

# **Approaching the management's strategy of a site in the UNESCO World Heritage List: the case of the Convent of Christ in Tomar (Portugal)**

**GAIA MARNETTO, *HERITY Italia Coordinator***

## **INTRODUCTION**

### **FOR AN EDUCATION TO THE PERCEPTION OF A COMPLEX REALITY**

The formulation of a complex judgment requires a cognitive effort not indifferent, since it is necessary to have a clear view of the object of our opinion or, alternatively, be able to easily find the functional information to our determination. This ability is not innate, on the contrary it is a real skill that you learn with the exercise. Not being part of the formal education we are accustomed to receive at the university, is not related to the acquired knowledge.

Our attention must be necessarily selective, otherwise we would be overwhelmed by millions of external stimuli. What we notice is something that strikes us for the most varied reasons, ranging from specific personal interests to traumas, which, for example, amplify and distort certain aspects of reality.

Academic training in the field of Cultural Heritage devotes little space to the stimulation of the perception of complex realities. This is a problem because in the absence of a finalized exercise, the student cannot automatically translate the technical know-how into applying applied contextualizing it into reality.

The quality assessment of the places of visit is made of not only by complex but also interdependent variables, and their correct detection depends on the degree of contextual attention gained by the observer. The practical tools for this form of mental training would not be lacking, but usually come developed for the benefit of other fields of application other than the Cultural Heritage.

What HERITY is doing through the HGES Certification, since its first applications, is closely linked to the goal of creating a critical and conscious mass of visitors. The experience of visiting can (and should) be an opportunity to strengthen an emotional relationship with the site.

Too often, museography and temporary exhibitions do not take this aspect into consideration, but on the contrary, they tend to be oriented towards a scenic, aesthetic or erudite effect.

Improve the quality of visitors means stimulating their responsibility, means make them active, not passive, towards what the site of culture offers to them: in that way is the DEMAND which changes the SUPPLY.

The object of the on-site exercise is the assessment of the contextual attention level of a sample of students from different countries and with different backgrounds but all trained on Cultural Heritage themes.

The first step in the revitalization cycle of a cultural site is to raise awareness among those who will occupy various positions in the field of Cultural Heritage in the World in the near future. That is why the student sample of the IP Apeleia 2017 is particularly appropriate.

## BRIEF MANAGEMENT'S HISTORY OF THE CONVENT OF CHRIST IN TOMAR (PT)

Although the oldest area of the complex is less visible today because it is undergoing redevelopment, the first castle dates back to 1141: a vast territory was donated by King Don Afonso Henrique to the Templars for their contribution at the time of the Christian reconquest of Portugal<sup>1</sup>.

Jerusalem in 1291 fall under the domination of the Mamluks as a consequence the order of the Templars no longer has a role, and the King of France Philip IV the Fair, begins a campaign of denigration in the hope of being able to confiscate the possessions of the Templars. The Pope extinguished the order of the Templars. However, the process of extinction had a very different outcome in Portugal, since King D. Diniz managed to keep the knights and the goods of the Templars, under the name of a new order of cavalry circumscribed to his Kingdom: the Order of Christ (1319). How can the King D. Diniz convince the pope of the need for a new military order? Thanks to the danger of a new invasion of the Arabs in the Algarve region, which was a sufficient alert in the framework of the strategic goal of the King himself.

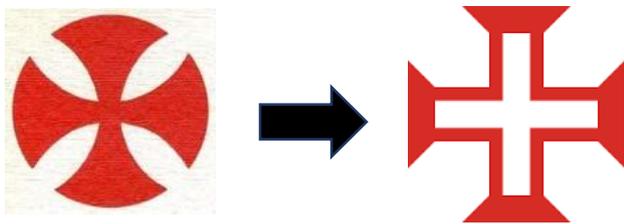


Fig. 1 The change of the graphic of the Templar Cross during the creation of the Order of Christ (visible in the decorations inside the Convent of Christ at Tomar)

The new Cavalry maintains the subordination to the king, being necessary his approval for all the acts of administration, alienation of goods, alteration of customs.

In 1357 the headquarters of the order of Christ are based in the old templary headquarters, the castle of Tomar, where it is permanently maintained. When the Infante D. Henriques becomes Grand Master of the Order of Christ in 1420, the Knights begin their new mission: the discovery of new lands. At this time Portugal changed the axis of the known world.

The Manueline style<sup>2</sup> is the symbol of this phase; for this the late Gothic in Portugal has its own characteristics: it is rich in references to navigation (armillary sphere personal symbol of King Manuel I, anchors, shells), botanical motifs, elements from newly discovered lands, such as suggesting Islamic filigree work, influenced by buildings in India.

During the activity of geographical discoveries the Order of Christ was also involved in evangelization. In the sixteenth century the Order of Christ undergoes a big change: no longer being

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<sup>1</sup>At the beginning of the eighth century, Andalusian Muslims invaded the Iberian peninsula, subtracting a vast territory to the Visigoths. Only from the middle of the 11th century it was possible to undertake a reconquest operation, starting from the region of Asturias, where the Arabs had not arrived because of the natural barrier of the Cantabrian mountains. The birth of the Kingdom of Portugal is the result of the progressive victory over the Arabs which, starting from the north, had also effects on the toponomastics (e.g. Alentejo is the region beyond the Tagus but on the south). Traditionally, it is considered the date of 1140, under King Don Afonso Henrique: it was a long and complicated process, as evidenced by the numerous castles erected at the Tagus River.

<sup>2</sup> The Manueline style is the artistic expression, specific of Portugal, of the transition from the late Gothic to the Renaissance style. The name derives from the king Manuel I of Portugal, since during his reign this style had the greatest application in the buildings of the time. It is a style that is easily recognizable because it has decorative constants: although composite, there will be a lot of references to navigation (ropes, anchors, shells, chains, etc.). The armillary sphere, king emblem, the Cross of Order Christ, phytomorphic elements replicating tropical plants, decorative variation borrowed from the art of the territories conquered.

protagonist in the New World, with the king John III becomes an order of cloistered (this change had a big functional and architectural impact on the Castle, as the numerous cloisters show up today).

The fact that this place of culture has come to our day is not obvious. In 1834, with the liberal revolution, the male religious orders were extinguished.

Many of the goods of the extinct Orders were sold by public auction by the liberal government; others were kept as historical monuments.

An influential liberal politician, António Bernardo da Costa Cabral, anxious to leave a personal mark in the local history, buys part of the complex and calls himself "Count of Christ". He made also a Stylistic restoration of the structures under his control (the Convent was already looted during the period of abandonment). The remaining part of the complex became a military hospital.

In 1934 the State buys the complex which was property of the heirs of the politician (Costa Cabral) and starts its regeneration as a national monument.

In 1983 the Convent of Christ was included in the UNESCO World Heritage List, because "*Originally designed as a monument symbolizing the Reconquest, the Convent of the Templar Knights of Tomar (transferred in 1344 to the Knights of the Order of Christ) came to symbolize just the opposite during the Manueline period – the opening up of Portugal to other civilizations*".

According to two criteria:

- (I) →to represent a masterpiece of human creative genius
- (IV) →to be an outstanding example of a type of building, architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history;

The actual Management of the Convent of Christ - under the responsibility of the General Direction of Portuguese Cultural Heritage (DGPC) - is so structured:

OFFICE	AIMS
Scientific and technical office	Research
Visitors services office	Reference for the visitor who wants specific information
Education and entertainment services	Relationships with schools + finding new audiences
Office of tourist assistance	Organizing itineraries in partnership with the local regional and national tourist bodies
Cabinet of conservation and restoration	Monitoring and restoration works
Ordinary maintenance services	←
Administrative services	←
Security department	Site vigilance

## ASSESSING THE CULTURAL HERITAGE

Unlike industrial products or operational processes Cultural Heritage cannot be analyzed using standards because every place of culture is subject to a specific:

- physical context
- human context
- relation between the two contexts.

As the creation in 1994 of the *HERITY Global Evaluation System* shows<sup>3</sup>.

The technical visit on site is a crucial phase of the HGES Certification because it links the opinion of the evaluators with the point of view communicated by the Manager through a specific questionnaire. When the HERITY certification team goes to a place of culture they must observe many aspects in a short time in order to write down the technical report. The contextual attention as well as the ability to detect several variables are essential skills.

Starting from the direct experience, we chose to simulate a visit - less complex than what HERITY does, but, in any case in depth - with the students of IP Apheleia 2017.

### THE EXERCISE ON SITE WITH THE STUDENTS

The students were informed the previous day about the history and the complexity of the Convent of Christ as well as the methodology (how to pay attention to the cultural ambient). A special questionnaire (2 pages) was created in order to help the students in the mental path to follow during the visit. This questionnaire was given the previous day in order to make possible a deep analysis of the different questions. The students also had the task of transmitting a picture of a significant aspect, for whatever reason, which they noted during the visit.

Gaia Marnetto, HERITY  
Italia Coordinator

## The practical exercise at the Convent of Christ

- **WHAT DO YOU HAVE TO DO?**
  1. **READ AHEAD** throughout the questionnaire to know what is necessary to note more carefully
  2. **ESTABLISH A STRATEGY** to build your opinion (for example by analyzing the Web site, the existence of hotels, public transports → all things that can be made already this evening)
  3. Remember that **YOU ARE SPECIALISTS** in the field of CH: simulate a technical visit to the site!!
  4. **BE CREATIVE** in the open answers

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<sup>3</sup> The **HERITY Global Evaluation System** was born in order to find a way to survey the *Quality Management of Cultural Heritage*® taking into account this special kind of assets, with the aim to **create a model valid for each kind of cultural places all over the world.**

## The practical exercise at the Convent of Christ

- What do you have to take in account?
- A) The Convent of Christ is the fourth most visited monument in Portugal, almost 300.000 visitors in 2016 (think about the tourist potential of the Middle Tagus region).
- B) It is a place of culture that is not subject to seasonality of tourism.
- C) You can reach Tomar by train from Lisbon.

The questionnaire respect the 4 sectors of the HERITY target: perceived value, conservation, communication strategy and services offered, and it is composed of multiple choice questions and open questions.

The following results are related to a sample of 49 students from 26 different Countries all over the World, participating in the Apheleia Intensive Programme 2017 in Mação (PT).

### **OBSERVATION ON THE COMPILATION**

Thanks to a similar experience already carried out by HERITY in Rome with a sample of students of the Vrije Universiteit in Amsterdam<sup>4</sup>, an evaluation of the accuracy of the compilation of the form was introduced (careful; sufficient; hasty.) in order to avoid the exercise being underestimated or taken lightly, invalidating the results. In fact, the questionnaires have been compiled with sufficient degree of accuracy.

Only 16% of students met the (written) request to write with capital letters. This is an important point, because they are no more accustomed to read with concentration a simple form, as a one of the effects of the *information pollution* of the actual anthroposphere.

Omitting language-related misunderstandings, open answers are in some cases too superficial if you consider that we are dealing with university students. For example, some people used general adjectives (e.g. wonderful, nice, important...) without going beyond self-evident qualitative aspects. This is not a fault, but it's an indirect symptom of the lack of habit of giving complex opinions in everyday life.

### **RESULTS OF THE EXERCISE**

The collection of the data generated by the compilation of the questionnaires was carried out using the methodology normally used for calculating the HERITY questionnaires for visitors. The partial

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<sup>4</sup> during the 2016 international summer school CHALLENGING ETERNITY HERITAGE, URBANISTIC INTERVENTIONS AND THE CITY OF ROME (KNIR, VU University, HERITY International and Roma Tre University).

HERITY *target*, tied to the student's opinion alone, is: 4 (value) - 4 (conservation) - 2 (communication) - 3 (services).

### **Highlights on the perceived value sector: 4**

The value of the Convent of Christ for the cultural history of the continent is clear, it's interesting that the students have appreciated the site also in relation to the ancient history of the Arab world. Its complexity allows for a potential transdisciplinary learning.

The open question in the questionnaire on the site promotion has created confusion with the notion of communication, aspect which prompted a brief clarification during the presentation of the results. Promotion refers to the entire set of activities, that communicate the product, brand or service to the user. The idea is to make people aware, attract and induce to buy the "product", preferring it to others.

In the case of Cultural Heritage: within the different choices of visits offered by the territory, are tourists attracted by the Convent of Christ? Will they choose this place of visit among other destinations in Portugal?

It's a polarization of the visitors through various channels (such as the Internet, social media, tourist offices, travel agencies). Some of you suggested to make available material and pictures on the Convent of Christ in the airports, and it is a good strategy.

The communication strategy on the other hand includes of course promotion, but it's related in particular to the whole efforts you make to spread the message of the place of culture in order to make understandable its significance through different means.

Could be improved: International promotion could be more developed not only as a UNESCO site, but above all as a symbol of the history of Portugal. Organization of thematic events (e.g. religious) and performing arts for residents and tourists. Recovering and opening of the park. Creation of in-depth points of information like totems.

### **Conservation sector: 4**

Students have noticed the scarcity of staff (i.e. less control, also with regard to the safety of visitors);

Some of them were bothered by the sounds of the acoustic bird deterrent system;

They were struck by the abundance of mosses, lichens and other organisms on the stone. This is of course a form of biological degradation that has very invasive effects on the stone, but it's important to take in account that the use of biocides is quite invasive, and the cleaning eventually made lasts for a short time, mainly due to environmental conditions favorable to the growth of algae, lichens and mosses.

The fact of some of them think that it's an integral part of the image of this kind of open-air art ("alive monument"), as it is in the case of incrustations of the ships, it's remarkable because it is a very diffused and shared thought, beyond the Ruskinian concept of restoration<sup>5</sup>, especially in all those cases in which the restoration itself has a strong impact both technically and aesthetically.

### **Communication: 2**

They understood the difficulty of building a communicative support in such a complex place (also from the point of view of fruition) but also the need to create an effective strategy for the benefit of many visitors who cannot benefit from a guided tour.

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<sup>5</sup> John Ruskin, *The Seven Lamps of Architecture*, 1849

About communication the students underlined some specific aspects:

The interaction place/visitors is lacking: there is no narration of the places, visitors cannot perceive which was the everyday life of the Convent of Christ, so the most part of the students indicate the need for an interpretation point, in order not to get lost (both physically and mentally);

The lack of guided tours, the essentiality of the panels, the poor availability of audio-guides can make tourists disoriented or unsatisfied of the experience of the visit.

Children are not so much involved in the story of the Convent of Christ.

### **Services: 3**

The students have noticed a *wayfinding* problem in the case of toilets, exits, and path to be followed.

They also underlined the lack of seats (which could become a risk because people could sit where they should not).

Visitors cannot leave comments on a guestbook.

in addition, the Convent of Christ seems not to consider adequately disabled people needs.

### **About the pictures on specific aspects**

Not all students have sent a photo of a significant aspect of the Convent of Christ. Among those who have also done this part of the exercise, the photographed aspects cover three levels:

- Details of parts of the complex they appreciated;
- Preservation of panels and other supports to the communication;
- Danger for visitors to certain points of the route;

### **Conclusion**

This exercise made possible to stress the observation capabilities in conditions of: time constraints; incomplete previous information; different backgrounds.

As reported by some students, exercise has been useful to accentuate contextual attention in an organized manner: the categorization of questionnaires in the four areas identified by HERITY led them to understand what the mental path to follow for detection and evaluation of numerous parameters in the Cultural Heritage sites.

The global vision is an anti-intuitive approach, but it is also true that the development of this "style of thinking" makes the reasoning itself - in every field - much more fluid and dynamic. In the world of Cultural Heritage this is the first step to think about cultural processes in a reticular way, making possible the utmost involvement of the territory.

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