



## Social innovation in cultural heritage management: a Neapolitan perspective

### Innovación social en la gestión del patrimonio cultural: una perspectiva napolitana

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#### Abstract:

Italy has one of the biggest cultural heritage in the world, but nowadays it is facing a strong crisis, concerning its management and key resources (economic, human, financial, etc). This article aims to contribute to social innovation studies by focusing on the emergence of new actors in cultural heritage management field, through an approach centered on hybrid organizational form. This is a preliminary study which analyze cultural initiatives carried out by social enterprises that have positive impacts, both social and economic, in terms of development of the local community and tourist attraction. According with the preliminary results, beyond public and private administration, Neapolitan social enterprises apply a hybrid organizational form in cultural heritage management, efficiently and effectively. Enterprises studied, in which social entrepreneurship and innovative business model emerge, play an active role responding to both individual and social needs through a cooperative and collaborative attitude.

**Keywords:** social economy; hybrid organization; shared value creation; organizational sustainability; bottom-up initiatives; minor heritage.

#### Resumen:

Italia tiene uno de los mayores patrimonios culturales del mundo, pero actualmente éste enfrenta una fuerte crisis en cuanto a su gestión y recursos clave (económicos, humanos, financieros, etc.). El presente artículo tiene como objetivo contribuir a los estudios de innovación social centrándose en la aparición de nuevos actores en el campo de la gestión del patrimonio cultural, a través de un enfoque centrado en la forma organizativa híbrida. Se trata de un estudio preliminar que analiza las iniciativas culturales llevadas a cabo por empresas sociales que tienen impactos positivos, tanto sociales como económicos, en términos de desarrollo de la comunidad local y la atracción turística. De acuerdo con los resultados preliminares, más allá de la administración pública y privada, las empresas sociales napolitanas aplican una forma de organización híbrida en la gestión del patrimonio cultural, de manera eficiente y efectiva. Las empresas estudiadas, en las que surge el emprendimiento social y el modelo de negocio innovador, juegan un papel activo respondiendo a las necesidades tanto individuales como sociales a través de una actitud cooperativa y colaborativa.

**Palabras clave:** economía social; organización híbrida; creación de valor compartido; sostenibilidad organizacional; iniciativas abajo-arriba; patrimonio menor.

Enviado: 2020-12-18 | Aceptado: 2021-08-18

## Introduction

Globalization, and economic, financial, and societal crisis, have shown the inability of welfare system to respond to social needs -aging population, youth unemployment, poverty, inequality, and migration are just some examples-, and this situation of general crisis has prompted policy makers -government, market, enterprise, and citizens- to redefine new actors, roles and business models that pursue sustainable development. In this scenario, social innovation and hybrid enterprise can respond to the social need of promoting and protecting the initiatives in the cultural and tourism sector, filling a gap in the current welfare system.

Due to social changes, new organizational and business models are being developed, and their aim is to meet different types of needs of the local community, to rethink the production of valued added, and to generate positive externalities for society. In particular, hybrid organizations introduce a new model of doing business and (re)think the society as a whole, because its main goal is to improve social nature systemically through commercial activity. New forms of social entrepreneurship attempt to respond social needs to create well-being and to increase the growth of the community through a hybrid process.

During the 2000s, the term hybrid organization appeared in scientific literature in the domain of public administration and non-profit organizations, in reference to organizations that operate between the public and the private sectors and respond to both governmental and business demands (Wood, 2010). However, hybridity in the third sector is not a new phenomenon. For many years, some organizations have moved into hybridity in a rather gentle fashion, causing minor disturbances, but not necessarily calling into question their basic third sector identity (Billis, 2010). In the presence of the current economic and social changes, hybrid models are spreading out in different fields and sectors.

A much-debated issue in cultural heritage management is the duality between centralized models with highest levels of government intervention vs. the participation of private local partners who are interested in being actively involved (Canónico, Iacono, Martínez, Mangia & Consiglio, 2019). Nevertheless, many authors point at the existence of cooperation relationships (Dubini, Forti & Leone, 2012; McKercher, Ho & du Cros, 2005), and, moreover, the necessity of considering the cultural organization not only as a common body, but as a hybrid organization composed of private, public and third sectors, with a complicated intertwining of properties, agreements, and components aimed to realize the services (Biancone, Secinaro, Brescia & Chmet, 2020).

¿How does the organizational model change into hybrids in the management of cultural heritage? ¿How do hybrid cultural organizations produce social innovation? The latter is understood here as “innovations that are social both in their ends and in their means”, in particular, “as new ideas (products, services, and models) that simultaneously meet social needs and create new social

relationships or collaborations” (European Union & The Young Foundation, 2010, pp. 17-18). This study aims to analyze the hybrid form in the cultural heritage management because it is a field that has been little studied, but it likely has interesting development perspectives.

The article is organized as follows. In the first section we elaborate our theoretical overview, analyzing the organizational hybrid form and its business model. Then, we focus on the methodological approach used for analyzing the social enterprises that animate the Neapolitan cultural and tourism heritage field. The paper ends by discussing the emergence of common features of social enterprises that operate in cultural heritage and its impacts on the territory and in economic and tourism field.

## Theoretical Overview

Organizational form is defined as “an archetypal configuration of structures and practices that is regarded as appropriate within an institutional context” (Greenwood & Suddaby, 2006, p. 30). Tracey, Phillips and Jarvis (2011) contend that the process of creating a new organizational form is particularly complex, because the logics that are being combined often are quite different and, in some cases, even in conflict.

However, it is the diversity of organizational forms in each society that underpins its capacity to change (Hannan & Freeman, 1989), and this insight suggests that it is important to understand how organizational forms emerge because “in a changing environment, diversity can only be maintained or increased by the introduction of new organizational forms” (Romanelli, 1991, p. 80).

In complex environments, hybrid organizations are likely to emerge and do well because they incorporate elements prescribed by various logics and are, therefore, likely to project at least partial appropriateness to a wider set of institutional referents (Greenwood, Raynard, Kodeih, Micellota & Lounsbury, 2011; Kraatz & Block, 2008). Hybrid organizational forms are structures and practices that allow the coexistence of values and artefacts from two or more categories (Doherty, Haugh & Lyon, 2014).

There are few investigations of how new hybrid organizations arise (Lee, 2014). Tracey et al. (2011) argue that one way they emerge, is in the process of bridging institutional entrepreneurship. By this, they refer to combine different institutional logics to create a new organizational form, and this new form is characterized by a new -hybrid- logic. According to the authors, the process of creating a new organizational form requires work at three different levels: (a) At individual level, entrepreneurs must recognize the opportunity for bridging entrepreneurship, framing the problem differently than other existing theories, and coming up with a solution; (b) at the organizational level, it is to be designed a new organizational form that fits the problem and solution; (c) at the societal level,

entrepreneurs need to lobby to legitimate the new organizational form and connect it with the contemporary discourses.

The term hybrid organization is used in reference to hybrids that operate between market and hierarchy (Williamson, 1985, 1991), or arrangements mixing contracts and administrative entities to ensure coordination between partners that gain from their mutual dependence, but need to control the risks of opportunism (Ménard, 2004). The term hybrid organization is also used to designate organizations that combine features of non-profit organizations, such as volunteering, mission orientation and focus on the creation of social value, with features of business companies, such as self-interest, market orientation and focus on the creation of economic value (Anheier & Schröer, 2008; Hudnut, Bauer & Lorenz, 2006; Koppel, 2003).

Thus, hybrid organizations surpass the boundaries between typical for-profit and non-profit organizations. What differ hybrid organizations from traditional nonprofit organizations, is the use of market forces and business to solve some of the world's most pressing challenges (Boyd, Henning, Reyna, Wang & Welch, 2009). The hybrids have a social mission and engage in commercial activities to be economically sustainable. Furthermore, they are different from many traditional for-profit organizations with social programs because they do not have the focus of doing "less bad" or evening out their bad actions, but rather contributing to positive social and/or environmental impacts (Haigh & Hoffman, 2014). For a hybrid, having a social mission is not part of the company's social responsibility program (CSR), but rather embedded within the company's identity (Santos, 2012).

Leading organizations have recently developed innovative governance forms based on social innovation, which can be the driving force to spark change and to find common ground for shared value creation, especially when targeting low-income markets (Michellini & Fiorentino, 2012). These organizations combine three elements: the concept of shared value creation; the theory of the fortune at the bottom of the pyramid; and a corporate social entrepreneurship approach, which they use to enter low-income markets by helping to solve global challenges while simultaneously generating profits. Recently, this new organizational model has been applied also in developed countries and in other fields of application, where new kinds of hybrid enterprises are rapidly appearing (Porter & Kramer, 2019).

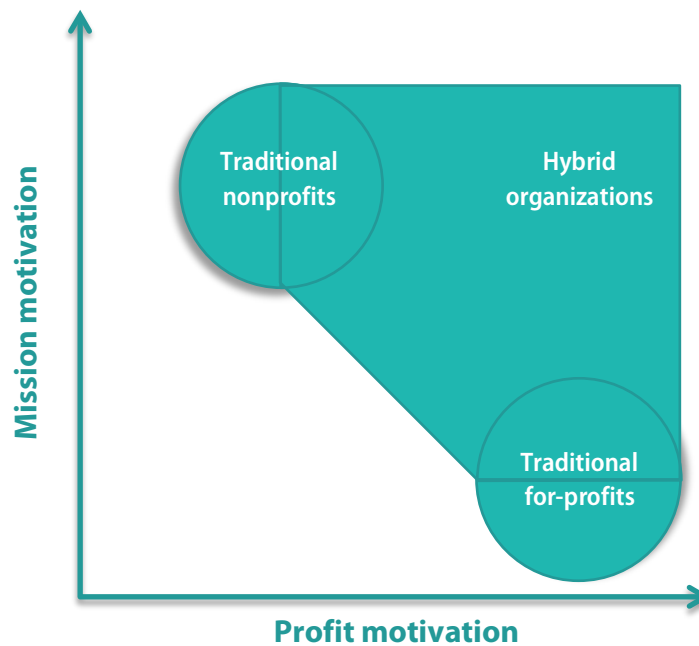
Alter (2007) has supposed a spectrum which avoids bifurcating the landscape into opposing functions: one, the for-profit world whose *raison d'être* is to create economic value; and the other, the non-profit world whose purpose is to create social value. In practice, these dichotomies are increasingly coming together through the application of methods that marry market mechanisms to affect both social and economic value resulting in total value creation.

**Table 1:** *Spectrum of practitioners*

	Purely philanthropic	Hybrid organization	Purely commercial
Motives	Appeal to goodwill	Mixed motives	Appeal to self-interest
Methods	Mission-driven	Mission and economic-driven	Market-driven
Goals	Social value creation	Social and economic value creation	Economic value creation
Destination of income/profit	Directed toward mission activities of non-profit organization (required by law or organizational policy).	Reinvested in mission activities or operational expenses, and/or retained for business growth and development (for-profits may redistribute a portion).	Distributed to shareholders and owners.

Source: Alter (2007, p. 13).

A hybrid organization is driven by two forces: social change and sustainability of the organization (Alter, 2007). Boyd et al. (2009) argue that profit and social and/or environmental mission are relatively independent and have therefore developed the figure below that represents the blurring boundaries between the different organizations.

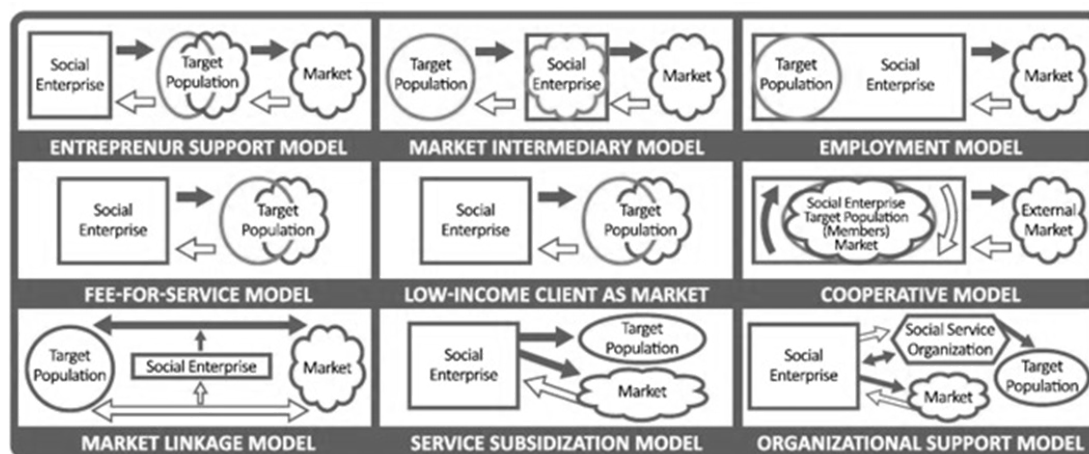


**Figure 1:** *Mission and profit dimensions of business models* (Source: Boyd et al., 2009, p. 9).

By pursuing financial and social aims, social enterprises are thus a classic example of hybrid organizations (Billis, 2010; Dees & Elias, 1998; Defourny & Nyssens, 2006, 2010; European Commission, 2011; Evers, 2005; Liu & Ko, 2012; Murphy & Coombes, 2009; Pache & Santos, 2010) and combine properties associated with private, public, and non-profit organizations. Hybridity in business can bridge several divides according to the chosen criteria of classification, notably the following (Grassl, 2012):

- 1) By ultimate ends: for profit vs. non-profit (Boyd et al., 2009; Brozek, 2009).
- 2) By societal sector: market vs. civil society vs. State (Billis, 2010; Brandsen, van de Donk & Putters, 2005; Defourny & Nyssens, 2010).
- 3) By type of integration: external vs. integrated vs. embedded (Alter, 2006; Malki, 2009).
- 4) By good produced: private vs. public (Becchetti, Pelloni & Rosetti, 2008; Bruni, 2010; Bruni & Zamagni, 2007).
- 5) By product status: good vs. services (Lusch & Vargo, 2011).
- 6) By agents of value creation: producers vs. consumers (Lessig, 2008; Payne, Storbacka & Frow 2008; Ramírez, 1999).
- 7) By ownership (corporate governance): private vs. cooperative vs. public (Billis, 2010; Boyd et al., 2009).

In literature there are numerous business model's design schemes that highlight the distinctive characteristics of social enterprises. We have chosen to describe Grassl (2012) scheme: as follow in Figure 3, the author identifies nine different business models, but it is relevant the cooperative model because it includes both the social and the entrepreneurship model, able to create multi-stakeholdership realities (Rago & Venturi, 2014).



**Figure 2:** Business models for social enterprises (Source: Grassl, 2012, p. 47).

The cooperative model of social enterprise provides direct benefit to its cooperative members, who are the primary stakeholders in the cooperative (benefits of income, employment, services, etc.), and who invest in it with their own resources of time, money, products, labor, etc. Cooperatives use revenues to cover costs associated with rendering services to its members, and surpluses may be used to subsidize member services (Alter, 2007).

## Methodological Approach

Our research is based on a qualitative approach to the object of study and a collection of empirical data is carried out using a plurality of instruments, sources, and tools (database, document analysis and semi-structured interviews). The research has been led in two steps: during the first phase, they were developed a map and a database about social enterprise on Neapolitan territory. These social enterprises present common elements:

- 1) They manage a cultural and touristic site reconverted to public use.
- 2) They promote and make accessible abandoned or minor cultural and touristic places to local communities and tourists.
- 3) They create cultural and touristic activities inside the location.
- 4) They guarantee economic and employment sustainability.

The first phase of the desk analysis conducted on induced sources (business plans, social business plans, mission statements and project documents) led to the mapping of 40 "realities" located in several cultural or heritage sites of the city of Naples, which are listed below:

**Table 2:** *"Realities" studied in the city of Naples*

The realities studied (40 over 48)	Cultural sites
Ad Alta Voce	Chiesa di San Potito
Amici di Marcel Proust-Babuk	Palazzo Caracciolo del Sole
Apogeo Records	Chiesa di San Severo, fuori le mura
Celanapoli	Ipogei ellenistici Rione Sanità
Circolo Artistico Politecnico	Palazzo storico Zapata
CSI Gaiola Onlus	Area Marina Protetta Gaiola e Pausyllon
Domus Arts - Il canto di Virgilio	Chiesa di San Francesco della Monache
Ex Asilo Filangieri	Complesso religioso ex asilo
Fondazione de Felice	Palazzo Donn'Anna - Teatro di corte
Fondazione Morra	Museo Nitch e Palazzo storico di Aragona
Fondazione Pietà dei Turchini	Chiesa di Santa Caterina da Siena e Chiesa di San Rocco
Foqus	Complesso religioso
Fork	Cappella nel Parco dei Ventaglieri
Galleria Borbonica	Sottosuolo di Napoli
Giardino Liberato di Materdei	Complesso religioso delle Teresiane
Gruppo Archeologico Napoletano	Area archeologica Terme di Agnano e di Via Terracina
Intolab	Ex Lanificio borbonico
L'intrecciata	Stazione liberty funicolare al Petraio
La Bottega del Mandolino	Palazzo storico a Via San Giovanni Maggiore Pignatelli
La Paranza	Catacombe di Napoli
LAES	Sottosuolo di Napoli
Lanificio 25	Ex Lanificio Borbonico
Le Scalze	Chiesa di San Giuseppe alle Scalze

Museo delle Bambole	Palazzo Marigliano
Made in Cloister	Ex Lanificio Borbonico
Napulitanata	Galleria Principe Umberto
Nuovo teatro Sanità	Chiesa dell'Immacolata e San Vincenzo
Palazzo Venezia	Palazzo storico
Piedi per la Terra	Vigna di San Martino
Pietrasanta	Basilica della Pietrasanta
Purgatorio ad Arco - Progetto Museo	Chiesa di Purgatorio ad Arco
Quartiere Intelligente	Palazzina ottocentesca
Respiriamo Arte	Chiesa di Santa Lucella e Chiesa di San Filippo e Giacomo
RIOT	Palazzo Marigliano
Santa Fede Liberata	Complesso religioso
Scugnizzo Liberato	Complesso religioso
SMMAVE	Chiesa di Santa Maria alla Misericordia ai Vergini
Museo del Sottosuolo - Tappeto Volante	Area archeologica
Acquedotto Augusteo - Vergini Sanità	Area archeologica
ZTL Live	Cappella Mauro

Through a second phase of analysis, it was decided to focus on six cases, considered as pilot cases. These were selected considering the availability of sources for the analysis -which were made available to the researchers by the representatives of the social enterprises- and applying four criteria derived from the social business model framework. The dimensions considered made it possible to analyze and highlight the social component of the organizations' business models. The criteria used were:

- 1) Social value proposition (Angeli & Jaiswal, 2016; Yunus, Moingeon & Lehmann-Ortega, 2010; Zott & Amit, 2008): Indicating the solution offered to a particular problem or customer need, characterized by the benefits derived from the business model through the products and / or services.
- 2) Social value equation (Michelini, 2012; Yunus et al., 2010): which describes how a business model generates social benefits.
- 3) Equation of surplus / social benefit (Johnson, Christensen & Kagermann, 2008; Yunus et al., 2010): that describes how the business model uses the economic surplus, for example, if it reinvests the dividends in other related social innovation projects.
- 4) *Start-up capital* (Michelini, 2012): which concerns the start-up capital, the composition of the promoting or entrepreneurial group.

The six organizations studied are Neapolitan social enterprises, located between the historic center and along the coast of the city. Centro Studi Interdisciplinare Gaiola, founded in 2004, is an interdisciplinary study center dealing with the research and dissemination in the field of natural sciences, marine biology, and archeology. The association manages the protected marine area Submerged Park Gaiola. For its part, Galleria Borbonica is an historic underground tunnel discovered by



two geologists. The association continues the activities of study, excavation and securing of the tunnel, while carry out tourism promotion, guided tours, and organize events both for locals and foreign tourists. Made in Cloister, placed in Porta Capuana area, has recovered and renewed an abandoned monastery of the sixteenth century, turning it into a place of creative excellence where art, design and craft coexist. On the other hand, La Paranza, founded in 2006, is a cooperative that manages the Catacombs of Naples and develops touristic business activities in the in the Rione Sanità area. Palazzo Venezia, a Venetian Embassy in the Kingdom of Naples, is one of the most important buildings placed in the heart of the city. The association organizes thematic and educational activities aimed at the discovery and appreciation of the territory, knowledge construction, and art and artistic expression development, exploitation, and dissemination of music. Finally, Respiriamo Arte was founded by a Neapolitan young people with the aim of spreading the knowledge of the history of Complesso di SS. Filippo and Giacomo della Seta as an important center of production and processing of silk.

The research was carried out through semi-structured interviews through the application of an open range protocol to the senior members of the social enterprise, in order to understand the origins of the idea, the enterprise lifecycle, the network and connected partnership, the forms of assignment of the heritage site, the organizational form of the enterprise, the employment created and the economic-financial sustainability of the project. In addition, the representatives of enterprises described or explained the activities they carry out, how they produce social innovation, the ownership of the places, the form of entrustment by public or ecclesial institutions, and the employment impact.

## Results

Recent debate has shown the failure of the State and, at the same time, of the market, in the management, subsidization and financing of the so-called social economy (Murray, Caulier-Grice & Mulgan, 2010; Phills, Deiglmeier & Miller, 2008). This is reflected in fields such as culture and heritage management, and proof of this is the Italian cultural heritage, which is currently challenging a strong crisis and suffering a lack of economic, financial, and human resources.

At the center of the reflections of several scholars is the finding that the traditional model focused on public control has not been able to ensure levels of efficiency in a sustainable way. However, the private model has not been able to offer an alternative solution capable of guaranteeing quality and affordable cultural heritage management.

So, if the public model is not able to deal with such a large and widespread heritage; private for profit do not find the conditions of economic convenience to take charge, and the associative world is able exclusively to promote a cultural sensitivity but not solve, a crucial question arises: ¿who takes care of the Italian minor cultural heritage?

Recently, we have witnessed the arise of social enterprises which operate into the field of cultural heritage management. Facing the limits of public and private actors, and its business models, it is possible to consider the hybrid model as an alternative (and innovative) model to be adopted for cultural heritage management. According to Grassl (2012), business model of social enterprises analyzed fulfill the following conditions: (a) They are driven by a social mission; (b) they generate positive externalities (spillover) for society; (c) they recognize the centrality of entrepreneurial function; (d) they achieve competitiveness on market trough effective planning and management.

During the interviews, we could highlight initial results about the characteristics that distinguished the hybrid enterprises and its business model. The social enterprise analyzed are bottom-up initiatives that pursue participative, collaborative, and sustainable actions. Private citizens, faced with the insufficiency of the State and the lack of economic and financial resources, are driven by the interest and desire to change the situation of abandonment of cultural heritage and create a new form of entrepreneurship. Social enterprises recover and regenerate spaces and degraded areas, focusing on the cultural and tourist sector, giving back to local communities their own space. Citizens and tourists can visit and enter cultural and tourist places as an open and common place.

The six social enterprises studied have activated partnerships with local stakeholders and take part in associations networks (between 2 - 8 actors). Also, social enterprises generate network relationships among various companies operating in the same territory (for example restaurants, hotels, businesses, etc.) through numerous alliances and projects with retailers, improving cultural and tourist services for the citizens and tourists. Finally, positive externalities are related to the improvement of the image and tourist brand of the city, enhanced by the cooperative work of all the stakeholders located on the territory.

The cultural and touristic sites are curia, private, and local administration property; social enterprises manage these sites thanks to formal and informal agreements with local authorities, private contracts, and purchase. Three of the management associations have a life cycle of 7 to 10 years (consolidation phase), while the other three were born in the last 4-5 years (start-up phase). These social enterprises deal with the management of cultural and tourist sites that have been recovered because of the indifference and abandonment of administrative and lucrative actors. The renovated places are a historical building, a marine protected area, an industrial archeological site, an ancient church, a historical underground tunnel, and a catacomb site.

In these places, social enterprises have implemented numerous artistic and cultural activities, events and exhibitions, tourist tours, investigations, and security measures. All these actions contribute to the inclusion of local communities, helping to create value and supporting social and business development and increasing employment. Thanks to the hard work of employees and social

entrepreneurs, these places, nowadays, are important cultural and tourist attractions for citizens and tourists.

Cultural and tourist activities in the re-functionalized places follow an efficient and effective market logic; incomes of social enterprise are not distributed among the shareholders, but they are reinvested in the organization to ensure the sustainability of activities and acquire new tangible and intangible resources (human resources, promotional activities, buildings, and materials for infrastructure renovation, and for cultural and social activities). Social enterprise bases on different type of financial funds. By these study cases, we can observe that most of social enterprises rely on own capital, donations, and two enterprises have won a call for tenders of both public (local and European fund) and private funding. Just one enterprise has received financial support through crowdfunding.

Social enterprises create new jobs and provide paid work to the people who work in them; here, volunteer work is not a predominant form. The employment involves a young generation of workers, who have a high level of training and diversified skills, and who work as a team to achieve the development of the territory through culture and tourism. Human resources are employed on full and part-time contract, in a staged program.

## Conclusion

The main findings of this work aim to contribute to the scholar's debate in the social innovation field, and to address the possibility that hybrid models generate social value in the cultural heritage management field. The cases analyzed suggest that new actors and organizational forms are arising in the cultural and tourism sector. Hybrid enterprises take care, protect, reuse and renewal cultural heritage abandoned, transforming it from inaccessible places, to inclusive, collective, and participative ones.

Moreover, there are important implications for policy makers. Beside public and private management, social enterprise applies a different organizational form to the management of the cultural field, in an efficient and effective way. Social enterprises observed, in which social entrepreneurship and innovative business models emerge, play an active role through a cooperative and collaborative spirit, and respond to both individual and social needs. From the first data analyzed, it is perhaps possible to say that social enterprises have positive -both social and economic- impacts, in terms of development of local community and tourism attraction.

In the cultural heritage field, these social enterprises base their existence on a cultural asset linked to the territory and to a network of relationships. In this way, the cultural heritage becomes the space where cultural, economic, and relational skills of the community can get together and create social innovation.

This paper presents a preliminary study of what will be a more detailed analysis of Italian social enterprises in the cultural sector, to identify common features, models, and business that they have adopted. In the future, it is necessary to insist on expanding research both in the literature and in the quali-quantitative analysis.

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### Para citar este artículo bajo APA 7

Consiglio, S., Cicellin, M., y Scuotto, A., & Ricchezza, D. (2021). Social innovation in cultural heritage management: a Neapolitan perspective. *Social innovation studies*, 01, e4639. <https://doi.org/10.22199/issn.2452-5774-4639>



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