quality Costs within Heritage Management.

6.1 Cross-cases analysis

After the individual analysis of each case study, presented in Chapter 5, this section of Chapter 6 presents the cross-cases analysis. The goal is to identify common phenomena/behaviour among two or more cases through a careful observation of all the evidences collected. The interpretation of these evidences – are organised according to our theoretical model - and the establishment of relationship between them represent the bases for the creation of our empirical model. Thus, each of the following subsections presents the cross-cases analysis according to each one of the six dimensions of the theoretical model.

6.1.1 Culture of Quality within Heritage Organisation

In analyzing the Quality applied to the management of cultural heritage and its effects on the territory, namely on tourists and local communities, we found that it is very important to have an understanding of the level of diffusion of the "culture of quality" within the places analyzed (see Chapter 4). The cross-cases analysis has highlighted a number of elements that define a common framework among the places studied. One above all, the attitude of rejecting certain *concepts* or *terminology* related to traditional management is quite common among the operators of cultural heritage.

In this regard, we found the content of a newspaper article retrieved from our research, interesting and representative. The article - by the Italian journalist Zanini (2014: 4) - analyses a new ministerial strategy for the directors' recruitment for some important museums and archaeological sites in Rome: a sentence from Dario Franceschini, *Ministro dei Beni e delle Attività Culturali e del Turismo*[25], confirm our interpretation about this attitude of rejection towards some concepts and terms without any doubt. When he talks about directors of museums, he points out:

[25] Ministry of Heritage Cultural Activities and Tourism

Non chiamateli manager, altrimenti sembra che si prenda qualcuno che è stato bravo a commercializzare bevande o tondini di ferro e lo si metta a guidare un museo. Non è così!

(Do not call them *managers*, otherwise it seems that you take someone who was good in selling drinks or iron rods and put him to direct a museum. It's not like this!)

For the Italian minister of culture, the term manager fits just to those selling drinks, or a little more. We quote this sentence by the Italian minister because it seems fairly representative of the attitude of dissociation, almost of contempt towards some terms and concepts of the management area, from which the concepts of quality is derived from. It seems that organisations that deal with the management of archaeological sites and, in general, cultural heritage show the same phenomena that Drucker (2001) described for non-profits organisations. The latters, according to Drucker, "were proud in being freed from the taints of *commercialism* and be above such *sordid factors* such as financial results, and for this reasons they rejected the concept of *management* (…) as closely associated to profit sector" (Drucker, 2001: 40-41). We have found similarities between the attitude descripted by Drucker about non-profit organisations and heritage intitutions, which generally reject the traditional concept of *management* in the field of cultural heritage. By the way, talking about non-profits organisations, Drucker (2001: 41) brilliantly states:

"(...) *they need management* even more than the business sector, precisely because they do not have the *discipline of financial results*: they understood that good intentions are not a substitute for *organization*, *leadership*, *responsibility*, *performances* and *results*. All this factors requires *management*, which - in turn - starts with the *mission*, which allows organizations focus on *action*, defining specific *strategies* to achieve the crucial *goals*. It creates a disciplined organization, and it prevents, by itself, most degenerative disease for organizations: the fragmentation of its resources, always limited in things that are *interesting* and that *seem profitable* instead of *focusing* on a small number of productive efforts"

We had already found signals of this approach within the contents of the exploratory interviews: Maria Grazia Massafra, Director of the museum *Casina delle Civette* in Rome, for example, has shown scepticism about the actual usefulness of Quality, especially in contexts where the "culture of quality" does not exist. During the interview she has stated:

In realtá se sei una persona che professionalmente é aggiornata e lavora bene, alla fine, riesci ad avere degli alti livelli di qualitá.

(Actually, if you are a person who is professionally updated and who works well, finally you can achieve high level of quality)

And she concludes:

I sistemi di qualitá porterebbe a maggiori stimoli e a miglioramenti, peró solo all'interno di un sistema meritocratico, ma - diciamoci la veritá - se io alzo il livello di qualitá e divento un problema, allora é una presa in giro!

(A Quality System would lead to greater incentives and improvements only if contextualized in a meritocratic system, but - let's face the truth - if I raise the level of quality and it becomes a problem for other people, then the all process becomes a joke!)

The perception of the director and her mistrust towards the quality systems is clearly due to the fact that she does not believe that she is in a context characterized by a culture of quality and meritocracy. Precisely for this reason, the director transmitted us her appreciation and trust towards the HERITY GES, defining it a “system that is *super partes* with respect to local policies and managerial cultures”.

6.1.2 General impacts of quality system on heritage management

The cross-cases analysis provided us evidences about a fundamental aspect: the benefits of implementing quality systems depend on the existence of *preconditions*:

1) A *culture of quality*, that is, an organisational culture in which it recognises the importance of Quality;

2) Strong *leadership* to orient and give continuity to the all process.

The *culture of quality* is not synonymous of the *application of a quality system*, but it is a condition that is reached when the entire organisation accepts, shares and promotes the quality principles. In this regards, one of our informant, Maurizio Quagliuolo, affirmed during the interview that:

> *Il livello della cultura della qualità é di norma basso. Dal punto di vista teorico, lo é sicuramente! Dal punto di vista pratico forse lo é un po' meno, tanto che alcuni ci dicono: "Abbiamo capito che facevamo qualità senza saperlo". Però, in generale, se parli di qualità continuano a rispondere che é qualcosa che "comporta una fatica in più"!*
>
> (The level of culture of quality is, generally, low. From the theoretical point of view, it is definitely! From the practical point of view it is perhaps a bit less. In fact, some tell us: "We understand that we were making quality without knowing!" However, in general, if you talk about quality they continue to respond that "it is something that just causes more fatigue"!)

On the other hand, the second feature – the importance of leadership - is an aspect we did not consider previously (as we will explain within the presentation of the empirical model): several evidences lead us to affirm that the importance of heritage managers' leadership skills and sensitivity towards the importance of quality, can therefore facilitate the implementation of a quality system, optimizing its benefits. On the other hand, lack of interest, responsibility and leadership may put the success of the process and its benefits to the organisation and the territory at risk. The general-secretary of HERITY based on his personal experience affirmed that:

> *Io credo che in generale esistono dei livelli (dal punto di vista politico) che possano bloccare altri livelli. E questo é quello che secondo me sta succedendo a Roma. Non é necessariamente un' avversione alla qualitá, ma se c'é una persona alla quale la qualitá non interessa, semplicemente blocca il processo!*
>
> (I believe that in general there are levels (from the political point of view) that block other levels. And this is what I think is going on in Rome. It is not necessarily an aversion to the quality, but if there is someone who is not interested in Quality, he simply blocks the process!)

In this scenario, the sensitivity but also the academic and professional background of managers is important. Maurizio Quagliuolo affirms in this respect:

Non é che il manager garantisce la buona gestione, però ti garantisce apertura mentale! (It's not that the manager guarantees good management, but at least he guarantees an open mind!)

A widespread and shared culture of quality and managers' leadership skill is then, the "minimum requirements" in order to reach the third and last prerequisite to quality: the investments needed for a continuous and efficient implementation of the principles of quality. In this regard, some empirical evidences emerge from the cross-cases analysis which could represent an indicator of these attitudes:

1) the renewal of the certification;
2) the "score" obtained by the same monument/museum in different evaluations HERITY, which sometimes decreases over time instead of increasing.

Regarding the first situation, namely, Italian cases, they seem to have deliberately chosen not to renew their certification (Table 5.8a). On the other hand, in some cases some values have decreased instead of increasing, if compared to those obtained in the previous HERITY certification (Table 5.8b and 5.8c). In both cases, we can consider this as the result of a political choice to not to deal with the costs of quality. It is interesting to note that in the Spanish case, the responsible of the *Ruta Caesaraugusta* have publicly attributed their decreased score within the second HERITY assessment to a wrong political choice regarding to the distribution of public funds to the local level.

Table 6.1a: assessments made and results

ITALY		
Museo del Mare e della Navigazione Antica	Santa Marinella, Rm	2009-2011
		3 – 3 – 3 – 4
Museo della Civiltá Romana	Roma	2011-2013
		4 – 3 – 2 – 3
Museo dei Fori Imperiali e Mercati di Traiano	Roma	2011-2013
		5 – 4 – 3 – 3

Table 6.1b: assessments made and results

PORTUGAL			
		2010-2011	2014-2016
Museu de Arte Pré-histórica e do Sagrado Vale do Tejo	Mação	3 – 3 – 3 – 3	3 – 3 – 3 – 2
CIAAR	VN Barquinha	3 – 2 – 2 – 2	
Castelo	Abrantes	4 – 2 – 3 – 3	
Sinagoga	Tomar		4 – 2 – 2 – 2

Table 6.1c: assessments made and results

SPAIN			
Ruta cesaraugusta	Zaragoza	2009-2011	2012-2014
Foro		4 – 3 – 3 – 4	4 – 4 – 3 – 3
Puerto Fluvial		3 – 4 – 3 – 3	3 – 4 – 3 – 3
Teatro		4 – 4 – 4 – 4	4 – 4 – 3 – 3
Termas		3 – 4 – 3 – 3	3 – 4 – 3 – 2

Finally, the evidence shows that the main impact of the application of the principles of quality and the HERITY assessment process consists in a greater awareness of managers and staff on issues related to Quality and cultural heritage management. Direct observation confirms this aspect, as well as the interviews: this is indeed unanimous opinion of the managers, regardless of their degree of skepticism about the concept of quality in general.

In addition, our study has produced evidence demonstrating that, on its side, HERITY is conscious of this responsibility. One of these evidences is given by the sentence one can read in the footnote of the "HERITY self-evaluation form" (questionnaire directed to managers and operators in charge of cultural heritage):

> *La compilazione di questo modulo vuole costituire un'occasione di riflesione sulla situazione del bene culturale di cui siete referenti e facilitare lo scambio di opinioni con i valutatori Herity.*
>
> (The compilation of this form is intended to provide an opportunity for relfection on the situation of the cultural heritage you are referents of and facilitate the exchange of opinions with the evaluators Herity)

The sentence structure is particularly effective even from the syntactic point of view: the use of the second person plural gives the message more force in order to be more effective in raising awareness and involving the recipient: the cultural heritage managers. We will discourse about the implication of this finding in the next section.

6.1.3 Impact on local communities' involvement

Regarding to one of the most important dimensions of our research, the keystone of our work - the links between quality and involvement of the local population - cross-cases analysis has led us to the delineation of a fairly complex framework.

On the other hand, based on the evidences gathered and analysed transversely in this section of the study, we can assert the existence of different types of operators, with equally diverse approaches to the issue. The most favorable approach and inclined to the involvement of the population, is that of the museum's director of Mação (Portugal), who sees his work also as a social mission. He said:

Um museu tem que funcionar como contribuinte para a organização do território, porque outros espaços que cumpriam esta função foram destruídos: as igrejas já não têm este papel, as escolas deveriam ter e não tem, e estão demasiado dependentes do poder central. Os museus – sobretudo os arqueológicos, mas os museus em geral - podem cumprir esta função territorial. E deste ponto de vista tem que ser espaços de encontro das comunidades em que se inserem.

(A museum has to work as a contributor to the organization of the territory, because other spaces that fulfilled this function were destroyed: the churches have no longer this role, schools should have but they don't have, as they are too dependent on the central power. Museums - especially archaeological, but the museums in general - can fulfill this territorial function. And from this point of view they have to be meeting places for the communities in which they operate)

At the other extreme, there is the attitude of the director of CIAAR (Vila Nova de Barquinha, Portugal), who, although recognises the importance of disclosure and involvement of the local community, in theory, he prefers to invest his effort only on research in practice:

Trascuriamo questa dimensione perché non interessa alla direzione! Anche se avessimo piú soldi, faremmo comunque maggiore investimenti negli equipaggiamenti di ricerca!

(We neglect this dimension because the direction is not interested in it! Actually, even if we had more money, we would anyway make greater investment in equipment research!)

Threfore, while variety of perceptions have been observed in the several sites and museums analysed, on the other hand it is important to consider the perception of HERITY, the main institution promoting - practically and theoretically - the Quality Heritage Management. Once again, observation, interviews and document analysis allowed us to collect a number of important evidences about the meaning attributed to the concept of Quality in the context of heritage management, and the extent to which the involvement of the local population is considered with quality indicator. Our informant, Maurizio Quagliuolo, the main representative of HERITY at the international level, brings us his general opinion based on his experience:

Nei casi che abbiamo incontrato, sicuramente i gestori dei musei non tengono quasi per niente in considerazione il fatto che il pubblico può aiutare molto nella qualità. Per quanto riguarda i residenti, questi frequentano i luoghi ma si sentono poco coinvolti, e i gestori non fanno sforzi migliorare la situazione. Il turista é sicuramente oggetto di maggiore attenzione (perché porta soldi). Ancora non si é capita l'importanza di un maggiore coinvolgimento dei residenti, e purtroppo nessuno investe (e forse anche noi potremmo fare di più) sulla formazione della popolazione locale

(In the cases we have analysed, surely the managers of the museums do not take into account the fact that that the public can help in quality improvement. To what concern the residents, although they use to visit these places, they seem to feel not involved, and the managers do not seem to make efforts to improve the situation. On the other hand, tourists definitively receive more attention (because they bring money!). Finally, they still do not understand the importance of a greater involvement of residents, and unfortunately no one invests (and maybe we also could do more) on local communities development)

Not only the individual managers, but also the main promoters of the Heritage Quality Management worldwide have not so far focused their attention on other dimensions. In this case, thus, the contribution of Maurizio Quagliuolo represents an evidence that confirm, together with our observation, one of our hypotesis: the approach of the majority of the managers involved in the research do not perceive the involvement of the population and the promotion of the encounter between citizen and tourist as a dimension of quality.

Actually, according to the same informant, the right of access to cultural content itself is nowadays still under discussion:

É un dibattito ancora aperto, perché ci sono persone che ancora affermano, come successe in una delle ultime conferenze HERITY, che la cultura deve essere per pochi!

It is still an open debate, because there are people who still say - as it happened in one of the last HERITY conferences - that "culture must be for just a few"!)

The access to HERITY documentation (courtesy of the institution) has been fundamental to understand on what extent quality is related to local community's involvement. During the data collection period and direct observation along the European stage in HERITY headquarters in Rome, and among other activities of research, we analysed some technical documents. We found particularly interesting the HERITY "self-assessment form", an instrument designed by HERITY in order to record the self-assessment on the part of sites' managers and operators. The form is divided in four sections, based on the four dimension considered by HERITY GES (Relevance of the place, Conservation, Communication and Services). The section was dedicated to the auto-evaluation of the "Relevance" of the site and contains five questions; the one dedicated to "Conservation" contains thirty-one questions; the section regarding the "Communication" contains thirty-seven questions and the one dedicated to the "Services" contains twenty-seven questions.

By analysing each one of these questions, we found some interesting evidences regarding the dimension 3 of our theoretical model ("Impact on local communities' involvement"). Namely, Questions 3 and 4 of the "Relevance" section refer to the "primary beneficiary of the site"; Questions number 27, 28 and 31 of the section dedicated to "Conservation" refer to the involvement of local population; in the "Communication" section, Question 4 to 11 and Questions 13 and 16 concern with the involvement of schools and the issue of education, and finally Question 29 is related to the local associations involvement (Table 6.2).

Table 6.2: Questions contained in the HERITY self-evaluation form and related with the involvement of local population

Dimension	Question Number	Question Content
Relevance	3	Which kind of public you aim to target?
	4	To what extent you feel you have reached this goal?
Conservation	27	How do you evaluate the involvement of the local population?
	28	How do you evaluate the involvement of local politicians?
	31	How do you evaluate the involvement of local institutions?
Communication	4	Is there specific didactic staff?
	5	Do you consider appropriate spaces used for this purpose?
	6	How do you evaluate your educational programs for primary schools?
	7	How do you evaluate your educational programs for secondary schools?
	8	How do you evaluate your educational programs for higher schools?
	9	How do you evaluate your educational programs for universities?
	10	How do you evaluate your educational programs for adults?
	11	How do you evaluate your educational programs for teachers?
	13	Do you consider your activities for public awareness?
	16	How do you assess the presence of witnesses to events related to the site?
	29	How do you evaluate the actions of associations connected to the place?
Services	- - -	- - -

Questions 3 and 4 can be considered as exploratory, while Questions 27, 28 and 31 are strictly related to the assessment of the involvement of population and local authorities. In the field of communication, if on the one hand we observe the importance given to the issue of didactic and public awareness, on the other hand, we have to consider that those questions are not related only to the involvement of local schools. Question 16 and 29, on the contrary, are directly related to the involvement of the local population in several forms: individual or through associative activities.

The evaluation form delivered to the public for filling, instead, contains just one question (Question 12 contained in the "Communication" sector) that we can interpret as relaed to the participation of local community (Table 6.3).

Table 6.3: HERITY Question evaluation form for public and related with the involvement of local population

Dimension	Question Number	Question Content
Relevance	- - -	- - -
Conservation	- - -	- - -
Communication	12	Have you been accompanied by someone who lived in/during the occurrence of the place?
Services	- - -	- - -

The question posed to the public in order to obtain their opinion in this concern, reflects the perception of HERITY regarding the participation of the local community - holder of knowledge related to cultural heritage – as part of Quality Heritage Management. And it creates a bond with the dimension we have considered, that of the meeting between the local population and tourists. We will face this dimension in the next subsection.

6.1.4 Relationship between local communities and tourists

One of the dimensions of our theoretical model relates to the perception of quality in relation to the meeting between the local population and tourists, as well as the influence of the implementation of quality systems on the promotion of intercultural dialogue through tourism. We have not found a systematic propensity on the part of heritage managers to consider this indicator among those that define the quality. This dimension seems to be neglected in the majority of the cases analysed, although if in some of them we found an effort made in the past in this direction. In the Spanish case, indeed, as well as in the case of Abrantes, Portugal, managers told us about the project of cration of a group of volunteers among the citizens who guide tourists. In both cases the project has not been successful. The exception is represented by the case of Mação (Portugal), where the population is heavily involved in the management of cultural resources, and the local community are in a very close contact with visitors.

To understand if, and how, the current concept of quality takes into account this dimension, and what is its influence in this domain, we also analyzed the approach of HERITY in this concern, as the main promoter of quality management and cultural heritage. The observation and the analysis of docuements, as well as the interviews, lead us to a comprehension of the perception and approach. According to or analysis of the HERITY assessment tools, we found that they have no particular reference to this dimension, except for the question 12 of Section C of the evaluation form for the public, as we presents in subsection 6.1.3.

On the other hand, the interview provided data that confirm this interpretation. In this regard, during our interview, the HERITY International Secretary-General admits:

> *L'incontro tra turista e residente ha un peso parziale sulla certificazione HERITY.*
>
> (The encounter between tourist and resident has a partial weight on the certification HERITY)

As we will see later, HERITY experience has shown that the implementation of such a system of certification of quality also represents a vehicle for raising awareness - of managers and visitors - on aspects of quality within heritage management. With regard to the intercultural dialogue, it could be promoted through the meeting between residents and tourists at sites of cultural interest, since none of the agents takes this aspect into account as an indicator of quality, we can say that the implementation of quality systems and the HERITY certification itself does not have any effect on the chance to promote contact between citizens and tourists. During our research work at HERITY, in an interview with the Secretary General HERITY - responding to a question on this issue - he thus explained:

L'HERITY non ha aiutato quanto avremmo voluto nella questione del'incontro tra visitatori e residenti. Ma ritengo debba far parte della qualità.

(HERITY did not help as much as we would like to, regarding the matter of the encounter between visitors and residents. But I think should be part of quality)

In interpreting this phrase, and according to the observations made, the responsible of HERITY seem to deeply believe in the process of application of the principles of Quality they are promoting. And, as among the latters, one can find the concept of the *continuous improvement*, the possibility of improving even the HERITY itself seem to be welcomed with big naturality by the HERITY team.

6.1.5 Impact of the implementation of quality system on Local Economy

In general, the study showed that the economic dimension has undoubtedly a great importance to the heritage managers, who consider their impact on the local economy as an indicator of the quality of their work. The study of individual cases show some variation in the perception of this dimension as part of the quality of the management of cultural heritage, and the result of direct observation show different outcome from the practical point of view. The Spanish case (Subsection 5.1.6 of this Chapeter), for example, has provided evidence on the involvement of museums in the economic life of the city, while in the case of the Italian and portuguese cases, we perceived certain isolation, with the exception of the case of Mação, where the economic impact is not just considered but even monitored with regularity (Subsection 5.8.6 of this Chapter).

The importance of the positive influence on the economy is also reflected in the HERITY perception of Quality: this is demonstrated by the question in the "self-evaluation form" that relates to the services offered, as well as in assessment reports, as in the case of Synagogue of Tomar. The study also highlighted an important aspect from the point of view of the economic impact of quality in the management of cultural resources: cost optimisation is definitely one of the impacts of the implementation of quality systems. On the contrary, a poor rationalisation of the processes and the lack of efficiency in the implementation of the principles of quality lead to increased economic cost – and social - for the organisation, as demonstrated by the analysis of the case of the museum of Mação, in which the rationalisation process has led to the reduction of maintenance costs, or – on the other hand - in the case of the Museum of Roman Civilisation, in which the lack of rationalization and efficiency in the application of the principles of quality, has led even to the closure of the museum, a situation that results in very high economic and social costs. For the great importance given to this point, this matter will be considered further in Section 6.4 in this Chapter.

6.1.6 Destination Branding, Heritage and Authenticity

The Influence of Quality on the construction of the image of the destination through its cultural resources - ensuring authenticity - greatly depends on the perception of Quality itself by heritage managers. In the case of the HERITY assessment, actual and desired effects are clear enough in some cases. In the case of Zaragoza, although managers are skeptical about the function of the symbol HERITY, they affirm:

> *Nadie pide una explicación sobre HERITY. También depende de la posición tiene la placa... Pero, en general, las personas no se identifican con este símbolo.*
>
> (No one asks for an explanation about HERITY. It also depends on the position that the plaque has... But in general, people do not recognize this symbol)

Nontheless, they recognise that improvements that are associated with the implementation of the quality system have improved the perception of cultural resources by the community and tourists:

Creo que sí, porque - por ejemplo - con la ampliación de las indicaciones y señales, aumenta automáticamente la percepción positiva del patrimonio por parte de la gente! Siempre damos más valor al monumento a través de la comunicación al público. Se ha hecho un gran trabajo para traducir el trabajo científico y los resultados obtenidos, en el contenido que hoy se transmite al público.

(I think so, because - for example - the improvement of indications and signals automatically increases the positive perception of the heritage on the side of the people! We always value the monument through public communication. It has done a great job translating the scientific work and the results obtained in the content that is transmitted to the public today)

Another case fairly representative of this phenomenon is that of the Portuguese museums: the certification process is, in these cases, not only an improvement of the management, but manifestly a strategic process towards the construction and international projection of the territorial image. Several evidences confirm this "interpretation" of the quality assessment tat is emerging from the study of documents, direct observation and interviews with the main responsibles of the management of cultural heritage.

Figure 6.1: Official invitation to the ceremony of delivery of the 26 HERITY certifications for the sites and museums of *Medio Tejo* region

Figure 6.2: Institutional photo at the end of the ceremony for the certification of the 26sites
Picture taken during our direct observation, Tomar (Portugal), 1/11/2013

6.2 Discussion and Empirical Model

The study has brought to light many evidences about the perception of quality by the heritage managers and provided the necessary findings for us to be able to answer to our main research question:

To what extent the implementation of quality management systems for heritage sites contributes to boost the participation of local communities and their encounter with tourists?

In the context of this main question our intention was to understand:

1. How Quality Management is perceived by the heritage operators? (and still: "Is Quality Management in heritage enhancement perceived as a bureaucratic framework by the operators?")
2. What is the impact of the implementation of quality management systems on the level of self-awareness of the local population?
3. How does the implementation of quality management systems for heritage sites play a role to boost the visitors' experience?

4. To what extent the promotion of intercultural dialogue – namely through the encounter between tourists and the local community – is perceived by heritage managers as a dimension of the heritage quality management?

In order to achieve our objective we studied the cases on the basis of a theoretical model composed by six dimensions:

Dimension 1 – Quality within heritage organisation;

Dimension 2 – General impact of Quality System within heritage management;

Dimension 3 – Impact of Quality Management on local communities' involvement;

Dimension 4 – Quality Management and local communities' encounter with tourists;

Dimension 5 – Quality and Economic impacts;

Dimension 6 – Destination Branding, Heritage and Authenticity

6.2.1 About Quality within heritage organisations and general impacts of quality systems and certification within heritage management

Firstly, we found - generally - a lack of culture about the general principles of management on the part of heritage managers, which in extreme cases leads to the "stigmatisation" of the term *manager* itself, as well as terms like *clients* or even *users*, certainty because they are perceived as belonging to the economic sector, then pretty distant, even antithetical, from the the mission and the values of the cultural sector. In this context, the level of the culture of quality among the cases analised is particularly uneven. In some cases it is positively perceived by managers and staff, on the other hand we found cases – like the Museum of Roman Civilisation in Rome (Chapter 5, Section 5.2) - in which we observed great skepticism with regard to Quality. The latter is perceived, in this case, as a useless surplus of work.

In this regard, an important finding is the relationship found between the attitude of the main manager(s) and the culture of quality whitin organisation. Since we observed several approaches, also influenced by the cultural policies as observed in the case of the *Museo del Mare e della Navigazione Antica* (Italy) where the Director clearly states that he considers inappropriate to talk about quality in the absence of appropriate policies and especially in the absence of proper funding for culture and cultural heritage management (see Section 5.4, Chapter 5). This attitude obviously detracts consistency of the whole process of implementation of Quality. The cross-cases analysis evidently shows that managers in the same situation of lack of financial resources consider, on the contrary, Quality and its certification as vehicles for attracting structural funds - as observed in the *Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo* of Mação, Portugal (see Section 5.8, Chapter 5). - or, on the other hand, a valid argument to oppose detrimental cultural policies, as observed in the case of the museums of the *Ruta Caesaraugusta*, Zaragoza, Spain (see Section 5.1, Chapter 5). The attitude of managers is therefore essential for the spread of a culture of quality.

This aspect was not considered in the theoretical model, but arises from the empirical study, creating a new dimension which we consider very important: as regards to the role of leadership in the successful implementation of the quality heritage management (see Subsection 6.1.1 in this Chapter). The idea of quality whitin cultural heritage management has appeared as a concept still very undefined, “under construction”, perceived and interpreted by managers according to three main factors:

1) Academic background;
2) Personal sensitivity;
3) Personal Interests.

Cultural heritage managers’ perception therefore, influences and defines the staff and the culture of quality within the rganization, to the benefit or detriment of an effective process of implementation of the principles of quality. In this context the existence of an international system of quality certification, HERITY GES, which defines the dimension of quality within heritage management is found to be crucial. In fact, regardless of the degree of skepticism on the part of the managers, the latters unanimously affirm that the presence of a conceptual point of reference provides them a greater sensitivity and awareness about the concepts, dimensions and principles of quality (as we have shown in Subsection 6.1.2 in this Chapter). At the same time, they also affirm that the HERITY assessment process helps them to better identify, systematize and supervise processes, outputs and outcomes of the organisation. These findings have emerged from what, in subsection 4.7.5, we have defined as qualitative isomorphism, that is, the redundancy emerging as the interviews were made. Thus, emerging redundancies allowed us to identify a set of standardized approaches of managers towards Quality (with regards to the analysed cases), and that we organised according to a Weberian typification (Table 6.4).

Table 6.4: Heritage managers' Weberian Types towards Quality

Type	Description
Conservator / Reactionary	He or she had contacts with processes related to Quality. The latter, however, continues to be perceived as an accessory, something not really important. The important work of the museum (preserve, study and disseminate the historical and cultural content), it is not tied to a quality system, understood as a coded system. The quality is, for the most, perceived as bureaucracy almost useless. This type also proves to be "individualistic": he or she sees as "personal mission" the creation of a Qualitative Cultural Offer", something very subjective, non-coded. In the same way, the social function of the heritage manager is a personal issue, not linked with quality or management model. Again, it is perceived as something not object ivable, but totally subjective. Lack of spirit and capacity for leadership.
Reticent	Type with great inclination towards research. Understands and agrees with the appropriate aims of quality, but he does not implement it. He/she believes that it is ancillary to the research, and the latter has to prevail. He deliberately keeps away from the social dimension, which recognises important, and maybe even a possible dimension of quality management but, again, not enough to dedicate the time and investment, especially when budgets are tight. Leadership capacity is very limited.
Pragmatic	He/she sees in a very pragmatic way the implementation of Quality. Normally the basic training that characterizes this type is not culture-bound. The idea of quality is therefore much more tied to the classic concept of the companies (standard and quality control). However, he/she thinks it is possible to apply these principles to the management of cultural resources. He/she has a clear idea also about the economic effort and the political conditions required by a concrete and efficient implementation of quality systems. This type sees in Quality a source of many benefits. However he/she does not consider the involvement of local population as a dimension of quality within heritage management. On the contrary, tourism is perceived as a vehicle for economic growth, and the quality of the cultural offer is particularly important for this reason. He/she has a great capacity for leadership.
Enthusiastic	This type totally embraces the innovation of quality applied to the heritage management. He/she applies the principles of quality to his/her work, and encourages staff to follow him/her in this practice, also by disseminating the positive results. He/she "lives" the Quality in a critical, constructive and positive way. He/she follows proactively the evolution of the concept of Quality itself, as a duty of a manager/operator of cultural heritage. Transversal competences, strong sensibility and strong capacity of leadership.

Finally, we can truly say that direct observation, interviews and document analysis confirmed the important role of the implementation of a process such as the HERITY GES as a way to raise awareness (among operators and even visitors) with regard to the principles of quality and the importance of a culture of quality in the cultural heritage. For the importance recognised to this aspect, emerged from the empirical analysis, we consider this phenomenon as an additional dimension of our empirical model.

In addition, a further finding consists in the observation of a relationship between the implementation of a quality management system and the effectiveness of the use of financial resources: the awareness about Quality as well as the results of its assessment can have their direct influence on the use of resources and the optimisation of investments. In this regard, public investment to implement a quality system depends on the public cultural policies which, in turn, can be strongly influenced by the degree of general awareness of the importance of quality, is crucial. In this context, we make a series of considerations with respect to the "quality costs", in Section 6.4. The analysis of the perception of quality by the managers of the assets has led to interesting results that are reflected in our empirical model.

6.2.1.1 "Tangibility" of the Principles of Quality

The empirical study has shown that, during the quality assessment process, managers and general public are deeply aware about the mode and purpose of the quality within heritage management. All the interviewed managers and operators affirmed that assessment process was useful to "structured " the idea of quality, as well as the practices that lead to quality management (which sometimes, they already practiced but without orientation and/or external recognition). In this case we can define the phenomenon as "Tangibility of the Principles of Quality": thorough the assessment process, quality - still perceived mostly as a theoretical concept and, for this reason, even shunned by some operators and heritage managers - becomes "tangible", finally "materializes" as something concrete, something that is made up of concrete practices and measurable results, as well as real benefits in the short and long-term.

On the other hand, general public are made aware indirectly on issues related to the good management of cultural heritage because the questions contained in the questionnaires stimulate their critical spirit relatively to the output of the management of the museum or archaeological site. During the interview, Maurizio Quagliuolo recalls an episode quite illustrative in this respect, of a family who, at the end of a visit in a museum, questioned by HERITY staff about the presence and efficiency of access for people with disabilities, they replied that actually they had not even think about this "detail" and that now they felt aware in this regard. Maurizio Quagliuolo highlights:

> *Il processo di certificazione sensibilizza il pubblico su aspetti ai quali, differentemente, non farebbero caso!*
>
> (The certification process raises public awareness about issues which, otherwise, they would never think about!)

And he adds:

> *Gli obiettivi della certificazione HERITY é triplice: promozionale del bene, di supporto per l'organizzazione, educazione per il pubblico.*
>
> (HERITY certification has three objectives: heritage promotion, support for the organization, awareness for the public)

We can therefore define certification (in this case, the HERITY GES process) as fundamental in the overall global spread of quality in the cultural sector.

6.2.2 About the impact of the implementation of quality management systems on the level of self-awareness of the local population

From our empirical research in three European countries, a common trend among heritage managers has emerged. They generally recognise the social function of cultural heritage and the needs of raising awareness among local population. This perception is unanimous; still it is made concrete in very different ways among the cases analyzed. In the case of CIAAR, in Vila Nova da Barquinha, Portugal (see Section 5.7, Chapter 5), we observed in this sense a detached attitude of managers, which are fully aware on the importance of the involvement of the population even if they affirm that, anyway, they “prefer to invest in research and equipment". Opposite attitudes were observed in the case of Mação (Portugal), Santa Severa (Italy) and Zaragoza (Spain), where the social and educational daspect of heritage management is particularly present.

According to our interpretation of data collected through direct observation, interviews and document analysis, on the one hand the introduction of quality systems and certification did not affect particularly the pre-existing attitudes of managers. On the other hand, the HERITY certification has given the necessary recognition to the effort of communication, education and awareness. The link between the archaeological heritage management, the involvement of the local community and the reinforcement of the personality of the region as a tourist destination is not necessarily considered one an aspect of heritage quality management.

By analyzing the phenomenon of the application of quality on the cultural heritage management, we found that, on the one hand, HERITY GES strongly considers the local community participation among the indicators of quality within its four dimensions (especially in the dimension concerning the Communication). On the other hand, the case studies showed a lack of uniformity and unanimity on the part of managers regarding the perception of this matter as a dimension of quality. However, it seems fair to say that a greater emphasis on this matter on the part of HERITY, possibly the recognition of the “Involvement of Local Community” as a quality dimension independent from that of “Communication” could create greater sensitivity on the part of managers and operators, as it already happens (according to our observations) for the other considered dimensions. Doing so, the concept of “Paideia Approach to Heritage Management” – presented in Section 4.4 as our theoretical contribution - would be fully applied to the HERITY GES and, consequently, to the concept of quality promoted by HERITY that is already recognised by UNESCO. The empirical model derived from the analysis reflects this consideration.

6.2.3 About Cultural Heritage Quality Management and the improvement of visitors' experience

The analysis carried out at the sites chosen for this study showed that the implementation of a quality system and its certification provide a positive impact on the general tourist experience. In particular, it is the unanimous opinion that the process HERITY GES made a positive contribution to the improvement of the museums, archaeological areas and monuments as a resource and tourist attraction. The improvements relate more directly, in many cases, the forms of communication and services offered to the public. The HERITY report defines weaknesses about the Conservation, Communication and Services within the place. According to this document, managers should provide the improvements, which could also affect the area surrounding the assessed place, as in the case of Zaragoza (Spain): in this case the improvement process involved the strengthening of the signage leading to museums. According to the managers of the Museums of Zaragoza, to improve the signage has also contributed to increase the perceived value of the places.

Another important finding in this regard has emerged from our study, and concerns the presence and function of HERITY "target" at the entrance of the assessed places. In the HERITY technical sheet (Code: IT-DOC-12) (available in http://www.herity.it/Carte%20Roma.htm, retrieved 10/10/2014) we can read:

> At the entrance to every museum, monument, outdoor site, library, archive, public or private, the HERITY symbol, similar to a target, shows clearly and in advance to the visitor the level reached on a scale from 1 to 5, for the current year, referred to 4 criteria:
>
> a) perception of cultural significance (VALUE);
>
> b) state of maintenance, preservation and restoration (CONSERVATION);
>
> c) information provided to the visitor (COMMUNICATION);
>
> d) quality of reception and services offered (SERVICES).

The "target" is thus emphasized by HERITY as a useful tool for visitors of cultural heritage. But our direct observation and the interviews (including that to Secretary-General of HERITY) have instead revealed a different reality: the symbol HERITY does not attract the curiosity of visitors, which basically ignore the "Target" in the majority of cases, and do not use this tool as HERITY was initially expecting. Presumably this trend will change when the certification itself will be more known by the general public. At the moment, we conclude that the improvement of the tourist experience is given by indirect benefitis: the evaluation process leads to the improvement of the cultural offer guiding the work of managers, and the output of this process is the guarantee of a better experience for the tourists. HERITY certification is thus an important tool for the management of cultural heritage, but the symbol of the HERITAGE evaluation at the entrance of the assessed places does not represent *per se* an add value – in tourist terms – for the place, because it is still unknown and not perceived by the general public. The improvement of the tourist experience in terms of authenticity and meeting with the local population is an issue treated separately, in the next subsection.

6.2.4 About Cultural Heritage Quality Management and the promotion of intercultural dialogue through the encounter between tourists and the local community

Several evidences collected during the study have shown us that the capacity to promote the meeting between the local population and tourists is not considered by heritage managers as an aspect of quality within cultural heritage management. The empirical model summarized in the algorithm highlights the matter set out in the research question, that is, how much the quality takes into account the involvement of the population as well as the regular practice of using heritage as a starting point for intercultural dialogue between residents and tourists, on behalf of local population and the authenticity of the tourism offer.

Among the cases studied, just in one - the Museum of Mação (Portugal) – we could observe a clear awareness on the part of the director about this concern, which is regularly considered within the process of management. In other cases, however, we could observe some concern in this regard, such as in the case of the museums of the *Ruta Caesaraugusta* (Zaragoza, Spain) where managers told us about an attempt to create a group of volunteers who could interact with tourists starting by the presentation of the exposition in the museums. Anyway, in this case as well as in the others, we did not perceive this aspect as taken into account by the heritage managers as an indicator of quality of management.

With regard to the model proposed by HERITY, if on the one hand the representative admitted in interview that they do not take particularly into account this aspect and that they could do more in this sense, on the other hand, we were positively surprised by the fact that some of the questions in the HERITY evaluation questionnaire for the public are related exactly to the meeting with the locals during the visit. This aspect that we consider of great importance is maintained in our empirical model.

6.2.5 Empirical Model

After thorough discussion of the data, we come therefore, in this section, to the presentation of the empirical model derived from fieldwork oriented by the theoretical model formerly structured. The dimensions presented in this empirical model derived from the comparison of the empirical results with the theoretical model proposed: some of the dimensions previously defined are kept in the empirical model; others have been added based on the results of the research.

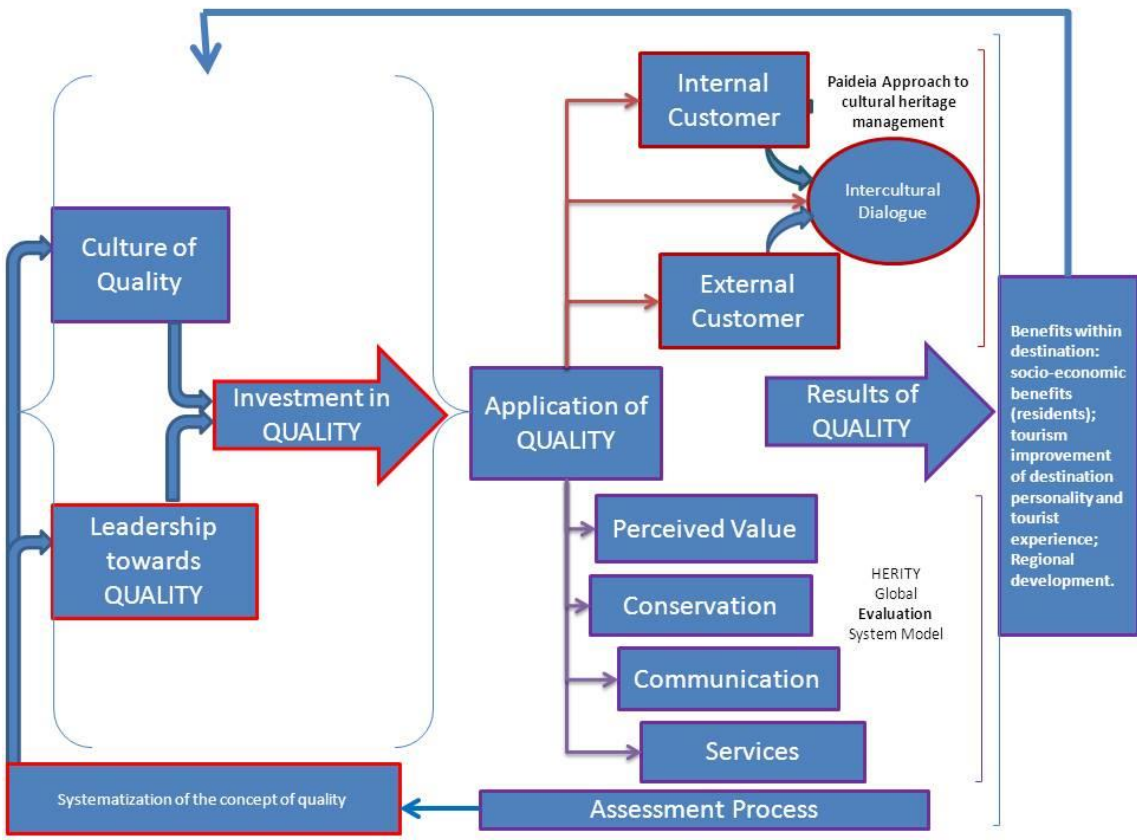

Figure 6.3: Algorithm of the empirical model of the study

The study of the process of implementation of quality within heritage management has revealed the existence of elements we had not considered in the creation of our theoretical model. The figure 6.3 presents an algorithm containing the dimensions related with the phenomenon investigated: the process of implementation of the principles of quality management to archaeological sites and its effect, with particular attention to the effect on the local community involvement and the encounter with tourists. The boxes bordered in purple represent pre-existing dimensions; boxes bordered in red represent the new elements emerged from the study.

As has been widely discussed in the previous subsections, first of all it is necessary to consider some pre-conditions which guarantee the efficiency of the process:

1. the culture of quality in the organisation and the environment in which it is inserted, and
2. the capacity of the leadership of the manager and his confidence in the process.

These are the preconditions that lead to the effective Investment of resources for the implementation of a quality system and, in the analyzed cases, its certification. At this point, the process takes into account: the four dimensions considered by HERITY (Relevance, Conservation, Communication and Services) and recognised by UNESCO. The findings of the empirical study allow us to affirm that the concept of quality should encompass also the efforts devoted to the involvement and satisfaction of the *internal customer*: the latter is represented by the local community, while the external customer is represented by the tourists. Doing so, the dimension of Communication is integrated by the concern about the recipients. At this point, once defined the degree of involvement of tourists and local population, the following dimension will be that of the meeting between the two agents (a process theorized in the "Paideia Approach to Heritage Management") as last dimension of Quality.

Since we have empirically demonstrated that the process of quality assessment, namely the HERITY GES, represents not only an assessment tool but also a vehicle for raising awareness among public and managers involved in the assessment process, the empirical model shows another new element, compared with the theoretical model: the role of the assessment process as vehicle of spreading the culture of quality among operators and general public. The certification process, as thought by HERITY, totally involves three key players:

1. the managers;
2. the public and
3. external specialists (called to do the external assessment).

The results and benefits of quality are directed to the managers and indirected to the visitors. In the empirical model, presented in a flowchart the output and outcome of quality lead to the begining of the figure, defining a self-perpetuating process where the matter of the involvement of the local population and that of the encounter between tourists and residents would be promoted as dimensions of Cultural Heritage Quality management as well as those of conservation, communication and services.

6.3 Quality Costs within Heritage Management

It has emerged, thus, the problem of the cost of quality: we have found a common trend for which there is a certain reticence, to varying degrees, in investments which have as their purpose the application of quality management within cultural heritage. We have therefore created a parallel between our study and those carried out since the 70s in the corporate environment by scholars such as Crosby (1979). The latter affirmed that, contrary to what the managers' thought, the *quality is free*, and in fact, the costs of non-quality are much higher than those of quality. The quality is therefore a strategic choice also. With regard to the quality applied to the management of cultural heritage, based on our empirical evidences we support the same statement: quality is free within heritage management.

As well as Crosby (1979) said referring to the business world, the same way we can affirm, based on the findings, that also in heritage management the costs of non-quality are higher than the costs of quality. Still, we add that the costs of non–quality in heritage management are not only economic, but also social. The example of the Museum of Roman Civilisation (Rome) is paradigmatic: the closure of this museum results in a significant economic loss (concerning the loss of ticket sales as well as the public investment needed to solve the structural problems), but also in a enormous loss in terms of social. For several years the museum will not be able indeed to fulfil its mission - that of dissemination of cultural contents - among the local public and tourists.

The issue of the cost of quality and the lack of investments towards Quality seems to be particularly critical especially in Italy. All respondents denounce that public policies are incompatible with the application of any systematic and programmatic process of improvement. According to them, due to the lack of public investments, it is untenable to speak of "quality" within heritage management as it is theoretically described. However it also must be said that, when compared to other European studied cases, Italian managers (museum directors and operators) demonstrate an implicit mistrust towards the instrument that can potentially represent the quality certification. In Portugal, for example, we found managers using the HERITAGE certification as a political and operational tool: the Director of the museum of Mação (Portugal) requested and obtained EU Structural Funds also by attaching the HERITY report to his application as additional argument.

Conclusion

In this chapter we explained any links and correlations apparent in our data by presenting, firstly, a further data analysis (cross-cases analysis) and then a discussion about our findings. The Section 6.1 contains the cross-cases analysis conducted coherently with the study of isolated cases exposed in the previous chapter. Each of the six sub-sections (Subsection 6.1.1 to 6.1.6) is one of the dimensions of the theoretical model, according to the structure used in the previous chapter. The comparative analysis of the case studies has resulted in further discoveries, including the identification of recurring attitudes among heritage managers, typified in subsection 6.1.2.

The evidences and findings emerged from the case studies and cross-cases analysis is finally discussed from several points of view from Section 6.2. An articulated answer to the research question is given by the responses to the specific questions related to it, by defining the perception of Heritage Quality Management by the operators (Subsection 6.2.1); comprehend the impact of the implementation of quality management systems on the level of self-awareness of the local population (Subsection 6.2.2); Understanding to what extent the quality management system for heritage sites (and its assessment) plays a role to boost the visitors' experience (Subsection 6.2.3) and finally defining to what extent the promotion of intercultural dialogue given by the encounter between tourists and the local community is perceived by heritage managers as a dimension Quality (Subsection 6.2.4).

In this chapter was also discussed our empirical model (subsection 6.2.5), that is, the model obtained by comparing and enriching our theoretical model with the empirical study. The empirical model is also exposed graphically as a flowchart, reflecting the relationship we have found with the real process of implementing quality within heritage management. Finally, Section 6.3 was dedicated to important considerations raised during the study and based on our findings, about Quality Costs within Heritage Management.

Conclusion

This research was born from an observation to examine the possibility of managing the archaeological heritage in way to produce socio-cultural and economic benefits to the local population and to represent the meeting point between local/hosting community and tourists, as a space of encounter and intercultural dialogue. In this sense, we decided to investigate the recent phenomenon of the implementation of Total Quality Management applied to the management of cultural heritage, in order to understand if these aspects were included among the principles of Quality in itself and the extent in which the implementation of quality systems contribute to these aims. A number of preliminary considerations were required in order to design this research: the multidisciplinary aspect of the work, the necessity of a holistic approach and the search for reference for the concept of Quality applied to the management of cultural heritage. From the point of view of the latter aspect, one have to consider that, while we can find hundreds of quality systems for museums and archaeological sites, they are all only promoted at the local or regional level, with standards and indicators always different. In this regard, the HERITY Global Evaluation system of certification of quality found to be the only system applied worldwide and recognised by UNESCO, and therefore the best solution to this problem.

Eventually, it was necessary to contextualize the research through an in-depth review of the literature that consists of three areas: archeology and archaeological heritage management (Chapter 1), tourism (Chapter 2) and quality (Chapter 3). These three areas have been fully assessed in order to reach to the theoretical formalisation of our research question. In Chapter 1, we defined meanings and values of cultural heritage (Section 1.1), bridging cultural heritage values with new paradigms of development (Subsection 1.1.2) that led us to the study of the concept of archaeological heritage management (Section 1.3). Chapter 3 has been dedicated to cultural heritage and archaeological tourism, by considering aspects such as cultural heritage within tourism planning and development (Subsection 2.1.1), cultural tourism (Section 2.2) and heritage and archaeological tourism (Sections 2.3 and 2.4). We focused particularly on the latter, by considering the management of archaeological heritage as a tourism resource (Subsection 2.4.1), the attractiveness of archaeology as a tourism resource (Subsection 2.4.2), the current trends (Subsections 2.4.3) and the matter of archaeological tourism within the contemporary society (Subsection 2.4.4). Finally we could consider heritage and tourism in a holistic way within the new paradigms of development (Section 2.5) as well as the role of the “destination’s ambassador” within destination’s branding and authenticity (Section 2.6).

Quality Management within cultural heritage has been addressed in Chapter 3. To address this concept, we first defined theories and models of quality management (Section 3.1), by analysing issues such as the evolution of the concept of quality (Subsection 3.1.1) and the conceptual shift from quality assurance to quality management (Subsection 3.1.2). At this point, we addressed the matter of quality management within cultural heritage (Serction 3.2), also by bridging tourism and cultural heritage in the perspective of Total Quality Management (Section 3.3). Finally, we referred to Cultural Heritage Quality Management, namely the recognition of quality management for cultural heritage: HERITY Global Evaluation System (HGES) (Section 3.4).

Having defined the theoretical framework through this extensive literature review, Chapter 4 was dedicated to a methodological debate, where we contextualised our research by addressing important matters such as the investigation of the social world during a "scientific revolution"(Section 4.1) and the concept of scientific revolution (Section 4.2). At this point we identified our problem (Section 4.3) and defined our theoretical contribution: some consideration about what we called Paideia Approach to cultural heritage management (Section 4.4), in which we basically bridge tourism and community development on the basis of heritage enhancement (Subsection 4.4.3). In the Section 4.5 we finally presented our Research Question and then we defined our Theoretical Model (Section 4.6). We finally addressed our Research Design, in Section 4.7.

Chapter 5 was dedicated to the empirical part of the investigation, namely to the “Data Analysis and Findings” and Chapter 6 to the Cross-cases analysis and discussions. The latter contains our main findings. At first, we established that the perception of the concept of quality heritage management on the part of heritage managers is comparable to the perception of quality that managers and worker of the industrial sector had in the 50s of the twentieth century. There is still no unanimity in the perception of the concept (and the need) of Quality, which is seen in some of the cases studied as unnecessary *surplus* of work. The idea of internal and external customers, for example, by some operators is completely abhorred, while by others is accepted but interpreted asymmetrically. Only in a few cases, the local population is considered as an internal customer. In adapting this concept - typical of the quality withing the manufacturing sector - to the quality in cultural heritage management, it is our opinion that the local communities should be considered as internal customers, since they are “owners” of the cultural heritage of the territory and involved agents within its management.

We also found a relation between the perception of Quality on the part of the managers and their academic backgrounds, personal experience and their sensitivity. This fact has implications on the effectiveness of the implementation of a culture of quality within the organisation and the application of a system of quality, also depending to the leadership ability of the main managers. From this point of view, we consider that one of the practical implications of our work is the empirical evidence of the necessity of altering the programmatic content of university courses on cultural heritage, which should aim also at the creation of unanimity among future archaeologists, museum professionals and operators of cultural heritage in general, towards the necessity of management and quality. The subdivision into typologies based on the perception of Quality of the main heritage managers involved into this study, represents on the other hand one of the theoretical implications of our study.

By assessing the quality of the archaeological heritage management through the HERITY GES, the visitor experience has unquestionable improvments with regard to the aspects of services and communications. On the other hand, it must be said that the level of involvement of the local community is a matter on which there is little investment and great disparity of views on the part of managers is needed, when it comes to the quality of the work of heritage management. We found that HERITY incorporates this aspect into the dimension of communication, and by doing so they have a little impact on the awareness of the organisation on this topic. From this point of view, our other finding was indeed the fact that in the cases studied, the certification process can influence - if you met the preconditions for this to happen, as shown in the empirical model - the creation of a culture of quality in both operators and in the public. One of the theoretical and practical implication and suggestion of our study is that, according to this finding, clearly the aspect of the involvement of the local population should become more esplicit into the model HERITY, so that it can result in a more incisive awareness of managers and the public.

On the contrary, the dimension of the encounter between the local population and tourists is almost entirely neglected, or not considered among the objectives of heritage management. Thus, comparing our theoretical model with the empirical one, we can confirm based on theoretical and empirical that it would be necessary to include the dimension of intercultural dialogue in the concept of quality. That is, to ally the Paideia Approach to Heritage Management to the HERITY GES Model.

And so we answer to our research question: according to the study, and with reference to case studies. We can say now that the application of the quality system - in the considered case, HERITY GES - has a great influence on the improvement of the cultural offer from the point of views explicitily considered by the HERITY system, that is preservation of sites, capacity of communication and services provided to visitors. The role of HERITY is essential from the point of view of raising awareness of heritage managers about these issues. The method of HERITY GES involves all the agents and stakeholders, representing a good example of capacity of listening to citizen, politicians, managers, visitors and syntetizing their perception in a useful framework. However, no specific improvement at the level of local population involvement and promotion of intercultural dialogue were registered. This particular matter appears as something that is dependent on the sensitivity and vision of managers only. In particular, the general perception of quality does not take into account the dimension of the promotion of intercultural dialogue and encounter between residents and tourists.

Managers should promote greater public understanding of the archaeological heritage, as well as a fuller public appreciation of the importance of archaeology, also through campaigns for the social perception of museums as guardians of a vital part of the cultural identity and cultural heritage, through the conservation and interpretation of all archaeological material. But this function should be dynamic, and consider these places as meeting point for local communities and even for the promotion of intercultural dialogue, representing a potential meeting point between hosting population and tourists. Quality heritage management can actually represent a point of reference and inspiration for the heritage workers and managers and a great responsibility, that is: while there are those who are working to send tourists into Space, we should work to bring them back to Earth, rediscover our roots, understand and appreciate diversities, and together build a better world.

References

Abdallah-Pretceille, M. (2003). *Former et éduquer en contexte hétérogène. Pour un humanisme du divers*. Paris: Anthropos.

Abdallah-Pretceille, M. (2006). Interculturalism as a paradigm for thinking about diversity. *Intercultural Education, 17*(5), 475-483.

Abouaf, J. (1999). The Florentine Pietá. Can visualization solve a 450 years old mistery? *IEEE COMPUTER GRAPHICS AND APPLICATIONS*(Jan/Fev), 6-10.

Agnew, N. M., & Pyke, S. W. (1969). *The science game: an introduction to research in behavioral sciences*. Eglewood Cliffs, NJ: Prentice-Hall.

Aldenderfer, M. S., & Maschner, H. D. G. (1996). *Anthropology, Space, and Geographic Information Systems*. New York: Oxford University Press.

Almeida, J., & Pinto, J. (1995). *A investigação nas ciências sociais* (5 ed.). Lisboa: Editorial Presença.

Amado Mendes, J. (2009). *Estudos do Património. Museus e Educação.* Coimbra, Portugal: Universidade de Coimbra.

Amores Carredano, F., González Acuña, D., & Jiménez Sancho, Á. (2004). *La musealización de los restos arqueológicos de la encarnación y la emergencia de un nuevo escenario patrimonial en la ciudad de Sevilla.* Paper presented at the III Congreso de Musealización de Yacimientos Arqueológicos, Zaragoza.

Angela, A. (2007). *Una Giornata nell'Antica Roma. Vita Quotidiana, Segreti, Curiositá.* Milan (Italy): Mondadori.

Appadurai, A. (2002). Cultural Diversity: a conceptual platform. In K. Stenou (Ed.), *UNESCO Universal Declaration on Cultural Diversity* (pp. 9-16). Paris: UNESCO Publishing.

Archaeological-Institute-of-America. (2008). A Guide to Best Practices for Archaeological Tourism. *Archaeology*. Retrieved from www.archaeology.org/online/features/guidelines/

Archer, C. (2001). *International Organizations*: Routledge.

Arecchi, F. T. (2004). *Caos e complessità nel vivente*. Pavia: IUSS Press.

Ashworth, G. J. (1994). From History to Heritage - From History to Identity. In G. J. Ashworth & P. J. Larkham (Eds.), *Building a new heritage, tourism, culture and identity in the new Europe* (pp. 1-29). London: Routledge.

Ashworth, G. J. (1995). Managing The Cultural Tourism. In G. J. Ashworth & A. Dietvorst (Eds.), *Tourism and Spacial Transformation-Implications for Policy and Planning, Cab International*. UK.

Ashworth, G. J., & Tunbridge, J., E. (1996). *Dissonant Heritage: The Management of Past as a Resourch in Conflict*. Chichester, UK: John Wiley & Sons.

Ashworth, G. J., & Tunbridge, J., E. (2000). *The Tourist-Historic City: Retrospect and Prospect of Managing the Heritage City.* UK: PERGAMON-Elsevier Science.

Atkinson, P. (1995). *Medical talk and medical work*. London: Sage.

Audrerie, D. (2003). *Questions sur le Patrimoine*. Bourdeaux: Confluences.

Augé, M. (2004). *Oblivion*. Minneapolis and New York: University of Minneapolis Press.

Ausburg, T. (2006). *Becoming Interdisciplinary: An Introduction to Interdisciplinary Studies* (2nd ed.). New York: Kendall/Hunt Publishing.

Bahn, P. G. (2002). *Arqueologia*. Singapura: Weldon Owen Pty Limited.

Bambara, E. (2000). *Alle radici della Transdisciplinarità. Edgar Morin e Basarab Nicolescu.* PhD Thesis, University of Messina.

Bastos, R. L. (2007). *Preservação, arqueologia e representações sociais: uma proposta de arqueologia social para o Brasil*. Erechim (Brasil): Habilis.

Bauman, Z. (2000). *Liquid Modernity*. Cambridge: Polity Press.

Bauman, Z. (2001). *Community: Seeking Safety in an Insecure World*. Cambridge: Polity Press.

Becker, H. (1963). *Outsiders. Studies in the Sociology of Deviance*. Glencoe: Free Press.
Beeton, S. (2005). The Case Study In Tourism Research: A Multi-Method Case Study Approach. In B. Ritchie, P. Burns & C. Palmer (Eds.), *Tourism Research Methods: Integrating Theory and Practice.* (pp. 37-48). UK: CAB International.
Bell, P. M. H. (2007). *The Origins of the Second World War in Europe*: Pearson Education Limited.
Binford, L. (1962). Archaeology as Anthropology. *American Antiquity, 28*(4), 217-225.
Binford, L. R. (1992). Seeing the Present and Interpreting the Past - and keeping things straight. In J.Rossignol & L. Wandsnider (Eds.), *Space, Time and Archaeological Landscape* (pp. 43-59). New York: Plenum Press.
Binkhorst, E. (2008). Turismo de co-creación, valor añadido en escenarios turísticos. *ARA - Journal of Tourist Research, I*(1), 40-51.
Binkhorst, E., & Dekker, T. D. (2009). Agenda for Co-Creation Tourism Experience Research. *Journal of Hospitality Marketing & Management, 18*(2), 311-327.
Binks, G., Dyke, J., & Dagnall, P. (1988). *Visitors Welcome. A Manual on the Presentation and Interpretation of Archaeological Excavation*. London, UK.: Centre for Environmental Interpretation, Manchester Polytechnic.
Bizarro, R. (2007). *Eu e o Outro. Estudos multidisciplinares sobre identidade(s), diversidade(s) e práticas interculturais*. Porto-Lisbon: Areal.
Blackshaw, T. (2010). *Key Concepts in Community Studies*. London: SAGE.
Bleicher, K. (2011). *Das Konzept Integriertes Management: Visionen - Missionen - Programme* (8th ed.). Frankfurt am Main: Campus Verlag.
Blumer, H. (1969). *Symbolic interactionism. Perspective and method*. Englewood Cliffs: Prentice-Hall.
Bogdan, R. C., & Biklen, S. K. (1982). *Qualitative research for education: An introduction to theory and methods*. Boston: Allyn and Bacon.
Boniface, B. G., & Cooper, C. (2009). *Worldwide Destinations: The Geography of Travel and Tourism.* (9th ed.). UK: Elsevier.
Boniface, P. (1995). *Managing Quality Cultural Tourism*. London, UK.: Routledge.
Boniface, P., & Fowler, P. J. (1993). *Heritage and Tourism in the "Global Village"*. London, UK.: Routledge.
Bonink, C. (1992). *Cultural Tourism Development and Government Policy.* MA Dissertation, Rijksuniversiteit, Utrecht.
Bontis, N. (2005). National intellectual capital index: the benchmarking of Arab countries. In B. Ahmed & E. Leif (Eds.), *Intellectual capital for communities* (pp. 113-138). Oxford, UK: Elsevier.
Boorstin, D. J. (1983). *The Discoverers*. New York: Random House.
Bosio, L. (1983). *La Tabula Peuntigeriana*. Rimini (Italy).
Bounfour, A. (2005). Modelling Intangibles: transaction regimes versus community regimes. In B. Ahmed & L. Edvinsson (Eds.), *Intellectual capital for ommunities* (pp. 3-18). Oxford, UK: Elsevier.
Bounfour, A., & Edvinsson, L. (2005). *Intellectual Capital for Communities. Nations, Regions and Cities*. USA: Elsevier Butterworth-Heinemann.
Bowitz, E., & Ibenholt, K. (2009). Economic impacts of cultural heritage e Research and perspectives. *Journal of Cultural Heritage, 10*, 1-8.
Brito, M., & Silva, C. (2005). Turismo e Planeamento: a Continuidade ou a Autodestruição. *RT&D - Journal of Tourism and Development, 2*(2), 11-24.
Bruner, E. M. (2004). *Culture on Tour: Ethnographies of Travel*. Chicago: The University of Chicago Press.
Bryman, A. (2008). *Social Research Methods* (3th ed.). Oxford: Oxford University Press.
Buhalis, D., & Peters, M. (2006). SMEs in Tourism. In D. Buhalis & C. Costa (Eds.), *Tourism Management Dynamics-Trends, Management and Tools.* (pp. 116-130). UK: Elsevier.

Bursztyn, M. (2001). *Ciência, Ética e Sustentabilidade. Desafios ao Novo Século* (2nd ed.). São Paulo: Cortez.
Butzer, K. (1982). *Archaeology as Human Ecology. Method and Theory for a Contextual Approach*. Cambridge.
Calderón Perez, E., & Casas Novas, L. (2009). Costes de calidad y de no calidad: delimitacion de conceptos y reflexiones en cuanto al papel de la contabilidad de gestión. In M. Saraiva & A. Teixera (Eds.), *A Qualidade numa Perspectiva Multi e Interdisciplinar* (pp. 148-167). Lisbon: Silabo Edições.
Calegari, G. (2004). *Cronaca di un processo di archelogizzazione (con un occhio ambiguo di un contemporaneo urbanizzato.* Paper presented at the Convegno Nazionale di Etnoarcheologia, Rimini.
Canestrini, D. (2001). *Trofei di viaggio. Per un'Antropologia dei Souvenir*. Turin (Italy): Bollati Boringhieri.
Carandini, A. (1981). *Storie dalla terra. Manuale di scavo archeologico*. Bari (Italy): Einaudi.
Carandini, A. (1985). Relazione di uno scavo per ora inesistente. *Restauro e Cittá, I*(2), 79-88.
Carandini, A. (1999). Gli architetti e parchi archeologici a Roma. *Groma. Giornale di Architettura, 4*, 20-21.
Carandini, A. (2000). *Giornale di Scavo. Pensieri sparsi di un archeologo*. Torino (Italy): Einaudi.
Carbone, F. (2011a). *A New Approach in Management of Heritage for Tourism Development: the Paideia Approach.* Paper presented at the International Conference On Tourism & Management Studies, Portugal.
Carbone, F. (2011b). Turismo, Arqueologia e Desenvolvimento. Gestão de Áreas Arqueológicas com Fins Turísticos. O caso de Conimbriga. *RT&D - Journal of Tourism and Development, 15*, 103-115.
Carbone, F., Oosterbeek, L., & Costa, C. (2012). Paideia approach: bridging tourism and community development on the basis of heritage enhancement. *RT&D - Journal of Tourism and Development, 17/18*, 165-166.
Cardano, M. (1997). La ricerca etnografica. In L. Ricolfi (Ed.), *La ricerca qualitativa*. Roma: La nuova Italia scientifica.
Carocci, S. (1993). *Baroni di Roma*. Roma.
Castglione, L., & Mariotti, S. (Eds.). (1990) Vocabolario della Língua Latina. Torino (Italy): Loescher.
Cazzullo, A. (2013). Renzo Piano: "Da laico seguo il gesto del Papa. La pace é come una cittá", *Corriere della Sera*.
Cellini, R. (2011). Is UNESCO recognition effective in fostering tourism? A comment on Yang, Lin and Han. *Tourism Management, 32*(2), 452-454.
Cellini, R., Cuccia, T., & Reale, A. (2003). *Patrimonio culturale e turismo: un'analisi empirica su Siracura*. Paper presented at the XV Conferenza SIEP - Societá Italiana di Economia Pubblica, "DIRITTI, REGOLE, MERCATO. Economia pubblica ed analisi economica del diritto", Pavia.
Cerro, F. L. (1993). *Tecnicas de Evaluacion del Potencial Turistico.* Madrid: Ministério De Indutria, Comercio y Turismo.
Clifford, J. (1987). Of Other Peoples: Beyond the Salvage Paradigm. In H. Foster (Ed.), *Discussions in Contemporary Culture*. Seattle: Bay Press.
Coffey, A., & Atkinson, P. (1996). *Making Sense of Qualitative Data. Complementary Research Strategies*. USA: Sage.
Cohen, E. (1993). The study of touristic images of native people. Mitigating the stereotype of a stereotype. In D. G. Pearce & R. W. Butler (Eds.), *Tourism research* (pp. 36-69). London/New York: Routledge.
Cole, S. (2006). Information and empowerment: The keys to achieving sustainable tourism. *Journal of Sustainable Tourism, 14*(6), 629-644.

Collis, J., & Hussey, R. (2009). *Business Research. A Practical Guide to undergraduate and postgraduate students* (3rd ed.). UK: Palgrave Macmillan.
Conti, T. (1998). *Turismo e beni culturali nella prospettiva del Total Quality Management (TQM).* Paper presented at the 3rd International Meeting on Cultural Heritage Management, "Turismo e Beni Culturali e Ambientali", Cagliari (Italy).
Cook, R. A., Yale, L. J., & Marqua, J. J. (2010). *Tourism. The business of travel* (4th ed.). New Jersey: Prentice Hall.
Cooper, C., Fletcher, J., Gilbert, D., Sheperd, R., & Wanhill, S. (1998). *Tourism: Principles and Practice.* London, UK: Longman.
Corbetta, P. (1999). *Metodologie e Tecniche della Ricerca Sociale*. Bologna: Mulino.
Corbetta, P. (2003). *La ricerca sociale: metodologia e tecniche. Le tecniche qualitative*. Bologna: Mulino.
Costa, C. (1996). *Towards the improvement of the efficiency and effectiveness of tourism planning and development at the regional level: planning, organizations and networks.* University of Surrey, Surrey, UK.
Costa, N. (2005). *La cittá dell'iperturismo*. Milano (Italy): Cuesp.
Council-of-Europe. (1992). European Convention on the Protection of the Archaeological Heritage (Revised). Valletta.
Council-of-Europe. (2005). Framework Convention on the Value of Cultural Heritage for Society *Council of Europe Treaty Series* (Vol. 199). Faro.
Council of Europe. (2009). *Heritage and beyond*. Paris: Council of Europe.
Creswell, J. W. (2014). *Research design: quantitative, qualitative and mixed methods aproach* (4th ed.). UK: Sage.
Crosby, P. (1979). *Quality is free*. New York: New American Library.
Cuccia, T., & Cellini, R. (2007). Is Cultural Heritage Really Important for Tourists? A Contingent Rating Study. *Applied Economics, 39*, 261-271.
Cupeto, C. A. (2003). A sustentabilidade da actividade turística. *Semanário Económico*.
D'Amato, C., Di Tanna, A., & Liberati, A. M. (2008). *Museo della Civiltà Romana*. Milano: Electa.
D'amore, L. (1988a). Tourism-the world's peace industry. *Annals of Tourism Research, 15*(2), 1-8.
D'Amore, L. (1988b). Tourism - The World's Peace Industry. *Journal of Travel Research, XXVII*(1), 35-40.
Dallen, T. J. (1996). Tourism and the Personal Heritage Experience, . *Research Notes and Reports*, 751-754.
Damasio, A. (1994). *Descartes' Error: Emotion, Reason, and the Human Brain*. New York: Putnam.
de Boüard, A. (1911). Gli antichi marmi di Roma nel medioevo. *Archivio Societá Romana Storia Patria, 34*, 239-245.
De Groot, J. (2009). *Consuming History: Historians and Heritage in Contemporary Popular Culture*. USA & Canada: Routledge.
Debachere, M. C. (1995). Problems in obtaining grey literature. *IFLA Journal, 21*(2), 94-98.
Dennett, D. (1997). *L'idea pericolosa di Darwin*. Torino: Bollati Boringhieri.
Dolff-Bonekämper, G. (2009). The social and spatial frameworks of heritage - What is new in the Faro Convention? In C. o. Europe (Ed.), *Heritage and Beyond* (pp. 69-74). Paris: Publishing Editions.
Domingues, C. M. (1997). *Prontuário Turístico* (2nd ed.). Lisboa: Instituto Nacional de Formação Turística.
Dossey, L. (1999). *Reinventing Medicine: Beyond Mind-Body to a New Era of Healing*. SanFrancisco: Harper.
Drucker, P. F. (2001). *The Essential Drucker.* New York: HarperCollins.
Drummond, S., & Yeoman, I. (2001). *Quality Issues in Heritage Visitor Attractions*. Oxford: Butterworth-Heinemann.

Durkheim, É. (1895). *Les régles de la méthode sogiologique*. Paris: Alcan.
EFQM. (1999-2003). *Introdução à Excelência*. Brussels: EFQM.
Ekinci, Y., & Hosany, S. (2006). Destination Personality: An Application of Brand Personality to Tourism Destinations. *Journal of Travel Research, 45*, 127-139.
Emiliani, A. (1978). *Leggi, bandi e provvedimenti per la tutela dei beni artistici e culturali negli antichi stati italiani 1571-1860*. Bologna (Italy): Alfa.
Enei, F. (2011). *Il Museo del Mare e della Navigazione Antica. Scienza, educazione e ricerca sul mare e per il mare*. Roma: Historia.
European-Commission. (2000a). *Towards Quality Urban Tourism. Integrated quality management (IQM) of urban tourist destinations*. Italy: European Communities.
European-Commission. (2000b). *Towards quality urban tourism. Integrated quality management (IQM) of urban tourist destinations.* Luxemburg: European Communities. Office for Official Publications of the European Communities.
European-Commission. (2002). *Sustainable tourism based on natural and cultural heritage*. Bruxelles: Enterprise-Directorate General.
Fazzio, F. (2005). *Gli spazi dell'archeologia. Temi per il progetto urbanistico*. Roma: Officina Edizioni.
Feigenbaum, A. V. (1945). *Quality control: principles, practice and administration; an industrial management tool for improving product quality and design and for reducing operating costs and losses*. New York: McGraw-Hill.
Feigenbaum, A. V. (1961). *Total Quality Control*. New York: McGraw-Hill.
Ferreira, A. M. (2003). *O Turismo como Propiciador da Sustentabilidade dos Centros Históricos Urbanos. O Caso Algarvio.* PhD, University of Aveiro, Aveiro.
Figueiredo, C. (2012). O desenho e a ilustração na arqueologia. *Portugal Romano.com. Revista de Arqueologia Romana, 1*(1), 74-80.
The First World War. Look back in angst. (December 2013 - January 2014). *The Economist:* 13.
Fladmark, J. M. (1994). *Cultural Tourism: Papers Presented at the Robert Gordon University Heritage Convention*.
Flannery, K. V. (1967). Culture History v. Culture Process: A Debate in American archaeology. *Scientific American, 217*(2), 119-122.
Ford, J. (1975). *Paradigms and Fair Tales: An Introduction to the Science of Meanings* (Vol. I). London: Routledge.
Fortin, M.-F. (1999). *O processo de investigação*. Loures: Lusociência.
Friedman, N. L. (1990). Autobiographical Sociology. *The American Sociologist, 21*(1), 60-66.
Gans, H. (1962). *The urban villagers*. New York: Free Press.
García, J. A., Brea, J. A. F., & Rama, M. (2012). Grado de la utilización de las herramientas de la calidad en el sector de alojamiento turistico español. *Pasos - Journal of Tourism and Cultural Heritage, 10*(5), 495-510.
García, S., Castells Vela, R., & Erice Lacabe, R. (2007). La ruta de "Caesaraugusta": un itinerario por la ciudad romana de Zaragoza. *Mus-A: Revista de los museos de Andalucía*(8), 117-120.
GEATTE. (1993). *Le Tourism Culturel en Europe*. Bruxelles: Commission des Communautés européennes.
Giannichedda, E. (2005). Il valore dell'evidenza. *Archeo, XXI*(239), 106-109.
Gladfelter, B. G. (1977). Geoarchaeology: The Geomorphologist and Archaeology. *American Antiquity, 42*(4), 519-538.
Glaser, B. G., & Strauss, A. L. (1967). *The discovery of Grounded Theory: strategies of qualitative research*. New York: Aldine.
Glaser, M., Krause, G., Ratter, B., & Welp, M. (2008). Human/Nature Interaction in the Anthropocene. Potential of Social-Ecological Systems Analysis. *GAIA, 17*(1), 77-80.

Go, F. M., & Govers, R. (2000). Integrated quality management for tourist destinations: a European perspective on achieving competitiveness. *Tourism Management, 21*(1), 79-88.
Goffman, E. (1959). *The presentation of Self in everyday life*. New York: Doubleday.
Gomes de Moraes, A. (2006). Competitividade e Sustentabilidade: é possível as cidades turísticas serem sustentáveis e competitivas ao mesmo tempo? *Pasos, Revista de Turismo y Patrimonio Cultural, 4*(3), 443-446.
Gonçalves, A. (2012). Museus, Turismo e Território: como podem os equipamentos culturais tornar-se importantes atrações turisticas regionais? In I. Brasão, C. Malheiros & F. Dias (Eds.), *Imagem, Património e Sustentabilidade dos Destinos Turísticos* (pp. 43-94). Oporto: MediaXXI.
Gouldner, A. W. (1954). *Patterns of ndustrial burocracy*. New York: Free Press.
Greenwood, D. J. (1977). Culture by the Pound: An Anthropological Perspective Tourism as Cultural Commodization. In V. L. Smith (Ed.), *Host and Guest* (2nd ed., pp. 22-36). Philadelphia: University of Pennsylvania Press.
Greffe, X. (2009). Heritage conservation as a driving force for development. In C. o. Europe (Ed.), *Heritage and Beyond* (pp. 101-112). Paris: Publishing Editions.
Guba, E. G. (1990). *The paradigm dialog*. Newbury Park, CA: Sage.
Guba, E. G., & Lincoln, Y. S. (1994). Competing paradigms in qualitative research. In N. K. Denzin & Y. S. Lincoln (Eds.), *Handbook of qualitative research* (pp. 105-117). Thousand Oaks, CA: Sage.
Guba, E. G., & Lincoln, Y. S. (1994). Competing paradigms in qualitative research. In Denzin & Lincoln (Eds.), *Handbook of Qualitative Research*. Thousand Oaks: Sage.
Guidi, F. (2011). *Il mestiere delle armi. Le forze armate dell'antica Roma.* Milan: Mondadori.
Gunn, C. A. (1988). *Vacationscape: Designing Tourist Regions* (2nd ed.). New York: Van Nostrand Reinhold.
Gunn, C. A. (1994). *Tourism Planning: Basic, Concepts, Cases* (3rd ed.). Washington D.C.: Taylor and Francis.
Gunn, G. (1992). Interdisciplinary Studies. In J. Gibaldi (Ed.), *Introduction to Scholarship in Modern Language and Literatures* (pp. 239-240). New York: Modern Language Association.
Guzzo, P. G. (1993). *Antico e archeologia. Scienza e politica delle diverse antichità.* . Bologna (Italy): Nuova Alfa Editoriale.
Hall, G. (1976). Workshop as a "Ballerina": an excercise in professional socialization. *Urban life and culture, 6*, 193-220.
Hammersely, M., & Atkinson, P. (1983). *Ethnography: principles and practice*. London: Tavistock.
Hardesty, D. L. (2008). GOALS OF ARCHAEOLOGY, OVERVIEW. In M. P. Editor-in-Chief: Deborah (Ed.), *Encyclopedia of Archaeology* (pp. 1414-1416). New York: Academic Press.
Harrell, M. C., & Bradley, M. A. (2009). *Data Collection Methods. Semi-structured Interviews and Focus Group*. U.S.: RAND.
Henriques, C. (2003). *Turismo Cidade e Cultura - Planeamento e Gestão Sustentável*. Lisbon: Sílabo.
Herbert, D. T. (1995). *Heritage, Tourism and Society*. London: Pinter.
HERITY. (2007). *Guida Alla Valutazione HERITY (Rev. 12/08/2007)*. HERITY. Roma (Italy).
HERITY. (2009). HERITY Official Brochure. Rome: Enotria Onlus.
Hernández, J., & Tresseras, J. (2001). *Gestion del patrimonio cultural*. Barcelona: Ariel Turismo.
Hicks, D. (2010). The Material-Cultural Turn: event and effect. In D. Hicks & M. C. Beaudry (Eds.), *The Oxford Handbook of Material Culture Studies* (pp. 25-98). Oxford: Oxford University Press.
Hill, M. M., & Hill, A. (2009). *Investigação por Questionário* (2 ed.). Lisboa: Silabo.

Hirschman, E. C. (1986). Humanistic inquiry in marketing research: philosophy, method, and criteria. *Journal of Marketing Research, 23*, 237-249.
Horner, S., & Swarbrooke, J. (1996). *Marketing Tourism and Hospitality and Leisure in Europe*. Oxford: Thomson Business Press.
Hudson, S., & Ritchie, J. R. B. (2009). Branding a Memorable Destination Experience. The Case of 'Brand Canada'. *International Journal of Tourism Research, 11*, 217-228.
Huges, J. A. (1980). *The philosophy of social research*. New York: Longman.
Hughes, H. L. (1996). Redefining Cultural Tourism. *Annals of Tourism Research, 23*(3), 707-709.
ICOM. (2007). ICOM Statutes: ICOM.
ICOMOS. (1964). International Charter For The Conservation And Restoration Of Monuments And Sites. Venice.
ICOMOS. (1981). Historic Gardens (Florence Charter). Florence.
ICOMOS. (1987). Charter for Conservation of Historic Towns and Urban Areas (Washington Charter). Washington, DC.
ICOMOS. (1990). Charter For The Protection And Management Of The Archaeological Heritage. Lausanne.
ICOMOS. (1999). International Cultural Tourism Charter. Managing Tourism at Places of Heritage Significance. Mexico.
ICOMOS. (2008). Charter for the Interpretation and Presentation of Cultural Heritage Sites. Québec (Canada).
Imai, M. (1986). *Kaizen: The Key to Japan's Competitive Success*. New York: Random House.
Inskeep, E. (1991). *Tourism planning: an integrated and sustainable development approach*. New York: Van Nostrand Reinhold.
Inskeep, E. (1994). *National and regional tourism planning*. London: Routledge.
Jaeger, W. W. (1995). *Paideia, A Formação do Homem Grego* (3rd ed.). São Paulo: Martins Fontes.
Jager, K. (2009, 6-9 Sep., 2009). *Co-Creation As A Strategic Element Of Tourism Destination Competitiveness.* Paper presented at the 3rd Advances in Tourism Marketing Conference, Bourmouth, UK.
Jennings, G. (2010). *Tourism Research* (2nd ed.). Milton: Wiley.
Jennings, G. (2012). Methodologies and Methods. In T. Jamal & M. Robinson (Eds.), *Sage Handbook of Tourism Studies* (pp. 672-693).
Johns, N. (1999). Quality. In A. Leask & I. Yeoman (Eds.), *Heritage Visitor Attractions: An Operations Management Perspective.* (pp. 127-143). UK: Cassell.
Johnson, R. B., & Onwuegbuzie, A. J. (2004). Mixed Methods Research: A Research Paradigm Whose Time Has Come. *Educational Researcher, 33*(7), 14-26.
Jorgensen, D. L. (1989). *Participant observation*. Newbury Park: Sage.
Julesz, B. (1991). Early vision and focal attention. *Reviews of modern physics, 63*, 735-772.
Juran, J. M. (1951). *Juran's Quality Handbook*. New York, NY: McGraw-Hill.
Juran, J. M. (1988). *Juran's Quality Handbook* (Fourth ed.). New York, NY: McGraw-Hill.
Juran, J. M. (1999). *Juran's Quality Handbook* (Fifth ed.). New York, NY: McGraw-Hill.
Karlsson, L., & Martinez, P. (2005). The region's competence and human capital: lessons from the collaboration between three european regions on competence mapping and intellectual capital management. In B. Ahmed & E. Leif (Eds.), *Intellectual capital for communities* (pp. 275-295). Oxford, UK: Elsevier.
Kawamura, N. (2000). *Turbulence in the Pacific: Japanese-U.S. Relations During World War I*: Praeger.
Keitumetse, S. (2009). Methods for investigating locals' perceptions of a cultural heritage product for tourism: lessons from Botswana. In M. L. S. Sorensen & J. Carman (Eds.), *Heritage Studies. Methods and Approaches* (pp. 201-216). New York and Canada: Routledge.

Kenneth, R. H. (2005). *Project Quality Management: Why, What and How*. Florida: J. Ross Publishing.

Kirshenblatt-Gimblett, B. (1998). *Destination Culture: Tourism, Museums, and Heritage*. USA: University of California Press.

Klein, J. T. (1990). *Interdisciplinarity: History, Theory, and Practice*. Detroit: Wayne State University.

Kötting, B. (1950). *Peregrinatio Religiosa. Wallfahrten in der Antike und das Pilgerwesen in der alten Kirche.* Münster: Regensberg.

Kretzmann, J., & McKnight, J. (1993). *Building Communities from the Inside Out: A Path Toward Finding and Mobilizing a Community's Assets*. Chicago: ACTA Publications.

Kuhn, T. S. (1970). *The Structure of Scientific Revolutions* USA: University Of Chicago Press.

Lanciani, A. R. (1971). *La distruzione di Roma antica*. Milano, Italy: Edizioni del Borghese.

Lanfant, M. F. (1980). Tourism in the Process of Internationalization. *International Social Sciences Journal, 17*(1), 14-43.

Lanfant, M. F., Allcock, J. B., & Bruner, E. M. (1995). *International Tourism: Identity and Change*. London: Sage.

Lash, S., & Urry, J. (1994). *Economies of Signs and Space*. London, UK: SAGE.

Laursen, B. (2008). What makes Rome: ROME? A curious traveller's multisensory analysis of complex Roman experiences'. In J. Sundbo & P. Darmer (Eds.), *Creating Experiences in the Experience Economy* (pp. 60-81). UK and USA: Edward Elgar.

Laws, E. (2001). Chapter 5 - The analysis of quality for heritage site visitors. In D. Siobhan & Y. Ian (Eds.), *Quality Issues in Heritage Visitor Attractions* (pp. 61-77). Oxford: Butterworth-Heinemann.

Layder, D. (1993). *New Strategies in Social Research*. Cambridge: Polity Press.

Lazarsfeld, P. F., & Rosenberg, M. (1955). *The language of social research*. New York: Free Press.

Leask, A., & Yeoman, I. (1999). *Heritage Visitor Attractions: An Operations Management Perspective*. UK: Cassell.

Leiper, N. (1990). Tourist attraction systems. *Annals of Tourism Research, 17*, 367-384.

Leonardi, F. (1991). Contro l'anali qualitativa. *Sociologia e ricerca sociale, 35*, 3-29.

Levy, R. M. (2001). *Temple Site at Phimai: Modelling for the Scholar and the Tourist.* Paper presented at the Seventh International Conference on Virtual Systems and Multimedia (VSMM'01), Berkeley, Ca, US.

Lew, A. A. (1994). A Framework of Tourist Attraction Research. In B. Ritchie, J.R. and Charles R. Goeldner (Ed.), *Travel, Tourism, and Hospitality Research: A Handbook for Managers and Researchers* (pp. 291-304). New York: John Wiley & Sons.

Licata, I. (2011). *Complessitá. Un'introduzione semplice*. Palermo: Duepunti.

Lima, S., & Partidário, M. d. R. (2002). *Novos Turistas e a Procura da Sustentabilidade. Um Novo Segmento do Mercado Turístico*. Lisbon: GEPE - Gabinete de Estudos e Prospectiva Económica do Ministério da Economia.

Lincoln, Y., & Guba, E. (1985). *Naturalist Inquiry*. Newbury Park: Sage.

Lindblom, I. (2011). Quality of Cultural Heritage in EIA; twenty years of experience in Norway. *Environmental Impact Assessment Review, 34*(0), 51-57.

Lipovetsky, G., & Charles, S. (2004). *Le Temps Hypermodernes*. Paris: Editions Grasset.

Lloyd, S. (2006). *Il programma dell'universo*. Torino: Einaudi.

Lopes, F. (2000). O programa de incremento do turismo cultural. Dos novos conceitos e motivações sobre o património cultural à criação de produtos turísticos de qualidade. *CEAA - Centro de Estudos de Antropologia Aplicada*. Retrieved from http://ceaa.ufp.pt/turismo5.htm

Lumsdon, L. (1997). *Tourism marketing*. London, UK: International Thomson Business Press.

Lundberg, D. E. (1985). *The Tourism Business* (5th ed.). New Yor: Van Nostrand, Reinhold.

MacCannell, D. (1976). *The Tourist: A New Theory of the Leisure Class*. New York: Schocken Books.
Malek, A., & Costa, C. (2014). Integrating Communities into Tourism Planning Through Social Innovation. *Tourism Planning & Development*, 1-19.
Manacorda, D. (2004). *Prima lezione di archeologia*. Bari: Laterza.
Manacorda, D. (2007). *Il sito archeologico: fra ricerca e valorizzazione*. Roma: Carocci.
Marnetto, G. (2009). HERITY e l'UNESCO: riconoscere la qualitá del "valore eccezionale". *SITI. Trimestrale di attualitá e politica culturale, 2,* 52-55.
Marshall, C., & Rossman, G. B. (2011). *Designing qualitative research* (5th ed.). Thousan Oaks, CA: Sage.
Mason, J. (1996). *Qualitative Research*. London: Sage.
Mason, P. (2003). *Tourism Impacts, Planning and Management*. Oxford: Butterworth-Heinemann.
Mathie, A., & Cunningham, G. (2005). Who is Driving Development? Reflections on the Transformative Potential of Asset-based Community Development. *Canadian Journal Of Development Studies, XXVI*(1).
McIntosh, R. W., Goeldner, C. R., & Ritchie, J. R. B. (1995). *Tourism Principle, Practice and Philosophies*. New York: Wiley.
McKercher, B., & du Cross, H. (2002). *Cultural tourism: the partnership between tourism and cultural heritage management.* Binghamton, New York: The Haworth Hospitality Press.
McRae, M. W. (1993). *The Literature of Science: Perspectives on Popular Scientific Writing*. Athens: The University of Georgia Press.
Melotti, M. (2008). *Turismo Archeologico*. Milano: Mondadori.
Merriam, S. B. (1998). *Qualitative research and case study applications in educatin*. San Francisco: Jossey-Bass.
Miller, D., & Tilley, C. (1984). Ideology, Power and Prehistory: An Introduction. In D. Miller & C. Tilley (Eds.), *Ideology, Power, and Prehistory* (pp. 1-15). Cambridge: Cambridge University Press.
Miller, G., & Twining-Ward, L. (2005). *Monitoring for a sustainable tourism transition. The challenge of developing and using indicators.* UK: CABI.
Mitchell, W. L., & Economou, D. (2000). The Internet and Virtual Environments in Heritage Education: more than just a technical problem. In J. A. Barcelona, M. Forte & D. Sanders (Eds.), *Virtual Reality in Archaeology* (pp. 149-154). Oxford: ArchaeoPress.
Morin, E. (1993). *Introduzione al pensiero complesso* (M. Corbani, Trans.). Milano: Sperling & Kupfer.
Nash, D. (1989). Tourism as a form of imperialism. In In V. Smith (Ed.), *Hosts and guests: The anthropology of tourism* (2nd ed., pp. 37-52). Philadelphia: University of Pennsylvania Press.
Natali, F. (2005). Una certificazione di qualitá per i siti UNESCO. *SITI. Trimestrale di attualitá e politica culturale, 1,* 30-33.
Newman, M. E. (2010). Baldrige Program Name Change Emphasizes Performance Excellence. Retrieved from http://www.nist.gov website: http://www.nist.gov/baldrige/baldrige_100510.cfm
Nicolescu, B. (2008). *Transdisciplinarity - Theory and Practice*. Cresskill, NJ, USA: Hampton Press.
NORAD. (1999). *Logical Framework Approach LFA - handbook for objectives-oriented planning* (4th ed.). Oslo: NORAD - Norvegian Agency for Development Cooperation.
Norberg, J., & Cumming, G. S. (2008). *Complexity theory for a sustainable future*. New York: Columbia University Press.
North, K., & Kares, S. (2005). Ragusa or how to measure ignorance: the ignorance meter. In B. Ahmed & E. Leif (Eds.), *The intellectual capital* (pp. 253-264). Oxford, UK: Elsevier.

Oakland, J. S., & Sohal, A. S. (1996). *Total Quality Management. Text with cases*. Oxford: Butterworth Heinemann.
Oosterbeek, L. (2010). Meio ambiente, patrimonio e consciencia. Uma perspectiv arqueologica. In M. Passos (Ed.), *Dialogos Cruzados: religião, história e construção social.* (pp. 61-82). Belo Horizonte (Brasil): Argventum.
Oosterbeek, L., Cura, S., Cura, P., & Almeida, N. (2011). The Andakatu Project: A New Praxis in Archaeology. *Popular Archaeology, 2*. Retrieved from Popular Archaeology website: http://popular-archaeology.com/issue/april-2011/article/the-andakatu-project-a-new-praxis-in-archaeology
Orlikowski, W. J., & Baroudi, J. J. (1991). Studying information technology in organisations: research approaches and assumptions. *Information Systems Research, 2*(1), 1-14.
Otal, M. d. C. A., & Erice, L. R. (2008). El port de Caesaraugusta. *Citerior: arqueologia i ciències de l'Antiguitat*(4), 97-117.
Parker, L. (2004). Qualitative research. In S. Burton & P. Steane (Eds.), *Surviving your thesis* (pp. 159-177). USA and Canada: Routledge.
Patton, M. Q. (1990). *Qualitative evaluation and research methods*. Sage: Newbury Park.
Patton, M. Q. (2002). *Qualitative research & Evaluation Methods* (Third ed.). USA: SAGE Publications.
Pauketat, T. R. (2001). Practice and History in Archaeology: An Emerging Paradigm. *Anthropological Theory 1*, 73-98.
Pearce, P. (1991). Analysing tourist attractions. *Journal of Tourism Studies, 2*(1), 46-55.
Pedersen, A. (2002). *Managing Tourism at World Heritage Sites: a Practical Manual for World Heritage Site Managers*. France: UNESCO World Heritage Centre.
Peralta, E. (2003). O Mar por Tradição: o Património e a Construção das Imagens do Turismo. *Horizontes Antropológicos, 9*(20), 83-96.
Pereira, A., & Poupa, C. (2003). *Como Escrever Uma Tese, Monografia ou Livro Cientifico Usando o Word* (2 ed.). Lisboa: Silabo.
Pereira, B., & Belém, H. (2004). Best Practices. A implementação da Agenda 21 ao nível local - o projecto-piloto de Calviá. *RT&D-Revista Turismo & Desenvolvimento, I*(1), 99-100.
Picard, D., & Robinson, M. (2005). *Remaking Worlds: Festivals, Tourism and Change.* Clevedon: Channel View.
Picard, M. (1992). *Bali. Tourisme Coulturel et culture touritique*. Paris: L'Harmattan.
Pinheiro do Nascimento, E. (2001). Educação e Desenvolvimento na Contemporaneidade: Dilema ou Desafio? In M. Bursztyn (Ed.), *Ciência, Ética e Sustentabilidade. Desafios ao Novo Século* (2nd ed., pp. 95-114). São Paulo: Cortez.
Pinto, A., & Soares, I. (2009). *Sistemas de Gestão da Qualidade. Guia para a sua implementação*. Portugal: Silabo.
Piuzzi, F. (1990). *La ricerca stratigrafica in archeologia-Introduzione ai metodi di scavo e documentazione*. Udine, Italy: CDC.
Polacco, F. (2001). L'Antico dalla parte dei Giovani. *ARCHEO, XVII*(11 (201)), 48-49.
Posen, D. (1999). *Staying afloat when the water gets rough*. Toronto (Canada): Key Porter.
Pucci, G. (1993). *Il passato prossimo*. Roma, Italy: Carocci.
Punch, K. (2005). *Introduction to Social Research, Qualitative and Qualitative Approaches* (2nd ed.). London: Sage.
Quagliuolo, M. (1998). *Prospettive di sviluppo Territoriale attraverso la valorizzazione dei beni culturali e la cultura dell'ospitalitá*. Paper presented at the 3rd International Meeting on Cultural Heritage Management, "Turismo e Beni Culturali e Ambientali", Cagliari (Italy).
Quagliuolo, M. (2001). *Qualitá nella gestione di un bene culturale: il riconoscimento HERITY*. Paper presented at the 6th International Meeting on Cultural Heritage Management, "Qualitá e Beni Culturali e Ambientali", Barletta (Italy).
Quattrocchi, G. (2000). La villa dei Quintili. *ARCHEO, XVI*(10 (188)), 27.

Quattrocchi, G. (2001). Roma. A spasso per la Biberatica. *ARCHEO, XVII*(3 (193)), 17-20.
Raposo, J. (2005). Avaliação e Certificação de Monumentos e sítios. *Al-Madan, II*(13), 7.
Rauschelbach, B., Schäfer, A., & Steck, B. (2002). *Cooperating for Sustainable Tourism. Proceedings of the Forum International at the Reisepavillon, 2002*. Heidelberg: Kasparek.
Ravaglioli, A. (1996). *Breve storia di Roma dalle origini ai nostri giorni* (4th ed.). Roma: Newton.
Rebollo, J. F. V., & Linares, J. M. D. (1995). Turismo y patrimonio histórico-cultural. *Estudios Turísticos, 126*, 161-178.
Renfrew, C., & Bahn, P. (2012). *Archaeology. Theories, Methods and Practice* (6th ed.). London, UK: Thames & Hudson.
Ricci, A. (1999). Luogh estremi della cittá. Il progetto archeologico tra "memoria" e "uso pubblico della storia". *Topos e Progetto, I*, 97-127.
Richards, G. (1996). *Cultural Tourism in Europe*. UK: CAB International.
Richards, G., & Munsters, W. (2010). Developments and Perspectives in Cultural Tourism Research. In G. R. a. W. Munsters (Ed.), *Cultural Tourism Research Methods* (pp. 1-12): CABI Publishing.
Robinson, M., & Boniface, P. (1999). *Tourism and cultural conflicts*. Wallingford: CABI.
Robinson, M., & Phipps, A. (2004). Worlds passing by: Journeys of Culture and Cultural Journeys. *Journal of Tourism and Cultural Change, 1*(1), 1-10.
Roger, A. (1997). *Court traité du paysage*. Paris: Gallimard.
Romero, M. (1992). *Maid in the USA*. New York: Routledge.
Rosenberg, L., & Posner, L. (1979). *The logical framework: A manager's guide to a scientific approach to design and evaluation. Practical Concepts Incorporated*. Washington, D.C.
Rossi, P. (1958). Introduzione a Max Weber. In P. Rossi (Ed.), *Lo storicismo contemporaneo* (pp. 9-43). Torino: Loescher.
Rossi Pinelli, O. (1979). Carlo Fea e il Chirografo del 1802: cronaca, giudiziaria e non, delle prime battaglie per la tutela delle "Belle Arti". *Ricerche di Storia dell'Arte, 8*, 27-40.
Russo, A. P., & van der Borg, J. (2002). Planning considerations for cultural tourism: a case study of four European cities. *Tourism Management, 23*(6), 631-637.
Rypkema, D. (2009). Economics and the built cultural heritage *Heritage and Beyond* (pp. 113-124). Paris: Council of Europe Publishing.
Saïd, E. (1978). *Orientalism*. New York: Pantheon.
Saraiva, M., & Teixera, A. (2009). *A Qualidade numa Perspectiva Multi e Interdisciplinar*. Lisboa: Edições Silabo.
Sartini, M., & Vigliarolo, P. (2010). Il futuro del sistema di comunicazione del museo dei fori imperiali. In L. Ungaro & M. P. Del Moro (Eds.), *I Mercati di Traiano. Didattica, divulgazione, tecnologie: le scelte sperimentali e la risposta del pubblico.* (pp. 15-24). Roma: Palombi Editori.
Schmitz, P. C. (1995). The Phoenician Text from the Etruscan Sanctuary at Pyrgi. *Journal of the American Oriental Society, 115*(4), 559-575.
Schutz. (1967). *The phenomenology of social world*. Evanston: Northwestern University Press.
Scott, A. (2004). Reductionism Revisited. *Journal of Consciousness Studies, 11*(2), 51-68.
Scott, M. (1968). *The racing game*. Chigago: Aldine.
Settis, S. (2002). *Italia S.p.A. L'assalto al patrimonio culturale*. Torino (Italy): Einaudi.
Shanks, M. (1991). Some recent approaches to style and social reconstruction in classical archaeology. *Archaeological Review from Cambridge, 10*, 164-174.
Shanks, M. (1993). Style and the design of a perfume jar from an Archaic Greek city state. *Journal of European Archaeology, 1*, 77-106.
Shanks, M., & Tilley, C. (1987). *Reconstructing Archaeology*. New York: Cambridge University Press.
Shanks, M., & Tilley, C. (1988). *Social Theory and Archaeology*. Albuquerque: University of New Mexico Press.

Silberberg, T. (1995). Cultural tourism and business opportunities for museums and heritage sites. *Tourism Management, 16*(5), 361-365.
Silva, L., Bellon, O. R. P., & Boyer, K. L. (2004). Computer vision and graphics for heritage preservation and digital archaeology. *RITA, XI*(1), 10-31.
Sims, R. (2009). Food, place and authenticity: local food and the sustainable tourism experience. *Journal of Sustainable Tourism, 17*(3), 321-336.
Sowerby, R. (1995). *The Greeks. An Introduction to Their Culture*. London: Routledge.
Spradley, J. P. (1979). *The Ethnographic Interview*. New York: Holt, Rinehart and Winston.
Stebbins, R. A. (1997). Identity and cultural tourism. *Annals of Tourism Research, 24*(2), 450-452.
Stevens, A. (1991). We come from the land. *Habitat Australia, 19*, 14-15.
Svara, J. H. (2009). *The Facilitative Leader in City Hall. Reexamining the Scope and Contributions*. New York: CRS.
Swarbrooke, J. (1995). *The Development and Management of Visitor Attractions*. UK: Butterworth Heinemann.
Swarbrooke, J. (2000). *Turismo Sustentável. Conceitos e impacto ambiental*. São Paulo: Aleph.
Taft, R. (1981). The role and personality of the mediator. In S. Bochner (Ed.), *The mediating person: bridges between cultures* (pp. 53-88). Cambridge: Schenkman.
Taylor, F. W. (1911). *The Principles of Scientific Management*. New York, NY, USAand London, UK: Harper & Brothers.
Tedesco, T. (1997). *Crotone. Guida alla Provicia. Dalla Chora al Marchesato.* Soveria Mannelli, Italy.
Terrenato, N. (2000). Sito/Non Sito. In R. Francovich & D. Manacorda (Eds.), *Dizionario di Archeologia* (pp. 279-280). Roma-Bari (Italy): Laterza.
Testini, P. (1980). *Archeologia Cristiana - Nozioni generali dalle origini al sec. VI*. Roma (Italy): DESCLEE & C.- Editori Pontifici.
Therkelsen, A. (2003). Imaging Places. Image formation of tourists and its consequences for destination promotion. *Scandinavian Journal of Hospitality and Tourism, 3*(2), 134-150.
Throsby, D. (2010). *The Economics of Cultural Policy*. UK: Cambridge Universitu Press.
Tilley, C. (1993). *Interpretive Archaeology*. Oxford: Berg.
Timothy, D. J. (2011). *Cultural Heritage and tourism. An Introduction.* . UK: Channel View.
Timothy, D. J., & Boyd, S. (2003). *Heritage Tourism*. UK: Prentice Hall.
Tönnies, F. (1977). *Communauté et société: catégories fondamentales de la sociologie pure*. Pais: RETZ-CEPL.
Toops, S. (1993). Xinjiang's handicraft industry. *Annals of Tourism Research, 20*(1), 88-106.
Tosun, C. (2006). Expected nature of community participation in tourism development. *Tourism Management, 27*(3), 493–504.
Trigger, B. G. (1989). *A History of Archaeological Thought*. Cambridge: Cambridge University Press.
Trochim, W. M. K., & Donnelly, J. P. (2006). *Research Methods Knowledge Base* (3rd ed.). Ohio, USA: Atomic Dog/Cengage Learning.
Tsoukas, H. (1989). The validity of ideograph research explanations. *Academy of Management Review, 14*(4), 551-561.
Umbelino, J. (2004). Turismo e Património. Algumas ideias para a reflexão. *RT&D - Journal of Tourism and Development, 1*(1), 21-26.
UN, & UNWTO. (2010). *International Recommendations for Tourism Statistics 2008*. New York: United Nations.
UNESCO. (1945). Constitution of the United Nations Educational, Scientific And Cultural Organization. Paris: UNESCO Publishing.
UNESCO. (1972). Convention Concerning the Protection of the World Cultural and Natural Heritage. Paris.

UNESCO. (2000a). *Culture, Trade and Globalization - Questions and Answers*. Paris: UNESCO Publishing.
UNESCO. (2000b). *Culture, trade and globalization: questions and answers*. Paris: UNESCO publishing.
UNESCO. (2003). Convention For The Safeguarding Of The Intangible Cultural Heritage. Paris.
UNESCO. (2006). *Tourism, Culture and Sustainable Development.* Paris: UNESCO Publishing.
UNESCO, ICCROM, ICOMOS, & IUCN. (2013). *Managng Cultural World Heritage*. France: UNESCO.
Ungaro, L. (2006). Una finestra... sui Fori Imperiali Retrieved from http://www.mercatiditraiano.it/il_museo/editoriale
Ungaro, L. (2010). Comunicazione e Formazione, Valorizzazione e Conservazione. In L. Ungaro & M. P. Del Moro (Eds.), *I Mercati di Traiano. Didattica, divulgazione, tecnologie: le scelte sperimentali e la risposta del pubblico.* (pp. 3-10). Roma: Palombi Editori.
United-Nations. (2000). United nations Millennium Declaration. New York and Geneva: UN Publications.
UNWTO. (1978). *Évaluacion de los Recursos Turisticos*. Madrid: WTO.
UNWTO. (1985). *The State's Role in Protecting and Promoting Culture as a Factor of Tourism Development and the Proper Use and Exploitation of the National Cultural Heritage of Sites and Monuments for Tourism*. Madrid: WTO.
UNWTO. (1999). The Global Code of Ethics for Tourism. Ethics Code. Madrid: World Tourism Organization.
UNWTO. (2005). *Yearbook of Tourism Statistics 2005 (data 1999-2003)* (57th ed.). Madrid: UNWTO.
UNWTO. (2010). Tourism and the Millennium Developement Goals. Sustainable, Competitive, Responsible.
Urry, J. (1994). Cultural Change and Contemporary Tourism. *Leisure Studies, 13*, 233-238.
Van den Berghe, P. L. (1980). Tourism as ethnic relations: a case study of Cuzco, Peru. *Ethnic and Racial Studies, 3*, 375-392.
Van Maanen, J. (1983). *Qualitative Methodology*. London: Sage.
Veal, A. J. (2010). *Leisure, sport and tourism, politics, policy and planning* (Third ed.). UK: CABI.
Vidotto, V. (2006). *The Invention of Two Capital Cities. Archaeology and Public Spaces in Athens and Rome* Paper presented at the VIII International Conference on Urban History "Urban Europe in Comparative Perspective", Stockholm.
von Bertalanffy, K. L. (1968). *General System theory: Foundations, Development, Applications*. New York: George Braziller.
Von Mutius, B. (2005). Rethinking leadership in the knowledge society. In B. Ahmed & E. Leif (Eds.), *Intellectual capital for communities* (pp. 151-163). Oxford, UK: Elsevier.
Watters, M. R. (1992). *Principles of Geoarchaeology: A North American Perspective*. Tucson: The University of Arizona Press.
Watters, M. R. (2000). Alluvial stratigraphy and geoarchaeology in the American Southwest. *Geoarchaeology, 15*(6), 537-557.
Weber, M. (1922). *Gesammelte Aufsätze zur Wissenchaftslehre*. Tübingen: Mohr.
Weber, M. (2012). *Conceitos Sociológicos Fundamentais* (A. Morão, Trans.). Lisbon: Edições 70.
Weiss, R. (1989). *La scoperta dell'antichitá classica nel Rinascimento*. Padova, Italy: Antenore.
Whittaker, E. (1994). Public discourse on sacredness: the transfer of ayers rock t aborigenal ownership. *American Ethnologist, 21*(2), 310-334.
Wickson, F., Carew, A. L., & Russell, A. W. (2006). Transdisciplinary research: characteristics, quandaries and quality. *Futures, 38*(9), 1046-1059.
Wolkowitz, C. (2009). Challenging Boundaries: An Autobiographical Perspective on the Sociology of Work. *Sociology, 43*, 846-860.
Wylie, A. (2002). *Thinking from things: essays in the philosophy of archaeology*. Berkeley: University of California Press.

Yale, P. (1991). *From Tourism Attraction To Heritage Tourism*. UK: ELM.
Yang, C.-H., Lin, H.-L., & Uzi, B. (2011). Is UNESCO recognition effective in fostering tourism? A comment on Yang, Lin and Han: Reply. *Tourism Management, 32*, 455-456.
Yin, R. K. (2009). Case Study Research. Design and Methods. London: Sage.
Yourcenar, M. (1951). *Mémoires d'Hadrien*. France: Librairie Plon.
Zanini, L. (2014, 16-07-2014). Meno sovrintendenti, super-musei, tagli e rotazioni: rivoluzione Mibact, *Corriere della Sera:* 4.
Zardo, E. F. (2003). *Marketing Aplicado ao Turismo*. São Paulo: Roca.
Services Charter - Civic Museum Network of Rome (2012).

APPENDICES

ANNEX 1

Exploratory Interview's Script

“Gestione Di Qualità E Valorizzazione Turistica Del Patrimonio Culturale. Misurazione Degli Impatti Sociali.”

Progetto scientifico realizzato nell’ambito
del Dottorato di Ricerca

Lista Domande per intervista ai Direttori dei Musei

Nota

L'intervista semi-direttiva contenuta in questo documento e composta da 38 domande rappresenta uno degli strumenti di raccolta di dati del progetto scientifico realizzato nell'ambito del Dottorato di Ricerca di Fabio Carbone (*Universidade de Aveiro, Portugal*) e dal titolo **"Gestione Di Qualità E Valorizzazione Turistica Del Patrimonio Culturale. Misurazione Degli Impatti Sociali"**. Il progetto é svolto con la preziosa collaborazione di HERITY.

Per maggiori informazioni, contattare: fabiocarbone.pro@gmail.com.

Ringraziamo la gentile collaborazione dell'informante intervistato, al quale si consegna questo documento, e al quale saranno comunicati i risultati della ricerca.

Iª Parte
Informazioni Generali

1) Quante persone lavorano in questo museo (tempo integrale/Part-time/volontariato)?

2) Esistono attualmente laboratori di ricerca/conservazione/restauro legati al museo?

3) Qual é il numero medio di visitatori (su base annuale) del museo?

4) Qual é il profilo dei visitatori?

IIª Parte
Modalitá di valorizzazione del sistema turistico culturale.

Politiche Divulgative:

5) Potrebbe riassumere le politiche divulgative di questo museo?

6) Vengono realizzate conferenze/eventi inerenti le collezioni esposte?

7) Esistono filiali di questo museo?

8) Usate partenariati con operatori pubblici o privati del settore del turismo (o altri settori) al fine di rendere questi ultimi canali di divulgazione del museo?

9) Esiste un target specifico delle Vostre campagne?

Immagine Esterna

10) Esiste un messaggio associato all'immagine del museo?

Organizzazione Interna

11) Come definirebbe l'approccio adottato per la trasmissione dei contenuti all'interno del museo (tradizionale/innovatore/altro)?

12) Esistono laboratori didattici?

13) Viene stimolato il contatto tra tecnici del patrimonio e visitatori?

14) Facendo un'auto-valutazione, come giudicherebbe il museo in termini di ACCESSIBILITÁ; ATTRATTIVA; ATMOSFERA?

Responsabilitá Sociale e Realizzazione di Programmi Esterni:

15) Vengono realizzati programmi esterni?

16) Esistono obiettivi relativi ad un maggior coinvolgimento dei visitatori?

17) Quali sono i progetti realizzati e le fasce sociali coinvolte?

Politiche di prezzo

18) Esistono particolari politiche di prezzo che desidera evidenziare/commentare (oltre a quelle deducibili dalla tabella esposta in biglietteria)?

19) Qual é il vostro grado di autonomia nella gestione degli introiti annuali (biglietteria, merchandising, donazioni, eventi, etc.)?

IIIª Parte
Gestione di qualitá

20) Vengono applicati, nella gestione del museo, sistemi di *Quality Management* (QM)?

21) Ritiene che le modalitá di *Quality Management* (QM) rappresentino un valore aggiunto alla gestione del patrimonio?

22) Ritiene che il QM rappresenti un valore aggiunto nell'ambito dell'offerta turistico-cuturale?

23) Se si, in che modo?

24) Ritiene che il QM rappresenti un valore aggiunto e un contributo efficace per il processo di sviluppo socioculturale della comunitá locale, e la sua partecipazione nella gestione del patrimonio culturale?

25) Se si, in che modo?

26) Le modalitá di QM applicate alla gestione del patrimonio culturale, potenziano il ruolo del patrimonio nell'ambito dello sviluppo delle economie tradizionali locali?

27) Se si, in che modo?

IVª Parte
Certificazione di Qualitá HGES

28) Come é venuta a conoscenza dell'HERITY GES e perché é stato deciso di implementarlo presso il Museo che dirige?

29) Esistono cambiamenti nei processi gestionali del museo che possano ritenersi direttamente riconducibili al processo di certificazione ed ai suggerimenti da parte dei tecnici HERITY al momento della valutazione?

30) Ha potuto percepire miglioramenti della motivazione delle risorse umane e dei risultati raggiunti, direttamente riconducibile all'esperienza della certificazione?

31) I visitatori si mostrano incuriositi relativamente alla certificazione HERITY e il bersaglio esposto? Esiste un *feedback* immediato?

32) Ritiene che i visitatori percepiscano totalmente il bersaglio dela certificazione HERITY esposto al'esterno del Museo?

33) Se la risposta precedente é affermativa, saprebbe indicare, in base ad eventuali *feedback*) se la soddisfazione dei visitatori é coerente con i risultati del bersaglio HERITY?

34) Quali sono le Sue fonti?

35) Ritiene che l'HERITY abbia tenuto conto dell'impatto sociale derivato dalle attivitá del museo, nel suo processo di valutazione globale della gestione?

36) L'HERITY GES ha portato alla creazione di dinamiche per un maggiore coinvolgimento della comunitá locale?

37) Quali sono le Sue fonti?

38) Quali sono i suoi suggerimenti per un miglioramento del sistema di certificazione HERITY?

ANNEX 2

Interview's Script

Interview Script

This interview represents one of the instruments of data collection for the European Ph.D Research Project of Fabio Carbone, University of Aveiro (Portugal). The research is under the supervision of Professor Luiz Oosterbeek, Professor Carlos Costa and Professor Ana Maria Ferreira. This research also has the kind support of Dr. Maurizio Qualgiuolo (HERITY International) and the Portuguese *FCT - Foundation for Science and Technology.*

It will be our concern to keep you informed about the final outcome of the investigation, send you information about scientific publications and participation in conferences and, if you wish, we'll gladly send you a copy of the final paper in *PDF* format.

We are grateful for your precious and kind collaboration.

Components of the Conceptual Model Level One	Components of the Conceptual Model Level Two	Q*n*	Questions
(I) Culture of Quality Within heritage organization	(I) Perception of Quality within heritage managers and operators	Q1	How did you know about and why did you decide to implement a quality system in this archaeological site/museum?
		Q23	May you describe the quality system implemented in this archaeological site/museum?
		Q3	What is your opinion about quality? May you tell me more about it?
		Q4	How do you consider the concept of quality applied to the management archaeological and cultural heritage?
		Q5	How the implementation of the HERITY GLOBAL EVALUATION SYSTEM (HGES) has changed your perception about quality? Why?
		Q6	How did your collaborators react to the implementation of the quality system? Why do you think that happened?
		Q7	How did you spread the culture of quality among the operators in this archaeological site/museum?
		Q8	In which way the HGES has contributed to this awareness? Why do you think that happened?
	(II) Perception of Internal and external customer	Q9	The concept of quality includes the identification of internal and external customers. In your opinion, who are the internal and external customers of this archaeological site/museum?
		Q10	How, according to his opinion, this museum creates added value to its external and internal customers?
		Q11	How does the quality system and certification, increase this value?
	(III) Managers' perception about regional predominant mentality	Q12	What are, in your opinion, the main obstacles to the spread of a culture of quality in this region?
		Q13	What is your opinion about the regional predominant mentality about quality? Why do you think that happened?
		Q14	How do you think that is influencing the implementation of a culture of quality within heritage management?
		Q15	What kind of effort it has taken to make awareness in the long term, at local level? What should be done in your opinion to shape (if necessary) the mentality?
		Q16	Is the HGES helping for this purpose? In which way?

(II) General impacts of quality system on heritage management	(IV) Perception about the beneficiaries of Quality	Q17	Who do you think is benefiting from the implementation of a quality system and its certification? Why?
		Q18	How this archaeological site/museum had benefited from the quality management system and HGES? Why?
		Q19	In your opinion, to what extent the quality system and certification are helping a greater number of visitors to visit this archaeological site/museum?
		Q20	Do you consider the quality system and the HGES more useful to visitors or to professionals? Why?
		Q21	May you list, in order of importance, the four areas in which the HGES has had the greatest positive impact, in your opinion?
		Q22	Do you consider that HGES could/should be improved? If so, in what way?
	(V) Impact on Conservation	Q23	What kind of improvements has been made in the context of conservation of this site / museum?
		Q24	Is the HGES helping for this purpose? In which way?
	(VI) Impact on Communication	Q25	What kinds of improvements have been made in the context of COMMUNICATION of this site / museum?
		Q26	Is the HGES helping for this purpose? In which way?
	(VIII) Impact on Services	Q27	What kinds of improvements have been made in the context of SERVICES of this site / museum?
		Q28	Is the HGES helping for this purpose? In which way?
	(IX) Impact on Perceived Value	Q29	Do you think that what is called Perceived value of a monument could be improved? If so, in what way?
		Q30	What should be the role of the quality system in this process?
(III) Impact on local communities' involvement	(X) Degree of local communities involvement	Q31	What do you consider is the role of the archaeological heritage (and cultural) within the social development of local communities?
		Q32	In your opinion, how the local community benefit from the existence of this archaeological site/museum?
		Q33	In your opinion, the local population is sufficiently involved in the management of the archaeological (and cultural) heritage?
		Q34	How the archaeological site/museum promote the involvement of the local population?
		Q35	In which way the quality system and HGES contributed for this purpose?
		Q36	Do you consider that the system takes into account this dimension? If so, in which way?
		Q37	Do you think that the implementation of the quality system has improved the relationship of the museum/site with the local population? If so, in what way?
	(XI) Pedagogical Activities	Q38	Do you think that there have been improvements in the contact between the operators (archaeologist, conservators, etc.) of this archaeological site/museum and the local population, for pedagogical purposes? If so, in what way?
		Q39	In which way, the quality system and HGES has contributed to these improvements?
		Q40	Do you think that there have been improvements in the contact between the operators (archaeologist, conservators, etc.) of this archaeological site/museum and tourists? If so, in what way?
		Q41	In which way, the quality system and HGES has contributed to these improvements?
(IV) Relationship between local communities and tourists	(XII) Effort to make intercultural dialogue happen	Q42	There are attempts to promote contact between visitors and the local population? If so, what kind?
		Q43	In your opinion, in which way, the quality system and HGES has contributed to these improvements?
		Q44	Do you consider that the quality system takes into account this dimension? If so, in which way?

(V) Impact of the implementation of quality system on Local Economy	(XIII) Perception of the link between heritage management and economic growth	Q45	What kinds of bonds exist between the work done in this archaeological site/museum and the economic development of the surrounding region?
		Q46	There are efforts aimed at promoting economic development through the enhancement of cultural heritage? If so, what kind?
		Q47	Do you think the quality system contributes to this purpose? In what way?
(VI) Destination Branding, Heritage and Authenticity	(XIV) Managers' perception on their responsibility about reinforcement of destination personality	Q48	Do you think you contribute with your work to improve the image of the destination? If so, in what way?
		Q49	What do you think about the interest shown by the local population towards the cultural heritage?
		Q50	If there have been increased efforts to this goal, how much did the implementation of the quality system contribute?
		Q51	Based on your experience with HGES, do you believe that the quality system stimulate greater interest? If so, in which way?
		Q52	What is your opinion about the contribution your work could and should give in order to achieve a greater authenticity of the tourist experience?
		Q53	In which way, the system has contributed in this field?
		Q54	Do you think you can reduce the negative social impacts of tourism on the population? If so, in what way?
	(XV) Level of Internationally shared standards	Q55	What is your opinion about the importance of sharing experiences and quality standards?
		Q56	How do you feel that the quality system used is affecting this area?
	(XVI) Level of integration with other regional bodies (tourism, education, etc.)	Q57	How this museum interacts with other local stakeholders, particularly public?
		Q58	How does the quality system the push towards greater integration with other bodies?

ANNEX 3

Observation Grid

Observation Grid

This Observation Grid was elaborated trough the analyses of the museums awarded as *European Museum of the Year* between 2007 and 2012 for their outstanding achievements for public quality and excellence, and represents one of the instruments of data collection for the European Ph.D Research Project of Fabio Carbone, University of Aveiro (Portugal). The research is under the supervision of Professor Luiz Oosterbeek, Professor Carlos Costa and Professor Ana Maria Ferreira. This research also has the kind support of Dr. Maurizio Qualgiuolo (HERITY International) and the Portuguese *FCT - Foundation for Science and Technology.*

It will be our concern to keep you informed about the final outcome of the investigation, send you information about scientific publications and participation in conferences and, if you wish, we'll gladly send you a copy of the final paper in *PDF* format.

We are grateful for your precious and kind collaboration.

Activities		Y/N	Observations
Educational Activities	**School Activities**		
	Educational Materials		
	Courses For Seniors		
	Teacher Training Courses		
Guided Tours <u>With</u> Didactic Activity			
Guided Tours <u>Without</u> Didactic Activity			
Workshop			
Social Circle (*Tertulia*)			
Seminars			
Concerts			
Events (Others)			
Exhibition			
Historical Film Series			

Activities for the schools		
Activities <u>in</u> the schools		
Summer Programmes		
Photo Contest (and/or others)		
Projection of documentaries and symposia		
Volunteer Projects		
Associations of "friends"		
Surrounding Area		
Coffee Shop		
Accessibility for Disables		
Free guided tours (special Days)		
R&D		
Personal Media		
Non-Personal Media (audio guide, pamphlet, etc.)		
Club Card		
Adult Education		
Plastic Models		
Reconstructions 1:1 scale		

ANNEX 4

Study Protocol

A study protocol is, according with the *Oxford English Dictionary*, a *formal or official record of scientific experimental observation*, thus, a *procedure for carrying out a scientific experiment* (…). So, once exposed the Research Design, it is now possible to draw up the "study protocol" adopted in the twelve sites analysed.

<table>
<tr><td colspan="5">Study Protocol</td></tr>
<tr><td colspan="2">Objective:</td><td colspan="3">In-depth analysis of the perception of quality within the heritage managers and the implications of the implementation of quality within archaeological sites/museums management, especially in terms of <u>local communities' involvement</u> and <u>improved relationship with tourist</u>.</td></tr>
<tr><td colspan="2" rowspan="2">Method:</td><td colspan="3">Multiple, transdisciplinary, experimental and illustrative case study</td></tr>
<tr><td colspan="3">Population: Italian, Portuguese and Spanish Archaeological museums and archaeological sites open to the public, presenting the certification HGES.</td></tr>
<tr><td rowspan="4">P R E L I M I N A R Y
I N V E S T I G A S T I O N</td><td rowspan="4">Exploratory phase</td><td rowspan="3">Data Collection Techniques</td><td>1 - Semi structured interview Informants: managers of several production companies and heritage sites.</td><td rowspan="3"><u>General Objective:</u>
Complete the theoretical knowledge about Quality through a direct knowledge of the phenomenon and practical application of quality systems.

<u>Specific Objective(s):</u>
- Knowing from the practical point of view the application process of different systems of quality;
- Defining differences in operators' perception of Quality and quality systems used within the sector of Manufacturing, Services and Cultural organisations (museums, archaeological sites).</td></tr>
<tr><td>2 - Unstructured interview
Informants: employees of several production companies and heritage sites.</td></tr>
<tr><td>3 - Direct Observation
Companies and heritage sites.</td></tr>
<tr><td colspan="2">Extensive Literature Review</td><td><u>Objective:</u>
Building theoretical knowledge about the topics covered: management of archaeological and cultural heritage; dynamics of asset management in the processes of socio-economic and cultural development; archaeological tourism; quality.</td></tr>
<tr><td rowspan="3">D A T A
C O L L E C T I O N</td><td rowspan="3">Empirical phase</td><td rowspan="3">Data Collection Techniques</td><td>1 - Semi structured interview Informants: managers of archaeological sites/museums</td><td rowspan="3"><u>General Objective:</u>
Knowing the process of application of quality and quality evaluation systems within management of cultural heritage, specifically in areas and archaeological museums.
<u>Specific Objective(s):</u>
1. Define the perception of the managers and operators of the cultural heritage regarding the quality and use of quality assessment systems;
2. Defining to what extent the concept of quality in archaeological heritage management considers the use of heritage as a factor of socio-cultural and economic development.
3. Understanding what is the impact of the implementation of quality management systems on the level of self-awareness of the local population?
4. Understanding how does the implementation of quality management systems for heritage sites play a role to boost the visitors' experience.
5. Understanding to what extent operators consider the promotion of the encounter</td></tr>
<tr><td>2 - Direct Observation
Target: archaeological sites/museums</td></tr>
<tr><td>3 - Document analysis
Analysis of relevant documents of archaeological sites and museums</td></tr>
</table>

				between tourists and the local community and intercultural dialogue among the dimensions of quality in the management of cultural heritage.
Data processing	*NVivo10*			
Procedural aspects of field research	During the interviews, the participants are approached with questions such as "What do you think of...?" or "Can you give your opinion about...?" or "How...?", in order to provide maximum freedom of expression on the part of the respondent, reducing the influences of the point of view of the interviewer (bias). Moreover, principal questions are often followed by a supplementary question, such as "Why?" or "Why is this happening, in your opinion?" or "Can you explain how?", in order to stimulate greater depth in the answers.			
	Use of digital recorder			
	Compilation of research diary			
Human Subject Protections	- Major concern will be to respect the confidentiality of the participants; - The interviews will be recorded on digital media, transcribed and sent to the respective informants before the use and publication of data, in order to reduce the number of biases that might arise from a misunderstanding or an error of transcription; - During the empirical phase, in addition to the researcher only the supervisors and, in exceptional cases, representatives of HERITY will have access to the data collected.			

ANNEX 5

Codebook

1	ES-INT-1	Carmen Aguarod Otal (Chef of the Departments of Museums and Expositions, "Ayuntamiento de Zaragoza", Spain)	Interview	Interview, 15/03/2013
2	ES-INT-2	Dora Gabás Faure (Officer of the Services of Culture, "Ayuntamiento de Zaragoza", Spain)	Interview	Interview, 15/03/2013
3	ES-INT-3	Romana Erice Lacabe (Archaeologist of the "Ayuntamento de Zaragoza", Spain)	Interview	Interview, 15/03/2013
4	PT-INT-1	Pierluigi Rosina (CIAAR Director, Vila Nova da Barquinha, Portugal)	Interview	Interview, 19/11/2013
5	PT-INT-2	Cidália Delgado (CIAAR Founding member and officer, Vila Nova da Barquinha, Portugal)	Interview	Interview, 19/11/2013
6	PT-INT-3	Joana Santos (Office of Planning and Strategic Development of the "Comunidade Intermunicipal do Médio Tejo", Tomar, Portugal)	Interview	Interview, 19/12/2013
7	PT-INT-4	Luiz Oosterbeek (Director of the "Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo", Mação, Portugal)	Interview	Interview, 17/12/2013
8	PT-INT-5	Maria do Ceu Albuquerque (Mayor of Abrantes and President of the "Comunidade Intermunicipal do Médio Tejo", Abrantes, Portugal)	Interview	Interview, 19/11/2013
9	IT-INT-1	Clotilde d'Amato (Director of the "Museo della Civiltá Romana", Rome, Italy)	Interview	Interview, 16/12/2011
10	IT-INT-1BIS	Clotilde d'Amato (Director of the "Museo della Civiltá Romana", Rome Italy)	Interview	Interview, 01/07/2013
11	IT-INT-2	Gabriella Lilli (Museum Curator at the "Museo della Civiltá Romana", Rome, Italy)	Interview	Interview, 16/12/2011
12	IT-INT-3	Flavio Enei (Director of the "Museo del Mare e della Navigazione Antica", Santa Marinella, Italy)	Interview	Interview, 31/07/2013
13	IT-INT-4	Maurizio Quagliuolo (HERITY Secretary-General, Rome, Italy)	Interview	Interview, 07/02/2014
14	IT-INT-5	Viviana Giovannozzi Sermanni (Responsible of "customer care and quality" at Zètema, Rome, Italy)	Interview	Interview, 14/02/2014
15	IT-INT-6	Marcella Bagnasco (President of the "ANGT-Associazione Nazionale Guide Turistiche", Rome, Italy)	Interview	Interview, 5/08/2014
16	IT-INT-7	Maria Grazia Massafra (Director of the "Museo della Casina delle Civette", Rome, Italy)	Interview	Interview, 14/12/2011
17	IT-INT-9	Gianluca Masi (Responsible forthe "Planetario e Museo Astronomico", Rome, Italy)	Interview	Interview, 15/12/2011
18	IT-INT-10	Fabio Benedettucci Curator at the "Museo Napoleonico", Rome, Italy)	Interview	Interview, 15/12/2011
19	RD	Research Diary	Field Notes	Annotations from the direct observation from 24/02/2011 to 05/08/2014
		Notes from the Press Conference about the "Cerimónia Internacional Certificação Internacional Herity, Tomar". Interviewees: Maria do Ceu Albuquerque and Maurizio Quagliuolo.	Filed Notes	Press Conference held on 01.11.2013
20	ES-OBS-1	Observation grid. Museo del Foro (Zaragoza)	Data collection instrument	Applied on 15/03/2013
21	ES-OBS-2	Observation grid. Museo de la Termas Publicas (Zaragoza, Spain)	Data collection instrument	Applied on 16/03/2013
22	ES-OBS-3	Observation grid. Museo del Porto Fluvial (Zaragoza, Spain)	Data collection instrument	Applied on 16/03/2013
23	ES-OBS-4	Observation grid. Museo del Teatro Romano (Zaragoza, Spain)	Data collection instrument	Applied on 17/03/2013
24	IT-OBS-1	Observation grid. Museo de Mare e della Navigazione Antica (Santa Marinella, Italy)	Data collection instrument	Applied on 28-31/07/2013

25	IT-OBS-2	Observation grid. Museo della Civiltá Romana (Rome, Italy)	Data collection instrument	Applied on 01/07/2013
26	IT-OBS-3	Observation grid. Museo dei Mercati di Traiano e Fori Imperiali (Rome)	Data collection instrument	Applied on 02-05/07/2013
27	PT-OBS-1	Observation grid. Sigagoga (Tomar)	Data collection instrument	Applied on 19/12/2013
28	PT-OBS-2	Observation grid. Castle of Abrantes (Abrantes)	Data collection instrument	Applied on 19/11/2013
29	PT-OBS-3	Observation grid. CIAAR (Vila Nova da Barquinha)	Data collection instrument	Applied on 19/11/2013
30	PT-OBS-4	Observation grid. Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo (Maçao)	Data collection instrument	Applied on 17/12/2013
32	ES-PIC-1	The interior of the museum.	Photo/image	Picture taken during the fieldwork direct observation, 17/03/2013
33	ES-PIC-2	Model of the Roman theatre inside the museum.	Photo or image	Picture taken during the direct observation, 17/03/2013
34	ES-PIC-3	One of the main halls of the museum.	Photo or image	Picture taken during the direct observation, 17/03/2013
36	ES-PIC-4	Outside the museum, the Roman theatre.	Photo/image	Picture taken during the direct observation, 17/03/2013
37	ES-PIC-5	Panel used along the way to visit the Roman theatre.	Photo/image	Picture taken during the direct observation, 17/03/2013
38	ES-PIC-6	One of the showcases of the museum with replicas of objects related to daily life in the theatre.	Photo/image	Picture taken during the direct observation, 17/03/2013
39	ES-PIC-7	One of the showcases of the museum with replicas of objects related to the daily life of the Jews.	Photo or image	Picture taken during the direct observation, 17/03/2013
40	ES-PIC-8	Interior of the site/museum, where also the video is played.	Photo/image	Picture taken during the direct observation, 16/03/2013
41	ES-PIC-9	Diorama with virtual reconstructions of the architectural remains.	Photo/image	Picture taken during the direct observation, 16/03/2013
42	ES-PIC-10	Diorama with virtual reconstructions of the architectural remains (detail).	Photo/image	Picture taken during the direct observation, 16/03/2013
43	ES-PIC-11	Showcase containing reproductions of instruments and tools used by the ancient users of the baths.	Photo/image	Picture taken during the direct observation, 17/03/2013
44	ES-PIC-12	Certification and assessment HERITY exhibited at the entrance of the site / museum.	Photo/image	Picture taken during the direct observation, 16/03/2013
45	ES-PIC-13	The educational material delivered to children and students for the activities of scientific dissemination about Romans and the ancient navigation.	Photo or image	Picture taken during the direct observation, 16/03/2013
46	ES-PIC-14	AULA DIDÁCTICA, the didactic room.	Photo/image	Picture taken during the direct observation, 16/03/2013
47	ES-PIC-15	The target HERITY exposed at the entrance of the museum.	Photo/image	Picture taken during the direct observation, 16/03/2013
48	ES-PIC-16	Certification and assessment HERITY exhibited at the entrance of the site / museum.	Photo/image	Picture taken during the direct observation, 16/03/2013
49	ES-PIC-17	Exterior view of the Museum of the Forum.	Photo/image	Picture taken during the direct observation, 16/03/2013

50	ES-PIC-18	Showcases containing, through an effective combination of archaeological remains and drawings, information religious rites in Roman times.	Photo/image	Picture taken during the direct observation, 16/03/2013
51	ES-PIC-19	Model recreating the forum porticoes and the adjoining commercial establishments.	Photo/image	Picture taken during the direct observation, 16/03/2013
52	ES-PIC-20	Model with audio information that recreates the market in the time of Augustus.	Photo/image	Picture taken during the direct observation, 16/03/2013
53	ES-PIC-21	Graphical solution used to explain to the visitor where the walking surface was in Roman times.	Photo or image	Picture taken during the direct observation, 16/03/2013
54	ES-PIC-22	The “target” HERITY exhibited at the entrance of the Museum of the Forum of *Caesaraugusta*.	Photo or image	Picture taken during the direct observation, 16/03/2013
55	ES-PIC-23	Poster of the Evening Show: "The theatre of Caesaraugusta. 20 centuries of history"	Photo or image	Courtesy of the municipality of Zaragoza.
56	ES-PIC-24	Graphic rendering (The “target”) of the HGES assessment of the Museo del Teatro	Photo/image	
57	ES-PIC-25	Graphic rendering (The “target”) of the HGES assessment of the Museo de la Termas Publicas	Photo/image	
58	ES-PIC-26	Graphic rendering (The “target”) of the HGES assessment of the Museo del Puerto Fluvial	Photo/image	
59	ES-PIC-27	Graphic rendering (The “target”) of the HGES assessment of the Museo del Foro	Photo/image	
60	IT-PIC-1	Graphic rendering (The “target”) of the HGES assessment of the Museo della Civiltá Romana	Photo/image	Retrieved from the official HERITY website, list of assessed places (http://www.herity.it/33596.html)
61	IT-PIC-2	Announcement of the closure of the Museum of Roman Civilization in the institutional webpage	Photo/image	Print screen of the message in the official webpage of the museum, retrieved at 31/01/2014.
62	IT-PIC-3	Room of the Museum of Imperial Forums dedicated to the explication of the Forum of Augustus, a good example of coexistence of didactic panels and multimedia products	Photo/image	
63	IT-PIC-4	Graphic Reconstruction of the Forum of Caesar during the Trajan era (Museum of the Imperial Forums)	Photo/image	
64	IT-PIC-5	Graphic reconstruction of the Via Biberatica the Trajan Markets (Museum of the Imperial Forums)	Photo/image	
65	IT-PIC-6	The reconstruction (1:1 scale) of an underwater archaeological excavation site on the wreck of a Roman cargo ship. *Museo del Mare e della Navigazione Antica* (Room I), Santa Marinella, Rome	Photo/image	Picture taken during the direct observation, 10/01/2014
66	IT-PIC-7	Reconstruction (1:1 scale) of the hold of a roman ship in the Room VI of the *Museo del Mare e della Navigazione Antica*, Santa Marinella, Rome	Photo/image	Picture taken during the direct observation, 10/01/2014
67	IT-PIC-8	The flyer / invitation to the multimedia exhibition "The Etruscans in 3D"	Photo/image	Courtesy of the Director of the “Museo del Mare e della Navigazione Antica”
68	IT-PIC-9	Graphic rendering (The “target”) of the HGES assessment of the Museo del Mare e della Navigazione Antica	Photo/image	Retrieved from the official HERITY website, list of assessed places (http://www.herity.it/33596.html)
69	IT-PIC-10	The Director of the Museum and the Mayor of Santa Marinella received the certification by HERITY General Secretary, may 21th, 2011	Photo/image	Retrieved 15/01/2014 from http://www.vivereilmare.it/museidelmare/foto/mm08.html
70	IT-PIC-11	The "target" exhibited by Maurizio Quagliuolo during the ceremony, may 21th, 2011	Photo/image	Retrieved 15/01/2014 from

				http://www.vivereilmare.it/museidelmare/foto/mm09.html
71	PT-PIC-1	Territory of the Comunidade Intermunicipal do Medio Tejo.	Photo/image	Courtesy of the "Comunidade Intermunicipal do Medio Tejo"
72	PT-PIC-2	Localization of museums in the region of the Medio Tejo	Photo/image	Courtesy of the "Comunidade Intermunicipal do Medio Tejo"
73	PT-PIC-3	Official invitation to the ceremony of delivery of the 26 HERITY certifications for the sites and museums of Medio Tejo region, held on 1/11/2013	Photo/image	Invitation received by e-mail from the organiser of the event
74	PT-PIC-4	Institutional photo at the end of the ceremony for the certification of the 26sites. Picture taken during our direct observation. (Tomar, Portugal)	Photo/image	Picture taken during the direct observation, 1/11/2013
75	PT-PIC-5	Graphic rendering (The "target") of the HGES assessment of the Castle of Abrantes (Portugal)	Photo/image	
76	PT-PIC-6	Graphic rendering (The "target") of the HGES assessment of the Centro de Interpretação de Arqueologia do Alto Ribatejo (Portugal)	Photo/image	
77	PT-PIC-7	Graphic rendering (The "target") of the HGES assessment (2010-2012) of Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo (Mação, Portugal)	Photo/image	
78	PT-PIC-8	Graphic rendering (The "target") of the HGES assessment (2014-2016) of Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo (Mação, Portugal)	Photo/image	
79		Este Património Somos Nós. Projeto de Guias Voluntários para o património de Mação, 2010 (Cartaz)	Photo/image	Courtesy of the Director of the "Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo"
		Partcipants of the International Programme (IP) on "Integrated Landscape Management for Sustainable Development". Museum of Mação (Portugal) 2013	Photo/Image	Picture taken during the direct observation
80	ES-WEB-1	https://www.zaragoza.es/ciudad/museos/ruta-caesaraugusta.htm	Webpage contents	
81	ES-WEB-2	http://www.zaragoza.es/ciudad/cultura/observatorio/estu estu/stabla435.htm	Webpage contents	
82	IT-WEB-1	http://www.museociviltaromana.it/	Webpage contents	
83	IT-WEB-2	http://www.mercatiditraiano.it/	Webpage contents	
84	IT-WEB-3	http://www.museosantasevera.org/	Webpage contents	
85	IT-WEB-4	http://www.santamarinella.rm.gov.it/	Webpage contents	
86	IT-WEB-5	http://www.vivereilmare.it/	Webpage contents	
87	IT-WEB-6	http://www.zetema.it/	Webpage contents	
88	IT-WEB-7	http://www.herity.it/	Webpage contents	
89	IT-WEB-8	http://porabrantes.blogs.sapo.pt/herity-chumba-igreja-de-sao-vicente-1850718	Webpage contents	
90	IT-WEB-9	http://novasdisardara.blogspot.pt/2011/11/certificazione-herity.html	Webpage contents	
91	PT-WEB-1	http://www.sinagoga-tomar.org/	Webpage contents	
92	PT-WEB-2	http://www.mediotejodigital.pt/	Webpage contents	
93	ES-DOC-1	Zaragoza. Ruta de Caesaraugusta. HERITY Informe definitive 2009-2011	Grey Literature	
94	ES-DOC-2	Zaragoza. Ruta de Caesaraugusta. HERITY Informe definitive 2012-2014	Grey Literature	

95	ES-DOC-3	Área de Cultura Ayuntamiento de Zaragoza. Memoria 2012	Grey Literature	
96	ES-DOC-4	Área de Cultura Ayuntamiento de Zaragoza. Memoria 2011	Grey Literature	
97	ES-DOC-5	Área de Cultura Ayuntamiento de Zaragoza. Memoria 2010	Grey Literature	
98	ES-DOC-6	Área de Cultura Ayuntamiento de Zaragoza. Memoria 2009	Grey Literature	
99	ES-DOC-7	Área de Cultura Ayuntamiento de Zaragoza. Informe de Actividad 2007-2010	Grey Literature	
100	IT-DOC-1	Services Charter Civic Museum Network of Rome 2012	Grey Literature (Brochure)	
101	IT-DOC-2	Services Charter Civic Museum Network of Rome 2014	Grey Literature (Brochure)	
102	IT-DOC-3	Progetto per un uso pubblico del castello di Santa Severa per fini socio-culturali e turistici	Grey Literature	Document dated October, 2012
103	IT-DOC-4	ZETEMA. Indagini di Customer Satisfaction. Mercati di Traiano – Museo dei Fori Imperiali (16 – 21 Ottobre 2012)	Grey Literature (Report)	Report Published on 4/02/2013
104	IT-DOC-5	ZETEMA. Indagini di Customer Satisfaction. Museo della Civiltá Romana (16 – 21 Ottobre 2012).	Grey Literature (Report)	Report published on 6/02/2013
105	IT-DOC-6	ZETEMA. Codice Etico.	Grey Literature	Document dated July, 2012
106	IT-DOC-7	Gli standard di qualità In ambito museale	Grey Literature	Document published on September, 2013
107	IT-DOC-8	Self-evaluation form HERITY	Grey Literature	Courtesy of HERITY, 2013
108	IT-DOC-9	HERITY Survey for the visitors	Grey Literature	Courtesy of HERITY, 2013
109	IT-DOC-10	Conclusions of the Third HERITY International Conference	Grey Literature (Conference Proceedings)	Conference held on December, 2010
110	IT-DOC-11	Conclusions of the Fourth HERITY International Conference	Grey Literature (Conference Proceedings)	Conference held on December, 2012
	IT-DOC-12	HERITY technical sheet	Grey Literature	Courtesy of HERITY, 2013
111	PT-DOC-1	Certificação Internacional de Qualidade da Gestão do Património Cultural. Sítios Piloto em Portugal Abrantes, Mação, Vila Nova da Barquinha. RELATÓRIO DEFINITIVO, September, 2010	Grey Literature (Report)	Courtesy of the Director of the “Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo”
112	PT-DOC-2	Certificação Herity De 26 Bens Da Região Do Médio Tejo (Portugal) – RELATÓRIO DEFINITIVO MAÇÃO – Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo, 2014	Grey Literature (Report)	Courtesy of the Director of the “Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo”
113	PT-DOC-3	Estudo custos operacionais 2010 Museu Mação, 2010	Grey Literature (Report)	Courtesy of the Director of the “Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo”
114	PT-DOC-4	Museu de Mação - Estudo operacional 2012	Grey Literature (Report)	Courtesy of the Director of the “Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo”
115	PT-DOC-5	Museu de Mação - Estudo dos inquéritos realizados	Grey Literature (Report)	Courtesy of the Director of the “Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo”
116	PT-DOC-6	Relatório sumário de atividades em 2011 do Museu de Arte Pré-histórica e do Sagrado do vale do Tejo	Grey Literature (Report)	Courtesy of the Director of the “Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo”
117	PT-DOC-7	Balanço de 2012 e plano de atividades do Museu de Arte Pré-Histórica e do Sagrado no Vale do Tejo em 2013	Grey Literature (Report)	Courtesy of the Director of the “Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo”
118	PT-DOC-8	Este Património somos Nós!	Grey Literature	Courtesy of the Director of the

		Projeto de Guias voluntários para o Património de Mação, (11/02/2012)		"Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo"
119	PT-DOC-9	Projeto Trans-formations. Circuito Museu dos Museus. Projeto Guias Voluntários para o Património de Mação, 2010	Grey Literature	Courtesy of the Director of the "Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo"
120	PT-DOC-10	Projeto Afirmação Territorial do Médio Tejo. Certificação Internacional Herity No Médio Tejo, 2013	Grey Literature	Courtesy of the Director of the "Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo"
121	PT-DOC-11	Certificação Internacional de Qualidade da Gestão do Património Cultural	Grey Literature	Courtesy of the Director of the "Museu de Arte Pré-Histórica e do Sagrado do Vale do Tejo"
122	IT-ART-1	Milani G.P. (2014) Meno civiltà a Roma: cronaca di una morte annunciata, in Openmag (retreived from: http://www.openmag.it/2014/01/25/meno-civilta-roma-cronaca-di-una-morte-annunciata/)	Newspaper article	Newspaper article dated 25/01/2014, found and selected within direct observation document analysis
	IT-ART-2	Zanini, L. (2014) Meno sovrintendenti, super-musei, tagli e rotazioni: rivoluzione Mibact, in Corriere della Sera (retrieved from: http://roma.corriere.it/notizie/arte_e_cultura/14_luglio_16/meno-sovrintendenti-super-musei-vortice-nomine-rivoluzione-mibact-3c7dc96e-0cda-11e4-b4c9-656e12985e4f.shtml	Newspaper article	Newspaper article dated 16/07/ 2014, found and selected within direct observation document analysis
123	ES-ART-1	El Teatro, Icono de Caesaraugusta, in "Aragón Universidad", 26/04/2012: 21	Newspaper article	Newspaper article dated 26/04/2012, Courtesy of Municipality of Zararagoza
124	ES-ART-2	Aragonia inaugura el espacio "disfruta con los museos", in Heraldo de Aragón, 11/02/2012: 52	Newspaper article	Newspaper article dated 11/02/2012, Courtesy of Municipality of Zararagoza
125	ES-SCI-1	Erice Lacabe, R. (2010). Los Museos De La Ruta De Caesaraugusta: Una Experiencia De Calidad Y Rentabilidad Social, paper presented at the International Conference "Archeologia E Citta': Riflessione Sulla Valorizzazione Dei Siti Archeologici In Aree Urbane", 11-12/02/2010, Rome	Publication	Article published 11/02/ 2010. Courtesy of Municipality of Zararagoza
126	IT-SCI-1	Ungaro, L.; Del Moro, M. P. (2010). I mercati di Traiano, Roma	Publication	2010
127	IT-SCI-2	Enei, F. (2011) Il Museo del Mare e della navigazione Antica, HISTORIA, Santa Marinella	Publication	2011

Note: NA= Not available. Not applicable.

About the meaning of the codes:

Country Code	Typology
ES- (Spain)	INT- (Interview)
IT- (Italy)	RD- (Fields Notes)
PT- (Portugal)	PIC- (Image)
	DOC- (Grey Literature)
	ART- (Newspaper Article)
	SCI- (Scientific Publication)