INTERPRETING THE PAST volume IV

INTERPRETING THE PAST

WHO OWNS THE PAST? Heritage Rights and Responsibilities in a Multicultural World

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CULTURAL HERITAGE CONSERVATION AND CORPORATE SOCIAL RESPONSIBILITY

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VER the last 15 years, multinational companies have been under increasing pressure to behave in "socially responsible" ways and to help mitigate the worst effects of an increasingly interconnected global market economy.

Meanwhile, some heritage professionals have suggested that the conservation of cultural heritage can contribute to realizing the goal of "globalization with a human face" (UN 1999; Mason and de la Torre 2000: 6-7) – helping to combat cultural homogenization while protecting a critical social, political and economic resource for many of the world's poorest countries. Yet, unlike environmental conservation, cultural heritage conservation is strikingly absent from company programs for ensuring responsible business practices and investing in social and community development.

This raises several questions. Should support for cultural heritage conservation form a bigger part of the business response to globalization? Given the particular nature of corporate giving, would greater corporate support be good for heritage? If it is desirable, what might be some ways to "optimize" this source of support – increasing corporate resources available to heritage conservation while ensuring that they benefit the heritage and those who have a stake in it? These questions are considered in this paper from both a theoretical and a practical perspective.

Definition: Private Sector Involvement in Heritage

It is important to begin by making a distinction among the various types of private sector involvement with heritage. I would propose distinguishing among four main types:

- Private sector ownership of heritage resources (moveable or immoveable)
- Private sector management of state-owned resources (comprehensive or specific services for the management of sites)

- Private sector access to / use of heritage sites (primarily tourism, for direct income generation)
- Private sector support for heritage conservation (offering financial, inkind or human resources to support conservation efforts, in return for indirect benefits such as enhanced reputation)

This paper is concerned with the last of these types of involvement – private sector support, or sponsorship, of conservation activities.

Clearly, any form of private sector involvement in the care of public goods, including heritage resources, is not unproblematic. However, as resource-constrained heritage managers and policy makers consider whether and in what circumstances it is appropriate to obtain support from the private sector – in both the short-term and long-term – it is useful to be aware of a trend that is transforming companies' approach to giving.

Globalization and Corporate Social Responsibility

The 1990s witnessed a change in the social environment for business. With the collapse of communism and expanded market liberalization, some 90 per cent of countries have adopted a form of market-based economy, and private capital flows have outstripped official aid to the world's key emerging economies. At the same time, explosion of the internet has raised public awareness of social and environmental issues globally, of the impact of global markets on developing countries and of corporate scandals such as Enron. (Davies, 1999)

A resulting shift in public attitudes has been documented in public opinion polls, which show a growing belief that "responsibility for addressing social issues lies increasingly with large companies", as well as government, and that companies should be judged on this basis in addition to financial performance. (inter alia: MORI, 2000, Prince of Wales IBLF, 1999)

The shift can also be seen in the behavior of various corporate 'stakeholders':

- Governments: the development of standards for corporate conduct by intergovernmental bodies (e.g. EU, UN OECD);
- Investors: the rapid growth of "socially responsible investing" (SRI), now nearly 10 percent of all professionally managed investments (Social Investment Forum 2006);

- Employees: evidence of preference for socially responsible employers (e.g. survey of leading business school graduates showing that 97% willing to forego 14% income to work for socially responsible companies Mallen-Baker 2004)
- Consumers: evidence of willingness to make purchases on basis of corporate social reputation (e.g. survey showing that in 2004 44% of North Americans and 22% of Europeans had done this in 2004 Globescan 2004)

As a result, the field of "corporate social responsibility" (CSR) has burgeoned as companies attempt to show that they are operating in socially responsible ways and contributing to sustainable development, evidenced by the rapid increase in the number of corporate non-financial reports, which rose from 0 to 1250 between 1991 and 2003 (Sustainability 2004).

These reports reflect an evolving ethic and discipline that good corporate citizenship is more than traditional philanthropic giving, but rather a commitment to: a) conduct business in a responsible manner according to defined standards, in good stewardship of resources used, ensuring accountability through measurement and reporting; b) strategically focus their giving to address specific environmental and social issues relevant to their business and the communities affected; c) work in partnership with relevant governmental and non-governmental organizations.

This in turn puts pressure on governments and NGOs to define what role the private sector can and should play in a given arena and ensure that they manage these relationships appropriately.

Critics rightly question this trend from a variety of perspectives, concerned either that it doesn't go far enough or that business has no place in addressing these issues. Nonetheless, as part of the response to globalization in the early 21st century, growing public-private-civic sector cooperation to address social issues is a fact. The question addressed here is what impact this might have, if any, on heritage conservation.

Researchers at the GCI have said that, "...the tangle of processes associated with globalization present the field with challenges so deep and transformative that they suggest the need for a new paradigm". (Mason and de la Torre, 2000: 2). The authors recommend a "values-centered" approach to conservation as a new source of meaning for heritage in the era of globalization. In this paper, my intent is to discuss the prospects globalization holds for new sources of support for heritage.

The Absence of Heritage in Corporate Responsibility Programs

The UNESCO Declaration on Cultural Diversity says that cultural diversity is as important for humankind as bio-diversity is for nature. (UNESCO 2001) Yet, unlike environmental conservation, cultural heritage conservation is strikingly absent from both corporate and governmental initiatives aimed at ensuring responsible business practices and encouraging corporate social investment. Below is a brief summary of existing initiatives:

- The World Monuments Fund (WMF) is the main private non-profit organization raising funds for heritage conservation worldwide (wmf.org/programs/aboutwmf.html). While much of WMF's funding is from private foundations, American Express has been its primary corporate supporter since 1995 as the founding sponsor of WMF's flagship programme, World Monuments Watch. As such, American Express is one of the few, if not the only, major company with a long-term commitment to cultural heritage conservation globally within its corporate charitable programmes.
- A few companies support individual local conservation activities either as an on-going programme, e.g. BP Amoco and Chicago House in Egypt (Sears and Maher, pers.comm.), or as ad hoc projects by corporate foundations, e.g. Diageo (www.diageo.com/proud of what we do). But examples are few. Surveys of arts giving confirm that very little goes to heritage, as opposed to other cultural activities, including museums, theatre, music, film and the visual arts) (Arts & Business 2003).
- Other companies (e.g. in extractives and construction) have undertaken projects to minimize damage by their operations to heritage sites in the context of World Bank lending programmes (Myers 2003; Wolfenson 1999) But examples of this are also limited and the World Bank's efforts in this area have not been consistent (Taboroff, pers. comm.).
- In the tourism industry, it could be argued that there is a clear long-term business stake in maintaining the integrity of cultural heritage sites. Indeed, a number of CSR and "sustainable tourism" initiatives have been launched over the last decade, inter alia: the International Hotels Environment Initiative (www.ihei.org), the UNEP Tour Operators Initiative for Sustainable Tourism Development (www.toinitiative.org), and the WTO Sustainable Development of Tourism unit (www.world-tourism.org). However, while cultural heritage conservation is often included in mission statements and definitions of sustainable tourism, a review of actual programmes undertaken both by

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individual companies in these cross-industry initiatives – reveals that nearly all are focused on the environment (and, secondarily, on social issues such as child labour).

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- The UN Global Compact is an initiative by the UN Secretary General in which companies are asked to commit themselves to embrace a defined "core set of universal principles fundamental to meeting socio-economic needs of the world's people, today and tomorrow" (UN Global Compact 1999). It covers human rights, labour and the environment and names co-sponsoring UN affiliate bodies, including UNHCR, UNEP and the ILO. Interestingly, culture and cultural heritage are not expressly included, and UNESCO is not listed as a partner.
- In 2004, UNESCO's World Heritage Centre launched its Partners for Conservation initiative (http://whc.unesco.org/en/38). UNESCO (in contrast to, say, UNICEF) is one of the last UN bodies to respond to the Secretary General's call for private sector partnerships (Bandarin, pers. comm.). A few projects have been set up with Hewlett Packard (IT/documentation), Jet Tours (creating world heritage tours and sensitization materials for travellers), the French bank, Calyon (increasing employee and customer awareness through their website), and NHK (producing documentaries) but the programme is still nascent. And an initial \$30 million grant from the UN Foundation was targeted for natural World Heritage sites (UNESCO 2003), in line with the UNF's environmental mission.

It is clear that, with the exception of American Express, cultural heritage conservation, in contrast to environmental conservation, has not yet won a significant place in the corporate sustainability agenda.

Is Corporate Involvement Good for Heritage?

Both in theory and in practice, it would seem that the implications of corporate support for heritage conservation are mixed.

In the realm of theory, Klamer and Zuidhof offer a model that is instructive for the purpose of this paper. Arguing that the way in which heritage is financed makes a difference for the value of a heritage resource, they distinguish among three different spheres of economic activity through which the value of a heritage resource might be realized: pricing by the market; subsidizing by the government; gift-giving by the civic sector (Klamer, Zuidhof 1998). They propose that, because

each sphere has its own "culture", each will affect the valorization process, and hence the value of a heritage resource, differently. The market values freedom and entrepreneurship; government transactions value national identity and the collective; giving reflects the values of partnership and responsibility. Each has advantages but can 'devolve into excess: ruthlessness (market), bureaucracy (government), or dependence (gift giving). I would suggest that corporate support – gift-giving by a commercial entity – combines characteristics of the first and third spheres – it reflects a sense of civic values and lacks direct financial return, but it is never completely divorced from the basic corporate mandate of shareholder value. Because its culture is a hybrid one, the impact of this form of economic activity on heritage is likely to be correspondingly mixed.

Indeed, practical experience as reflected in interviews with heritage professionals conducted for this paper testifies to both the advantages and disadvantages of corporate giving for heritage conservation. (See references for list of interviewees)

Advantages cited include a variety of relevant tangible and intangible resources that companies have at their disposal:

- Financial (e.g. the travel/tourism sector, estimated to generate 10% of global GDP) (WTTC 2003);
- In-kind resources (e.g. GIS mapping software from IT companies, or video production by media companies);
- Management skills (e.g. management training program set up by the International Business Leaders Forum for museum professionals in Russia) (www.iblf.org);
- Brand recognition (e.g. cases in which public awareness of American Express involvement has reversed neglect or destruction of sites by local governments in Glasgow (Amery 2004) and Kuala Lumpur (Sechler, pers. comm.).

However, experience shows that there are also clearly important reasons to be cautious. In contrast to private foundations, whose mission is philanthropic, it is often difficult to successfully match conservation and business objectives. Hence, corporate support can:

- require much longer lead times for approvals (Giangrande, pers. comm.)
- demand significantly more management effort and time (hence costs);

- be inconsistent over time and subject to unexpected budget cuts;
- require evidence of communications impact to justify continued funding (Sears, pers. comm.);
- most importantly, affect project priorities favoring high-visibility and low-risk, rather than the most critical aspects of projects (Palumbo, pers. comm.).

Both theory and experience suggest that the market character of this form of giving poses both opportunities and risks for heritage conservation. Despite the challenges, all interviewees argued that corporate support should be more actively pursued than it is today, while emphasizing that the heritage field must develop in how it approaches this resource.

Possible Ways to Better Harness this Resource

Given the challenges, can appropriate ways be found to harness corporate support to the benefit of heritage and the communities that value it? What steps might be taken to strive for the best of both worlds – to increase private sector funding available to conservation, while ensuring that it benefits the resource?

Below are several possible areas for attention as heritage managers and policy makers attempt to grapple with these questions. I would suggest that any productive solution needs to combine selecting the right business partners with setting standards for their behavior and enhancing conservation professionals' ability to manage these relationships. There might also be room for more creative thinking about partnership models and long term public advocacy.

Management capacity: As long as heritage resources are in the public trust, while corporations clearly have an obligation to behave responsibly, the ultimate responsibility for ensuring that they are properly managed remains with state heritage agencies. Those interviewed for this paper observed there is a need for more proactive, professional management. There is often a lack of understanding about what is required to attract, retain and manage these resources (Sears, pers. comm.) and, hence, a tendency to accept money with whatever strings are attached by the donor, leading to a "vicious circle" of misguided conservation choices. (Palumbo, pers. comm.) It was observed that this "requires a level of professionalism that exceeds the resources of many heritage organizations" (Pemberton lecture 2002), and that heritage agencies should recruit not just conservations specialists but also professionals with management expertise, who can bridge the public interest

and corporate interests. Managing outside resources is also another reason that integrated management planning is a critical tool for heritage managers (see, inter alia, Cossons 1994, Harrison 1994, Hall and McArthur 1998). The problem, of course, is that all this is not free; raising money costs money. While grant seeking can be less expensive than visitor operations, if funds are limited, to what extent should they be channeled into this type of activity? This will always be a judgment call on the part of the heritage manager – one that they could perhaps be better prepared to make.

Targeting partners: If, on the basis of an integrated management plan, a heritage manager determines that it is desirable to pursue corporate funding, donors should be chosen both creatively and carefully, to identify real partners that are in some way aligned with the values of the resource. The travel and tourism industry is an obvious sector to consider, but also, for example, companies whose "brand values" might include cultural understanding or diversity, those whose activities threaten cultural resources, such as extractive industries, and those who can offer relevant expertise, such as media and IT. The appeal must then be highly targeted, based on a very clear definition of the conservation mission, and how it fits the business mission or social responsibility obligations of the company. There must then be an up-front, explicit agreement that aids and protects the resource, while meeting several basic expectations of the donor, including: a) good use of their resources, based on a plan and monitored; b) some kind of recognition for their involvement.

Setting standards: Attracting support must be matched by setting standards for the behavior of donors. At the level of individual projects, this means proactively educating donors on the consequences of different actions, and proactively, clearly defining parameters that ensure the resource is not abused. At a broader policy level, perhaps more work could be done to develop specific standards of responsible business practice with regard to heritage resources, engaging business by promulgating these through relevant business organizations (e.g. the Tour Operators Initiative or the World Travel & Tourism Council) and intergovernmental bodies, as well as heritage organizations (e.g. ICOMOS).

New models: In addition, there might be room for exploring new models for cooperation, especially with the tourism industry. This subject does not often attract mainstream media attention, but an editorial in The Economist recently suggested that UNESCO should develop new, "more ambitious joint-ventures for developing sustainable tourism at its sites" (The Economist 2004). In November 2005, the UN Foundation and the internet travel company, Expedia, launched a

'World Heritage Alliance' aimed at promoting travellers' awareness of and support for World Heritage sites (www.worldheritagealliance.org). The project, in a pilot phase at selected sites in Mexico, combines several elements: contributing proceeds from special world heritage tours to selected heritage projects, allowing travellers to make matched donations on-line, providing funds to support small locally-owned tourism enterprises, and offering heritage-sensitizing training to local hotel staff and tourists. The outcomes are not yet clear, but it will be interesting to observe the results of this project. The Economist editorial also suggested, more radically, the "injection of some private sector blood" to the UNESCO World Heritage Committee, to "help come up with new ways to generate more private support for its activities".

Public advocacy: Finally, the cultural heritage community might consider the success of the environmental movement in conducting long-term public advocacy campaigns to engage the media on conservation issues and create public demand for conservation over time among those who influence company behavior (customers, investors, regulatory officials, etc).

We are witnessing a growing public appetite for historical entertainment (e.g. restoration television programming, heritage visitor sites, culturally-themed travel), greater media coverage of heritage destruction (e.g. the Bamiyan Buddhas and the city of Bam), and a growing debate about a 'clash of civilizations' and the role of culture in international political conflict. In this environment, is there not an opportunity to put cultural heritage and its conservation more squarely at the center of a growing public consciousness about creating a sustainable future for our planet?

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