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MODERN PROBLEMS AND FEATURES OF MANAGEMENT OF HISTORICAL HERITAGE INSTITUTIONS IN THE CONTEXT OF INCREASING THEIR SERVICE NATURE

СОВРЕМЕННЫЕ ПРОБЛЕМЫ И ОСОБЕННОСТИ МЕНЕДЖМЕНТА УЧРЕЖДЕНИЙ ИСТОРИЧЕСКОГО НАСЛЕДИЯ В КОНТЕКСТЕ ПОВЫШЕНИЯ ИХ СЕРВИСНОГО ХАРАКТЕРА

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The article deals with the main management problems faced by the institutions of the sphere of historical heritage. The text suggests the possible solutions to identified problems. The authors give the definition of the institution of the sphere of protection and public transmission of historical heritage. The article compares these institutions with other organizations and institutions in the field of social and cultural service. Special attention is paid to the specific and most urgent tasks of management of institutions of historical heritage in comparison with other cultural institutions or organizations of the sphere of social and cultural service.
Key words: *historical heritage, cultural institutions, museum, economy of culture, management.*

У статті розглядаються основні управлінські проблеми, з якими стикаються установи сфери історичної спадщини. Пропонуються можливі шляхи вирішення виділених проблем. Дається визначення дефініції установи сфери охорони та громадської трансляції історичної спадщини. Проводиться порівняння цих установ з іншими організаціями й установами сфери соціально-культурного сервісу. Особлива увага приділяється специфічним і найбільш актуальним завданням менеджменту установ сфери історичної спадщини у порівнянні з іншими організаціями культури або організаціями сфери соціально-культурного сервісу.
Ключові слова: *історична спадщина, установи культури, музей, економіка культури, менеджмент.*

В статье рассматриваются основные управленческие проблемы, с которыми сталкиваются учреждения сферы исторического наследия. Предлагаются возможные пути решения выделенных проблем. Дается определение дефиниции учреждения сферы охраны и общественной трансляции исторического наследия. Проводится сравнение данных учреждений с другими организациями и учреждениями сферы социально-культурного сервиса. Особое внимание уделяется специфическим и наиболее актуальным задачам менеджмента учреждений сферы исторического наследия по сравнению с другими организациями культуры или организациями сферы социально-культурного сервиса.
Ключевые слова: *историческое наследие, учреждения культуры, музей, экономика культуры, менеджмент.*

Problem statement. Historical heritage institutions are institutions, which preserve, produce or distribute historical heritage. In turn, historical heritage is defined as the ideas, performances and artifacts (including objects and buildings) that are considered by professionals and the public at large to represent and embody the legacy of a civilization, culture or community and hence to deserve preservation, display, transmission or reproduction. Thus, historical heritage institutions include institutions whose mis-

sion is to preserve and make accessible historical heritage. Museums and preservation sites, as well as libraries and archives are the material historical heritage institutions. In fact, until recently, historical heritage institutions have to a large extent focused on material artifacts. Moreover, historical heritage institutions are for the most part service organizations. The distinctive element of most service organizations relative to manufacturing organizations is that service is produced with the simultaneous presence and sometimes even with the collaboration of the customer, whereas manufacturing organizations can produce their goods in advance and stock them. Thus, scalability of service operations in a given locale is limited, by the size of the restaurant, hairdressing saloon, museum or orchestra hall, for instance. Therefore, a distinctive challenge of service organizations is how to manage the interaction with customers in the production of the service, which is an experience for customers. This is also clearly the case for the display function of historical heritage institutions, but less for restoration and maintenance of tangible heritage, tasks which are performed in the absence of the final customer.

Analysis of recent research and publications. The works of famous foreign and domestic scientists are devoted to problems of economy of historical heritage, activity of public institutions in this sphere and problems of management of the sphere of culture. In particular, these issues are considered by such scientists as: D. Rypkema, I. Rizzo, A. Mignosa, J. Hausner, A. Karwinska, J. Purchla, D. Vaughan, A. Rubinshtein and others. At the same time, some aspects of this multifaceted problem remain beyond the attention of scholars and are insufficiently substantiated, namely: the management problems faced by the institutions of the sphere of historical heritage and the possible solutions this problems; definition of the institution of the sphere of protection and public transmission of historical heritage; tasks of management of institutions of historical heritage in comparison with other cultural institutions or organizations of the sphere of social and cultural service etc.

Formulation of article goal. The goal of article is to identify the main problems and solutions in the field of management of historical heritage institutions in the context of increasing their service nature.

Presentation of the main material. One could say that, in their display function, historical heritage institutions could be managed like any other service organization. For instance, institutions which display tangible cultural heritage face like other service organizations such the task of organizing customers' movement within the organizational space. However, a systematic assessment is necessary to uncover the extent to which historical heritage institutions can be assimilated to other service organizations and thus whether there are organizational specificities, which

pose particular managerial challenges. The demand perspective focuses on the experience that customers generally have of the service offered. The supply perspective refers to internal features of organizations. From the demand perspective, historical heritage institutions can be compared to other service organizations on the basis of at least six dimensions of the customer experience: human interactivity, technological interaction, aesthetics, emotionality or emotivity, education and symbolic attachment.

Technological interaction relates to the way customers use technology in consuming the service. Aesthetics refers to the degree to which customers' experience of the service has an aesthetic dimension. Education considers whether customers decide to engage in the service experience to educate themselves. Symbolic attachment relates to the degree to which the customers see the service as a central part of their culture. Emotionality or emotivity is the degree to which customers experience emotions when consuming the service, or have feelings about it. All the other dimensions can of course generate emotions. For instance, aesthetic appreciation is also an emotion, whether pleasurable or not.

By exposition, historical heritage institutions offer the public the possibility of accessing cultural heritage. For instance, museum visitors often have to purchase a ticket for the visit of several rooms to contemplate the objects. This is similar to the experience of visiting a theme park where customers (visitors) walk to different attractions. Thus, in institutions dealing with tangible historical heritage, customers have very little interaction with the organizational staff – other than the cashier or the ticket check attendant, and maybe the cloakroom attendant, the security staff and the guide. In a restaurant and particularly in the hairdresser case, the interaction is much more important: the customer has to choose among different options or express his preferences to organizational members who can help shape them. Substantial human interaction in historical heritage organizations only takes place in face-to-face education and more marginally in some museums or sites when visitors rely on guides. Consumers' use of technology in the consumption of historical heritage can be higher than in other service organizations. Historical heritage institutions such as museums can use information technology to encourage customers' interaction with or access to more information relative to the artifacts displayed or ideas discussed, enhancing the educational role [1, p. 52–63].

The consumption of historical heritage can also be compared to other services. Services such as restaurant dining and getting a haircut also can have such dimensions. However, in contrast to historical heritage, we probably do not go to the hairdresser with an educational goal in mind. We go to a historical heritage site to discover its contents, to learn about

a community, its architecture, its religion and its history, or to learn about the work of an artist and his or her context and personality. Customers' educational goal may be the most distinctive dimension of the visitor experience in historical heritage organizations relative to other service organizations. Of course, customers' educational orientation in consuming historical heritage depends on their human and cultural capital. The greater an individual's human and cultural capital, the more acquainted and knowledgeable she is with heritage. Thus, for individuals with substantial human and cultural capital, consuming historical heritage might have, relatively speaking, more of an entertaining function than an educational role – going to "consume" works, which they already know and appreciate.

Consuming culture in general provides not only topics for conversation but also certain legitimacy or status. Properly educated citizens are supposed to be acquainted with historical heritage, particularly with their own community's heritage. By consuming one's community historical heritage, individuals reinforce their allegiance and attachment to their community. This consumption therefore has a symbolic, communitarian dimension, which is absent from the consumption of most other services. The symbolic dimension, which refers to the history and identity of a community, is also the reason why heritage and its institutions are supported by governments, particularly those whose jurisdiction includes the institutions in question. The community-related symbolic dimension of heritage institutions is particularly salient, as their very existence stems from the consideration that they preserve and diffuse the central symbols of a community. From this derives the managerial challenge for cultural heritage institutions of establishing, maintaining and enhancing the heritage dimension of a site, object or intangible [2, c. 62–69].

Historical heritage institutions can also be compared to other service organizations from a supply or internal point of view, in terms of their power structure and dynamics, staff composition and legal and property form. In terms of power structure, historical heritage institutions have traditionally been dominated by cultural professionals. Professional status comes from knowledge certification to exercise the profession and in certain cases professional associations when they grant certification, fix rates and salaries, organize continuing training. In addition, professions are distinguished from occupations by the importance that the opinion and recognition by other members of the profession outside the organization in which the individual works has in guiding the individual's behaviour. In historical heritage institutions, given their specialized knowledge, the core profession such as curators in museums, librarians in libraries or instructors in educational organizations – individuals usually with certified knowledge in their respective areas

from universities – holds to a large extent decision-making power over the organization's direction and tasks such as which objects to purchase, preserve, display and how.

Cultural mediators often have significant training in a related discipline, but they are usually not as powerful as curators or librarians. In fact, in some organizations, a power struggle and accordingly structural reorganizations are taking place between the traditional core cultural profession and the new semi-professional staff category of cultural mediators. The professionalization of historical heritage management with the emergence of specialized degrees and associations in the last 20 years has also generated tensions in historical heritage institutions. Whereas cultural professionals also used to hold the top managerial position in most cultural organizations until the 1990s, since then, in many cases, boards have created a managing director position, distinct from the top cultural position, and recruited people trained in cultural management for the new post. Given that management is supposed to be concerned with the overall organizational performance including economic and financial, and not only cultural performance, this has generated some tensions with cultural professionals.

Another distinctive characteristic of staff composition in historical heritage institutions as service organizations is often the presence of volunteers who are not formal organizational members but participate in core organizational tasks or provide important resources. The presence of volunteers and friends' associations in cultural institutions is possibly due to two phenomena: first, the fact that most cultural institutions are not financially self-sustaining and second the emotional and symbolic nature of their existence and activities which motivates individuals to give their time and other resources. Resulting from both staff composition and power locus, in historical heritage institutions there tends to be a bipolar structure where the two poles are cultural professionals and management professionals, somewhat like in restaurants where there is some tension between management and the cooks (creative staff). In contrast, in most service organizations, there is a more integrated structure and culture, given that there is no dominant profession at the operating core [3, p. 209].

Although there are some for-profit enterprises in the historical heritage domain, many cultural institutions have a different legal and organizational form. In some cases, the not-for-profit goal stems from the impossibility of generating profits, given the cost structure and the socially constrained prices. However, in many cases the intrinsic, primary organizational goal is genuinely distinct from profit generation, such as access, diversity, artistic or cultural quality, or innovation. The different legal and organizational forms also have an impact on the goals. Public organizations

tend to promote access and diversity, whereas private organizations are able to devote themselves to more constrained objectives. That said, their funding structure might also condition their activities. Having discussed the different specificities of historical heritage institutions, now turn to their distinctive managerial challenges as they regard the internal and the external environment of the organization.

For historical heritage institutions, managing the external environment perhaps has a particularity: assuring the legitimacy of the organization as well as of the field at large. Legitimacy is the extent to which relevant external audiences perceive an organization or more broadly the institution it represents as being appropriate, i.e. pursuing worthy goals in an appropriate manner. So, each historical heritage institutions faces a challenge in this respect. This legitimacy mainly refers to the societal and expert perceptions that the institutions does actually contain and diffuse historical heritage, i.e. that the tangible or intangible goods displayed by the organization have a symbolic dimension [4, c. 156].

Information and communication technologies and digitization enable virtual consumption of intangible heritage or virtual visits of tangible historical heritage, making less necessary the visit to a physical space to "consume" the object of cultural heritage or to experience intangible heritage. This is particularly salient for tangible historical heritage institutions, which have traditionally defined themselves as spaces or receptacles for the display of such heritage. As mentioned, historical heritage institutions face legitimacy challenges at two levels: the organization itself in particular and the field as a whole.

One of the main issues, if not the fundamental one, for organizations is the definition of their mission, which influences their internal identity and external image, legitimacy and reputation. Historical heritage institutions are particularly confronted with this issue because they claim to preserve and showcase part of the historical heritage of a community. Moreover, historical heritage institutions face two specific legitimacy challenges regarding the preservation of purchased or donated objects which are not shown and their role in actually creating heritage.

The first issue is that the name and actions of the organization have to be consistent with the mission. Despite the fact that organizations overtime tend to go beyond their initial activities, the name and stated mission of the organization sometimes remain unaltered and thus becomes inconsistent with the organizational reality. However, changing core attributes such as an organization's name and mission can also have detrimental consequences in terms of reliability and loss of some supporters. The second crucial issue in defining a mission refers to the fact that the mission – and the specific projects the organization proposes to carry out – will determine how easily it

can attract an audience and garner the support of experts, donors and sponsors. The nature of the mission determines in part the extent to which public authorities deem the organization worthy of receiving public funds or even being owned by a public administration. In most democratic countries, public authorities tend to favour organizations and activities which provide cheap or free access to heritage to the entire population. But they also favour prestigious organizations which might attract a relatively small and privileged audience [5, c. 72–75].

There are two main legitimacy challenges. The first relates to the questions some raise about preserving or simply storing works, which cannot be displayed for lack of space or proper conditions. Although preservation of historical heritage is part of the mission of these institutions, if heritage cannot be displayed in the foreseeable future it defeats its ultimate purpose, i.e. appreciation by the public. That said, new technologies such as the internet might allow for at least electronic or virtual exposure. The second and more problematic specific challenge refers to the economic and societal implications of historical heritage institutions in actually creating heritage. Every historical heritage institution makes a claim that it contains, preserves and displays or diffuses heritage of one or more communities. Thus, the organization often engages in a promotional role to obtain and preserve professional and official recognition as such. The legitimacy of that claim is in relation to the defining values of the community and of art historians, critics, cultural sociologists and anthropologists, which might change over time. At the end of the day, it is a judgement about what the community considers its heritage and wants to preserve and showcase, its notable past and contribution to humankind. Therefore, historical heritage institutions face the challenge of achieving and maintaining societal consideration as part of the historical heritage of one or more communities. Lobbying towards stakeholders who make it possible to earn the label of cultural heritage is thus critical. The literature on lobbying (now sometimes called non-market) strategy and stakeholder management as well as on public agenda setting might be useful in that regard [6, s. 252–253].

Another question is the legitimacy of the appropriation of the benefits deriving from the treatment of an object as historical heritage. In particular, art museums and especially contemporary art museums acquire and display objects of relatively young and unknown artists. By doing so, these objects become "institutionalized" and part of heritage. Artists benefit to the extent that such "institutionalization" grants them a prestige, which allows them to ask for greater fees for their production. These positive externalities created by museums in their purchasing and displaying are to large extent appropriated by the author of the purchased object and those who already hold

other works of the artist. Public administrations also generate externalities when they include a given site or building as part of the official historical heritage: some negative for the owners of the site who cannot make free use of it any longer and some mixed for the neighbouring community. It might create positive externalities in the form of economic benefits due to public attraction, but also nuisance.

For the museum case, given that it is the museum's action which generates the value-added and, given that many museums are public or publicly subsidized, the positive externalities appropriated by private actors are produced thanks to public money. It would seem reasonable that museums should be able to appropriate at least part of the positive externalities they generate. Beyond the legitimacy challenges each historical heritage institution faces, the field as a whole faces a major challenge about its legitimacy and hence its public transmission and the support it obtains from society for it. Legitimacy is audiences' perception or judgement about the appropriateness of the focal actor's ends and means. The legitimacy challenge historical heritage institutions face is thus twofold. The first one concerns the methods which historical heritage institutions use to undertake their current societal mission, i.e. the preservation and display of tangible and intangible heritage. The second legitimacy challenge some institutions of cultural heritage face deals with their mission and, more precisely, with the relative importance of different functions.

Most tangible heritage institutions are still conceived as physical receptacles. This is the case of museums or heritage sites, as well as libraries. These physically constrained means to making historical heritage available to the public have being challenged for a few years by the new IT and, in particular, digitization and the internet. These technologies are capable of creating virtual spaces so individuals can have a similar experience to visiting a historical heritage site, at their convenience and pace. Of course, it is still a virtual visit, without the authenticity of the visitor's co-location in the real site or physical proximity to the objects. The substitutive effect of these new technologies is even greater if not complete in libraries. This is why some libraries are searching for new roles, new uses for the physical space, like hosting cultural and community activities. The Schumpeterian substitutive role of new technologies affects the attractivity of a given field or industry. The challenge is to redefine these institutions by redefining their role in society and hence repositioning themselves, given existing and forthcoming technological changes among others. One of the critical questions is the degree to which virtual visits or purchases online are substitutive or complementary to real visits. The substitutive effect is much greater for libraries than for historical sites, given that the experience of reading a text remains to a large extent the same whether it is contained in a paper book or displayed on a screen. Instead, virtual visits to sites might have more difficulty in recreating the experience of a real visit.

Following the analysis of the specificities of the internal structure of historical heritage institutions when compared to other service organizations, it is possible to identify two specific managerial challenges in regards to their internal environment. The first one deals with the influence of a dominant professional logic on the overall organizational logic. The second refers to how these institutions can organize themselves for more innovation, given the external challenges identified. Historical heritage institutions have traditionally been characterized by a core profession that thanks to training and certification – and the knowledge asymmetry which ensues – is entitled to a large extent to define and manage the activities of the organization. Furthermore, these professionals often take and are expected to take a professional orientation, that is, to defend the values and means of the profession, both as a cognitive framework which prescribes certain actions and as a social network which links many of the professionals beyond their individual organizations. Professional values or the search for professional recognition and prestige might sometimes run against broader organizational goals, such as public access, understandability or enjoyment [7, p. 3–19].

A tension between the values of cultural professionals and organizational values seems to have emerged with the "professionalization" of cultural management and thus the staffing of the top decision-making positions with individuals who are not only cultural experts in historical heritage organizations, as in cultural institutions in general. These individuals tend to be trained in business schools or economics' departments. The overall organizational perspective that these managers bring focuses on achieving the different organizational goals, namely, the cultural mission as well as financial health. However, management does not only potentially bring rationalization in budgeting and finances, but also an approach to marketing the organizational services and products, organizing the operations and managing the organizational staff. By adopting a customer orientation, for instance by listening to the public and the non-public through surveys, management can even attempt to redefine the organizational mission and activities. This customer orientation has been negatively termed as commercialization, particularly by certain cultural professions and part of the academic community.

Although managers can try to use incentives to orient professionals towards the desired goals, assuming they are extrinsically motivated, probably the best way to gain their collaboration and allegiance is to involve them in decision-making. As in cultural institutions in general, cultural heritage managers are usu-

ally in the position of having to assert their power and defend a broader, more multidimensional conception of organizational goals and performance, to the detriment to a certain extent of the core profession's values. Therefore, managers might find it necessary to bring into the decision-making process other voices representing other dimensions of the desired organizational performance, such as the public, donors or other staff members. This is not to say, again, that the core professional logic is no longer relevant. By adopting this broad participatory approach, the fact that the different stakeholders can listen to each other's logic and expectations might facilitate understanding among them, and prevent all the tension from being focused only on management.

At the organizational level, historical heritage institutions can benefit from the accumulated knowledge in the innovation and creativity literatures. This literature discusses the role of incentives, structures and processes that can be put in place to try to encourage creativity and innovation within organizations. In general, a climate supportive of new ideas, even if they fail, is considered necessary. But there is also an opportunity for institutional entrepreneurship and change to redefine historical heritage institutions. Institutional entrepreneurs, like organizational innovators, can come from existing organizations or be outsiders from other fields. In any event, the importance for any community to treasure and share its historical heritage together with the challenges discussed above are probably going to spur a new wave of innovations in this field. Digitalization and new communication technologies challenge, in part, some of the functions of historical heritage organizations. However, they also offer an opportunity to redefine these functions and, more broadly, the institutions of historical heritage.

Summary. The article describes the specific challenges that historical heritage institutions face as service organizations and briefly provides pointers and references on how the management literature could respond to them. Thus, the first task was to define historical heritage and analyse the particularities of historical heritage organizations relative to other service organizations. There are significant differences in the degree of symbolic attachment, human interactivity and an educational function. Few differences appear though in terms of emotionality. As for the internal structure of historical heritage institutions when compared with other service organizations, there are three main differences: the first one lies in the power of the core cultural profession and the bipolar structure and culture it has generated with the professionalization of management. The second difference is the distinctive presence in historical heritage institutions of volunteers. The third deals with the fact that historical heritage institutions typically exhibit a more variegated palette of legal and organizational forms than other service organizations. This entails a substantial challenge given that the measures for their goals are more difficult to obtain. Looking at the managerial challenges in dealing with both the external and internal environment of historical heritage institutions, and considering the current specificities two issues emerge: the issue of both organizational and field legitimacy and the need to redefine the mission and ways of working of particular organizations as well as the institutions they represent in general. This led to a discussion of the internal challenges consisting in the relation between the values of the dominant or core cultural profession in the organization and the overall organizational values.

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