Management of Cultural Heritage in Italy, China and Peru

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Menu:
A. General aspects/approach
B. Machupicchu
C. China
D. Where do we go from here

A) MANAGEMENT AND CH

• Perspective: ⇒ management studies (+ history)
  ⇒ micro-focus: individual entities
  practices vs. policies
  ⇒ general mgnt (>museum, site)

An emerging view:
- CH entities as (professional) “organizations”:
  - activities / conditions / resources / actions
  - and most important: - economic feasibility (B Plan)
    - non necessarily profitable

• Conflicts & controversies arts/economics/mgmt:
  - all over the world (BM)
  - transformation of PS ($$$; caring for the “client”: NPM)
A) Management and CH (continued):

**A Call for International Comparison**

From Research in Italy:
- Pompeii; Opificio Pietre Dure; Egyptian Museum in Turin; Municipal museums, Milan; Venetian Municipal Museums; Archeological Museum, Bologna….
- A modest approach (listening)
- Management knowledge & general mgnt (>MKTG & Fund R.)

To International comparison (virtually missing)
- British Museum; Quito Historical Centre; Heritage Malta;
- Machupicchu & CHINA

Administration matters:
- Professional dynamics & administrative reforms
- Long term traditions & short longitudinal changes
- Just superficial/partial isomorphism

Variety of solutions vs ethnocentric views (WB?)

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**B. MACHUPICCHU**

1. **context**
   a) "nature" of Machupicchu
   b) Administrative/political context (Fujimori to SNIP)
   c) Arena of "conflicts" (institutional fragmentation):
      - INC/Inrena
      - vs Anguas Caliente
      - Rationalities (Andean vs West?)

2. **key actor** (archaeological side)

3. **the role of Plans**

4. **discussion**
B) Machupicchu (continued):

1. context

2. key actor (archaeological side): INC-Cusco
   a) Structure
   b) Human resources
   c) Financial resources
   d) “business model”

3. the role of Plans

4. discussion
B) Machupicchu (continued):

Human resources

<table>
<thead>
<tr>
<th>Human Resources at INC-Cusco in 2008</th>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOTAL</strong></td>
<td>2,751</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Stable</strong></td>
<td>123</td>
<td>4.5</td>
</tr>
<tr>
<td><strong>On contract</strong></td>
<td>2,628</td>
<td>95.5</td>
</tr>
</tbody>
</table>

- **administrative and operational activities**
  - "Personal de operación y administración"
  - "Personal de inversión por área"
  - "Personal de inversión por área" (587)
  - "Personal de inversión por área" (686)

- **investment projects**
  - "Personal de inversión por área de subdirección de obra"
  - "Personal de inversión por área" (80)
  - "Personal de inversión por área" (1,346)

Focus on the Archaeological Park of Machupicchu:

<table>
<thead>
<tr>
<th>Role</th>
<th>Stable</th>
<th>on contract</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>directive/administrative functions</td>
<td>5</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>maintenance staff</td>
<td></td>
<td>147</td>
<td>147</td>
</tr>
<tr>
<td>elaboration of the master plan for the Sacred Valley</td>
<td></td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>archaeological research at the Inca City</td>
<td></td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>5</td>
<td>147</td>
<td>186</td>
</tr>
</tbody>
</table>

* excluded personnel contracted for investment projects

B) Machupicchu (continued):

Organizational aspects

- "Autonomy"
  - "económica, financiera y administrativa"
  - INC Cusco more than HSM discussion

- A "multiunit" entity:
  - amount of diversity

- Anomalous role of "on contract" positions
  - different issues in contracting out?
Almost totally self-funded - increasing inflows
- “hard to spend” syndrome?

Internal cross-subsidizing
- $ (88%) and people
- HSM funding restoration & running costs

Trade off exploitation/conservation

Externalities:
- Peru train
- Buses, hotel etc.

B) Machupicchu (continued):

Business model
B) Machupicchu (continued):

1. context

2. key actor (archaeological side)

3. the role of Plans
   a) “Planes Maestros”: management and change tool
   b) Plan Maestro 1998
   c) Plan Maestro 2005
   d) a comparison

4. discussion

B) Machupicchu (continued):

1. context

2. key actor (archaeological side)

3. the role of Plans

4. Discussion
   - Plans and actual change: a difficult issue
   - Some research problems:
     - Inconsistencies/weaknesses (e.g. Aguas Calientes, visitors)
     - “backstage” & process issue (time for investments)
     - conflicts are an issue (vested interests/illegal behaviour…)
   - However: identity building
B) Machupicchu (continued):
Discussion ii

- Drivers for change:
  - National level → political-administrative reforms
  - International community
    → Cultural policies (call for "ecological" approach)
    → Substantive solutions (e.g. stopping cableway)
    → Methodologies (the plans: a good example)

- Role of Unesco:
  - Positive contributions: solutions, enacts planning:
    → VOICE to professional
  - Limitations: "macro" approach:
    - missing a notion of responsibilities
    - UGM: misunderstandings
    - capacity building institutional change?

C. CHINA:

A 3-years research project:
Within a field research approach:
- in the shoes of professionals
- looking at micro impacts
- working “with” professionals/administrator
- a sino/italian team
- sort of “action research”

A unique bias:
"A journey inside Chinese PS"

Two parts:
- trends at aggregate level
- local level (Luoyang)
C. Research in China (continued)

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Ch. 4 Chinese Archaeology in The 20th Century and Beyond
Ch. 5 Tradition and Development of Cultural Heritage, Protection and Restoration in China
Ch. 6 China Tourism Developments
Ch. 7 Overview of Cultural Heritage in Luoyang City

Part B: Field analysis
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Ch. 8 The crucial role of local government in managing the archaeological chain: the CRB of Luoyang
Ch. 9 The organization of excavation activities: Archaeological teams n.1 & n.2
Ch. 10 A happy ending case of heritage preservation: the new museum of "Horse & Chariot"
Ch. 11 Old problems and new projects: opportunities and risks for Luoyang Museum
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Ch. 15 Institutional & organizational issues in the most important site of Luoyang: the Longmen Grottoes
Ch. 16 Cultural heritage at the county level: the case of Yanshi Administration
Ch. 17 A preliminary recap: major issues in managing Cultural Heritage from field research

Concluding remarks

C. Research in China (continued)
Main focus

Changes & challenges:
- urban, administrative, social & cultural changes
- also in the "archeological chain": discovery/conservation/museums practices
- in addition to "technical" & professional issues involving
  new managerial challenges

i.e.: - conflicts between curatorial/customer oriented view
- trade off between effectiveness & resources
- division/conflict of role between ≠ levels (PS changes)
- issues of coordination (macro/micro)
- making money & spending across entities
- budgeting & business plan & sustainability
C. Research in China (continued)

Case Histories

A TYPICAL CASE STRUCTURE
based on Zan, 2006, Palgrave MacMillan

0. Elements of interests
1. History/identity
2. Effectiveness:
   2.1 Curatorial back office
   2.2 Visitors
      ⇒ not a celebration (critical)
3. Efficiency:
   3.1 Human Resources & Organization
   3.2 Financial resources
      ⇒ access to data!!
(4. Future developments)

In short

Recommendations

C. Research in China (continued)

Few comments on individual case histories

Institutions (9 out of 19) ⇒ elements of interest
- The CRB Luoyang: coordination/governance issues
- Archaeological Teams N.1&2: excavation/coordinating problems
- Horse & Chariot Museum: happy ending; new museum
- Luoyang Museum: old-fashioned?
- The Ancient Tomb Museum conservation/visitors problems
- Guan Lin financial mis-management
- Han & Wei Site what to do?
- The Longmen Grottoes coordination/outsourcing
- Yanshi Administration inter-organizational relations development & visitors?

⇒ Major findings (see the book!)
C. Research in China (continued)

Effectiveness (a) : curatorial & visitors

- **Nature of Luoyang CH**: mainly underground
  - archaeological sites/excavation
  - wood and earth (gone; going)

- **Managerial implications at 3 levels**:
  1. Museum/site concept:
     - difficult to protect:
     - enormous value for professionals
     - appeal for visitors ???

  2. CH system funded by excavation (anomaly)
     But lack of incentive for research/coordination along the ArcheoChain

  3. Bias towards special projects /extraordinary activities
     # Lack of funds/practices for normal restoration
     # Lack of attention to “organizational maintenance”
     - new entities rather than managing change
     - bias on initial steps (not running costs)
C. Research in China (continued)

Effectiveness (b) : curatorial & visitors

• Nature of Luoyang CH:  
  - a very rich area  
  - high number of entities (inside; outside)

• Institutional fragmentation & impacts:
  1. Duplication of resources / lacking effectiveness
  2. “managing visitors”???:  
     - differences in performances  
     - but also in attitude  
     - difficulties in "central" leadership?  
     - benchmarking exercises
  3. From competition to cooperation (???): Luoyang as-a-whole  
     Strategic alliances

C. Research in China (continued)

Human Resources

• Explanation for internal differences?  
  - staffing: status more than organizational needs  
  - Plus "behaviors" not far from other bureaucracies:  
    (Centralism, Political “intrusion”, Lack of mngt KH)  
  - Strange enough: lack of control on workers performances
• Lacking talents? Or lacking basic rules in HRM

Financial data and managerial processes

• Far from any notion of “managing by numbers”  
  a) lack of a notion of accountability (report to sources on a item base)  
  b) transparency. WYGIWYAF
  c) doubts about consolidation processes  
     - simply summing  
     - missing breakdown
  d) lack of focus on running operations

• Substantive aspects (our cases)  
  ⇒ a variety of situations  
  ⇒ calling for a benchmark exercise (explaining differences)
D. WHERE DO WE GO FROM HERE

• A Research agenda on Managing CH

  Short term (China):
  - Extension to other areas (SOAS 2009)
  - Inter-Province comparison
  - Visual case studies? Mgnt course?

  (Heritage Malta): overcoming itemized-budget???

  Long term: **Toward a serious international comparison?**
  - understanding historical inertia
  - "mapping" varieties in administrative traditions
  - accepting varieties of solutions

• A Policy making agenda

  European countries as a possible model?
  in particular: preserving the role of the State

  (CH as a special "social laboratory")