



The educational and awareness purposes of the *Paideia* approach for heritage management

F. Carbone¹, L. Oosterbeek², and C. Costa¹

¹University of Aveiro, Economics, Management and Industrial Engineering Department and Research Unit “Governance, Competitiveness and Public Policies” (GOVCOPP), Campus de Santiago, 3810-193 Aveiro, Portugal

²Polytechnic Institute of Tomar – Instituto Terra e Memória, Av. Dr. Cândido Madureira 13, 2300 Tomar, Portugal

Correspondence to: F. Carbone (fabiocarbone.pro@gmail.com), L. Oosterbeek (loost@ipt.pt)

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Abstract. The need to raise awareness among the communities about the challenge of resource use – and, more generally, about the principles of sustainability – is the reason why the United Nations General Assembly proclaimed, in December 2002, the United Nations Decade of Education for Sustainable Development, 2005–2014 (DESD). For operators and managers of cultural and natural heritage, it represents a profound challenge to their ability to transmit the content of scientific knowledge to the general public in order to empower everyone on the preservation of cultural and natural resources, and to raise awareness about the potential that mankind has at its disposal. In this context, the application of the *PAIDEIA APPROACH* for the management of cultural heritage is the key to the recovery of socio-economic values intrinsic to these resources. This approach to management is based on the enhancement of cultural (namely archaeological) and natural heritage for social benefit and it involves the tourist trade as a vehicle of knowledge transmission, intercultural dialogue and socio-economic sustainable development.

cultural exchange. UNESCO dedicated an entire publication to the topic of the present work (UNESCO, 2006), highlighting issues like “culture, heritage and diversity as tourism resources” and “Tourism as a vehicle for intercultural dialogue and cross-cultural understanding”. Moreover, the United Nations World Tourism Organization (UNWTO) recognizes the importance of tourism and culture as a vehicle to solve some of the most tragic socioeconomic problems worldwide, and defends the need of a commitment by both tourism and cultural managers to achieve the United Nations Millennium Development Goals (UNWTO, 2010). The present article supports the idea that heritage and all the knowledge produced through its study may be a key component in the process of socio-cultural and economic development for communities, representing also the starting point for intercultural and inter-religious peaceful relationships. This concept, which we call the *PAIDEIA APPROACH* for heritage management, and which was created in the context of cultural (namely archaeological) heritage, is a paradigm of cultural resources’ enhancement as a vehicle of social and economic development. It could be applied to the management of natural resources, too. In this sense, it is appropriate to remember with Binford (1992) the close relationship between archaeological knowledge and the understanding of the different strategies of human adaptation (and their environmental consequences) to the surrounding environment in the course of history. The specific objective of this paper is to present the theoretical contribution of our work by illustrating the concept of a revisited alliance between heritage and tourism on behalf of local communities, and by introducing the research design and the empirical study that we are about to start.

1 Introduction

The international Cultural Tourism Charter adopted by ICOMOS at the 12th General Assembly in Mexico (ICOMOS, 1999) has made clear the important role of heritage as an irreplaceable and important foundation for development, both now and into the future. The document refers to the importance of management and possibility to use cultural heritage for educational purposes to residents and tourists; and on these bases it indicates, among the fundamental principles of the Charter, the importance of tourism as a vehicle for

2 Heritage, tourism and development: the PAIDEIA APPROACH for heritage management

The relationship between heritage, tourism and development is a fertile field for study. A large body of literature about this subject is easily found. The debate about the sustainability of tourism stepped in parallel with the debate on sustainable development (UNWTO, 2010). Agenda 21 for travel and tourism Industry by UNWTO, the World Travel and Tourism Council (WTTC) and the Earth Council (1996) was a milestone in this debate. Inskip (1991, p. 342) recognized positive impacts of tourist activities on a destination (conservation of important natural areas, archaeological and historic sites; improvement of environmental quality; improvement of infrastructure; increasing environmental awareness; etc.) as well as negative impacts (water, air, noise and visual pollution; ecological disruption; land use problems; risks for archaeological sites; etc.).

The study conducted by Carbone (2006) verified that there was an ancestral alliance between cultural heritage and tourism based on the traditional motivation of travel: knowledge and self-knowledge. He also relates the existence of theories arguing that the root of the word “tourism” did not originate from the word “tour”, but from the Hebrew “tur”, which we find in the Bible to mean journey of self-knowledge. Peralta da Silva (1997) claims that “the material and immaterial traces of the past (...) of a particular geographical and cultural area has the capacity to symbolically represent an identity”; then we can certainly say that the cultural heritage is among the oldest motivations for a trip. The motivational component of knowledge and self-knowledge, based on the enhancement of tangible and intangible cultural heritage at the destination, would have to be taken up and promoted, not only for the benefit of the tourist experience, but above all, for a socio-cultural growth of host communities. Tourism activity, in turn, benefits from the enhancement of cultural heritage by gaining those features of uniqueness and authenticity which are essential to the success of a tourist destination. The Australian Heritage Commission (AHC) argues that heritage provides the possibility to “tell stories” about a territory and its people, and indicates the heritage as a key element of a successful tourist destination (AHC, 2004). In summary, the main added value that heritage gives to the tourism is related to its ability to differentiate a destination, conferring authenticity.

On the other hand, as the Earth Summit and Agenda 21 inspired the tourist sector in the '90s, in the same way the United Nations Millennium Development Goals are having the same effects more recently: UNWTO defends that tourism has an important role to achieve the Millennium Development Goals (UNWTO, 2010). Scientific research is also focusing on these issues, creating new perspectives in the field of Cultural Tourism Research (Richards and Munsters, 2010) or wondering about the compatibility between sustainability and competitiveness in destinations (Moraes, 2006).

In paradigmatic terms, Carbone (2011) defends the gradual transition from 3-S' Tourism (Sun, Sand, and Sea) to a 3-L' Tourism: Leisure, Landscape and Learning.

In our current research, after the study of the considerations above, we propose the *PAIDEIA* APPROACH (Carbone, 2010) as a multistage approach to heritage management: the first step is all about “communicating heritage” to the local population in order to reinforce self-esteem and identity. Later, in a second stage, the aim is to promote the interchange and the intercultural understanding through tourism. This holistic paradigm aims to optimize the positive social impact of tourism activity. Often communities only become aware of particular cultural elements through the interaction with tourists. In this context, the mobilisation of such elements – or “resources” – may only make sense in relation to the “touristic other”, not only as a symbolic vehicle to define and distinguish the self from the other, but also as an economic resource to generate income (Picard and Robinson, 2005).

Indeed, the idea of *PAIDEIA* APPROACH for heritage management is inspired by the Socratic idea of *παιδεία*. Defining the term *PAIDEIA* and the concept behind it is an arduous task. 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: basically, according to the philosophy of *PAIDEIA*, a human being becomes free – and ready to meet and *understand* “the other” – only through knowledge of himself. We strongly believe this idea is more than a philosophical aspiration, and could be actually achieved by applying it as a policy of management of cultural and natural heritage as a new focus of development. The sequence of these two phases (heritage enhancement for local communities and heritage enhancement as touristic resource) is not necessarily chronological, but it needs to be conceptual. The investment in the tourist should contribute, especially in terms of infrastructure and interpretation frameworks, to the *heritage enhancement* for the local communities. On the other hand, heritage and tourist stakeholders must be very clearly aware about the social process of heritage enhancement shown by the *PAIDEIA* APPROACH: as first step it is absolutely necessary to emancipate, socially and culturally, the local community through the heritage enhancement and its values, and also to avoid or reduce undesirable effects of tourism on the hosting population, such as *demonstration* and *relative deprivation* effects mentioned by Swarbrooke (2000, p. 116–117).

This approach has direct relation with landscape management concerns, as posed in the International Conference on Ecohydrology. In fact, there is growing concern over the failure to meet the 1992 Earth Summit expectations, despite the engagement of many countries and other agents. It is important to design new complementary strategies that, being focused on a common goal (global sustainable growth), may give room for different understandings to recognise themselves in such common process. The *PAIDEIA* APPROACH

should hence be looked upon as a complementary strategy that offers three strengths: it is focused on individuals and consciousness, while individuals and widespread alienation are the key factor in the current global crisis (Oosterbeek, 2011, p. 100); it is based on a major economic sector, tourism, that grows across the globe, i.e. that may not be perceived as an excluding driver for either the developed or developing countries; and it is very flexible and rooted in a culture of quality, flexibility and quality being keywords to overcome the current global crisis.

3 The empirical study

At this time the PAIDEIA APPROACH for heritage management serves as a theoretical basis for the creation of indicators for the analysis of a management model of places of cultural value. In our empirical study we adopted a mixed strategy (quantitative-qualitative) and a case-study method. The strategy influences the choice of the method and collecting of data instruments: we selected the “case study” method, which is “...frequently cited for the employment of both quantitative and qualitative research” (Bryman, 2008, p. 53). The case study is an empirical and holistic analysis “to obtain a deep understanding of a contemporary phenomenon in its real context, using multiple sources of evidence” (Beeton, 2005, p. 42). To adopt the method of case study involves the definition of a population from which – if necessary – may mean realizing a sampling. (Fortin, 1999, p. 203–204): our population is represented by all the monuments, archaeological sites and sites of cultural value (museums, castles, etc.) open to the public and certified by HERITY Global Evaluation System.

The following considerations justify our choices related with population: first, by limiting our population to places open to the public guarantees to consider places that are being officially mobilised for tourism. Secondly, the presence of a certification of quality management is selected as a characteristic of our population because we assume that it implicitly expresses the intention of the managers to ensure the quality of heritage management and its tourist enhancement. The HERITY GES (Global Evaluation System) System is the unique system of certification for quality management of heritage sites, so it has been chosen to be a characteristic of the studied population. Note that the research is extended to three European countries: Portugal, Spain, and Italy. The choice of the number of four sites for each country is due to the fact that, at the time of the choice of methodology to be followed, there were only four sites certified by HERITY GES in Portugal and Spain. On the contrary, in the case of Italy where there are approximately one hundred certified sites, it will be necessary to create a sample frame and proceed to sampling due to the amplitude of the population. It will be a non-probability, convenience sample.

At the moment the exploratory phase of research is being carrying out, which includes semi-structured interviews with key stakeholders of the sites analyzed. The criteria and parameters adopted for this initial investigative approach were created on the basis of those used for the certification HERITY (preservation of the site, perceived value of the monument, public communication and services offered to the public) (Quagliuolo, 1998, p. 251), and in accordance with the principles outlined in the Charter For The Protection And Management Of The Archaeological Heritage, or in the Charter of Lausanne (ICOMOS, 1990).

4 Conclusions

The PAIDEIA APPROACH for heritage management – an adaptation of Socratic philosophy to the contemporary issue of heritage, tourism and sustainability – defends a multistage approach to heritage management: the first step is all about “communicating heritage” to the local population in order to reinforce self-esteem and identity. Later, in a second stage, the aim is to promote interchange and intercultural understanding through tourism. This holistic paradigm aims to optimize the positive social impact of tourism, raising awareness within the local population and spreading knowledge through tourist activity in a destination. This theoretical approach, which is being currently testing in the field of cultural (namely archaeological) heritage management, could be successfully applied to the policy of natural heritage management in order to respond to the UNESCO challenge regarding education for sustainability (decade of education), and in order to raise awareness in the local community, as well as in visitors, about the importance of the preservation of natural resources for a sustainable development.

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