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ORTE2013 Challenging immateriality: Outline for a valuation model of invisible (and visible) heritage

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Abstract: The objective of this paper is the presentation of a model conceived to value and promote intangible heritage, specially conceived for contexts in which there is a high degree of mistrust and, relatively little regular communication among the main stakeholders.. The problematic of heritage valuation is closely linked with tourism, and intangible heritage has been acquiring increasing relevance in processes of cultural and creative tourism development. For its part, the local harnessing of the benefits of tourism, namely in rural contexts, is very much dependent on the stakeholders' capacity to organize themselves and to cooperate in order to create valuable tourist experiences. The valuation model presented is built on a combination of former propositions (Lopes, 2012; Lupo, 2007; Saxena and Ilbery, 2008) and the preliminary results from a research project on the area of intangible (partially invisible) heritage.

Keywords: Creative Tourism; Created Heritage; Heritage Valuation; Intangible Cultural Heritage; Integrated Rural Tourism; Stakeholder Cooperation; Mentoring.

ORTE2013 inmaterialidad desafiante: Esquema de un modelo de valoración del patrimonio invisible (y visible)

Resumen: El objetivo de este trabajo es la presentación de un modelo de valoración para el patrimonio inmaterial, especialmente concebido para contextos de alta desconfianza y bajo nivel de comunicación. La problemática de la valoración del patrimonio se queda vinculada al turismo y al patrimonio inmaterial y ha adquirido relevancia en el proceso de desarrollo del turismo cultural y creativo. Por su parte, el aprovechamiento local de los beneficios del turismo, particularmente en los contextos rurales, es muy dependiente de la capacidad de los interesados a organizarse y cooperar con el fin de crear experiencias turísticas valiosas. El modelo de valoración presentado se basa en una combinación de propuestas anteriores (Lopes, 2012; Lupo, 2007; Saxena y Ilbery, 2008) y en los resultados preliminares de un proyecto de investigación en el área del patrimonio inmaterial (parcialmente invisible).

Palabras Clave: Turismo Creativo; Patrimonio Creado; Valorización del Patrimonio; Patrimonio Cultural Inmaterial; Turismo Rural Integrado; Cooperación de las Partes Interesadas; Tutoría.

1. Introduction

In the scope of a multidisciplinary research project¹, we are developing a socio-economic valuation model specially conceived to take advantage of archaeological finds, whose material existence although known and studied, remains invisible (not available for visits) and therefore can be considered as part of the intangible heritage.. This means that we are dealing with a context where there is no material patrimonial resource, but it must be instead created, by adding value to assets that remain buried. Creating value implies the coordinated participation of the parties involved, and the best organizational form to achieve it is the network (Castells, 2010; Lopes, 2012; Ashkenas, 1995). However, networks are fragile structures, even more in contexts like the Portuguese society in which there is a high degree of

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and significant social distances created by power differentials (Hofstede, 1991; House, Hanges, Javidan, Dorfman, and Gupta, 2004).

In a first phase of the project, which is the basis of this article, we did exploratory research about two already functioning archaeological sites in order to understand how the local heritage was valued, how invisible heritage would be valued and the quality of the cooperation between three types of stakeholders, local business people and resource controllers (Saxena and Ilbery, 2008), the last one split in two, namely site's managers and local authorities. In the second phase, the results of which were not yet available when writing this article, these same three groups of stakeholders were interviewed in the very context where the socio-economic value proposition is to be implemented, the Alqueva dam region, where a considerable amount of funerary artefacts were found, mapped and buried again.

In the meantime, based on the empirical data from the exploratory phase and on the literature review, an outline of a valuation model especially adapted to contexts with a high degree of mistrust and significant power differentials, was developed and is presented and explained in this paper. The model will next be refined based on the results of the second phase of the research project and a special study designed to test it is already being prepared. Being a work in progress, this paper aims at theoretically explaining the model in the sphere of the creative tourism concept and its associated implementation mechanism, as well as considering the network of coordinated social actors. Therefore, it comprises three main parts. In the first part, covering sections 2 and 3, we discuss the shift in tourism trends advocated by Richards (2010a, 2010b, 2011a, 2011b), from cultural to creative tourism, contextualizing the rationale for this change within the scope of current changes in Europe. We also associate this with the need to shift from the exploitation of endowed resources, as in traditional cultural tourism, to their creation, through symbolic value added, a movement that implies new, more cooperative organizational forms. In the second part we describe already existent valuation models and we present some of the main conclusions from the exploratory empirical work, showing the high mistrust, low communication nature of context. Finally, we outline and explain a proposal for the development of a valuation model of intangible heritage, based on the combination of already existent models and on the conclusions derived from the analysis of the empirical data. We conclude by explaining the next research steps, including the validation of the proposed model.

2. Following postmodern moods

Despite the financial and economic crisis, which severely hit the United States and Europe since 2008, tourism remains one of the most dynamic economic activities in the world. After a fall of about 4% in 2009, the World Tourism Organization (UNWTO, 2011) signalled a strong recovery of 6.9% in international tourism arrivals in 2010, since then growth has remained at around 5% per year, and in southern Europe reached 6% in 2013 (UNWTO, 2014). While instability in the Eurozone, and the submission of many countries to the tutelage of the *troika*², contributed to the lack of liquidity of citizens and families, low cost tour formats emerge, based on collective accommodation (hostels) and exchange or borrowing of private homes (couch surfing) and other similar arrangements. The good performance of the tourism sector is also very much due to the emerging economies (Richards, 2011a) and Europe functions as a powerful attractor for the new middle classes, who currently seek especially prestigious shopping (The Economist, 2010), but are expected to soon become more demanding in terms of cultural and experiential touristic offer (Z_Punkt, 2012).

Simultaneously, European citizens are experiencing changes in their ways of life, due partially to the crisis and partially to more gradual changes in habits, needs and worldviews. Those changes are determining a shift in the touristic experiences offered and most of all a transformation of the very notion of tourism. In this context, we may refer to two important trends in contemporary tourism development in Europe; on one hand, the market of the emerging economies, whose citizens are experiencing for the first time the possibility of visiting the highlights of European heritage and, on the other hand, the more experienced tourists from the developed countries, who are looking for other, more introspective touristic experiences (Richards, 2011a). For these kinds of tourists the local, which means the specific place itself and its people, acquires a new, increased value.

Richards (2010a; 2011a; 2011b) considers as the main qualitative trends of today's tourism the growing interest in the "everyday culture" of the destination, as well as in creativity and the arts. According to the author, tourists are becoming omnivorous, meaning that they are equally able to enjoy a great

opera at the Milan Scala, and a popular village ball, or a day at the grape harvest. The dilution of classical, established borders and the capacity to harmoniously deal with heterogeneity, as well as the pursuit of learning experiences and self-fulfilment are characteristics of postmodern, post materialistic consumption, which so tightly blends with production, that becomes prosumption (Ritzer, 2014).

This transformation determines the emergence of new forms of organization and increasing complexity in the value chain, challenging the classical power relations (Binkhorst and Den Dekker, 2009) and the traditional equilibria between the endogenous and the exogenous (Saxena and Ilbery, 2008). This kind of development is particularly sensitive in rural spaces, where touristic activity is frequently limited to the direct use of endowed natural and some built heritage and associated with the myth of the “rural idyll” (Van Dam, Herin and Elbersen, 2002; Hosszú, 2009).

The massification of cultural tourism, indirectly determining the emergence of creative tourism (Richards, 2011a; Richards, 2011b) is gradually changing this situation, appealing to a broad and deep participation of all social actors in the process, so that the “inter-relationships between travel, other economic sectors and society as a whole have become so integrated that we might conceive of a ‘value network’ rather than the old value chain” (Richards, 2011a: 4). This transformation has profound implications for the traditional organizational forms and for the classical notion of heritage. From the moment that value is no longer perceived as an inherent characteristic of some specific places and/or buildings because visitors want not only to see, but to experiment and feel the unique “flavor” of a place, a valuable resource is no longer given, but must be (co-)created. Resource creation implies empowered participation of all social actors, local as well as external stakeholders and the tourists themselves (Miettinen, 2008; Richards, 2011a).

3. From endowed to created heritage

This trend has strong consequences for the tourism industry, namely for cultural tourism, which configures one of the most vibrant niches in Europe, not only in terms of increasing numbers of cultural visitors, but in terms of the volume of spending of these often well-educated and economically well-endowed tourists (Richards, 2010b).

“Cultural tourism essentially involves visits to cultural attractions and events by culturally motivated people” (Council of Europe, 2010: 23) and turned to a good opportunity for specific places, namely historical cities and different heritage sites, to affirm its individuality. In a world of global competition, this was a good form of ensuring comparative advantage for a while, but very rapidly every place engaged in similar strategies to demonstrate its uniqueness, which made them seem all-equal. This means that most of the efforts, which were meant to attract the cultural tourists ended up driving them away because of the growing massification and rigidity of the programs, normally attached to monuments and other material heritage exhibitions.

The tendency for massification, or *McCulturization* (Richards, 2010a) of cultural tourism coincided with a more intimate tourist's needs, a search for “authenticity”, personal development through diversified learning experiences and a sense of *comunitas*, of being together, of being part of nature and the world in the specificity of its many places. The concept of creative tourism meets precisely these needs and simultaneously ensures the possibility to gain competitive advantage *vis-à-vis* a wider range of places, since it becomes dependent on created, not endowed heritage.

According to Richards and Wilson (2006) referred to in (Council of Europe, 2010:26), creative tourism is a type of “tourism, which offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences which are characteristic of the holiday destination where they are undertaken”. Considering this definition, it is clear that it is not necessary for a place to be endowed with material heritage in the form of cathedrals, monumental ruins, palaces or even fabulous natural landscapes in order to be competitive in the creative tourism market. The learning experiences desired by creative tourists have much more to do with the particular know how of a place and the opportunity to co-create tourist experiences, based on its unique place resources. This approach has important consequences for a range of classical notions and relations: first of all the idea of resource and/or heritage; then the question of power and organization and, last but not least, the issue of communication and the new centrality of narrative.

The notion of resource, which includes heritage, has been changing during this last decade (Emery and Franks, 2012; Lamara, 2011; Lipietz, 1995; Pesteil, 2001; Richards, 2011b; Saxena and Ilbery, 2008; Valera, 2008). In a metaphorical sense, we may say that the concept has been losing its materiality,

or is becoming immanent. This means that the resource is no more envisaged as something given, effectively present in a specific place by chance, because of destiny or the vicissitudes of history, and that may be appropriated by someone who has the means and/or the skills to make profit from that chance. The resource has become something that must be created by the social actors of that place in interaction with each other and with external stakeholders, in order to develop a unique value proposition, whose uniqueness resides precisely in the overt ascription to a place (a local in the world), in its integrated character (the highlight does not exist in itself, but is derived from the diversity of the network) and in the way it is communicated (the narrative). The approach of resource creation instead of exploitation implies a networked organization (McDonald and Jolliffe, 2003; Ohe and Kurihara, 2013; Panyik, Costa and Rátz, 2011; Richards, 2011a; Richards, 2011b; Saxena and Ilbery, 2008) of very heterogeneous stakeholders and in order to be effective, a complex, delicate and dynamic equilibrium between the endogenous and the exogenous (Saxena and Ilbery, 2008) must be created and maintained. This kind of organization is of course extremely fragile and subject to systematic (re-) negotiation, which involves the notion of resource itself (how a monument, a particular knowledge, a song, a tradition, a piece of landscape is locally viewed), the active involvement of stakeholders in the network and the ways of presenting/selling the created resource to the world. Several studies have already shed some light on this problematic (Gomes, 2010, 2011; Gomes and Manesch, 2011; Lopes, 2012; McDonald and Jolliffe, 2003; Ohe and Kurihara, 2013; Panyik, Costa and Rátz, 2011; Richards, 2011a; Richards, 2011b; Saxena and Ilbery, 2008), many of them suggesting the eventual positive impact of an external, as neutral accepted mentor in order to deal with trust and power problems. As an example we can mention the work of Saxena and Ilbery (2008) about what they conceptualized as “Integrated Rural Tourism”, in which the authors refer to several problems relating to the building of effective value networks in rural areas. They mention the strategic, but difficult relationship between local and “indirect stakeholders”, namely the resource controllers, *i.e.* those “who exert ownership, management, or service provision control on many natural and cultural resources for tourism, such as large estates, cultural centers, museums, historic buildings” (Saxena and Ilbery, 2008: 235). This paper (Saxena and Ilbery, 2008) also mentions the perceived psychological distance from the central development agencies and the state, whose programs and rules totally misfit the localities, as well as the high risk of network capture by a small group of locals, who stifle participation, hamper internal cooperation and external connections, and in fact privatize development policies, contributing to the unsustainability of rural tourism.

Lack of trust is at the heart of many of these symptoms and this is the main reason why some kind of external mentoring is often advocated (Gomes and Manesch, 2011; Panyik, Costa and Rátz, 2011). Communication, in this context, is crucial, both internally within the local network, and externally, in relation to the potential visitor, regarding the perceived value of the product and/or service he/she is buying.

The process of resource creation is consequently as much related to the organizational and cooperative competencies of internal stakeholders, as with the capacity to communicate the value of the resource. Internally, communication fulfills two key functions, namely network trust building and social identity enhancement; externally it adds symbolic value to the resource.

As Valera (2008) points out, scientific discourse in its quest for objectivity and context-free precision has long repressed any approach to narrative, in fear of emotional or poetic contamination. Such practice had/has consequences in terms of the perceived richness of the phenomena transmitted, even in the context of peer communication, far more if we think about dissemination to the general public. Creating a resource, adding symbolic value to a product, a service, a specific way of doing things, a piece of material or intangible heritage implies the use of narrative, and often the use of ritual, which is a collective performed narrative (Costa and Valera, 2008).

So far, we may summarize the discussion in five points: (1) the concept and practice of tourism has been changing from a mass approach, to a more individualized and/or communitarian approach; (2) this transformation implies another form of organization, a shift from the “value chain” to the “value network” (Richards, 2011a); (3) the “value network” implies communication, cooperation, co-construction and collective implementation of touristic products; (4) this is a difficult endeavor because networks are fragile, and must be continuously supported from inside and from outside; (5) these difficulties increase in high mistrust, low communication contexts. Considering this, research has been trying to develop models, which may serve as roadmaps helping to implement effective “value networks”. In the next section, we are going to present the main ideas underlying some of these models, before presenting our own.

4. Heritage valuation models

In the context of cultural tourism, and especially creative tourism, the promotion of heritage becomes a frequent topic of discussion and several authors propose valuation models that may enable local actors and stakeholders to approach the issue more systematically and with increased effectiveness.

Arguing for a broad view of design, Lupo (2007) presents a valuation model focussed on “Intangible Cultural Heritage” (ICH)⁴, which aims at safeguarding the living character of this kind of heritage by ensuring its continuous narration and performance. The main idea of the model is to integrate the processes of conservation and documentation with those of transmission and consumption. In accordance with this, Eleonora Lupo’s model proposal has three phases (identification; conservation/protection; diffusion/activation) and an implementation vector, which is quite straight and linear in the first two phases, but assumes a bundle or cluster character in the third phase, dedicated to the diffusion and activation of the ICH. This representational form indicates an increased complexity and implies the need for a multitude of cooperative actions and integrated strategies. The model ends exactly where the effective problem begins, namely with the diffusion and activation of the already identified and protected heritage. While referring to a broader issue, “Integrated Rural Tourism” (IRT), Saxena and Ilbery (2008) may have given some insight to “solve” the problem of the “diffusion/activation” phase. Their case study about rural tourism development in an English/Welsh border region ends up demonstrating the inevitability of stakeholder action integration in order to achieve competitive advantage, with the achievement of this objective dependent on systematic negotiation and on several balances of power. Starting from the very notion of IRT, which “can thus be conceptualized as a mesh of networks of local and external actors, in which endogenous and embedded resources are mobilized in order to expand the assets and capabilities of rural communities and empower them to participate in, negotiate with, influence, and hold accountable the actors and institutions that affect their lives” (Saxena and Ilbery, 2008: 239), the authors show that the effectiveness of such networks is dependent on a dynamic equilibrium between the extent of the embeddedness and disembeddedness of these networks⁵. The joint contributions of endogenous and exogenous elements in these networks implies that the benefits of resource appropriation by local stakeholders may be boosted by exogenous elements in “a process of continuous (re)interpretation and (re)negotiation [...] that allows for a continuous evolution of new forms of survival and interaction in a context of active and empowered participation” (Saxena and Ilbery, 2008: 238).

Recognizing the barriers to implementing an organizational format of this nature, Aylward (2009) proposes an integrated model of rural stakeholder network relationships, based on focus group discussions and semi-structured interviews conducted in an Irish rural area. This author’s findings reinforce the centrality of communication (information dissemination and knowledge transfer) and relational variables like reciprocity and trust and the need to build a shared common vision. However, her model does not consider two relevant aspects: first of all, that the centrality of the shared common vision hides the diversity of interests, that are inevitably present; second, the model does not propose ways to build the common vision, or at least the superordinate goals (Sherif, 1958), when they are not present. Nevertheless, Aylward’s model is very interesting for our own research because, among other things, it uses the same methodology and refers to a context, which apparently has many similarities with the Portuguese rural context -- namely concerning communication and trust.

5. The context

The context within which networks form and evolve is a determinant aspect when dealing with resource creation and valuation in the scope of IRT (Aylward, 2009; Saxena *et al.*, 2007). In some contexts, network building and power balance negotiation between stakeholders is easier, in others it may be hampered by various circumstantial or structural reasons, as there are situations in which stakeholders almost “naturally” determine superordinate goals, and others where this possibility is not even considered. So, when developing a valuation model for ICH in the scope of IRT, context must be considered.

The model suggested by Lupo (2007) is a very general one, universally applicable, but in order to be effectively applied it must be adapted to the various contexts, specially the third, non-linear phase, which deals with diffusion and activation, and as already seen, implies the integrated and cooperative action of the stakeholders.

Figure 1: Map of Portugal with location of the two archaeological sites (Foz Côa, São Jorge) and the region of future implementation of the valuation model (Alqueva).



Source: Adaptation from Google Maps <https://maps.google.com/maps/ms?ie=UTF8&oe=UTF8&msa=0&msid=206220935075610620012.0004b5c8ffa4eb89953e2>

In turn, when studying a specific rural region at the border between England and Wales, Saxena and Ilbery (2008) concentrated their attention on the organizational dimension of integrated valuation processes in rural contexts. Their conclusions may be summarized in two interrelated strands, one dealing with organization and a second dealing with communication. Firstly, the authors conclude that, in their case study, there is a lack of integration of the various local economic and cultural activities and a lack of strategic vision. This situation is simultaneously the cause and the result of the “failure

to link different actors – local authorities, tourism boards, regeneration partnerships, community groups, and others – in order to create a more rational approach based on the real needs of members” (Saxena and Ilbery, 2008: 249). Secondly, the authors also conclude that there is a lack of coincidence between the more general strategies for marketing the region -- normally developed and carried out by indirect stakeholders, like the resource controllers and national tourism boards -- and the localized versions of place identity. In the face of this situation, it seems that there is a need to “recapture” the narratives and the mythical figures by the local stakeholders, in order to embed the stories into local people’s knowledge and tourist’s experiences.

In 2012, we carried out a preliminary study in two different archaeological sites in Portugal trying to understand how local stakeholders and resource controllers would position themselves in face of the possibility of valuing almost invisible heritage (Gomes and Souza, 2013). The study was carried out as part of the first phase of the research project “Funerary Practices in Alentejo’s Recent Prehistory and Socio-economic Proceeds of Heritage Rescue Projects”, which aims to develop a model for valuing heritage resulting from interventions of salvage archaeology⁶.

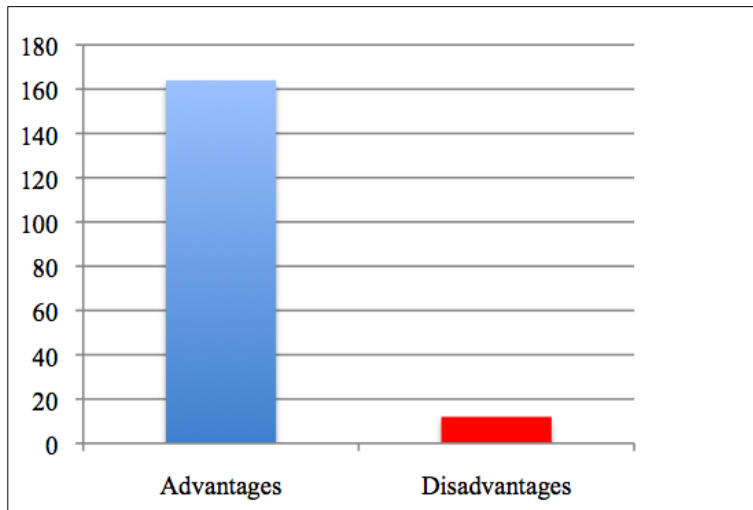
Although the specific location for the implementation of the project is a different one (Alqueva), we decided to select, for the exploratory phase of the main project, the Coa Valley Archaeological Park⁷, because of its unique relevance as the only UNESCO World Heritage site in the Portuguese archaeological universe, and the Aljubarrota Battle Camp⁸, because it is the closest to the situation we wanted to test, since its value is independent of the exhibits (they remain buried or disappeared), resulting almost exclusively from its symbolism. In the case of the Coa Valley, despite the engravings can be visited, the construction of the museum, which uses audio-visual technologies, complemented by a well-constructed narrative strongly contribute to attract the interest of visitors. Also in the case of Aljubarrota, tourists have the possibility to “watch” the battle that was fought there, through the use of a historical reconstitution film, complemented by a guided tour. In both cases, it is not the material heritage that really counts, but the symbolic value added to it through the narrative, whether oral or visual, and by immersing the tourist in the local context.

We conducted a total of 22 semi-directed interviews in both sites during approximately 3 weeks in the winter of 2011. The number of 22 was not a deliberate goal. It resulted from the willingness of local social actors within the constraints of time and funding. Due to the exploratory character of this research phase, we were more concerned with the type of respondents, than with their number. Our sample consists of three types of social actors, namely the managers of the archaeological sites, local authorities’ representatives and local business owners. As we wanted to gather input regarding local actors’ perceptions, we did not interview any tourists.

Table 1: Characterization of the respondents in Foz Coa and Campo de So Jorge

| Total respondents | Site managers | | | | Municipal authorities | | | | Businesspeople | | | |
|-------------------|---------------|----------|-----------|---------------|-----------------------|----------|-----------|---------------|----------------|----------|-----------|---------------|
| | natives | incomers | residents | non-residents | natives | incomers | residents | non-residents | natives | incomers | residents | non-residents |
| FC | 1 | 3 | 3 | 1 | 1 | 0 | 1 | 0 | 8 | 2 | 10 | 0 |
| CSJ | 9 | 0 | 1 | 0 | 1 | 0 | 3 | 0 | 5 | 0 | 5 | 0 |

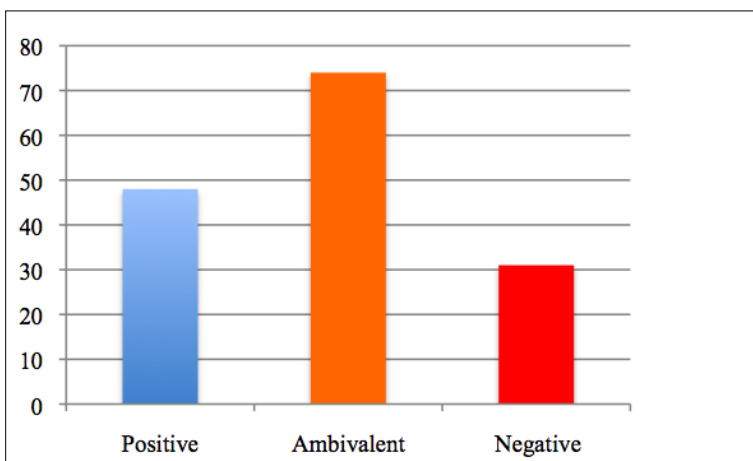
The results of this exploratory phase coincide with the conclusions presented by Saxena and Ilbery (2008) in relation to the two main dimensions we are dealing with: organization and communication. The following charts illustrate some of the results of the thematic content analysis of the semi-directed interviews. We chose to present the results of both sites in aggregate format, since we didn’t detect any significant difference between them concerning the main dimensions in inquiry, namely value of intangible heritage, communication and organization. Significant expressions were codified and counted. The charts show the quantitative expression of the interviewees’ perceptions⁹.

Chart 1: Perceived advantages and disadvantages of archaeological sites.

Source: Gomes and Souza, 2013

The discourse of the interviewees, regardless of the stakeholder group to which they belong, is in general appreciative of the presence of the archaeological sites in the respective places. The appreciation is mainly related with positive inputs for the local economy, for employment (even if job creation is quite limited) and most of all for tourism. Tourism is, without doubt, the main reason for the supportive attitude of the interviewees, as well as the perceived positive reputation for their localities, which comes with it (Gomes and Souza, 2013).

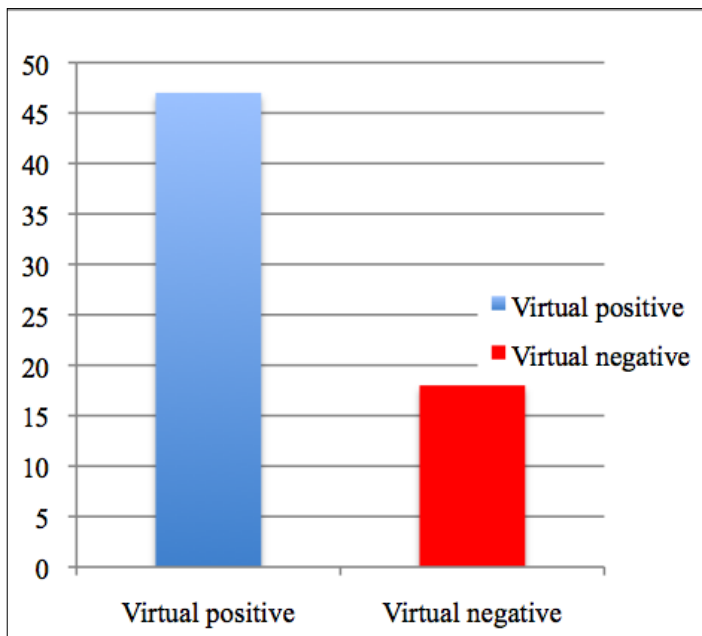
The major perceived disadvantage of the archaeological site lies, at this level, in the respondents' understanding of their places' weak capacity to attract tourists for longer stays. And precisely here lies one of the lines of dissent which oppose business people and resource controllers, namely site managers, each part blaming the other for the insufficient and unsatisfactory tourist presence and stay in the regions (Gomes and Souza, 2013).

Chart 2: Perception of value of the local archaeological heritage

Source: Gomes and Souza, 2013

The predominance of ambivalence over clear positive or negative expressions, when valuing the archaeological sites, may be explained by the consciousness of the effective advantages brought by the archaeological discoveries, together with some negative feelings dividing the parties, namely local business people and the resource controllers, due to communication difficulties as well as negative attitudes of indifference and feeling of being put aside of the process and therefore refusal to participate.. Nevertheless, it is clear that the majority of the respondents, even the more critical ones, have gained something with the opening of the heritage sites, as many respondents express disappointment, because they did not get what they thought they would get, as opposed to a firm opposition. (Gomes and Souza, 2013).

Chart 3: Perception of the virtual (not directly material) value of heritage

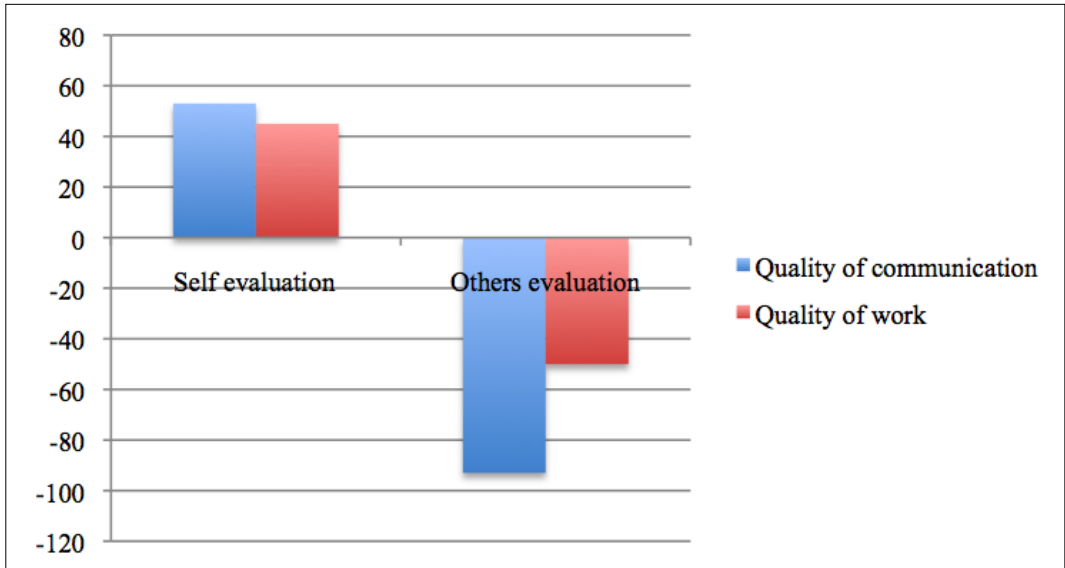


Source: data collected in the exploratory study, 2011.

Even considering the advantages, interviewees do not fully understand the value of the heritage, although recognizing the possibility of the valuation of the intangible, mainly through the use of visual technologies (films, virtual reality). The understanding of “value” remains attached to the material thing and even the possibility of any kind of virtual display is much more valued due to the high tech component and its symbolic association with modernity, than with the idea of an endogenous creation of value out of an archaeological narrative. However, Costa and Valera (2008) describe and explain the process of creating a legend, based on the archaeological interpretation of a rock in the landscape, a legend which was staged by the community and has become a sort of a yearly repeated “identity ritual” as well as a tourist attraction. This case may illustrate the idea that the fundamental issue lies in fact in organization, and the creation of conditions for the active participation of all stakeholders.

Nevertheless, communication and participation seem not to be perceived as satisfactory in both places where the exploratory inquiry presented here took place, as the following chart demonstrates, although self evaluation tends to be more positive than evaluation of others.

Chart 4: Evaluation of the quality of work and communication by the sites' managers themselves, and by others (local business people and authorities).



Source: Gomes and Souza, 2013

The communication barrier and misunderstanding between the two groups is evident, showing a situation of mutual incomprehension and evident lack of an integration strategy. The sites' managers consider quite positively their work, in terms of outputs, referring to different efforts to promote the sites, and also in terms of efforts to include the local population and to disseminate information about the sites and all the related events. In turn, other respondents show a strong level of criticism, precisely regarding such issues as closure, lack of information, and the resulting exclusion and conflict. Similarly, most of the local entrepreneurs consider that the acknowledged commitment of the site's management is insufficient to counter the lack of coordination, which results in inferior work and a poor use of the local potentialities (Gomes and Souza, 2013). It should be noted, however, that criticism relating to lack of coordination often refers to the action of the national bodies responsible for tourism and culture and not necessarily to the local management of the archaeological sites. This criticism towards external institutions, perceived as being very distant, is one of the few points of agreement between the parties, matching also with the attitude of the English/Welsh border inhabitants, referred to by Saxena and Ilbery (2008). However, the patterns of divergence visible in the chart also result from conflicting objectives between the directing bodies of the sites, very concerned with heritage preservation, and the interests of business people, for whom the more tourists the better. Suggestions for improvement are made by all parties, with archaeological site managers stressing the need for better coordination and an improved networked integration of all stakeholders, while business people urge for events that attract more visitors to the region (Gomes and Souza, 2013).

So far, we may find some tendencies, based on the results of the exploratory study undertaken in the two Portuguese heritage sites, that there seems to be a propensity of local actors, private businesses as well as resource controllers to: (1) perceive heritage as being valuable and good for the development of lagging rural regions; (2) consider development as fundamentally based on tourism; (3) understand that heritage contributes to the enhancement of the identity of the local population; (4) perceive heritage as still mostly associated with materiality (the thing). Additionally, the broader case-study context analysis, enriched by literature review suggests that: (5) creating valuable resources implies the active participation of coordinated stakeholders; (6) in order to achieve this goal it is necessary to create the conditions for communication and free information flow; (7) the resulting narratives and their enactment (yielding the creation of the "tourist products") must

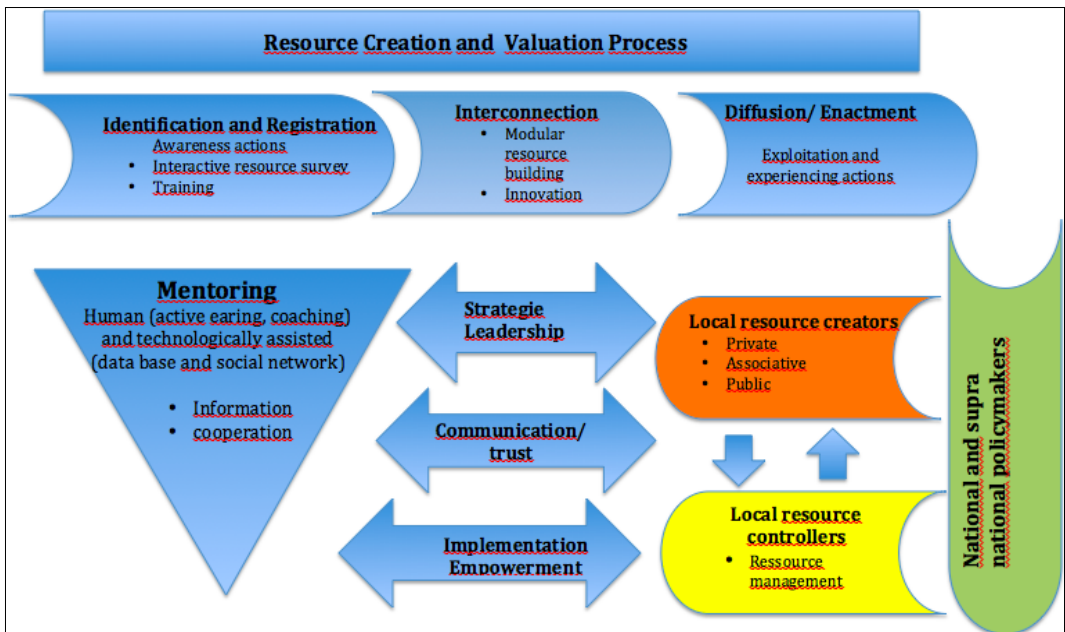
match or be closely related to the conceptions of the local stakeholders, and not be confined to the fabrication of the, strategic agencies that are designing sites, and the decision making boards that are perceived as being distant from local heritage. Our proposal of a heritage valuation model takes all these points into consideration.

6. Our approach: outlining a valuation model for invisible (and visible) intangible heritage

Now, returning to the valuation model proposed by Lupo (2007), we consider it relevant to maintain the three phases and to additionally introduce two more elements in the model, one of them allowing for a better understanding of the complexity of the third phase and the other suggesting the introduction of a mentoring mechanism conceived to deal with the integration and communication issues, theoretically discussed and empirically validated, in contexts of high mistrust such as the Portuguese (Hofstede, 1991; House, Hanges, Javidan, Dorfman, and Gupta, 2004).

As previously referred to, the two first phases of Lupo’s model are quite linear. They just need a contractual partnership between local and/or external resource controllers, professional specialists, the local authorities, as well as funding institutions and strategy designers. The local stakeholders are also involved in the building of awareness and identification of actions, which should permit, through active listening and compiling of ideas and potential resources, the registration and conservation of the identified heritage,. However their participation is still rather passive, since they are just asked to identify and “translate” the meaning of heritage. It is in the third phase that the synergistic contribution of the “mesh of networks of local and external actors” (Saxena and Ilbery, 2008) becomes determinant for the success of the process. Considering this, we made the complexity of the diffusion/enactment phase explicit, by graphically representing the interrelationship of the three stakeholder groups mentioned by Saxena and Ilbery (2008), namely the locals, the resource controllers and the strategy designers (national and supranational policy makers). But revealing the complexity of the diffusion/enactment phase alone is not enough to help deal with the integration and communication issues, whose effectiveness is determinant for the positive accomplishment of the valuation process.

Figure 2: Heritage Valuation Model proposal



The valuation model we are proposing is clearly related with IRT, inasmuch as it perfectly coincides with the main focus of most of this concept approaches, namely the one proposed by Saxena *et al.* (2007: 21), which defines IRT as “a web of networks of local and external actors, in which endogenous and embedded resources are mobilized in order to develop the assets and capabilities of rural communities and to empower them to participate in, influence and hold accountable the actors and institutions that affect their lives.”

The valuation model is presented as a process constituted of three interrelated phases, activated by a “web of networks of local and external actors”, namely the local stakeholders, the resource controllers (who are, or may also be local) and the national and supra-national policymakers. The big challenge of IRT is to mobilise and empower these stakeholders (through integration, communication and free information flow) in order to create valuable resources (enactment), which may positively affect the lives of those living in rural communities, as well as contribute to wealth creation through the development of more appealing tourist products and services.

We assume that the building and development of local and external actor networks, and community-based partnerships is not a “natural” bottom up process, but it is not a top down process, either. The fact is that change is very often triggered by external agents, through their actions and information transmission, but any new system of meaning necessarily results from reinterpretations in the light of local knowledge and experience, so that this process is always based on extremely interactive, and often violent, relationships between external and internal agents, each group being also very heterogeneous (Lopes, 2012). This is why we advocate that, mainly in high mistrust contexts, a third, external party that is perceived as being neutral may be useful to create the necessary trust conditions in order to foster a negotiation-friendly environment that induces cooperation. This third party is graphically presented in the model (Figure 2) as an inverted pyramid, which means that its mediation role is based on the systematic listening to and integration of stakeholders’ knowledge in order to preserve local identities that are, in many contexts, lost or perverted (Saxena and Ilbery, 2008). The role of this mentor, which should be human, but may also be technologically assisted (Gomes and Maneschky, 2011; Bousset *et al.*, 2007), is the one of being a facilitator of communication, a convenor of proposals, ideas and suggestions and a guardian of the free flow of information, supporting creativity and participation. The inverted form of the pyramid means that this mentor shall be listening to and actively learning from the parts, not in order to build an hypothetically purified narrative (those stories which mean nothing for the people involved), or a false consensus, but in order to be a catalyst for the recapture of identity by the local stakeholders and its translation into narratives and rituals with an added value that shall go far beyond the local boundaries, being thereby transformed into intangible heritage.

7. Summary

The present paper aims to present, explain and theoretically frame a proposal for a Heritage Valuation Model, conceived for high mistrust, high power differential contexts. The outline is based on a literature review dealing with the evolution of tourism, ICH, IRT and rural development and preliminary empirical data resulting from the exploratory phase of the research project “Funerary Practices in Alentejo’s Recent Prehistory and Socio-economic Proceeds of Heritage Rescue Projects”.

The data presented here are the result of the exploratory phase of the abovementioned project and allow us to reach some conclusions: (1) the benefits associated with the existence of archaeological sites in the localities are generally recognised, even when some ambivalence about their effective value persists; (2) the value of intangible, namely invisible (because buried or missing) heritage is also acknowledged, although generally associated with the use of technology that allows for its visual display; (3) serious problems of communication and participation persist, which deeply hinders the establishment of cooperation networks among stakeholders, which is essential for the development of creative tourism.

We are now entering the second phase of the project, beginning to conduct semi-structured interviews with selected representatives of the three stakeholder groups mentioned in the model proposed (Figure 2); namely local actors (mainly business people), resource controllers and policymakers. The aim of these interviews is to gather information on three main dimensions, namely integration, communication (and enactment as ritualized narrative) and the perception of the scope and role of the intervention of an external mentor. The results of this second phase will hopefully permit the development of a valuation model for intangible heritage in contexts of high mistrust and low communication, in conditions for being tested in the field.

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Notes

- ¹ Funerary Practices in Alentejo's Recent Prehistory and Socio-economic Proceeds of Heritage Rescue Projects (PTDC/HIS-ARQ/114077/2009). This is a multidisciplinary research project founded by the Portuguese official Foundation for Science and Technology and involving several higher education institutions, research centers and a private company. The project, in addition to its main focus on archeology, aims to develop models of socio-economic valuation of outcomes of salvation archeology interventions. The project run between 2010 and 2013 and was coordinated by the researcher António Carlos Neves de Valera. A full description of the project is found in <https://drive.google.com/file/d/0B04-SDZOdVEbMzdMRE5vRHBsMkE/edit?usp=sharing>
- ² European Commission; European Central Bank; International Monetary Fund.
- ³ "...a positive image surrounding many aspects of rural lifestyle, community and landscape."... "presents happy, healthy and problem-free images of rural life safely nestling with both a close social community and a contiguous natural environment" (Van Dam *et al.*, 2002 p. 462)
- ⁴ According to the UNESCO's 2003 Convention for the safeguarding of Intangible Cultural Heritage, ICH is defined as "practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artifacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals, recognise as part of their cultural heritage" (Article 2.1)
- ⁵ "Deeply embedded networks can perpetuate dichotomous understandings of the nature of these urban and rural worlds; they thus help to reinforce locally distinctive attitudes and behaviours, while at the same time possibly inhibiting the introduction of new thought processes and strategies." (Saxena and Ilbery, 2008: 244)
- ⁶ Archaeological excavations performed in the ambit of public Works, and whose findings remain mostly buried.
- ⁷ <http://www.arte-coa.pt/index.php?Language=en>
- ⁸ <http://www.fundacao-aljubarrota.pt/?idl=2&action=22>
- ⁹ To check some of the stakeholders' speech quotations please see <http://researchpub.org/journal/lmar/archives.html>

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