

CONCLUSIONS OF A BENCHMARKING ANALYSIS FOR THE PERDIGÕES ARCHAEOLOGICAL COMPLEX

Innovation usually reminds us of best of breed investigation and major discoveries. Notwithstanding, innovation can also be the application of other industries' practices and concepts, or the application of our own industry best practices in order to get close to (or gain) leadership.

In the vast majority of industries, it has been a long time since the "Not Invented Here" syndrome was overcome. Benchmarking, a comparative analysis with the best practices, is nowadays a standard procedure in those activities where looking to neighbors in order to learn from them is considered an intelligent option. In the heritage industry, however, benchmarking, as a management tool is scarcely used and, what is most, not systematized.

Beware though, for the singularity of each archaeological site means that a direct comparative analysis of items elected as benchmarks can be worthless. For instance, a straightforward comparison of the number of visitors amongst sites is senseless, as this figure depends of a series of other variables, most of them exogenous to the sites, such as the capacity of the country or region to attract tourism as a whole.

As the internal organizational processes are fundamental in the value delivery to visitors, the evaluation of a site performance must also be carried out taking into account the possibilities of a given organizational structure.

So, the results of a benchmarking analysis must be interpreted much beyond the quantitative data, meaning that the contact with site managers is fundamental.

ATIVE – Património Vivo, an ERA–Arqueologia company, has recently undertaken a benchmarking study regarding archaeological heritage management, as a previous step to the definition of a management framework for the Perdigões Archaeological Complex. In this study, the managers of the selected sites revealed great will to cooperate and share management information, which is the only understandable attitude since each site, whatever site, is unrepeatable.

The study included sites elected, partially or wholly, as **best practice**: Altamira Museum (in Cantábria, Spain), Atapuerca Archaeological Complex (Burgos, Spain), Hadrian's Wall (North England), Vindolanda (a site of Hadrian's Wall), Çatalhöyük (Turkey) and Jorvik (York, England).

Benchmarking Main Conclusions

The main conclusion from the analysis of the selected sites, from which all other conclusions are drawn, is that sites management must obey to long term thinking, with the formulation of strategies that project the site for ten or more years, followed by a plan where goals and deadlines are set. As a way of tracking down progress, performance indicators should be introduced to detect deviations and allow corrective measures to be taken timely.

If there were still any doubts, it became clear that the Enhancement of the Perdigões Archaeological Complex must lay on several premises critical for its success, namely those presented bellow.

Scientific Rigour and Continual Research

All content and activities that may be developed in Perdigões must have a scientific basis - findings in themselves or their theorization of researchers - without which the project will be devoid of meaning.

Moreover, the natural phenomenon of erosion of visitor figures can only be defeated with the introduction of

new programs and speeches, turning sites alive, with vitality coming from research, the sole reliable basis to places of reflection and learning for those who visit them.

Local Development

The Perdigões Archaeological Complex is not in stand-alone mode. To think of it as such, aseptic for the outside world, is denying the project the opportunity to enrich its visitor offer and stripping local populations of a valuable contribution to their economic, social and cultural development.

Therefore, there is at the analyzed sites, understandably and intelligently, a dynamization carried out by local economy players and politicians who, seeing the sites' international recognition, count on them as providers of a differentiating or identity factor and, consequently, as potential development anchors.

Self-generated Funding

The model adopted for funding will be crucial for the sustainability of the Perdigões project, with diversification being a key point in reducing the risk of failure or of lower performance of any given revenue source. Therefore, self generated revenue plays an important role in the financing mix.

The poor performance that this item systematically presents in archaeological heritage projects has no justification other than the existence of a "complex" towards profit. It is true that these cultural equipments fulfill social objectives, but that can no longer be an excuse. Creative formulas have to be found so that, not restricting access to any potential visitors, those who can, and are willing to, may contribute more.

The Roman Site of Vindolanda can be pointed out as a good example of this. At this site, considered best practice for the early engagement of civil society in the knowledge production, self generated revenue (admission fees, donations, shop and cafeteria) account for 78% of the total revenue¹, making the Vindolanda Trust quite independent in the pursue of its goals.

Professional Management

From the benchmarking it became clear that a greater or smaller public dimension of the Perdigões enhancement project, and a faster or slower research rhythm, depend upon the capacity of continually capturing the needed resources, and, as such, of the existence of a dedicated management team, with skills and profiles so diverse as marketing and communication or investor relations.

Heritage Fruition

Examples such as Çatalhöyük, of enormous historical and archaeological significance, with only 13,000 visitors in 2005 despite the proximity to a city with 1.3 million visitors per year, make it easy to understand that while the Perdigões Archaeological Complex does not offer interpretation intellectually accessible to all visitors and public spaces of socialization and comfort, it will be very difficult to attract visitors other than specialists and enthusiasts.

The Researchers as the Public Face of the Projects

Archaeological sites with years of excavations ahead and many issues still open, as at the Perdigões Site, end up merged with researchers in terms of identity. This happens because the knowledge that is being produced and the theories that are being developed strongly need the seal of quality from recognized personalities in the scientific community.

The implications of this are many and must be fully assumed by the scientific responsables, namely the high involvement in marketing activities, being it scientific or events for the general public. It is them who give

¹ Average between 2002 and 2007, not considering VAT refund on admissions.

projects their undisputed credibility that investors and partners look for.

This happens at Çatalhöyük, where the project is impossible to dissociate from Professor Ian Hodder, and at Atapuerca, where a similar phenomenon takes place with the three excavation co-directors (Carbonell, Arsuaga e Bermúdez de Castro).

COMPONENTS OF THE PERDIGÕES FEASIBILITY STUDY

When working in heritage enhancement projects it is fundamental to answer questions like “what?”, “to whom?”, “when?” and “how?”. Apart from a site’s intrinsic value, the arguments that support the required investment in its preservation or conversion can only be sustained if it adds value to society.

Moreover, it is not logic to think of these sites only for a startup moment. Then what? How will the site be kept running? How will it continue to attract visitors? How will it continue to produce knowledge? How will it guaranty free access to that knowledge? These and many other questions can only be answered through long term planning.

In the case of the Perdigões Site, despite seeing archaeological heritage as a legacy for future generations, the “continual grant” logic is out of question for the promoter. There is therefore the need to find ways of self funding, even if partially.

Not to consider the self financing capacity of the project would be foolish, as the Perdigões site is located in a region where tourism is now developing, with major tourism projects taking off, having the archaeological complex the potential to add so much in terms of cultural tourism.

Thus, the viability study takes into account a much broader reality than just the archaeological site, relating it to local economy and the remaining business activities of the promoter.

Given the wide spectrum of subjects necessary to conduct such study, the team incorporates specialists from different areas, other than heritage, including finance, communication, market research, law, and quality, amongst others.

Components of the Perdigões Archaeological Complex feasibility Study

The feasibility study can be divided into three big themes: what will the site be, what fruition is proposed for this heritage and how will the site be managed.

Site DNA

The definition of the identity of the site feeds all subsequent phases of the study, and begins by answering basic questions, vital for the alignment of the entire team: among others, why is the site important? what is intended for the site to be? what is the site’s mission?

Only after having the site’s identity solved can we define the differentiation strategy of the site in face of its "competition". Since archaeological sites are unrepeatabe, there is no direct competition, but substitute offers competing for the visitor’s leisure time.

So when it comes to finding a positioning, a meaning in the visitor’s mind, we must look not only for similar offers, but also for those considered by the visitor when asking himself: "Where am I going to this weekend?".

Having no doubts about “who we are”, “where we want to reach” and “how we want to be perceived” the conditions are in place to define the interpretative model: “what we want to say” (speech), “how we want to say it” (interpretative resources and path – where interpretative and directional signage are included) and the exhibition phasing.

Exhibition phasing allows: a) an earlier initial contact with visitors; b) strategic adjustments to subsequent phases avoiding some learning costs; c) for the project to prove itself smoothly, through quick-win logic, lowering the risk for investors.

Infrastructures and, whenever applicable, landscaping are part of a site conception, undissociated from its identity. Knowing that budgets for these items can vary brutally, it is wise to attribute costs based on preliminary studies. Otherwise there is a huge risk of deviation at an implementation stage, which can turn the viability study into a fantasy.

The study also basis its costs of exhibition design in a conjoint work carried out between designers and archaeologists, in order to have a museology pre-project that allows to budget with confidence a solution which provides a good edutainment experience.

Interacting with the “Market”

The perception that visitors will have of the Perdigões Archaeological Complex stems not only from physical spaces and contents exhibited but, above all, from how we "wrap-up" these experiences. This means creating cultural and leisure products, following the identification and characterization of target audiences, for the creation of appropriate offers to each segment.

And the offer will not be limited to the site itself; it considers what can be offered in terms of network-based value. The network logic covers a greater percentage of the total visitor experience, enriching it with other products and services, often complementary, and allowing the region to collect more benefits from the generation of a visitors' economy.

The network logic is also precious in planning the dynamization of the Perdigões Site cultural program.

Finally, beyond the definition of product and service, and its renewal in the medium and long term, it is essential to consider how to reach potential visitors: how will they know of the site's existence and how will they convert from potential to real visitors? The answer to these questions is given by setting the brand strategy (including the launching strategy) and defining the marketing strategy to visitors, researchers, and network partners.

Management Model

In the feasibility study it is essential to define the model in which the site will operate, beginning with the institutional setup of the entity responsible for managing the site: is it a foundation, an association, a public-private partnership, or other considered more appropriate? The implications of this decision are many, from tax to financing options available for the project.

The definition of external sources of funding (sponsorship, patronage, public funds or bank financing) and of the balance funding mix is vital, with diversification being a key factor to reducing risk.

The design of an organizational structure capable of meeting the ambitions of the project is also crucial. This has to adjust to the different evolutionary phases of the project to ensure the necessary skills at all times.

Knowledge Management

The Perdigões feasibility study also includes a chapter on knowledge management, which implies: a) defining the strategy to generate scientific knowledge about the archaeological site, b) the strategy for knowledge dissemination (including planning of educational services or setting the publications policy); c) knowledge strategy for getting to know visitors and d) the planning of information and management systems.

Quality Management

While the definition of quality standards and procedures is out of this study scope, the boundaries of what quality themes will mean in terms of budget must be defined.

This chapter covers subjects as diverse as maintenance and preservation or training for employees and specific market studies.

Security Plan

The analysis of this item is justified by the potential magnitude of these investments.

Investment Evaluation

Once all important items are well defined and budgeted, it is time to allocate the predicted income and expenses in a time line, so that the project cash flows can be calculated. The financial analysis also requires the definition of assumptions, such as buying probability for the different products and services, growth rate or cost of capital.

Financial statements are fundamental to define working capital requirements along the different stages of project evolution or to define when to go forward with heavy investments.

Finally we would like to state that, though being very important, the implementation of Perdigões enhancement project does not depend exclusively on its financial performance, since the project's scope is much broader than the mere return on investment.

FRUITION CONDITIOS

Fruition can be interpreted as possession, which in the case of heritage is very interesting because it implies recognition of significance and a process of identification with the site. This notion is reinforced by Ashworth and Howard², for whom heritage is what people want to conserve, preserve, protect or save.

Then, an archaeological site can only be protected and preserved through the creation of emotional bonds that lead people, in fact many, to feel a site is theirs, which requires involvement and participation.

Civil society participation is at the heart of the Perdigões site enhancement project, based on the concept of Archaeology in Construction. Thus, this will not be a project where decades of excavation culminate with the presentation of the "scientific truth", but a project where the public can participate in the generation of knowledge and in the building of the messages it consumes.

Once upon a time there was Archaeology in Construction

Once upon a time there was a magical place where every time someone returned to the site, it was different. The site was being excavated in search for knowledge, but not in secret, since the treasures belonged to everyone.

Whenever someone elaborated a theory about the hidden treasures, immediately after others could submit another version. The different versions were part of a system of ideas, where, from an idea into the other, people came closer to finding the treasures.

One day, a group of strangers came near to the treasures' hole and dared to peek and see what was being excavated. Tired of sharing the ideas only amongst each other, those who excavated began to exchange their views with the group, which had no idea of what was going on.

Realizing the importance of what was taking place and how it benefited everyone, the group, now no longer of strangers, began to come more often. Not only did they return but also brought others, and to the ones who could not come they passed the word about the importance of the site and the ideas being generated.

Given the amount of ideas that already made part of the ideas' system, it was decided to put them in a place where everyone could see, know and interpret them. Opting for showing all the ideas, and not just the ones that had more supporters, proved to be a good choice, as visitors continually found reasons to come back.

All felt the site as theirs and wanted to help as they could. One day, eager to participate, some of the visitors jumped into the hole of the treasures. Then, the ones who had always been there taught them how to bring to light the fragile knowledge. It was a delicate task, that required much dedication, but which instead of tiring the visitors gave them further encouragement to proceed.

Nobody knew when the search for the treasures would end, but day after day everyone felt richer.

² Ashworth, G. e Howard, P. (1999:11). European Heritage Planning and Management. Exeter, England: Intellect.